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General:

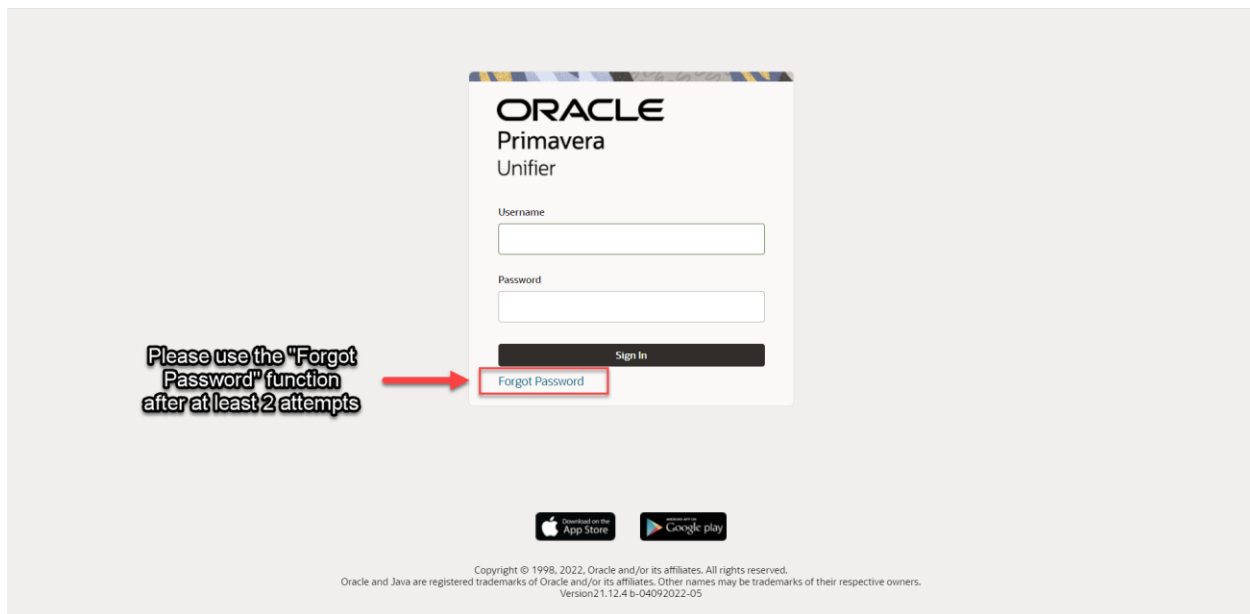
The purpose of this document is to provide an outline of upcoming changes in processes as it relates to P6 migration to Unifier. DeIDOT is migrating P6 functionalities to Unifier. The migration is intended to bring all active projects and associated data into Unifier. The following sections are intended to provide users with information on performing P6 tasks in Unifier.

General Navigation:

Unifier is web-based application and is accessible at <https://unifier.deldot.gov/>. User credentials are managed by DeIDOT's Engineering Services section and can be reached via email DOT.Unifier_support@delaware.gov. Additional support resource information is provided in the 'Support' section of this document.

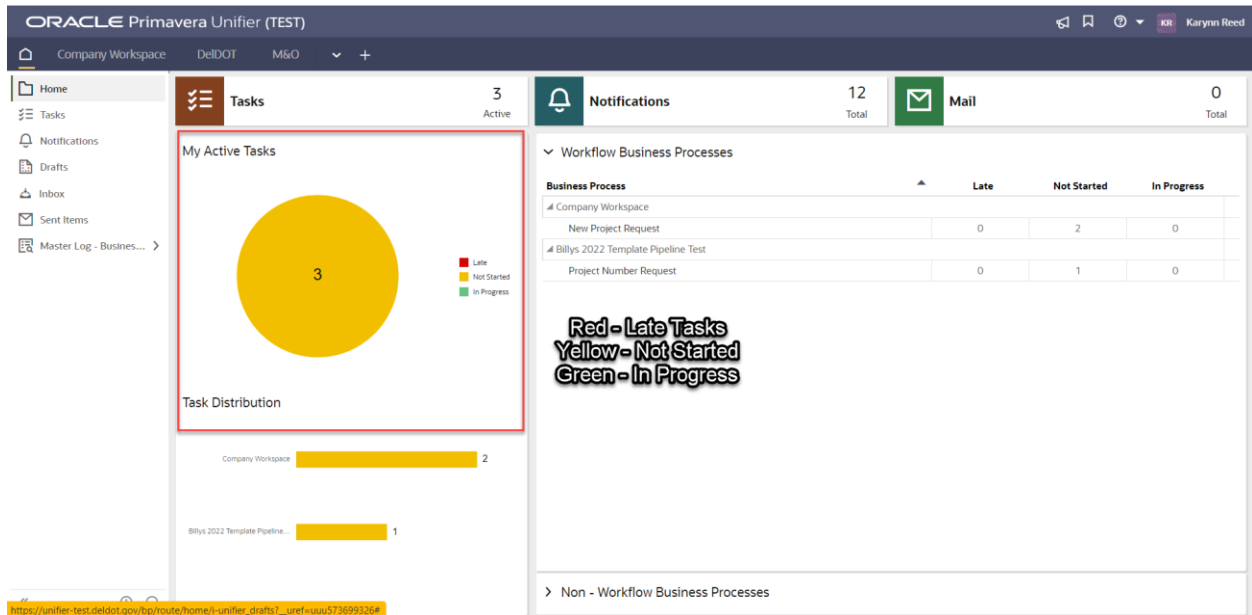
Login:

Unifier allows up to 4 attempts with an incorrect password before locking the account. Use the "Forgot Password" function shown below after two failed login attempts. This will allow the user to reset their own password. NOTE: Please ensure to set up Security Questions so that you may be able to reset your own password. Further instructions on how to do so are in the General Navigation section.



Home Page

Once in Unifier, clicking on the house icon on the left corner will take the user to the "Home Page". Click on "Home Page" to access the screen below. This screen will show the "My Active Tasks" as a pie chart, "Notifications", "Mail", and "Workflow Business Processes"



The pie chart is broken down into three colors. Red for Late tasks, Yellow for tasks that are not started, and Green for tasks that are in progress. The “Workflow Business Processes” details what the task is and how many.

My Tasks:

Under the Home button click on “Tasks” to open the list of tasks (To Do Items) that the user is assigned to.

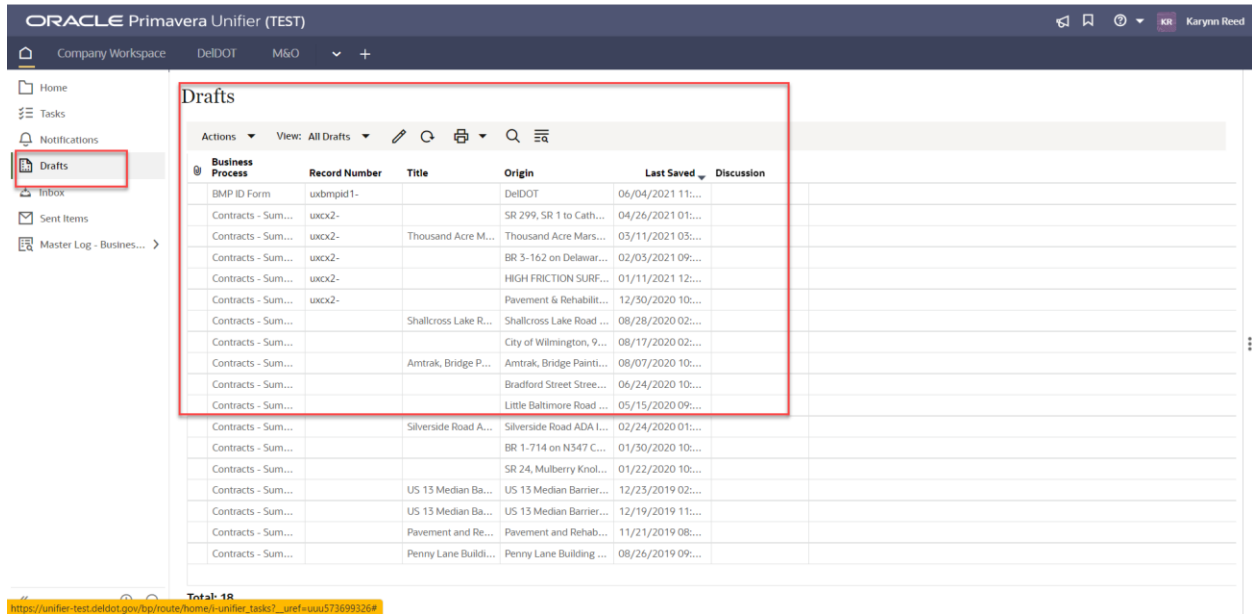
The screenshot shows the 'Tasks' list view in Oracle Primavera Unifier (TEST). The 'Tasks' button in the left navigation menu is highlighted with a red box. The main area displays a table of tasks with columns: Origin, Business Process, Record Number, Title, Record Due, From, Sent for, Task Due, Received, and Workflow Name.

Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due	Received	Workflow Name
	New Project Requ...	NPR-0054			Karynn Reed, Del...	Company Admin ...	10/24/2022 08:24 PM		New Project Requ
	Billys 2022 Template ...	PNR-0001			Billy Sweeney, Del...	WS_Step	08/04/2022 07:21 AM		PNR WF
	New Project Requ...	NPR-0041			Todd Pryor, DelDOT	Company Admin ...	05/10/2022 01:30 PM		New Project Requ

Total: 3

Drafts:

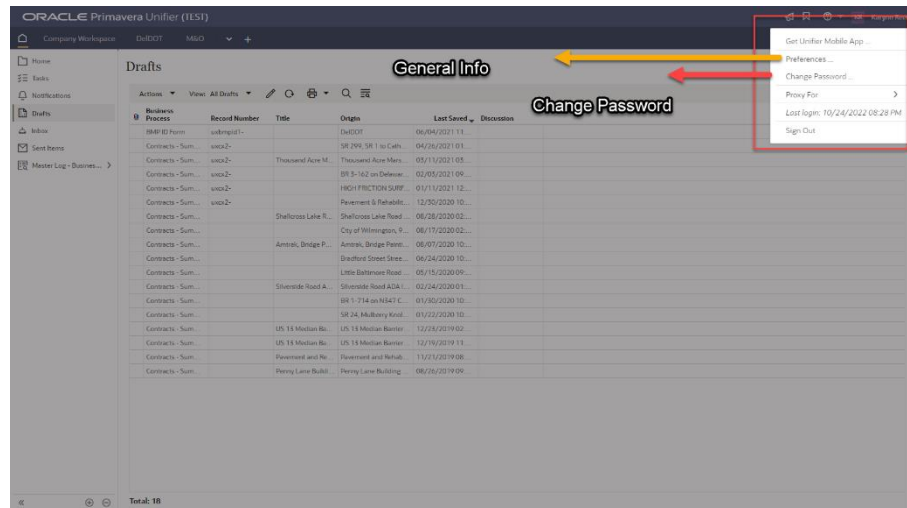
Anytime a record is started and saved for later, the draft can be accessed by clicking on “Drafts”. Double click on the record to open and continue working on it.



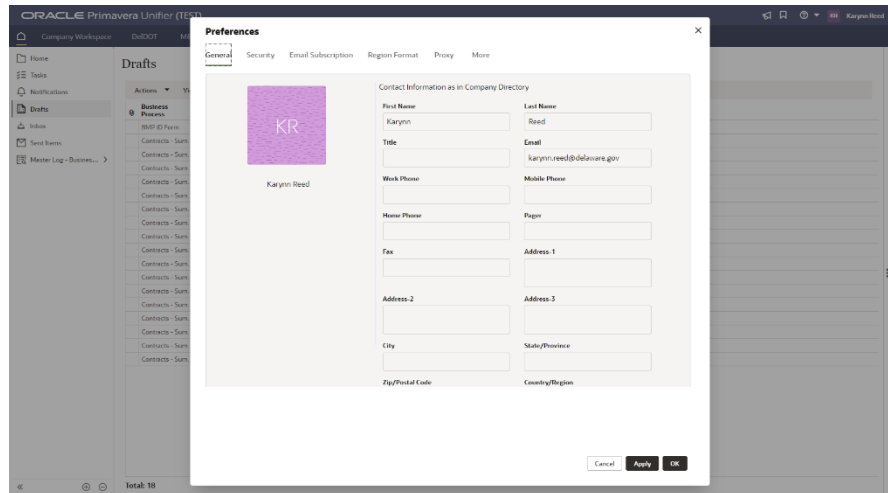
User Preferences:

In the upper right hand corner, the User name will appear. To access the “User Control Panel” click on the name.

A menu will appear. From this menu, the user can change their password by clicking on “Change Password”.

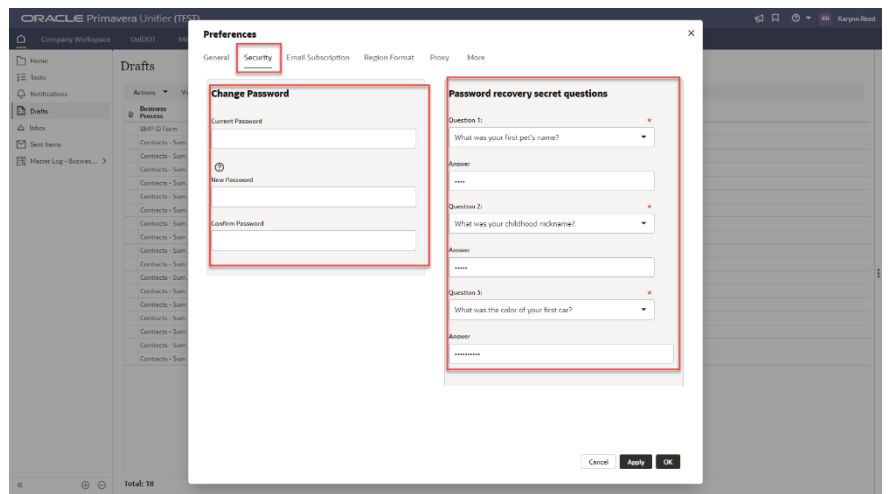


By clicking on “Preferences” another window will open. In the “Preferences” the user can update their contact information under the “General” tab.



Change Password:

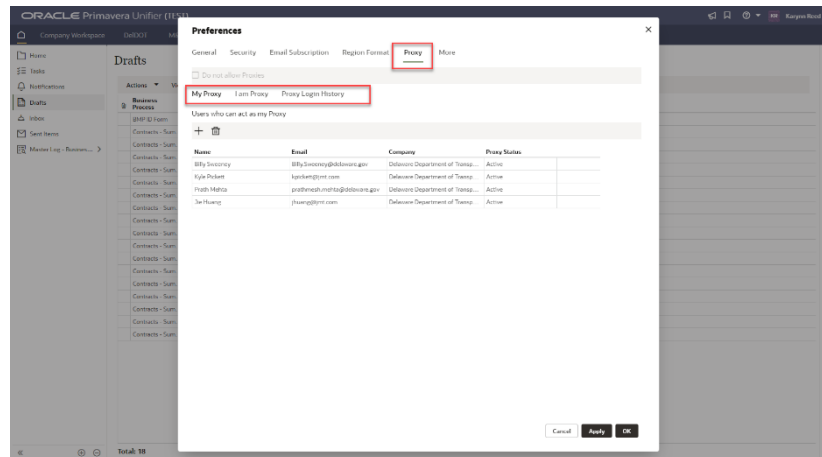
To change passwords and set-up Security Questions, click on the “Security” tab under the “Preferences”



Proxy Users:

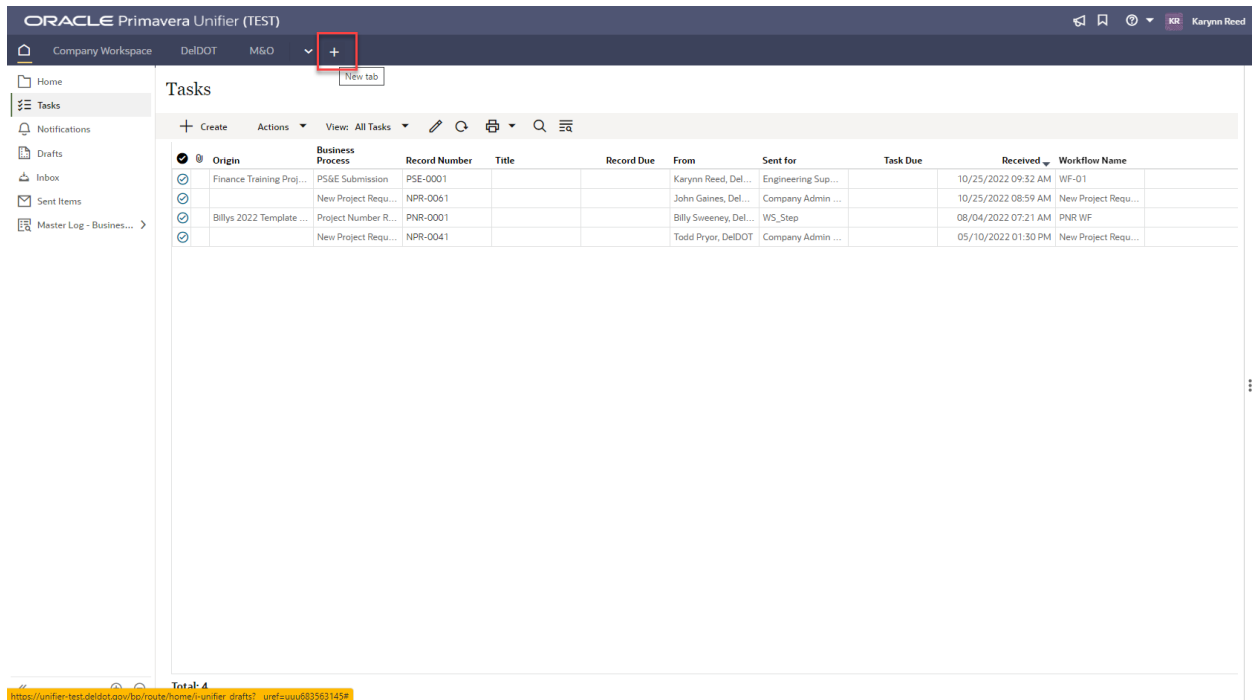
The “Proxy” tab is where a user can give another user Proxy access. Proxy access means that a user can accept and approve records in place of another user.

Typically this occurs if someone is on vacation and has tasks that need to be attended to during their absence. The user can set up specific dates and times that allow other user to take action on their behalf. Under the “Proxy” tab, the user can see who can act as their proxy, who they are proxying for, as well as see the Proxy login History. Unifier keeps a record of anytime someone proxies as them.

