User Guide
Principal
Site Discretionary Request

Contents
Site Discretionary Project Manager ................................................................. Error! Bookmark not defined.
Quick Start (Directly to Unifier Portal) ........................................................................................................ 2
Navigation (from Staff Portal to Unifier Portal) ......................................................................................... 3
Site Discretionary Dashboard ..................................................................................................................... 4
Create a New Site Discretionary Request ................................................................................................. 5
  Complete Request Form: ......................................................................................................................... 5
Tracking your Request ................................................................................................................................. 6
Interpreting the Request Form ..................................................................................................................... 8
Cancelling your Request ............................................................................................................................... 9
Troubleshooting: ........................................................................................................................................... 10

CONTACT INFORMATION
1. Site Discretionary Project Manager – Douglas Penn works for PM in FPC, he is the PM for all SD items
dpenn@sandi.net

2. User Login & Password Information - sdusdfacilitiesinfo@sandi.net
Quick Start (Directly to Unifier Portal)

1. Bypass www.sandiegounified.org - Users can bypass logging in the Staff Portal by using the Unifier Portal link (below)

2. Log Requests directly in Unifier using link: https://unifier.sandi.net/portal

3. Use Login & Password provided
   Contact sdusdfacilitiesinfo@sandi.net for questions regarding Login & Password

Site Discretionary Dashboard

A – Principal create a new request
B – View request history
C – Cancel existing request
D – Instructions
E – Explanation of Site Discretionary

NOTE: If you click on the TRACK REQUEST AND you get a login screen
ENTER YOUR STAFF PORTAL CREDENTIALS
Navigation (from Staff Portal to Unifier Portal)

https://www.sandiegounified.org/ (Accessible via the Staff Portal)

1. Select: “STAFF PORTAL”

2. Enter SDUSD credentials

3. Select: “RESOURCES”

4. Select “APPLICATIONS”

5. Select “SITE DISCRETIONARY REQUESTS”

Note: User will be directed to Unifier
Principal to enter
1. User Name
2. Password

Note: Check “REMEMBER ME”

Site Discretionary Dashboard

A – Principal create a new request
B – View request history
C – Cancel existing request
D – Instructions
E – Explanation of Site Discretionary
Create a New Site Discretionary Request

Complete Request Form:

1. **Status** – select “open” *(required)*
2. **School** – Input your **school name** *(required)*
3. **Principal** – Input principals name
4. **Phone** – Input your contact phone number
5. **Location No.** – Input school location number
6. **Contact Name** – Input first & last name + phone number if different from principal
7. **Description** – Input as much known detail about the requested items/work
8. **Request Type** - if known, select type from dropdown (Construction, FF&E, Other)
9. **Reason for Request** – Input reason items/work is needed
10. **Pre-Approved Amount** – Principals estimated approved amount
11. **Required By** – Input the desired completion date
12. **Submit** – when form is complete, click on “SUBMIT” button

Note: After submitted, the system will return a confirmation

After user submits – Doug will receive a system generated notification

Doug will review and place request on the Tracking Report (request will not show on Tracking Report until Doug has reviewed)
## Tracking your Request

1. **Prop S/Z Allocations** – the amount that has been allocated to your school

2. **Balance Remaining** – the available dollars the school has remaining

3. **Total Committed (Pre-Approved)** – FPCs Estimated Cost to complete the request. If no Estimated Cost is provided by FPC, then the amount shown will be the principal’s preapproved amount

4. **Status** – Submitted (new request)  
   Assigned (request is in progress)  
   Completed  
   Cancelled

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### Site Discretionary Tracking for Tierrasanta Elementary

<table>
<thead>
<tr>
<th>Site Discretionary #</th>
<th>Title / Description</th>
<th>Created</th>
<th>Total Committed (Pre-Approved)</th>
<th>Status</th>
<th>Task Owner / Action</th>
<th>Required Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>SDK-000284</td>
<td>This is the lengthy description</td>
<td>8/15/2016</td>
<td>$10,000.00 Submitted</td>
<td></td>
<td></td>
<td>8/24/2016</td>
</tr>
<tr>
<td>SDK-000282</td>
<td>School garden</td>
<td>8/12/2016</td>
<td>$5,000.00 Submitted</td>
<td></td>
<td></td>
<td>4/3/2017</td>
</tr>
<tr>
<td>SDK-000281</td>
<td>New Marquee</td>
<td>8/12/2016</td>
<td>$20,000.00 Submitted</td>
<td></td>
<td></td>
<td>1/2/2016</td>
</tr>
<tr>
<td>SDK-000278</td>
<td>Kit</td>
<td>8/1/2016</td>
<td>$75,000.00 Submitted</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SDK-000277</td>
<td>Test</td>
<td>8/1/2016</td>
<td>$10,000.00 Submitted</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SDK-000276</td>
<td>Lunch new stuff</td>
<td>8/1/2016</td>
<td>$1,000.00 Submitted</td>
<td></td>
<td></td>
<td>9/9/2016</td>
</tr>
<tr>
<td>SDK-000255</td>
<td>New pull down screen for auditorium</td>
<td>8/27/2016</td>
<td>$5,000.00 Assigned</td>
<td></td>
<td></td>
<td>8/26/2016</td>
</tr>
<tr>
<td>SDK-000254</td>
<td>A stand up desks for a classroom alternative seating</td>
<td>8/27/2016</td>
<td>$5,000.00 Assigned</td>
<td></td>
<td></td>
<td>8/24/2016</td>
</tr>
<tr>
<td>SDK-000251</td>
<td>A classroom rug from Lakeshore 3D squares &quot;a place for everyone; bright colors&quot;</td>
<td>8/23/2016</td>
<td>$3,000.00 Assigned</td>
<td></td>
<td></td>
<td>8/1/2016</td>
</tr>
</tbody>
</table>

**Note:** User can open a request on the tracker using the hyperlink

**Note:** The tracker report will show the pre-approved amount (italicized) unless there is a commitment in which case it shows the committed amount (not-italicized)

**Note:** Font will be red if the record is open and COMPLETION DATE is within 7 days or has passed
TIP: To get back to dashboard

1. Hover over the browser icon and

2. Select unifier@https://unifier.sandi.net/bluedoor (i.e. Unifier dashboard)

In this example I’m using Explorer

You may be using Chrome or Safari.

Look for your relevant icon)
Interpreting the Request Form
(accessible via Tracking Report > click hyperlink)

Site Disccretionary Request Form

1. Pre-Approved Amount – Amount principal input on request form, ball park estimate of request cost
2. Estimate to Complete – The amount FPC estimates to complete the request
3. Total Committed (to date) – The contracted to date
4. Actual Cost to Date – Amount paid to vendor(s)
5. Cost at Completion – Balance remaining (Estimated Cost to Complete minus Actual Cost to date)
Cancelling your Request

An existing request can be cancelled using the “Cancel Site Discretionary Request” icon

1. Input Site Disc Request # (from Tracker Report and input in Cancel screen)
2. Input Description
3. Click “Finish Editing”

Note: Doug will receive a system generated email to cancel the request.
Troubleshooting:

If you run the Tracker Report and it looks odd, it could be your settings.

1. Click on the “Tools” gear on the top right hand side of your Internet Explorer window:

2. Select “Compatibility View Settings”

3. Add http://fpcreports.sandi.net/ to compatibility view