1.0 Policy

SFPUC Infrastructure Construction Management (CM) team members and Contractors who use the Construction Management Information System (CMIS) in the course of their work shall have access to assistance. Questions and answers shall be available to all CMIS users and shall be incorporated into a Frequently Asked Questions document available on the CMIS.

This SFPUC Infrastructure CM Procedure applies to all personnel working on SFPUC Infrastructure Projects during construction to the extent that their work is affected by this CM Procedure and does not conflict with specific SFPUC policies or the Contract under which the Work is executed. This procedure applies to all users of the CMIS.

2.0 Description

The CMIS is based on Oracle Primavera Unifier software. Users of the CMIS may at any time request assistance regarding any aspect of the use of the CMIS, including procedures, processes, techniques, system configuration and system access. This assistance may be requested in person, by telephone, email (see Paragraph 5.4.2). Responses shall be within 24-hours. Resolutions that required more time shall be tracked, and the requestor shall be notified of the extension of time and shall be advised of progress toward resolution.

System access is dependent on network access, either internally through the SFPUC intranet or through the Citrix Gateway from computers external to the SFPUC intranet. Access to the CMIS also requires a CMIS account, logon identification and password. Use of the CMIS requires training in and use of the standard CMIS Business Processes and CM Procedures which have been developed (refer to published Business Process Reports and CM Procedures pertaining to CMIS use). Assistance in system access, understanding of the
CMIS configuration and procedures and proper use of CMIS is available to any user at any time.

3.0 Definitions

3.1 Construction Management Information System (CMIS)
The CMIS is an on-line management tool for the processing of construction documents based on established SFPUC Infrastructure Business Processes. It serves as a tool for effective storage and retrieval of various documents generated during a construction project. The documents normally tracked are those that are used by the Contractor and the CM team members.

3.2 CMIS Administrator
The CMIS Administrator is identified as the Company Administrator in Unifier. As the name implies, the Company Administrator's role in Unifier is to control and administer the various SFPUC’s Enterprises and their differing construction programs based on a hierarchy system for each Enterprise. The CMIS Administrator provides all the necessary access and capabilities to the CM team members and Contractors to perform their work in accordance with the Contract, established Business Processes and Procedures. The CMIS Administrator is responsible for setting up the Project hierarchy within a Program. Furthermore, the CMIS Administrator defines and provides the Business Process templates for a Program or a Project to use.

3.3 CMIS Project Administrator
The CMIS Project Administrator is a member of the CM team and is given additional access capabilities to various Business Processes by the CMIS Administrator. With this capability, the CMIS Project Administrator can serve as a proxy to Business Processes assigned to others and can process documents accordingly.

4.0 Responsibilities

4.1 CMIS Administrator
The CMIS Administrator shall be responsible for:

- Developing, coordinating and maintaining Business Processes pertaining to the CMIS in accordance to established CM Procedures.
- Training new users in their respective roles, providing follow-on training and monitoring use to determine effective training practices and materials.
• Providing responses to help calls regarding CMIS logon, processes and procedures, use of CMIS and reports.

• Coordinating with the SFPUC Information Technology Services (ITS) for system access through the SFPUC intranet and the Citrix Gateway and identifying technical issues that are under the purview of ITS.

• Assisting the CMIS Project Administrator in resolving other project-level CMIS issues, as needed.

4.2 **Resident Engineer (RE)**

The RE shall ensure that all CM team members and designated contractor personnel who require use of the CMIS in the performance of their functional roles, are identified and initially trained by the CMIS Administrator. The RE is responsible for the consistent and quality use of the CMIS on the project as defined by the Business Processes and CM Procedures.

4.3 **CMIS Project Administrator**

On each project, the RE shall designate a CMIS user, generally the Administrative/Document Controls Specialist (ADCS) or the Office Engineer (OE), with good computer skills, to assist the CM team members in the use of the CMIS. In general, the CMIS Project Administrator can proxy for other (absent) CM team members so that the document workflow can proceed in a timely manner.

4.4 **SFPUC Information Technology Services (ITS) Group**

The ITS Group shall assist the CMIS Administrator to resolve technical questions or problems related to issues outside the CMIS environment, such as networking connectivity and server setup issues.

The ITS Group also provides an ITS Help Desk to all users to resolve technical questions or problems. When such problems are CMIS-specific, they are forwarded to the CMIS Administrator for resolution.

At the request of, and in coordination with, the CMIS Administrator, ITS shall create Citrix accounts for Contractors and for SFPUC personnel authorized to access the CMIS remotely.

4.5 **Responsibility Matrix**

All questions regarding the CMIS and/or software access issues shall be addressed to the CMIS Administrator via email at CMBHelp@sfwater.org. When questions need to be addressed by the ITS Group, the CMIS Administrator will coordinate with ITS for resolution, and respond back to the requestor.
5.0 **Implementation**

5.1 **CMIS Administrator**

The CMIS Administrator shall be responsible for:

- Developing, coordinating and maintaining Business Processes pertaining to the CMIS in accordance to established CM Procedures.
- Training new users in their respective roles, providing follow-on training and monitoring use to determine effective training practices and materials.
- Providing responses to help calls regarding CMIS logon, processes and procedures, use of CMIS and reports.
- Coordinating with the SFPUC Information Technology Services (ITS) for system access through the SFPUC intranet and the Citrix Gateway and identifying technical issues that are under the purview of ITS.
- Assisting the CMIS Project Administrator in resolving other project-level CMIS issues, as needed.

5.2 **Resident Engineer (RE)**

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5.5 **Responsibility Matrix**
All questions regarding the CMIS and/or software access issues shall be addressed to the CMIS Administrator via email at [CMBHelp@sfwater.org](mailto:CMBHelp@sfwater.org). When questions need to be addressed by the ITS Group, the CMIS Administrator will coordinate with ITS for resolution, and respond back to the requestor.

6.0 **Other Procedural Requirements**
None

7.0 **References**
7.1 **Technical Specifications**
None
7.2 **SFPUC Infrastructure CM Procedures**
None
7.3 **Others**
None

8.0 **Attachments**
002 - 1 Project Setup Flowchart
002 – 2 Project Setup Request Form
002 – 3 CMIS User Access Request Form
002 - 4 Revision Control Log
Attachment 002 -1
Project Setup Flowchart

1. RCM submits project setup request form to WSIP CMIS Administrator (WCA).
2. WCA creates project in CMIS, notifies RCM and Project CM.
3. Project CM submits user access request forms to WCA.
4. WCA coordinates with ITS for project setup.
5. ITS configures jobsite communications.
6. ITS creates attachment directory.
7. RCM submits request for Citrix access for specified user(s) to CMB Engineering Administration.
8. CMB Engineering Administration coordinates with ITS for Citrix access.
9. WCA conducts user training.
10. RICA creates contract document in CMIS.
11. ADICIS creates project companies/contracts directory in CMIS.
12. Project uses CMIS/WCA provides desk-side assistance.
13. Help requests logged in CMIS help project.
14. FAQ document updated and posted periodically to common drive/CMIS.

Citrix access required? (Yes/No)
## Revision Control Log

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