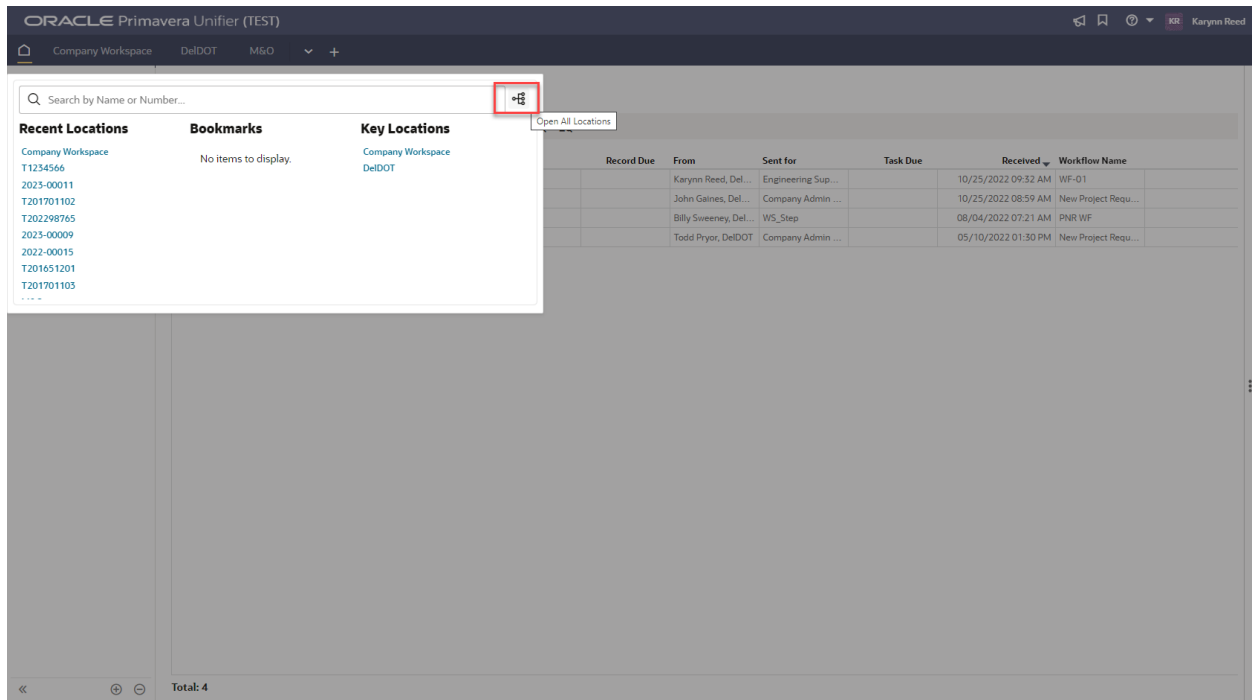


Find and Locate a Project:

Click on the (+) icon to open up a new tab. This will open up a search bar. The user can either search for a project by typing in the T number or even search by name.



Click on the icon next to the search bar to open all locations. This will display all projects that the user has access to.



Clicking on the down arrow will make a column list of all projects opened as tabs.

The screenshot displays the Oracle Primavera Unifier (TEST) interface. At the top, the title bar reads "ORACLE Primavera Unifier (TEST)" and includes a user profile for "Karynn Reed". Below the title bar, there are navigation tabs for "Company Workspace", "DeIDOT", and "M&O", with a red box highlighting the "+" icon next to "M&O".

On the left side, a sidebar contains navigation icons for Home, Tasks, Notifications, Drafts, Inbox, Sent Items, and Master Log - Business... The "Tasks" section is active, showing a "Tasks" header with a "Create" button and an "Actions" menu. Below this, a table lists tasks with columns for "Origin", "Record Due", "From", "Sent for", "Task Due", "Received", and "Workflow Name".

A dropdown menu is open over the "M&O" tab, listing "Company Workspace", "DeIDOT", and "M&O".

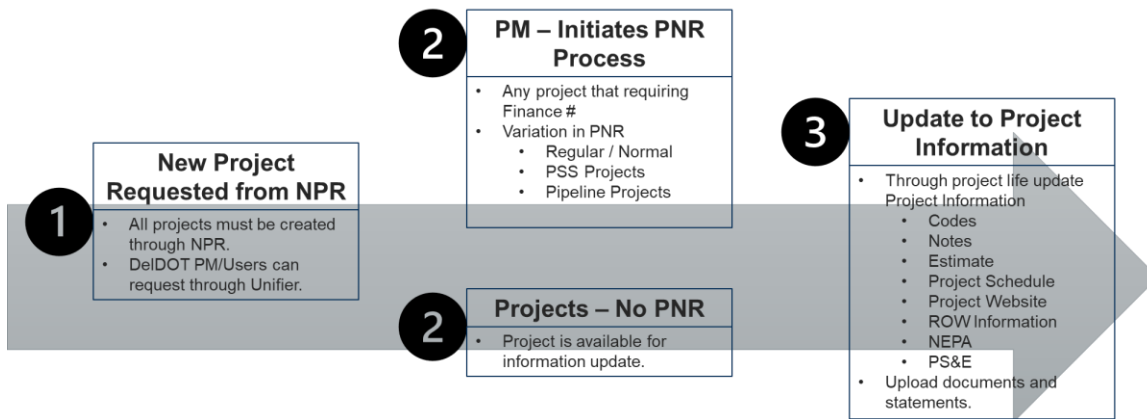
Origin	Record Due	From	Sent for	Task Due	Received	Workflow Name
Finance Training Pr...		Karynn Reed, Del...	Engineering Sup...		10/25/2022 09:32 AM	WF-01
		John Gaines, Del...	Company Admin ...		10/25/2022 08:59 AM	New Project Requ...
Billys 2022 Templat...		Billy Sweeney, Del...	WS_Step		08/04/2022 07:21 AM	PNR WF
		Todd Pryor, DeIDOT	Company Admin ...		05/10/2022 01:30 PM	New Project Requ...

At the bottom left of the interface, there is a "Total: 4" indicator.

New Project Request (NPR):

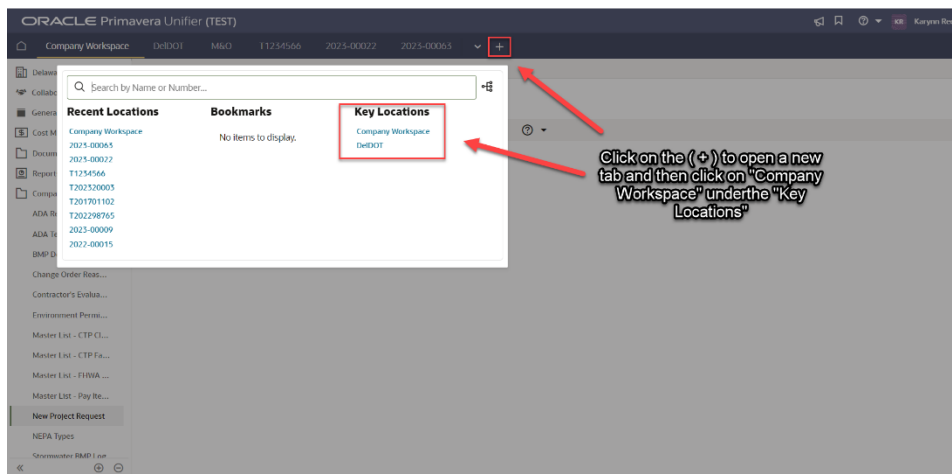
All request for new projects will be initiated from the Unifier process called New Project Request (NPR). Unifier provides intuitive user interface to input required information. All requests are logged in Unifier and goes through internal review prior to the creation of the project. The completion of NPR makes the project available in Unifier to work and perform other daily operations.

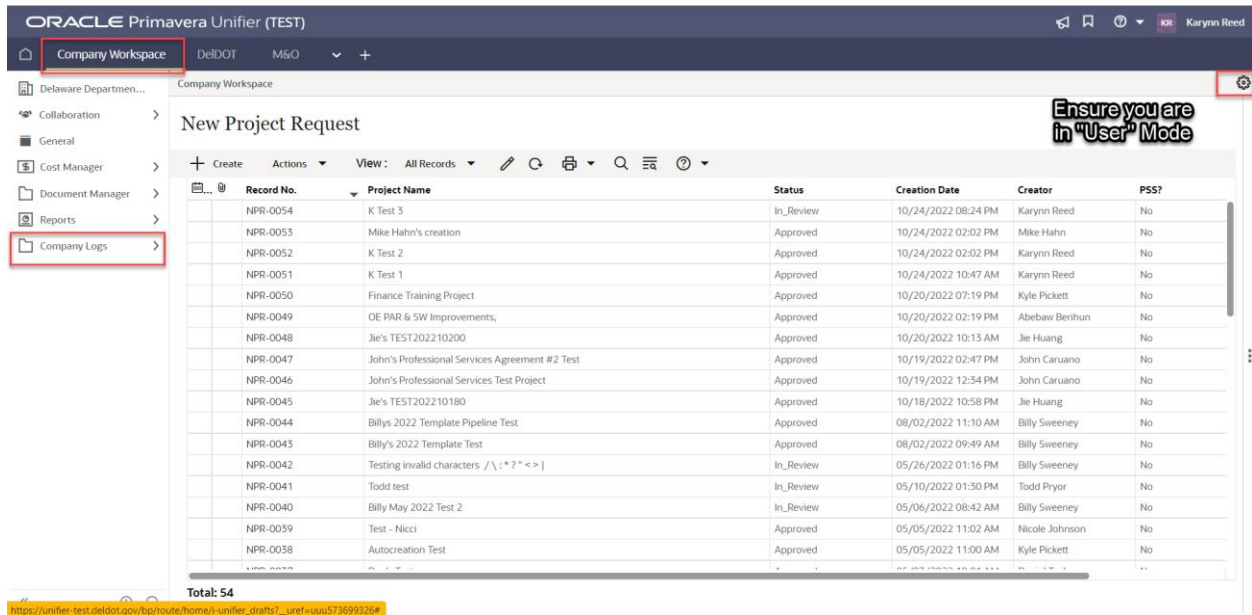
The following provides general overview of the process that includes order of operations from NPR to requesting a project number.



The NPR process is located at the ‘**Company Workspace**’ which is represents top-level of the hierarchy of the DeIDOT. The following outlines steps to create a record for the NPR.

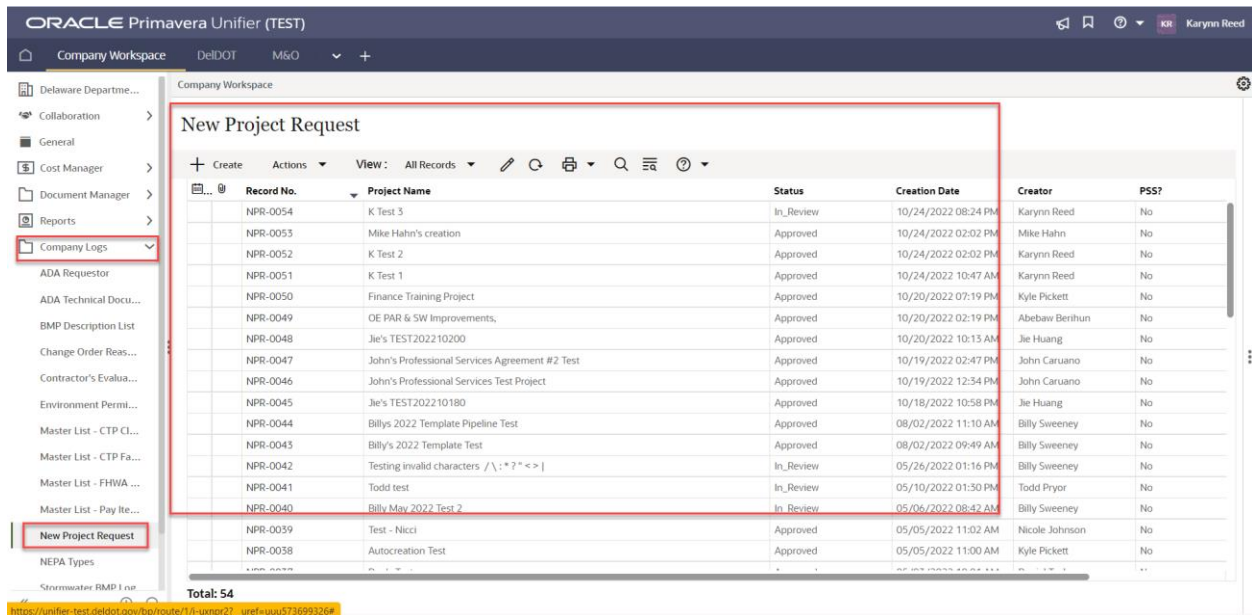
To start a NPR, click on the “Company Workspace” tab next to the home button on the left hand side. If “Company Workspace” is not an available tab, click on the (+) to open a new tab and click on “Company Workspace” under the “Key Locations”. Please note that there is a gear icon in the right-hand corner. Make sure that this is in “**User Mode**”. Tip: if the “**Company Logs**” is visible in the list under the “**Company Workspace**” then this indicates “**User Mode**”.



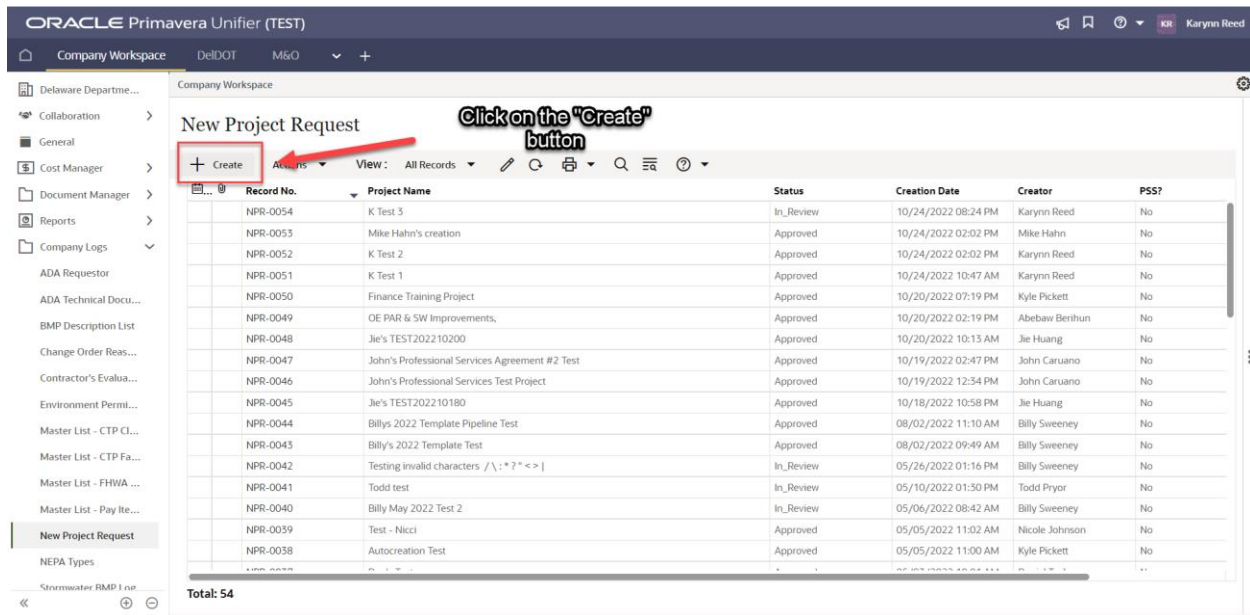


Click on the drop-down arrow next to “Company Logs”.

Then find “New Project Request” in the list. (Please note that the list in this example under “Company Logs” is larger than what may appear for you. The list is dependent on access level)



Once “New Project Request” is selected, click on the “Create” button. A new window will appear. (Please note if a window does not appear check to make sure the pop-up blocker in your browser is turned off.)



General:

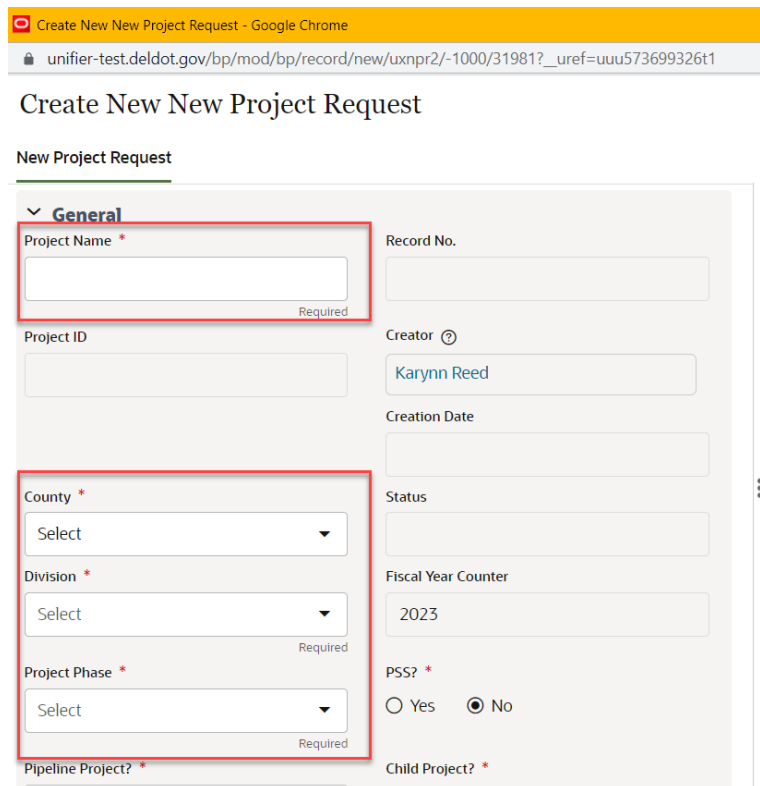
Anything with a red (*) is a required field. A record cannot be submitted if they are left blank.

Fill out the required information in the form that includes “Project Name”, “County”, “Division”, etc.

Please note that ‘Project Name’ field used in this form will be used to create the project.

The value for “PSS” is defaulted to “No”. PSS – Pavement and Subdivision Street System used by certain groups of DelDOT. Please select ‘Yes’ if your project is available in PSS. At this time “PNR Process” for PSS projects will not be managed in Unifier.

The (?) symbol next to the “Creator” field is a tooltip that provides information regarding the field. Hovering over that symbol will pop up information whether it’s an explanation or a general comment.

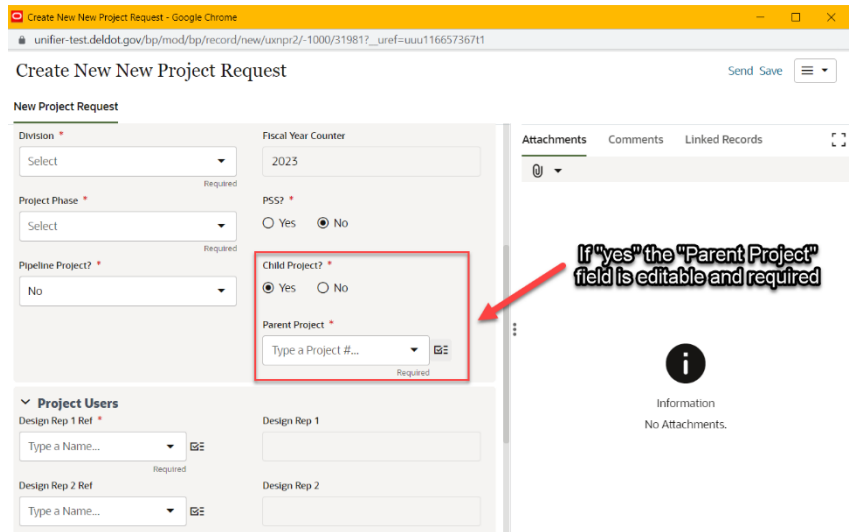
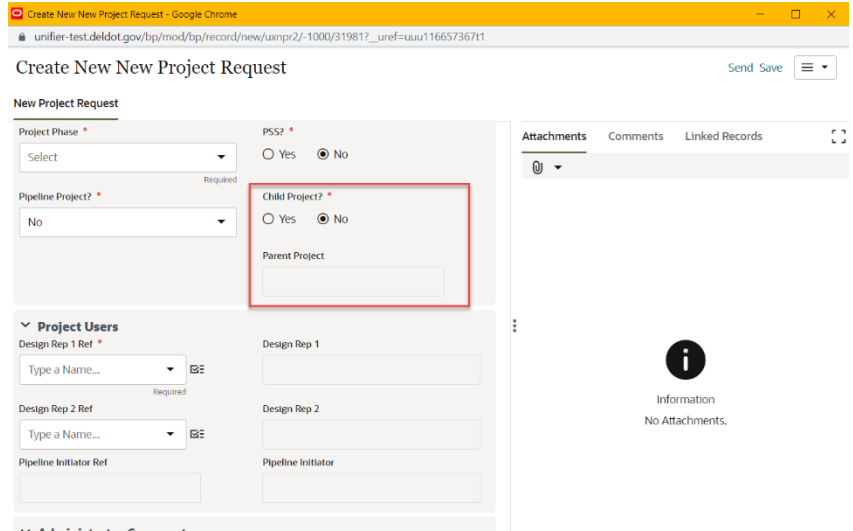


Child Project:

The NPR for child project must indicate that the request is for the 'Child Project' to the existing 'Parent Project'. When requesting a 'child project' please make sure that 'Parent Project' is active and available in the Unifier. The decision

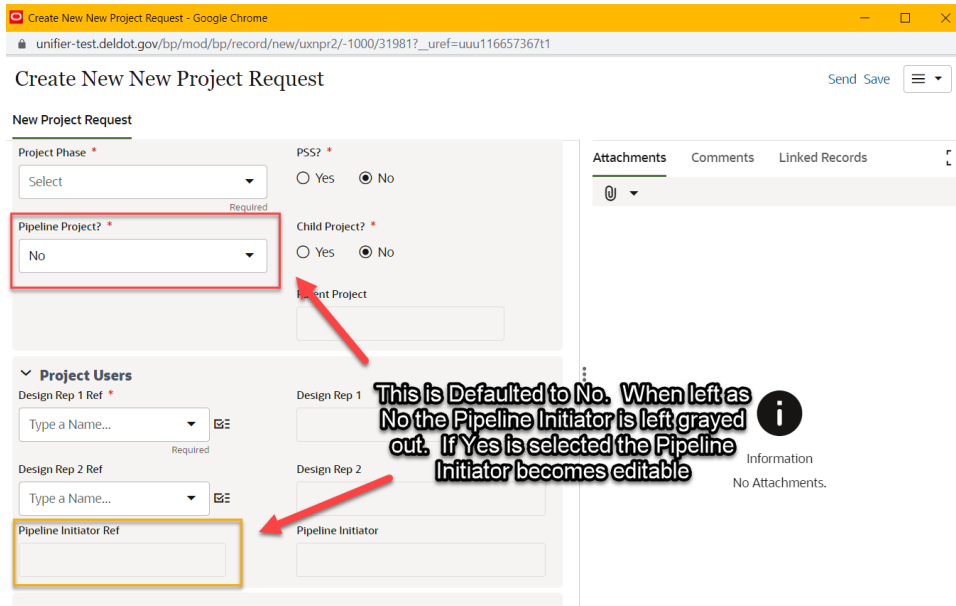
"Child Project" is also defaulted to "No". If this was a Child Project then select "Yes" and this will open up the "Parent Project" field to be a required editable field.

Below shows when the "Child Project" field is selected to "Yes" the "Parent Project" field is Required (*) and editable. The user can either begin typing in the project or select the icon next to the search bar to open the running list of projects.



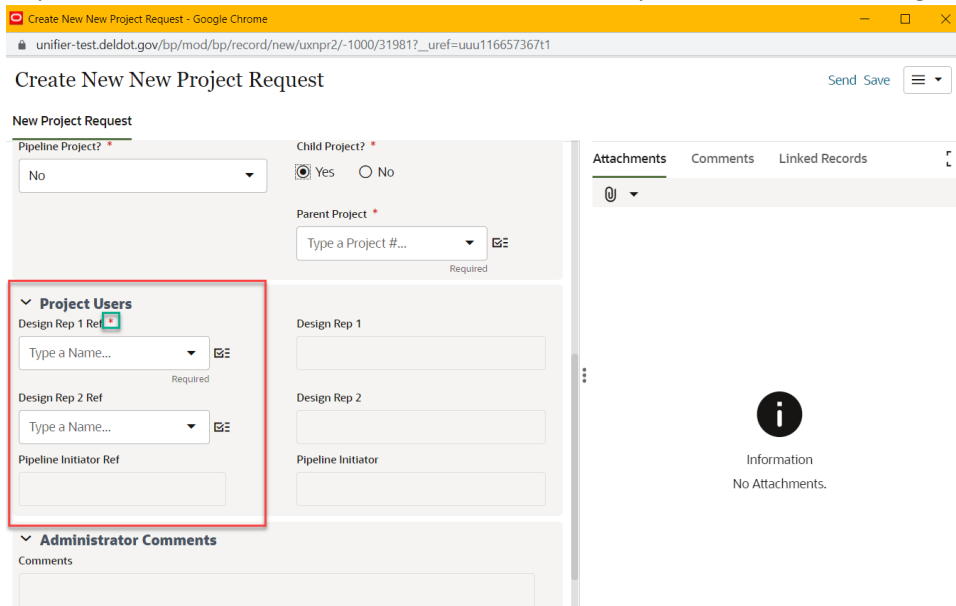
Pipeline Projects:

“Pipeline Project” is another field that is defaulted to “No”. If this was a Pipeline Project then “Yes” would be selected. This would then allow the “Pipeline Initiator” field to be editable.



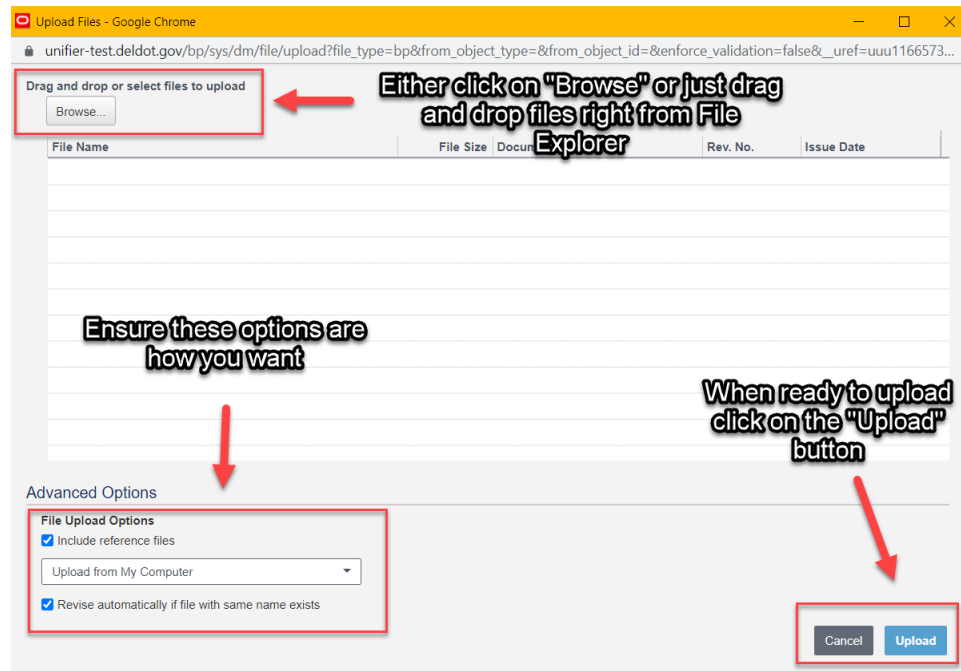
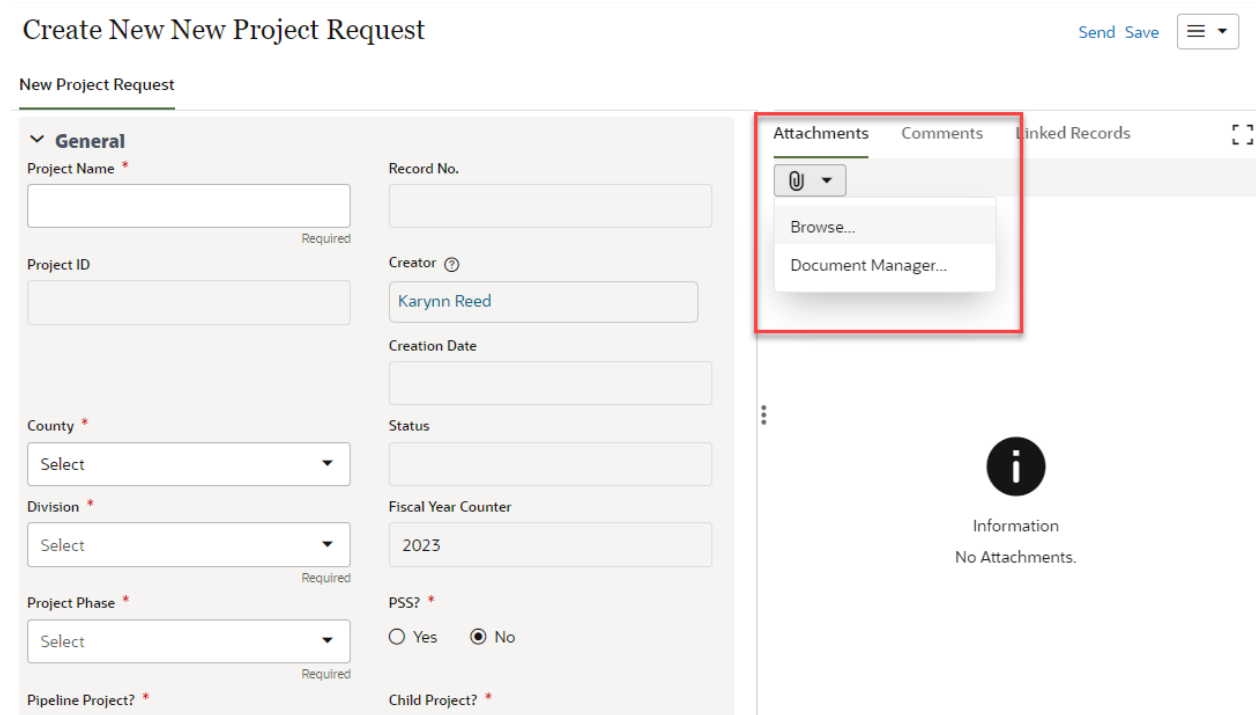
Project Users:

For Project Users, please identify the Design Rep and Pipeline Initiator if applicable. The Design Rep will be the individual responsible for updating and maintaining the project information as well as creating the Project Number Request (PNR). e.g., Project Manager. Either begin typing in the name or click on the icon next to the field to open a running list of users to make your selection. If there is a second “Design Rep” or an additional review of the PNR would be required, fill out the “Design Rep 2” field as well.

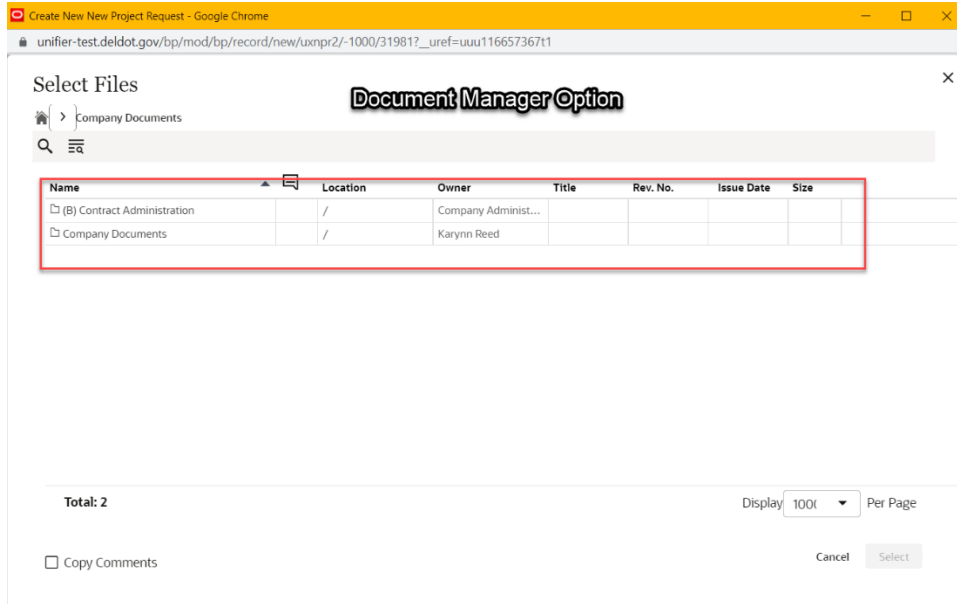


Attachments:

To add an "Attachment" to the NPR select the Attachment tab on the right hand side. Click on the paperclip icon. This will open up two options. The "Browse" allows the user to select documents from their File Explorer.

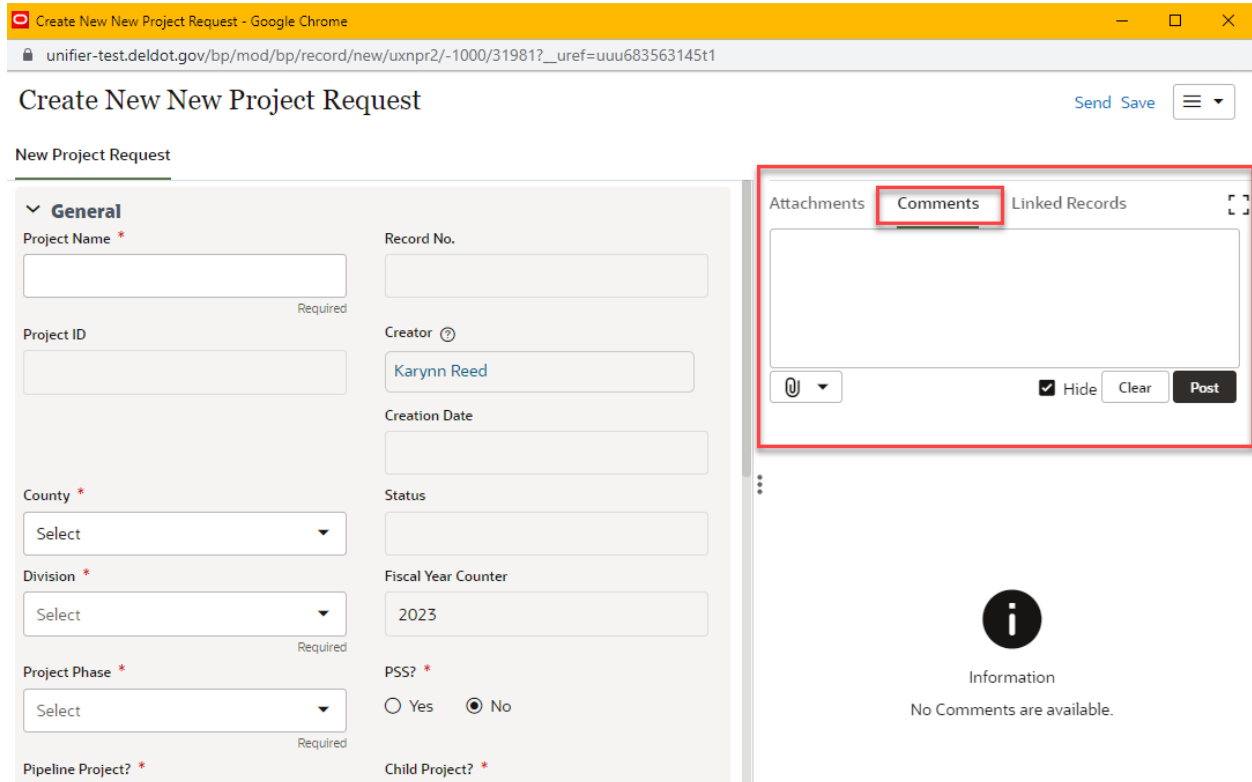


The “Document Manager” is another location within Unifier to pull files. NOTE: There is further explanation for the “Document Manager” and how to navigate this.

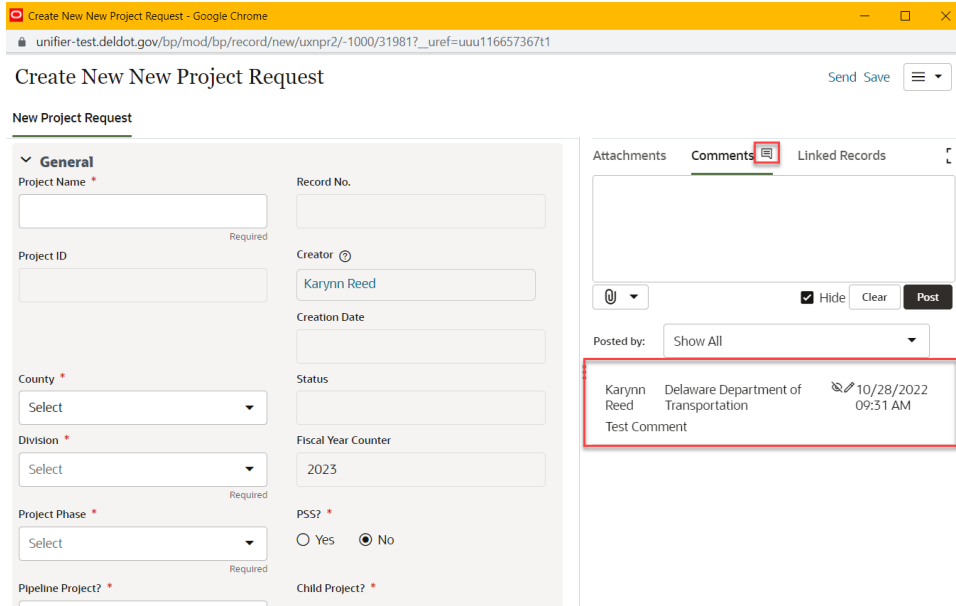


Comments:

To add additional comments click on the “Comment” tab on the right hand side. Type in the comment and then click post.

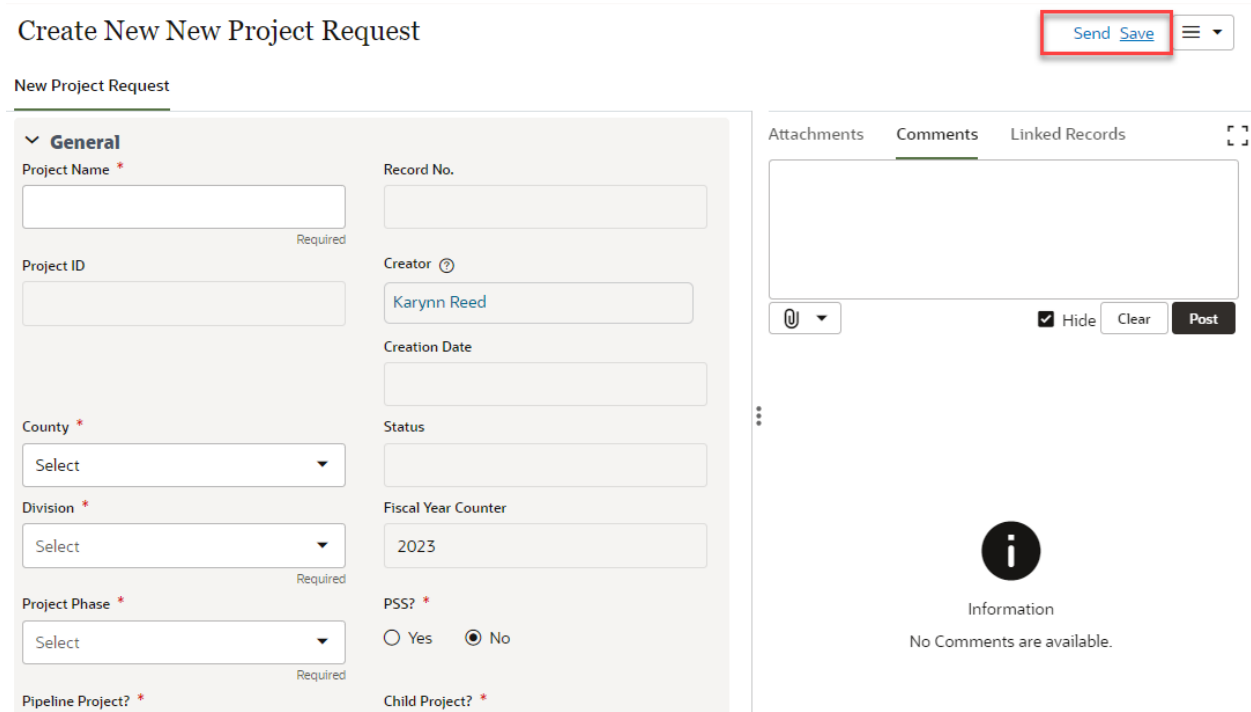


When a comment is posted, there will be an icon next to the “Comments” as shown below. All comments are recorded below the comment box.



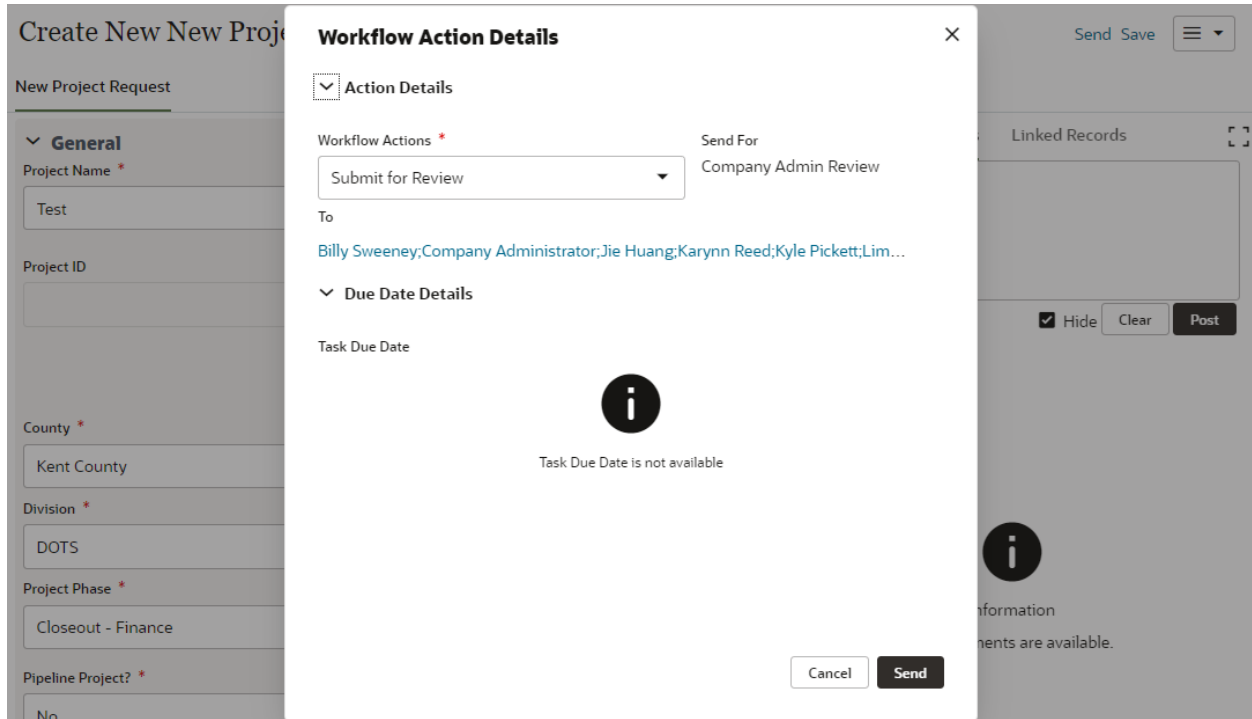
Save Record:

If at any point a record needs to be saved and continued later, click on the “Save” button at the top of the right hand corner. The record will then be saved into the “Drafts” (refer to General Navigation section of the instructions). If a record is ready to be sent click on the “Send” button next to “Save”



Send Record:

A screen will appear that has the Workflow Action, what it is being sent for in the Workflow, and who the record will be going to. For the NPR, "Submit for Review" is defaulted and the only option under "Workflow Actions". Click "Send" on the bottom right-hand corner to send the NPR.

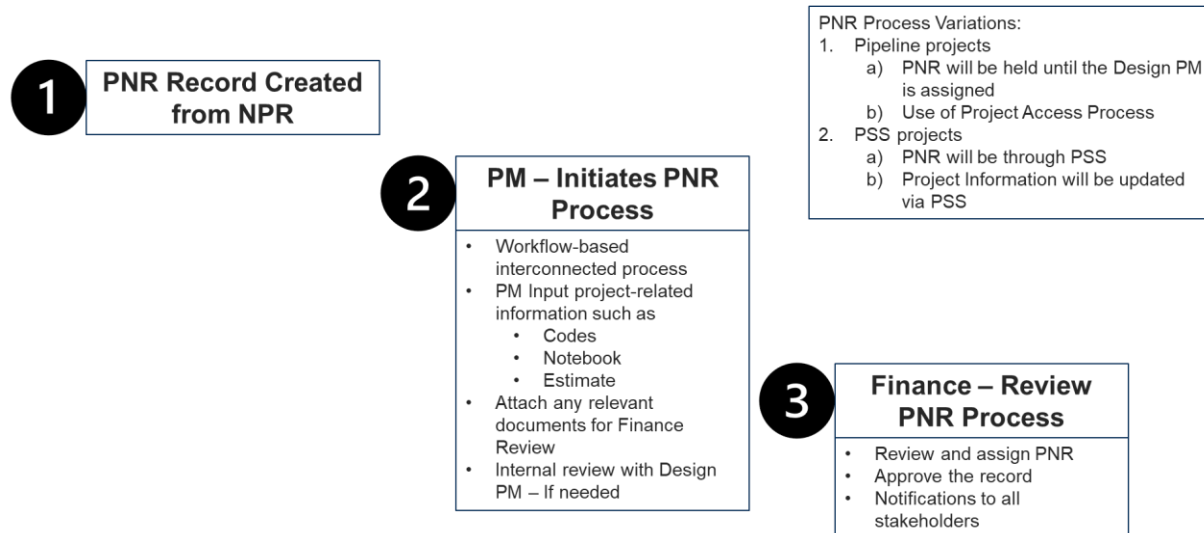


A notification will be sent via email when the New Project Request has been reviewed and approved by Engineering Support. A task will subsequently follow as well.

Project Number Request (PNR)

The Project Number Request (PNR) process is a Unifier process that the PM must take action to receive Project Number from Department of Finance (Finance) of Unifier. The PNR record in Unifier will be created upon approval of the NPR and a ‘Task’ will be in the PM queue to request the project number. It is expected that the PM will input required information (such as Project Codes, Project Notebook, and Project Estimate) to allow the Finance to issue a project number through the request.

The following outline general outline of the PNR process in the Unifier. The PNR is a workflow based process where PM can request the internal review prior to transmitting the record to Finance.

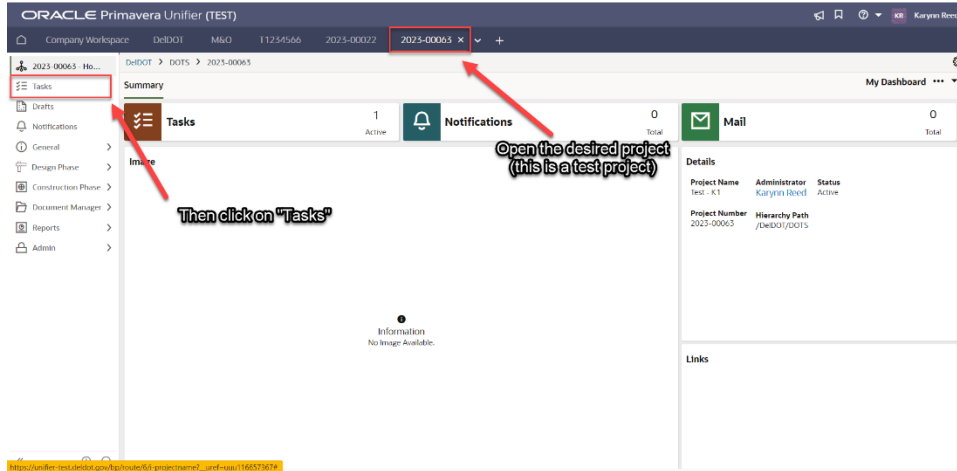


Before submitting the PNR be sure to map projects in MEAP as it is important for Project Codes and Locations. Instructions are provided below. NOTE: Submitting PNR instructions are after the MEAP instructions.

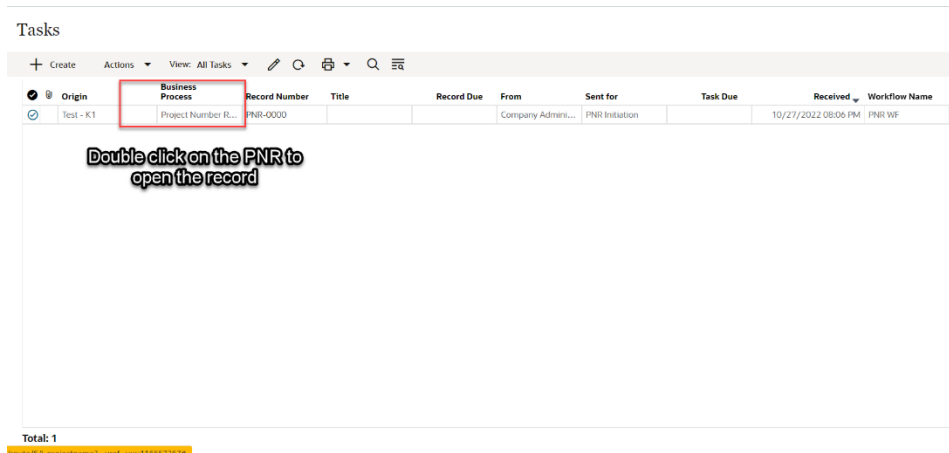
General:

The following steps are provided to guide the PM to work in the PNR record that can be then submitted for Finance’s review. The PNR record is already created for most project requests in which the PM will input required information. The PNR record can be accessed from “Tasks” in each project.

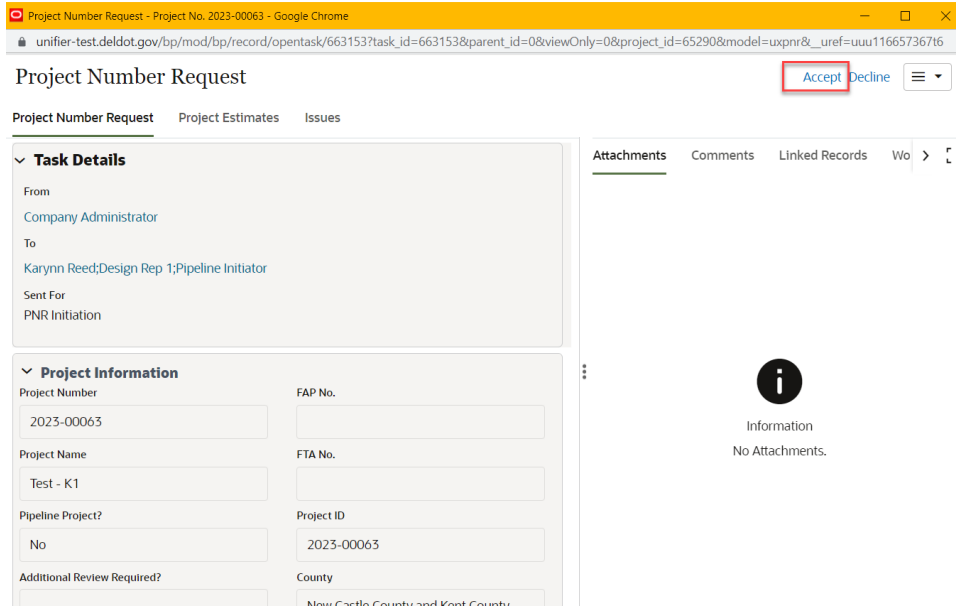
To open the PNR, open the project and click on “Tasks”.



Once under tasks double click on the PNR to open the record.



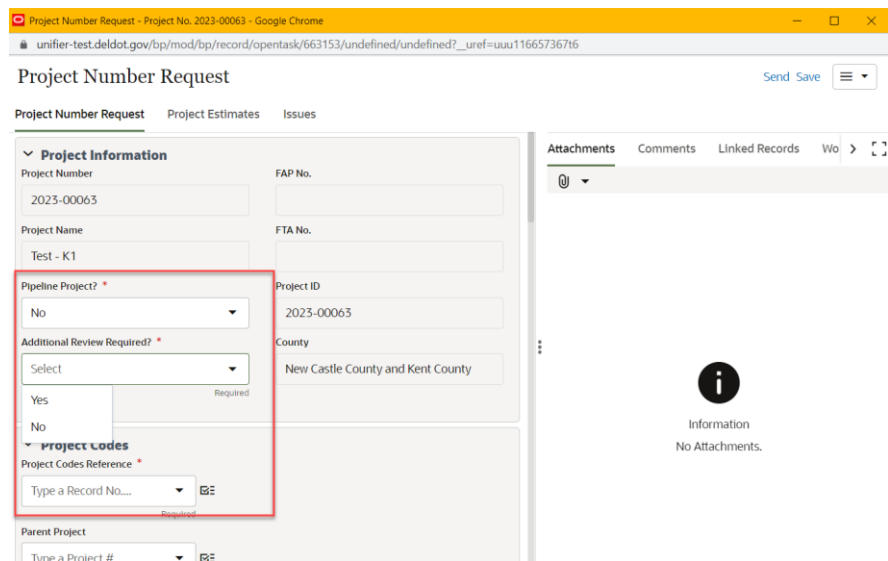
Click on the “Accept” button in the upper right hand corner of the record. This is taking responsibility of the task and will allow the user to begin editing the PNR.



Once the record is **accepted**, begin to fill out the information in the PNR. Fields marked red (*) are required fields. The user will be unable to send the record if those fields are not filled out. If a field is grayed out this is either auto populated or requires another field to be selected before this will become editable.

“Pipeline Project” = Defaults to “No”. This is inherited from the NPR process.

“Additional Review Required” = A second Design Rep will review the PNR before submitting to Finance. This is an optional item to support any additional review that Design PM may be needed.



Project Codes:

For “Project Codes Reference” begin to type “C” and the reference code will display as shown below. There will only be one record available for each project. (Note: this is a reference code for Project Codes) The user is also able to click on the icon next to the search field (highlighted in yellow)

Note: If at any point the user needs to exit the record to work on it later, click on the “Save” button in the upper right hand corner. This will save the record to the “Drafts”. If the user exits out of the record without saving it THE RECORD WILL BE LOST.

Continue to fill out the appropriate project codes in the form. Take note that these fields are not required however if the user has the information ensure that the fields are filled out. (Note: user will be able to update these fields after the approval of PNR)

A question mark in a circle (?) sign is a tooltip. Hovering over the (?) will display information or a description about the field.

The screenshot shows the 'Project Number Request' form in a web browser. A red rectangular box highlights the top portion of the form, which includes the following fields: 'Project Status Agenda?' (dropdown menu), 'Publish to QLR?' (dropdown menu), 'Responsible Manager Ref' (text input with search icon), 'Funding Point of Contact Ref' (text input with search icon), 'Responsible Manager' (text input), 'Funding Point of Contact' (text input), 'CTP Family Indicator' (dropdown menu), 'CTP Family' (text input), 'CTP Classification' (dropdown menu), 'Federal Stimulus Project?' (dropdown menu), 'Improvement Type' (dropdown menu), 'Improvement Type Description' (text input), 'Show on CTP?' (dropdown menu), and 'FHWA Participation' (dropdown menu). To the right of the form is an 'Attachments' section with a search icon and a tooltip icon. The tooltip icon is a black circle with a white lowercase 'i' inside, and the text below it reads 'Information' and 'No Attachments.'

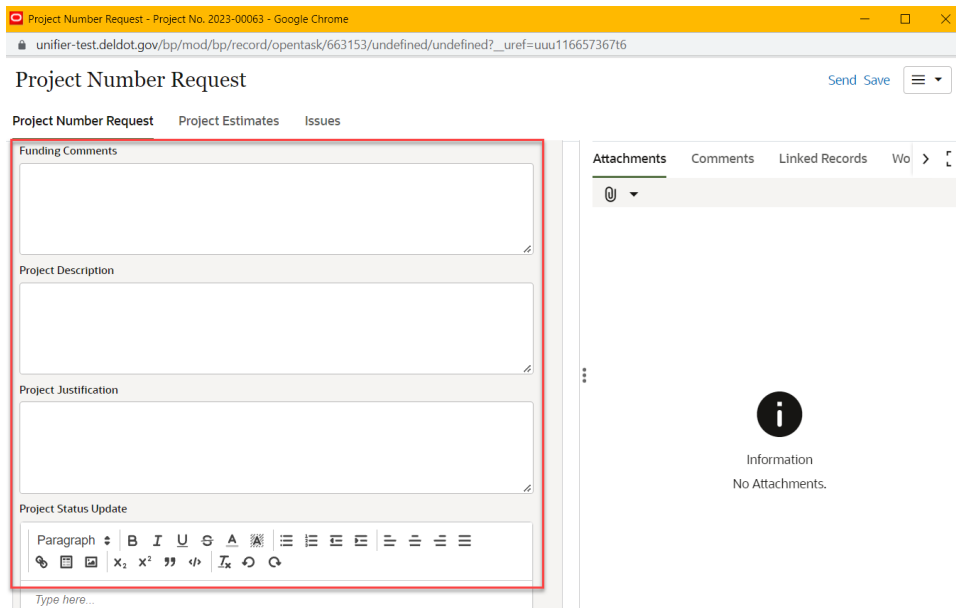
Project Notes:

“Project Notes Reference” is another Required field. This works the same way as “Project Codes Reference” mentioned above. Begin to type “N” or click on the icon next to the search bar.

The screenshot shows the 'Project Number Request' form in a web browser. A red rectangular box highlights the 'Project Notes' section. This section includes a 'Project Notes Reference' dropdown menu with a search icon. Below the search bar, the text 'PRJNOTE-0000' is visible. The 'Project Notes Reference' field is marked as 'Required'. To the right of the form is an 'Attachments' section with a search icon and a tooltip icon. The tooltip icon is a black circle with a white lowercase 'i' inside, and the text below it reads 'Information' and 'No Attachments.'

The “Funding Comments”, “Project Description”, and “Project Justification” are text fields. This is where the user can describe the funding phases, years and amounts. Ensure that these notes are clear and correct as they may be public facing in the CTP book.

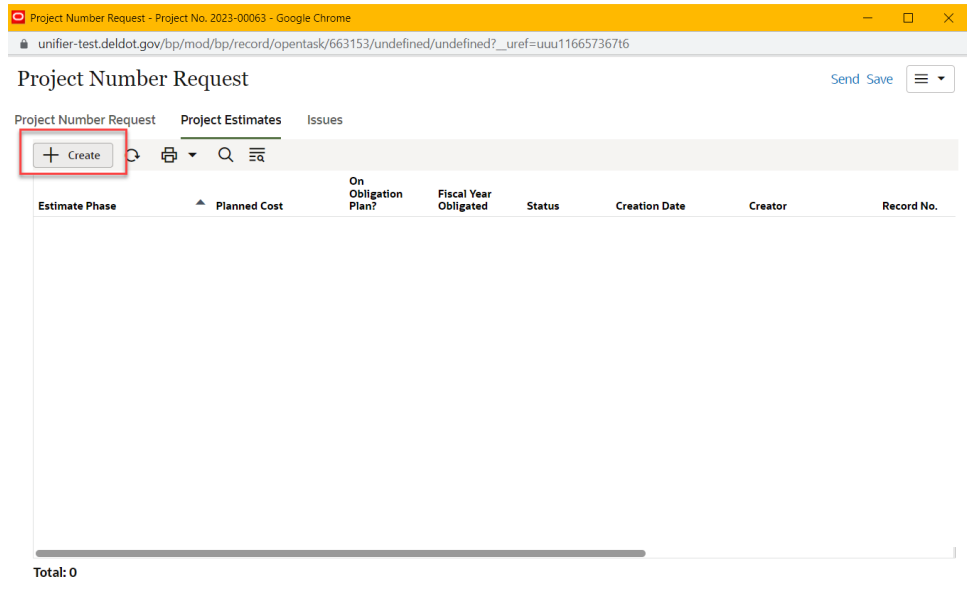
Note: Most of these notes are and will be used in several system across DelDOT and therefore it is important that these notes are clear, concise and reflects accuracy.



Project Estimate:

Once all of the information for the “Project Number Request” is filled out, click on the “Project Estimate” tab.

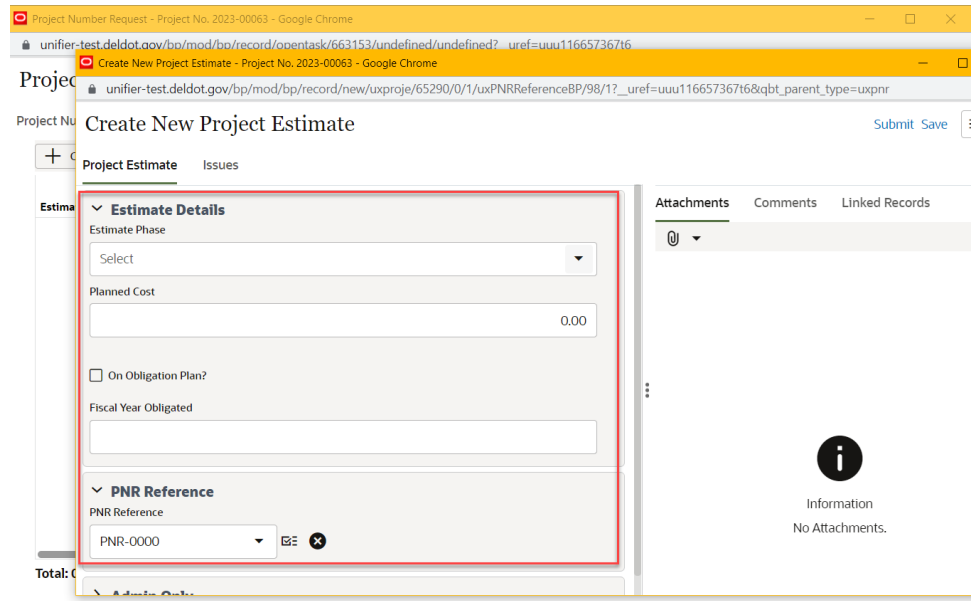
Click on the “Create” button to add an Estimate.



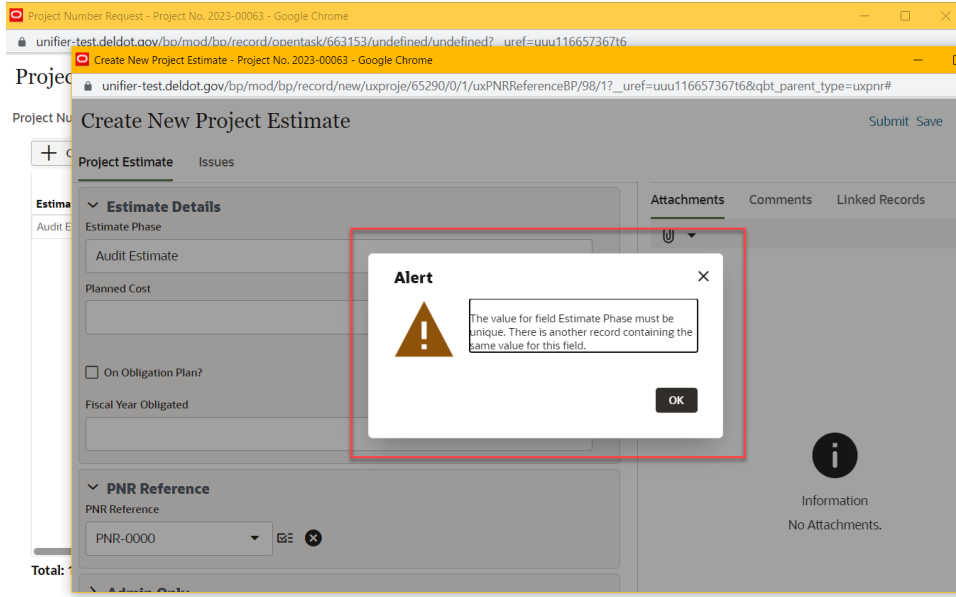
If the window does not appear like below, make sure that the window popup blocker is disabled.

Begin to fill out the information. Once the information is filled out click on the "Submit" button on the right-hand side of the window. To add another Estimate Phase, click on the Create button and repeat the above step.

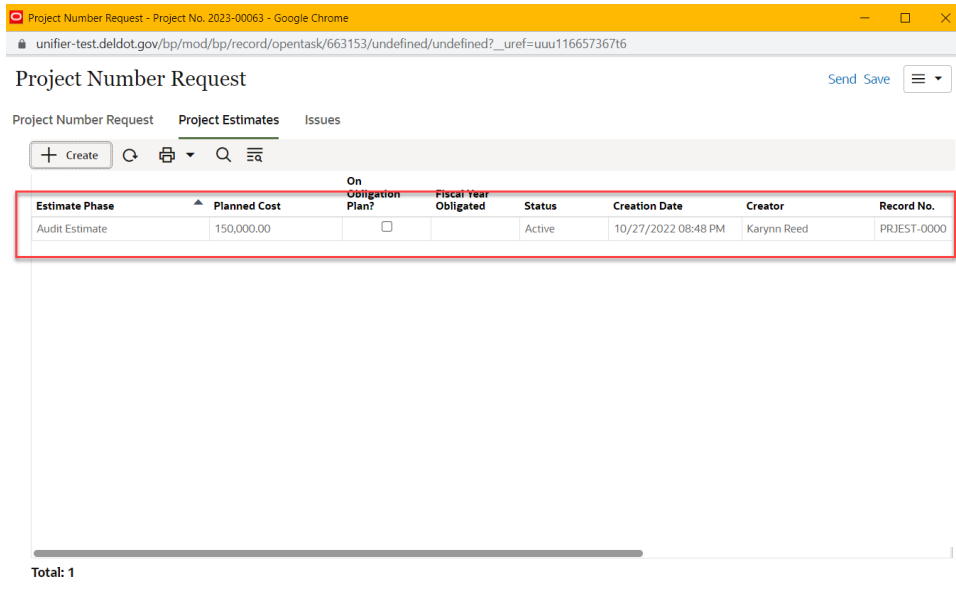
Estimates can be edited after the approval of PNR.



NOTE: Each Estimate Phase can only be submitted or created only once. An error window will appear if the user tries to duplicate the record as shown below.

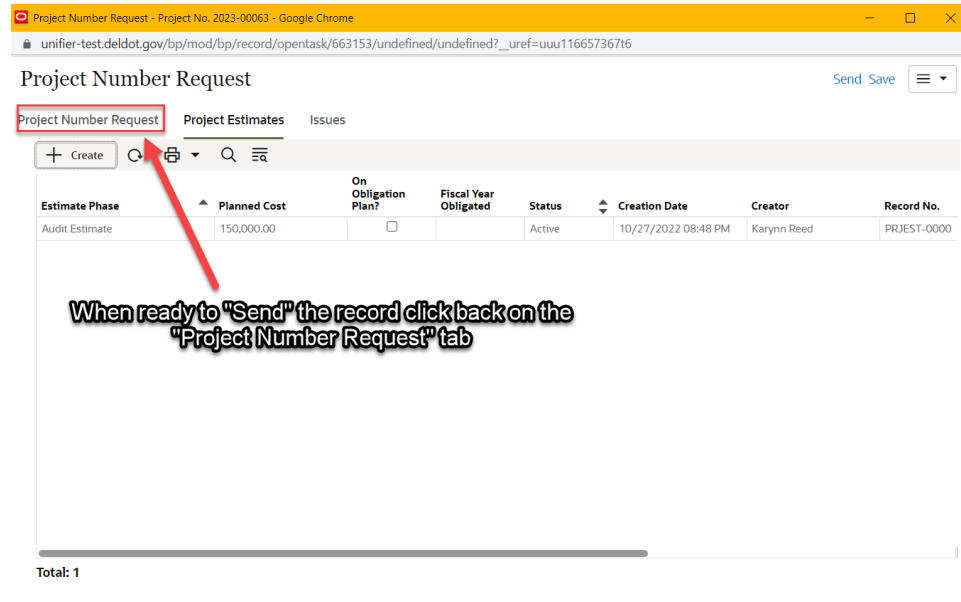


The Estimate Phase will appear in the list in the PNR process as shown below.

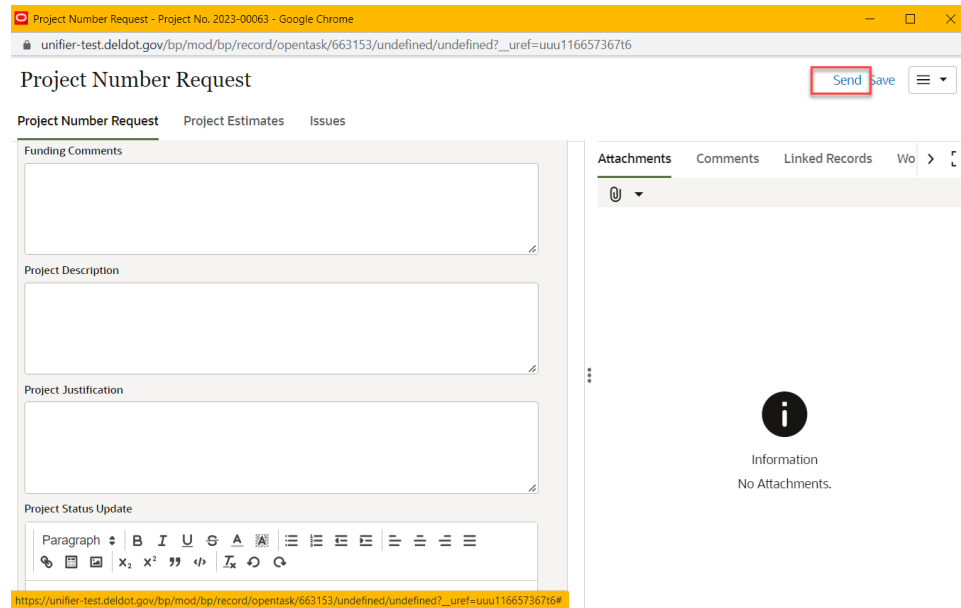


Send PNR Record:

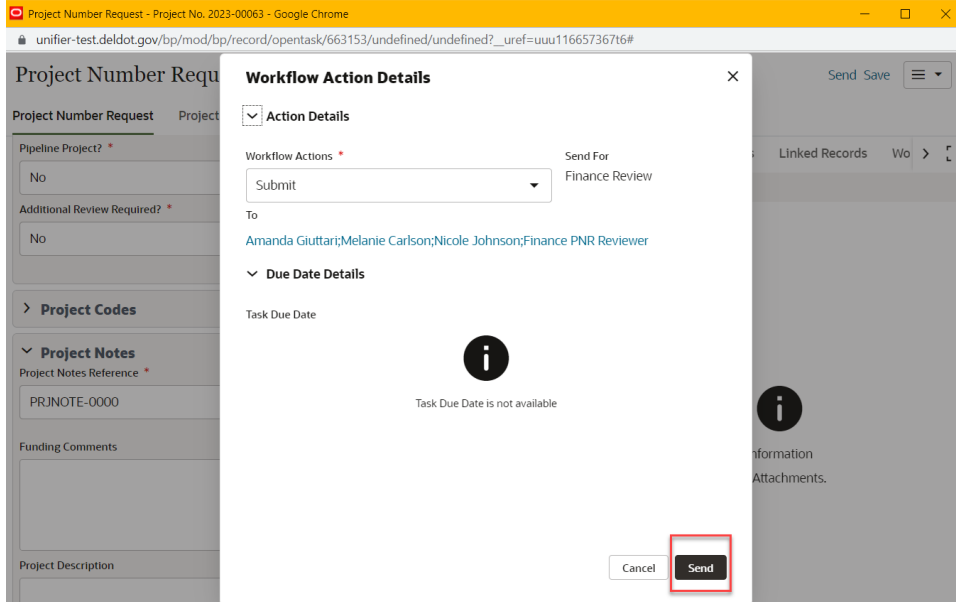
When ready to “Send” the PNR record, click on the “Project Number Request” tab. The record will not allow the user to send when under the “Project Estimates” tab.



Once ready, click on “Send”.



Click on “Send” in the bottom right hand corner.



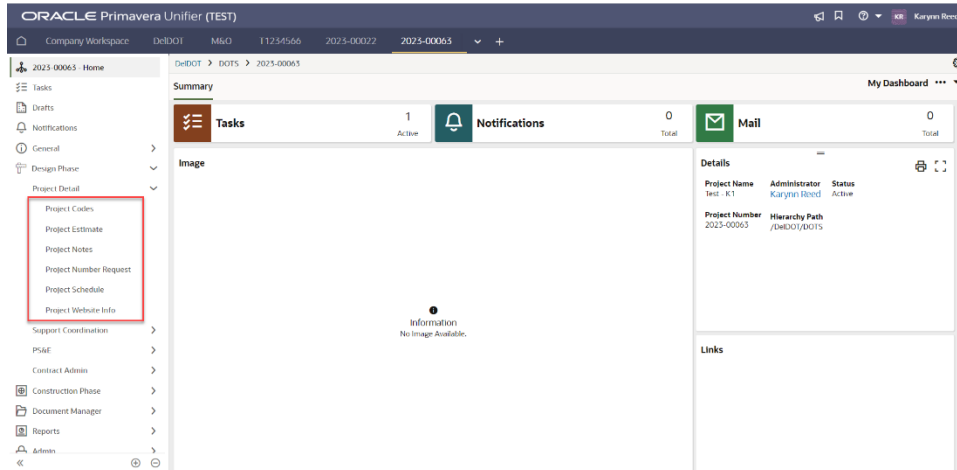
Finance Review:

Workflow now passes to Finance team to review PNR and issue Project Number (T Contract #). Finance team may return the workflow to the user if codes are incorrect, or incomplete or additional information is needed.

Update Project Information:

After the PNR record is approved for the project, any and all project information can be modified by the Project Manager directly in to the appropriate process. The users will modify these information in the project.

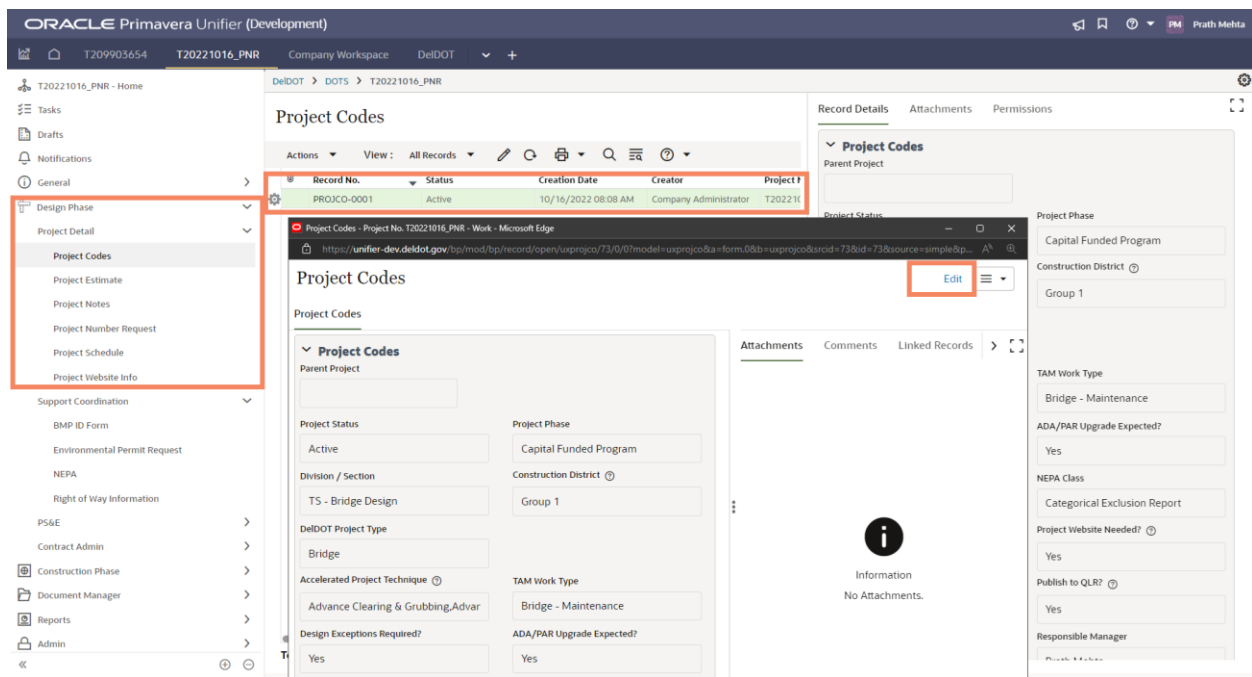
In each project, project detail processes are located in Design Phase > Project Details groping as shown in the image below.



Updating the project information is similar for all business process that are related to the project details. The Project Manager is responsible for maintaining current accurate proeject information.

Updating Project Codes:

Select the "Project Codes" from the list under the "Project Detail". Then double click on the record. A new window will open. Select 'Edit' to modify information the 'Project Codes'.



Upon completion of modification of code values in the record, select 'Submit' to close the record.

This action will save any modification to the project codes and will be reflected across multiple systems in the DeIDOT.

Update Project Notes:

The Project Manager are responsible for updating Project Notes. "Project Status Update" is a rich text field that allows users to modify the format of the text. These notes will appear in the status report and hence it is advisable that comments are relevant and accurate.

Similar to 'Project Codes' process, selecting 'Edit' will allow the Project Manager to modify comments and selecting 'Submit' will update records in the Unifier and other DeIDOT's integrated systems as well.

Update Project Estimate:

The Project Manager are responsible for updating Project Estimates. The Unifier will only allow unique Project Estimate phase records for each project. The system will not allow duplicate entry for any existing phase and therefore the PM should follow the following procedure to update existing Project Estimate records.

Project Estimate Edit ☰ ▼

Project Estimate Issues

▼ Estimate Details

Estimate Phase

Construction Engineering Estimate

Planned Cost

20,000.00

On Obligation Plan?

Fiscal Year Obligated

2022

▼ PNR Reference

PNR Reference

PNR-0001

> Admin Only

Open the record for appropriate estimate phase. Selecting 'Edit' will allow the Project Manager to modify the value in the estimate and selecting 'Submit' will update records in the Unifier and other DeIDOT's integrated systems as well.

Project Schedule:

Project Schedule record is created at the time of project creation. At this time, the Project Manager is responsible for recording planned and actual dates of project phases. These dates will be recorded in the Unifier and reported on the Project Status Report.

Project Schedule

Edit 

Project Schedule

Design Phase	
Preliminary Plans <input type="text" value="10/16/2022"/>	Actual Preliminary Plans <input type="text" value="10/24/2022"/>
Semi-Final Plans <input type="text" value="12/26/2022"/>	Actual Semi-Final Plans <input type="text"/>
Final RW Plans <input type="text" value="12/19/2022"/>	Actual Final RW Plans <input type="text"/>
Final Construction Plans <input type="text" value="01/30/2023"/>	Actual Final Construction Plans <input type="text"/>
PS&E Submittal <input type="text" value="02/28/2023"/>	Actual PS&E Submittal <input type="text"/>
Advertisement Phase	
Anticipated Advertisement Date <input type="text" value="03/30/2023"/>	Actual Advertisement Date <input type="text"/>
	Bid Period (Calendar Days) <input type="text" value="20"/>
Anticipated Bid Opening Date <input type="text"/>	Actual Bid Opening Date <input type="text"/>
Anticipated Award Date <input type="text"/>	Actual Award Date <input type="text"/>
Anticipated Contract Execution Date <input type="text"/>	Actual Contract Executed Date <input type="text"/>
Construction Phase	
Project ID <input type="text" value="2023-00015"/>	Status <input type="text" value="Active"/>

Project Website:

The Project Website process is to update documents to the public facing Project Website that is managed by DeIDOT. These documents are published on the website. The Unifier process allows the Project Manager to upload the document and also deactivate any uploaded document so that it can be removed from the website.

To upload the document to the Project Website, double click to open the record.

Select 'Edit' to modify the record information in the General Info section of the record.

Selecting 'Submit' after all changes will update Unifier and other integrated systems.

The screenshot shows the 'Project Website Info' form with an 'Edit' button in the top right. The form is divided into several sections:

- General Info:** Includes fields for External Email Address, External Phone Number, External Website URL, Workshop Survey Link, and Youtube Video.
- Virtual Workshop Info:** Includes fields for Virtual Workshop Start/End Date, Virtual Workshop Presentation URL, and Virtual Workshop Description.
- Live Question & Answer Info:** A section with a right-pointing arrow.
- Project Information:** A section with a right-pointing arrow.
- Admin Only:** A section with a right-pointing arrow.

Document Upload:

This screenshot shows the 'Project Website Info' form with the 'Documents' tab selected. Red boxes highlight the following steps:

- Step 1: The 'Documents' tab is selected at the top of the form.
- Step 2: The 'Add' button is highlighted in the top left of the document list.
- Step 3: The 'Add' dropdown menu is open, showing a list of document categories.
- Step 4: The 'Bid Document' category is selected from the dropdown menu.
- Step 5: The 'Save & Add New' button is highlighted at the bottom of the form.
- Step 6: The 'Submit' button is highlighted in the top right of the form.

As indicated in the image use the following steps.

1. Select 'Documents' tab in the record.
2. Select 'Add' to add new document in the record.
3. Browse and select a document to upload to the project website.
4. Select appropriate document category.
5. Save or Save & Add New lines as needed.

Note: "Admin Only" section of the detail form in Documents Tab allows users to 'Disable' the record to prevent it from publishing to the project website.

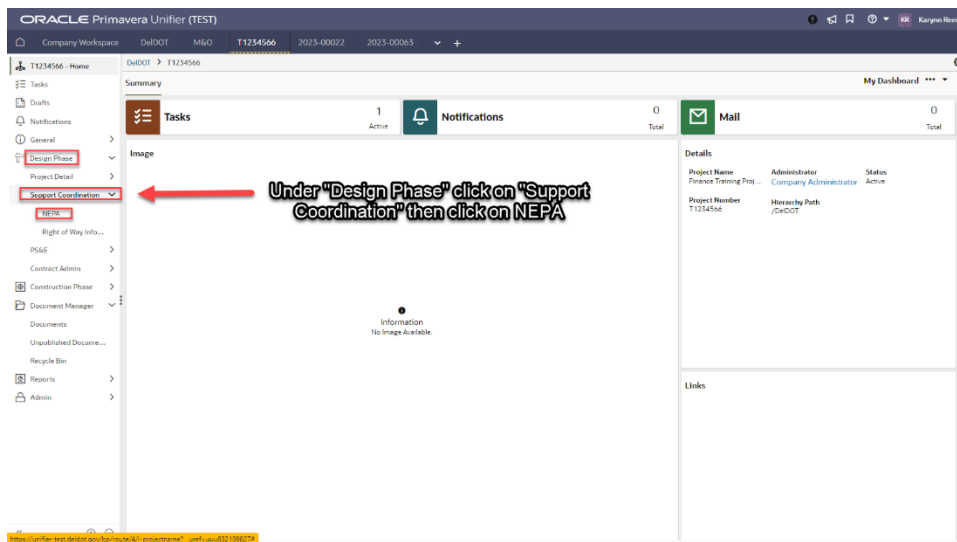
National Environmental Policy Act (NEPA)

The creation of NEPA record is dependent on the type of project. Any project with FHWA participation requires NEPA records and will be auto created at the time of approval of PNR record by Finance.

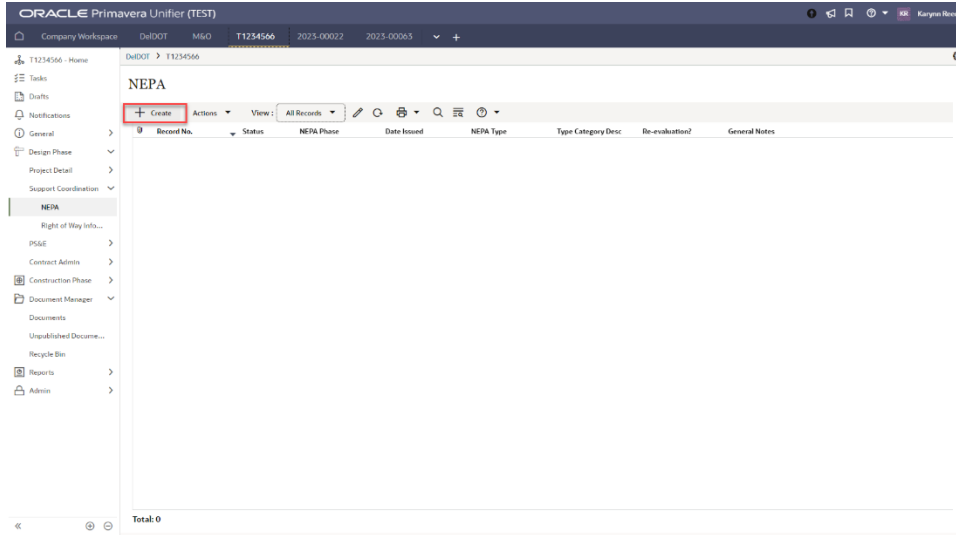
The record for NEPA is available in the project for any edits that may require through the project lifecycle. Users can also be able to add records in this BP as needed for the project.

The screenshot shows the 'Project Number Request' form. The 'Project Codes' section is highlighted with a red box. A red arrow points from this section to the 'FHWA Participation' dropdown menu, which is also highlighted with a red box and set to 'Assumed'. Other fields include Project Codes Reference (PROJCO-0001), Parent Project, Project Status (Active), Division / Section (TS - Bridge Design), and various checkboxes for design exceptions and public involvement.

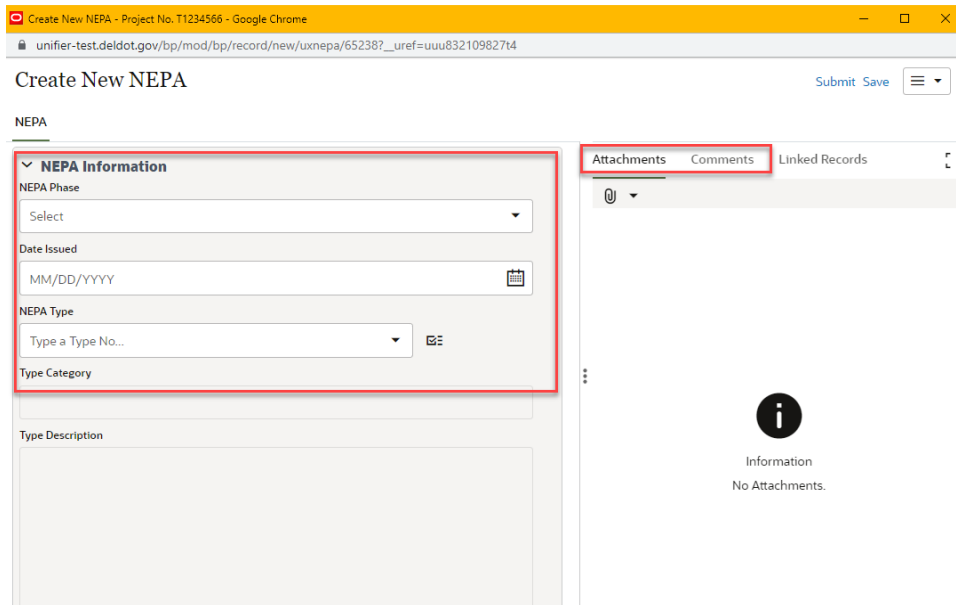
To access the NEPA records, click on "Design Phase". From this dropdown click on "Support Coordination" then click "NEPA".



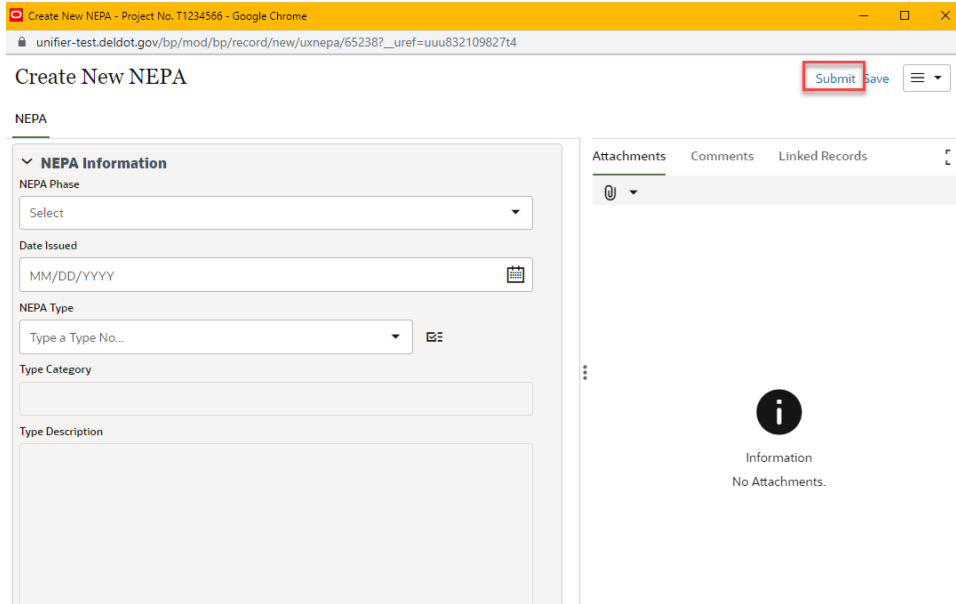
Click on "Create" to open the new NEPA record.



Fill out the information and add attachments or comments if needed.



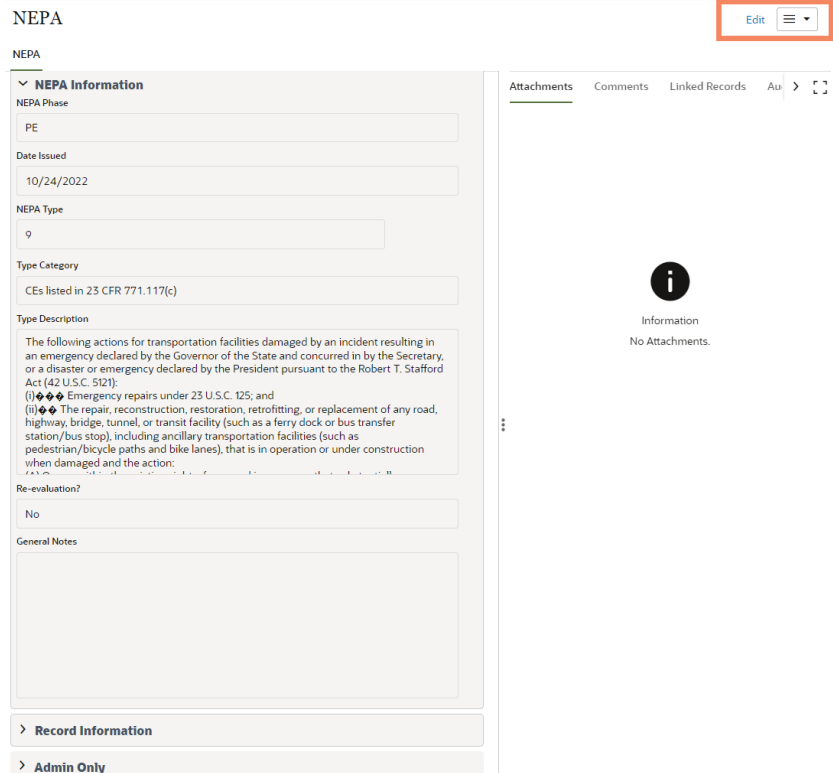
Click on "Submit" once the recorded is completed.



The (?) symbol next to the “Creator” field is a tooltip that provides information regarding the field. Hovering over that symbol will pop up information whether it’s an explanation or a general comment.

To update an existing record, select ‘Edit’ icon to edit information related to the record in the screen as shown below. Users can select “NEPA Phase” and appropriate “NEPA Type”. Selection “NEPA Type” will auto populate “Type Category” and “Type Description”. Furthermore, “Re-evaluation” allows the Project Manager to create a new NEPA record.

Information recorded in this process is used for reporting in DelDOT.



Right of Way (ROW)

The creation of ROW record is available for modification after the project is created.

Right of Way Information



ROW

▼ ROW Information

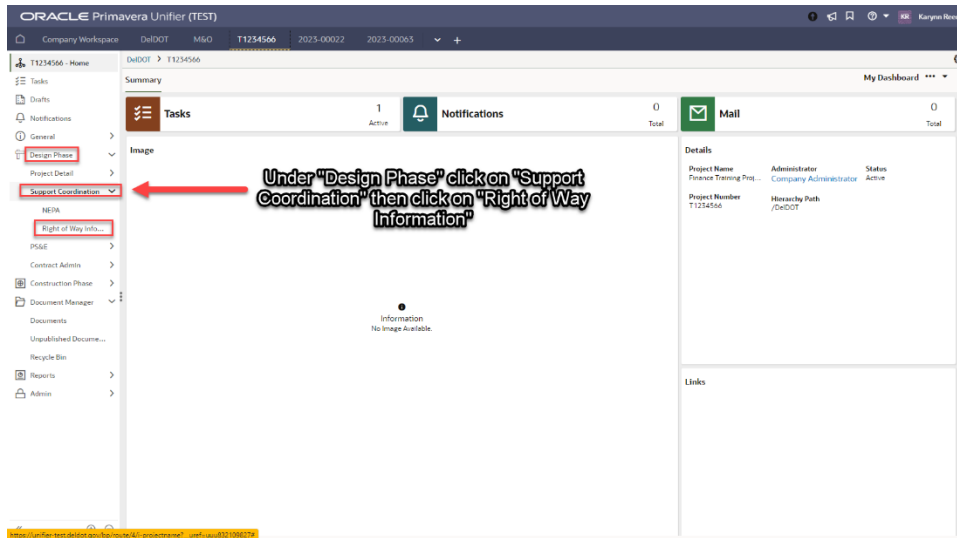
# of Parcels	<input type="text" value="0"/>	# of Offers Sent	<input type="text" value="0"/>
# of Negotiations Signed	<input type="text" value="0"/>	# of Settlements Completed	<input type="text" value="0"/>
Obtain Town Agreements?	<input type="text" value="No"/>	Date Obtained	<input type="text"/>

Notes

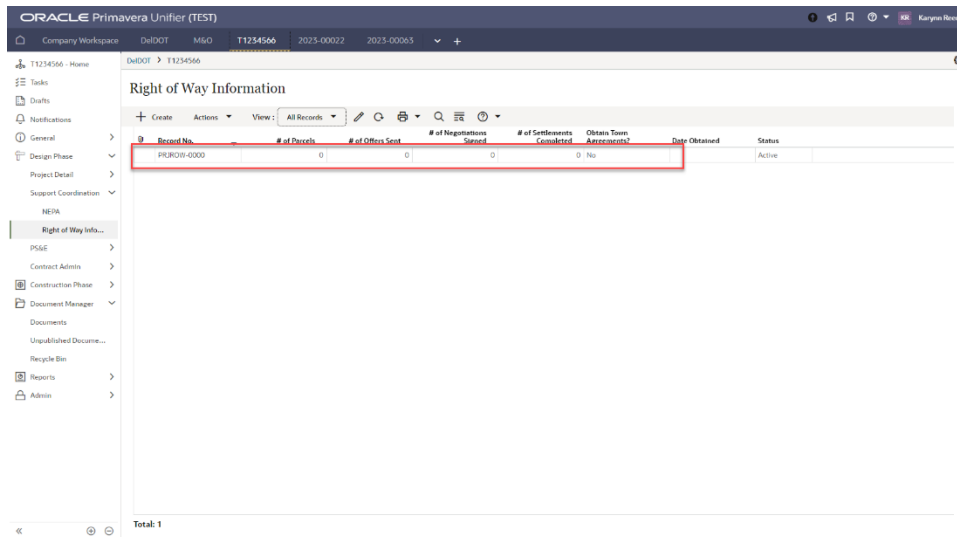
> Record Information

unifier-dev.deldot.gov/bp/mod/bp/.../0?...

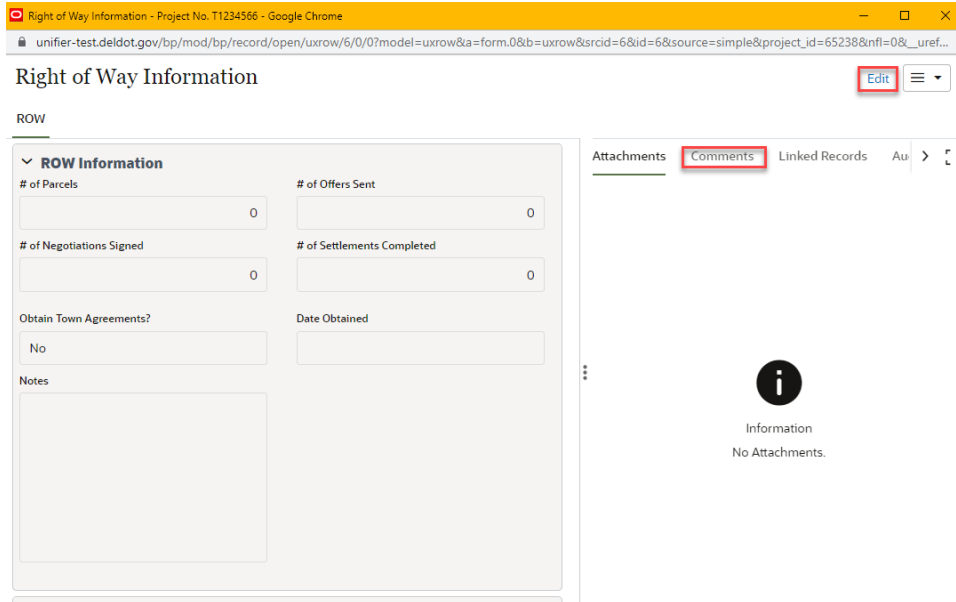
To update an existing record, select 'Edit' icon to edit information related to the record in the screen as shown above. Users can input parcel information that is related to the project and will be used for the Project Status Report in DeIDOT.



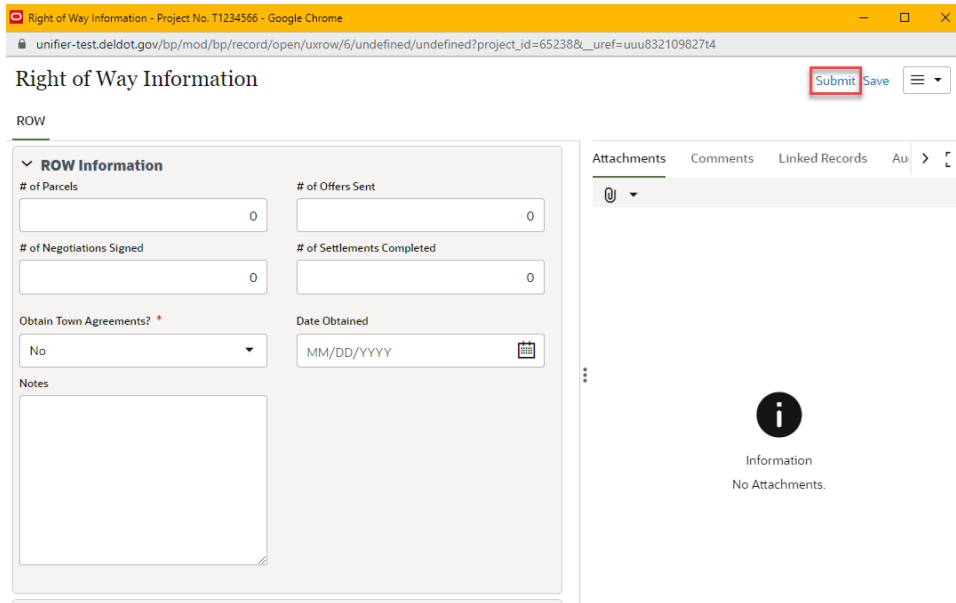
Double click on the record.



Click on "Edit" in the upper right hand corner of the record. Add comments to the Comment tab to make note of any changes that were made to the record.



Once the edits have been made click on the “Submit” button in the upper right hand corner of the record to submit the changes made.

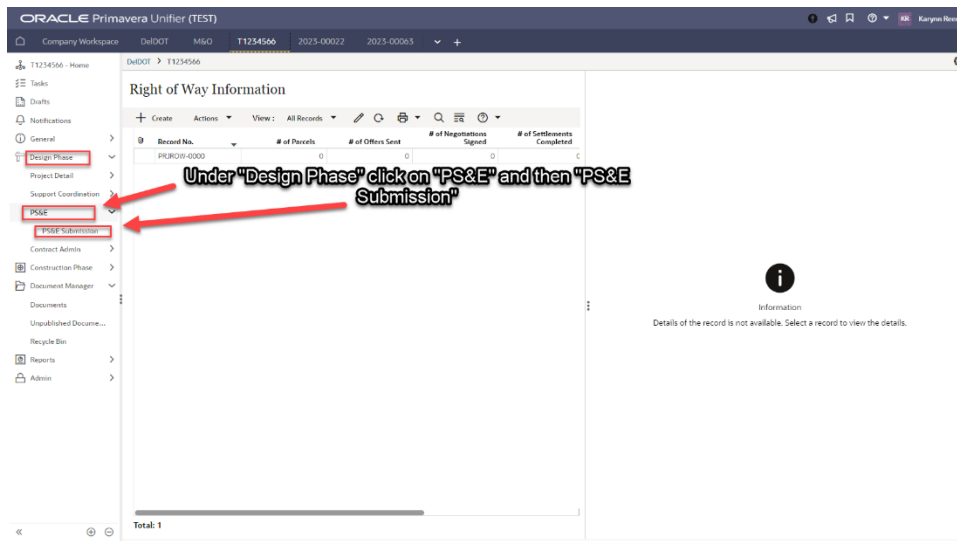


Plans, Specifications, and Estimates (PS&E)

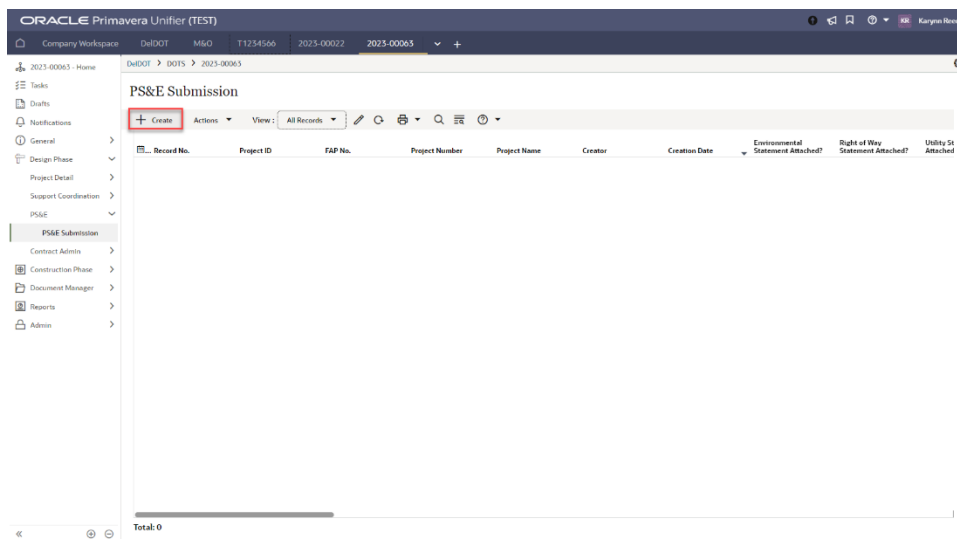
Plans, Specifications, and Estimates (PS&E) process in Unifier is initiated by the Project Manager upon completion of project design to collect relevant documents to prepare PS&E package to be transmitted to Contract Admin for project advertisement and award for Construction. Generally the required items for PS&E includes statements for Environmental, ROW, Utility, Traffic, Railroad, Timing Statement, Signed Final Plans and Stormwater.

The Project Manager will create the PS&E record in Unifier by selecting 'Create' from the PS&E process within the project.

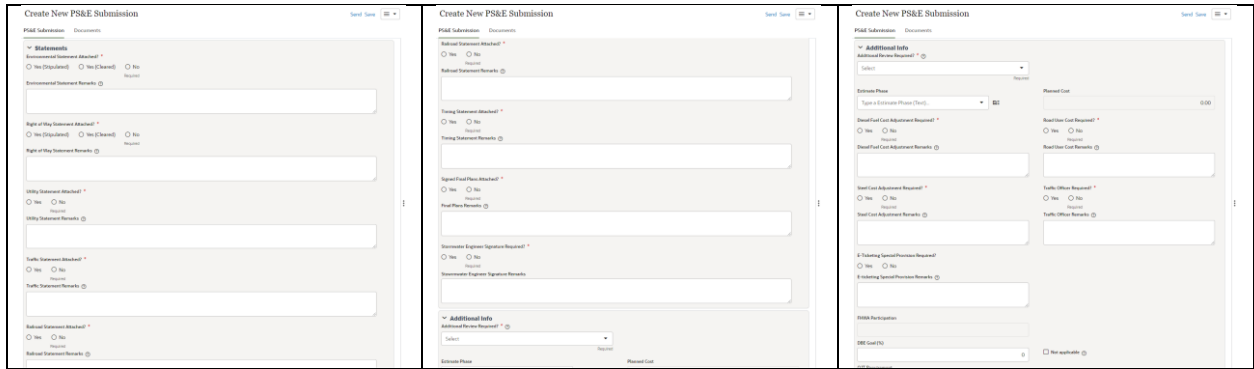
Under "Design Phase" click on the "PS&E" drop down then click "PS&E Submission".



Click on "Create" and a new window will open up.

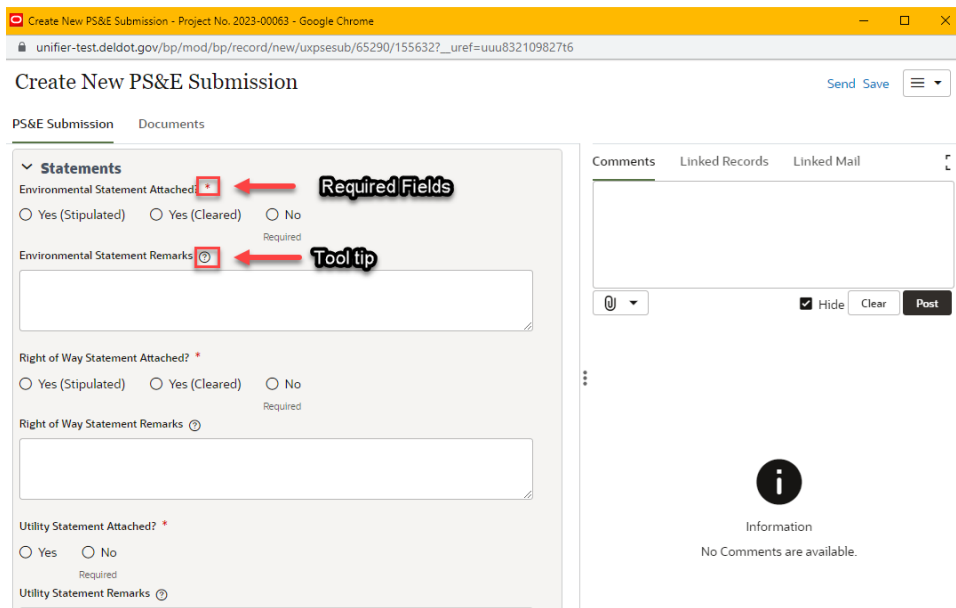


This action will open a window that lists required item for PS&E record. The following three screen shots provides the screen that user will be required to input information.

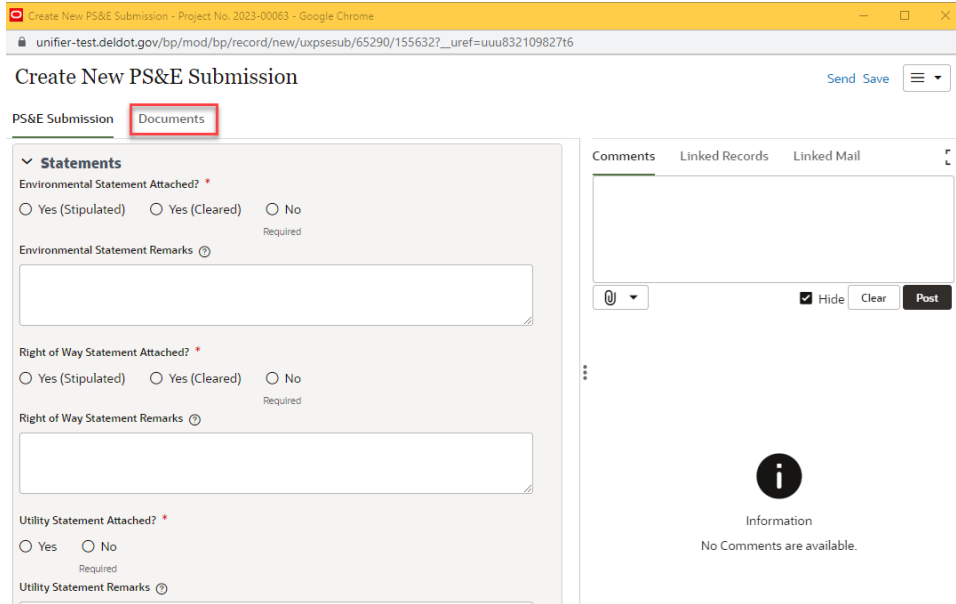


Red Asterisk: This indicates that a field is required. Note: The record will not allow the user to send if these “required” fields are not filled out.

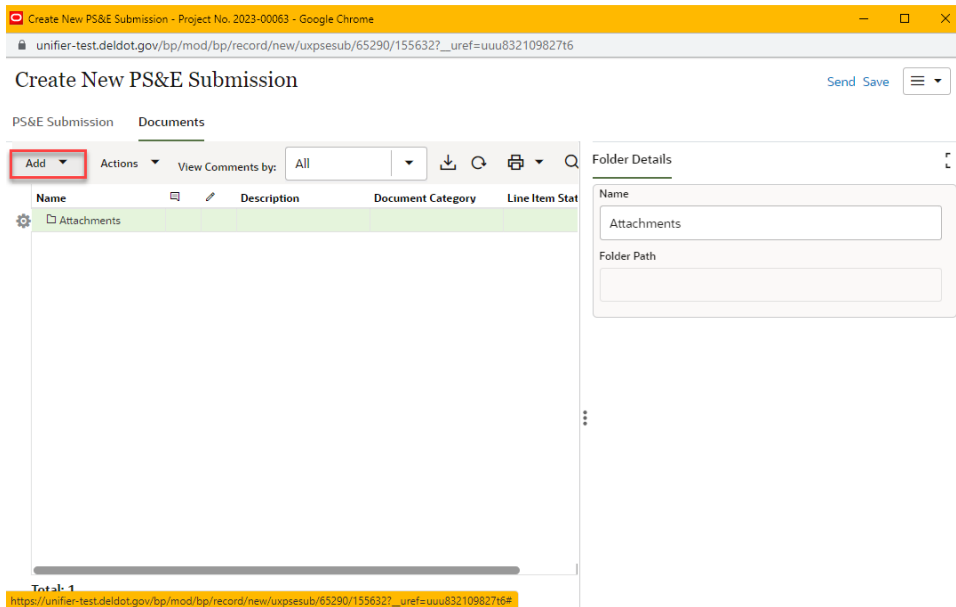
Question Mark in a circle: These are Tooltips. This will give information in regards to the field.



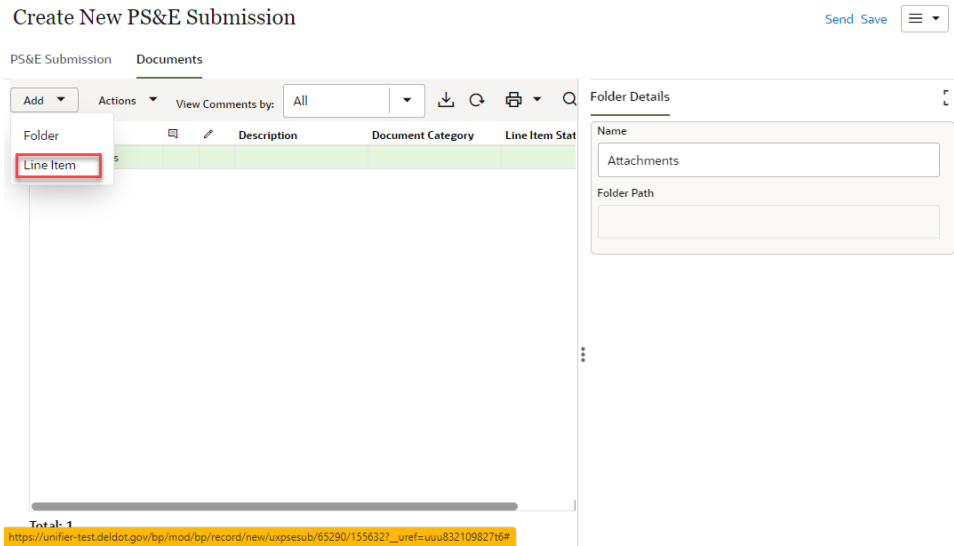
Once the information is filled out under the “PS&E Submission” tab click on the “Documents” tab. This is where Statements will be uploaded.



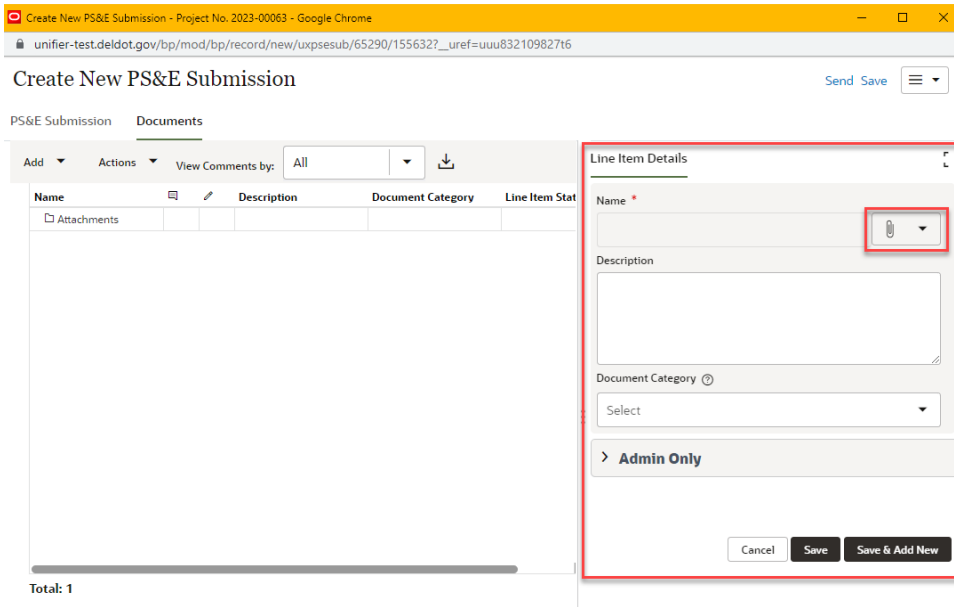
Click on the "Add" button.



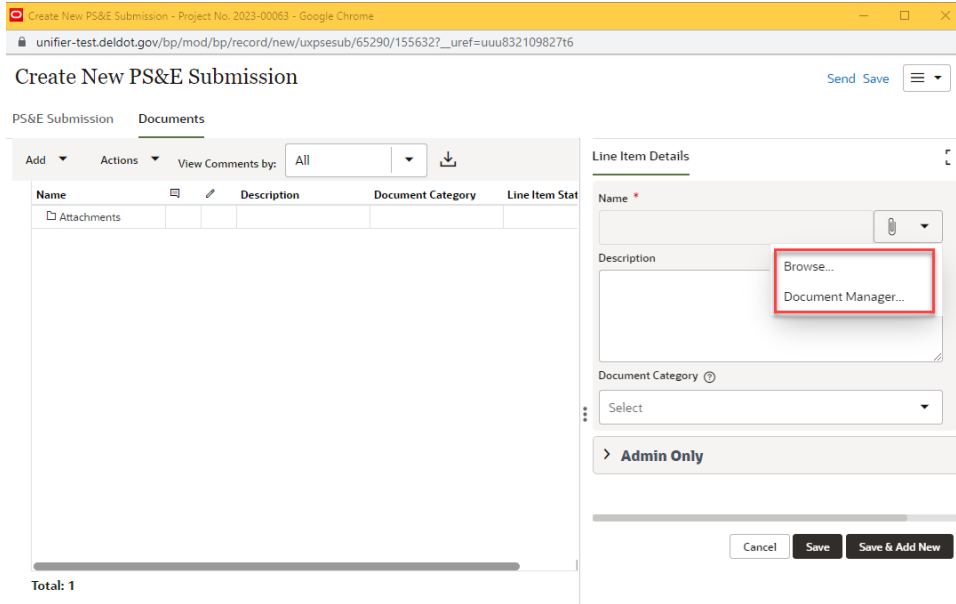
Click on "Line Item".



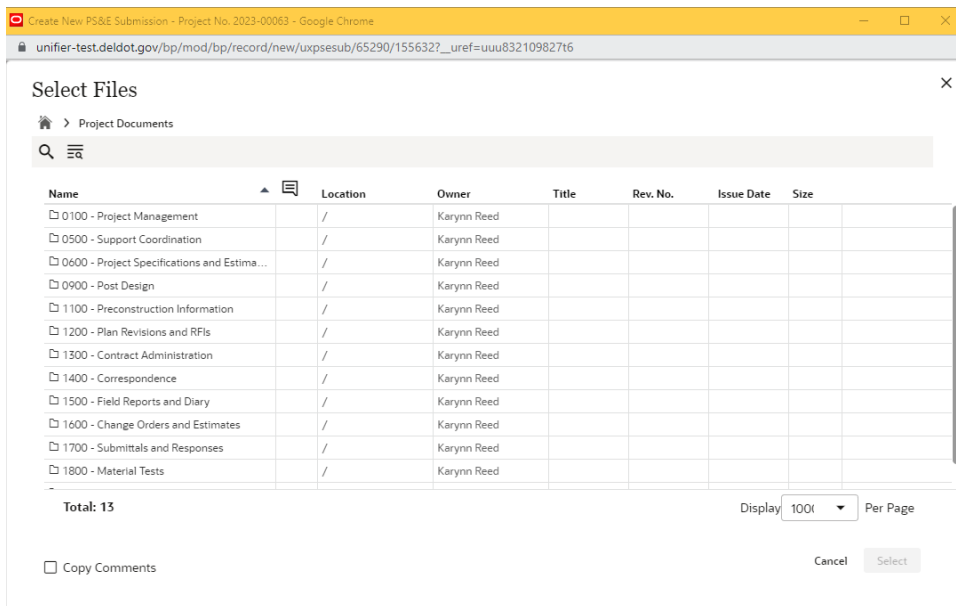
Fill out the information. To attach the documents click on the paperclip icon.



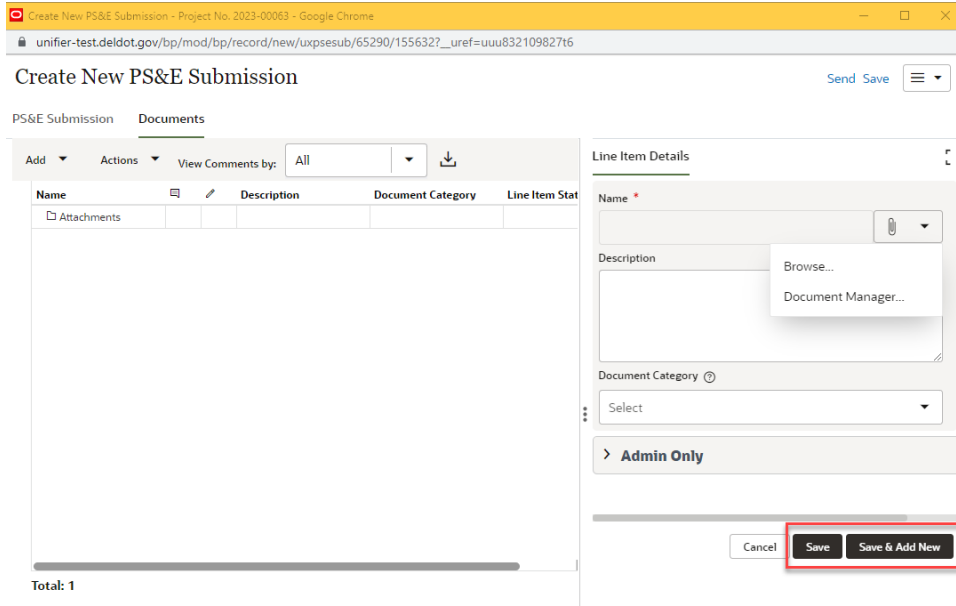
Clicking on “Browse” will allow the user to attach documents from their File Explorer. Clicking on the “Document Manager” will allow the user to attach documents that have been uploaded directly into the “Document Manager”.



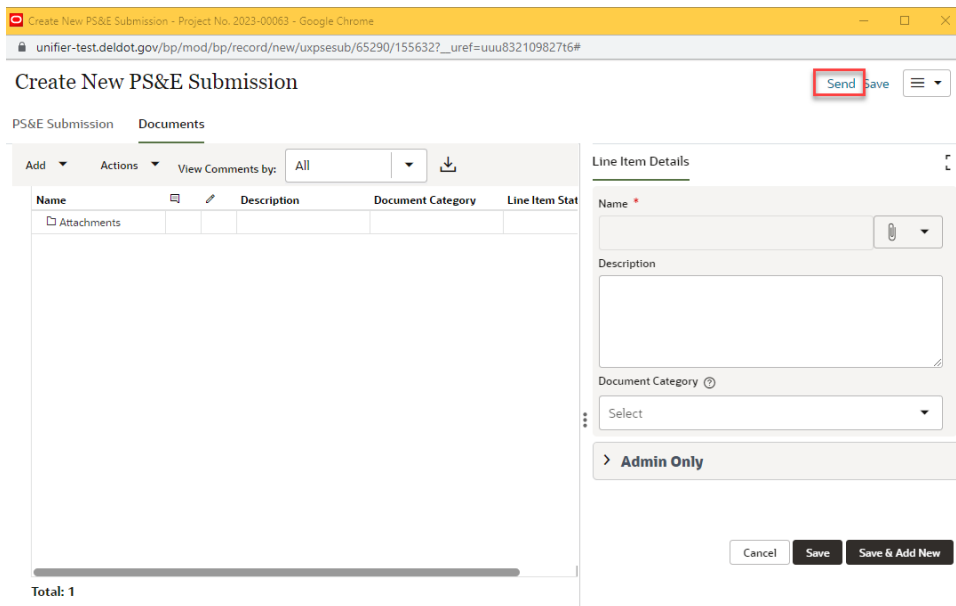
Clicking on “Document Manager” will open a window as shown below.



Click on “Select” at the bottom right hand corner to select the file in the window above. Once the information and document is attached click on “Save” to add the line item. If adding more than one document click on “Save and Add New” at the bottom right hand corner of the record.



Once everything is filled out for the PS&E, click on the “Send” button at the upper right hand corner.



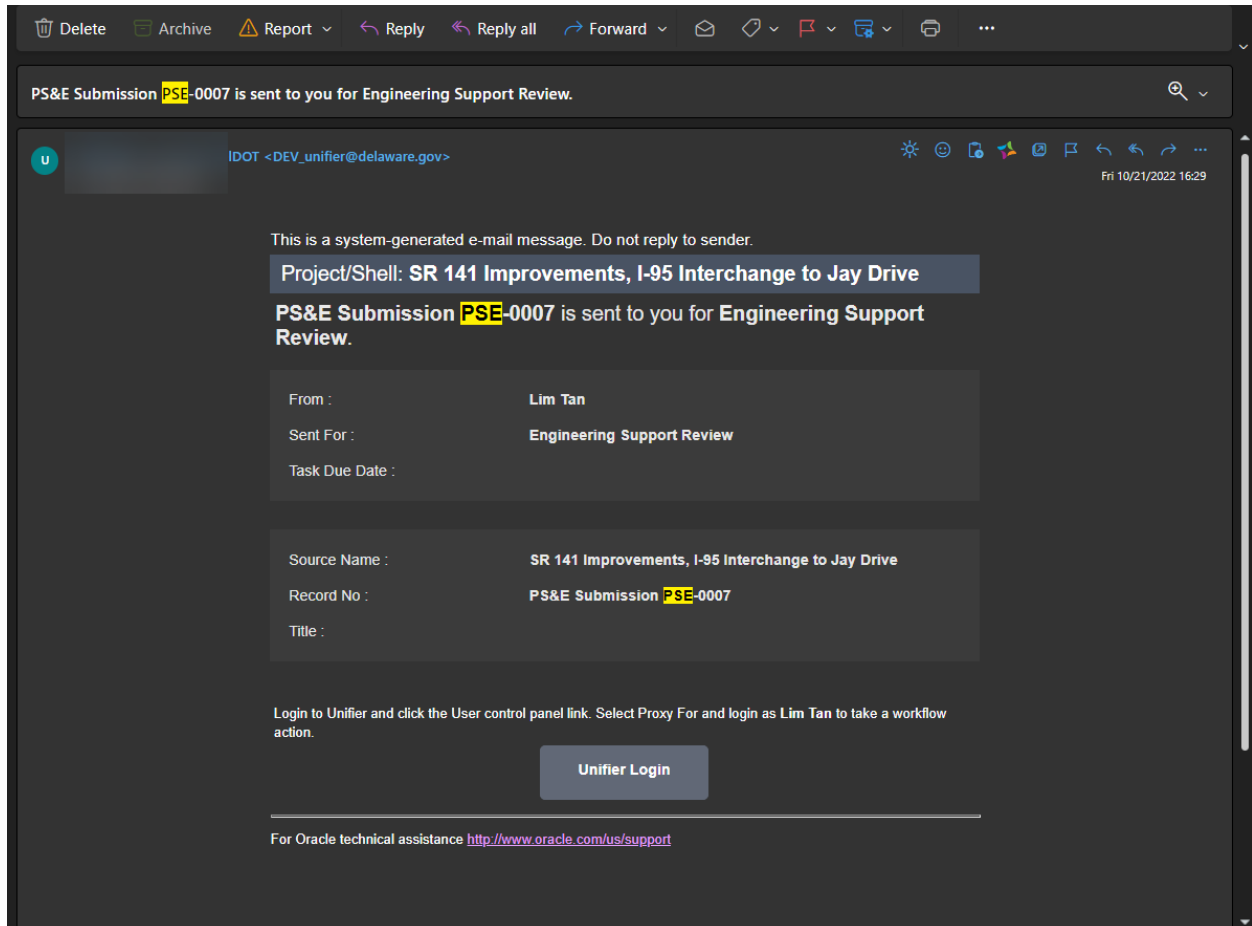
NOTE: If at any point the user needs to exit the record to work on it later, click on the “Save” button in the upper right hand corner. This will save the record to the “Drafts”. If the user exits out of the record without saving it THE RECORD WILL BE LOST.

Upon completion of the record the Project Manager shall select “Send” to advance the PS&E record to next step. The next step in the review will notify Engineering Support Staff.

Engineering Support Staff Review:

The Engineering Support Staff will “Accept” the record to review the PS&E record for its completeness. The users can return the record for additional information for comments or statements. The users are encouraged to use “Comments” section of the record to provide rationale for return.

The following is a screen shot of a email notification that a user will receive. The email contains direct link to the record and can be accessed by selecting “Unifier Login” icon.



Notification to Contract Admin:

The Engineering Support Staff will advance the PS&E record for completion which will notify Contract Administration staff with an email and a task in the Unifier. The task and the email will provide relevant information (such as Project Number, Record Number) to users with completed PS&E record.

The completion of PS&E record will also create a new record in Project Letting process.

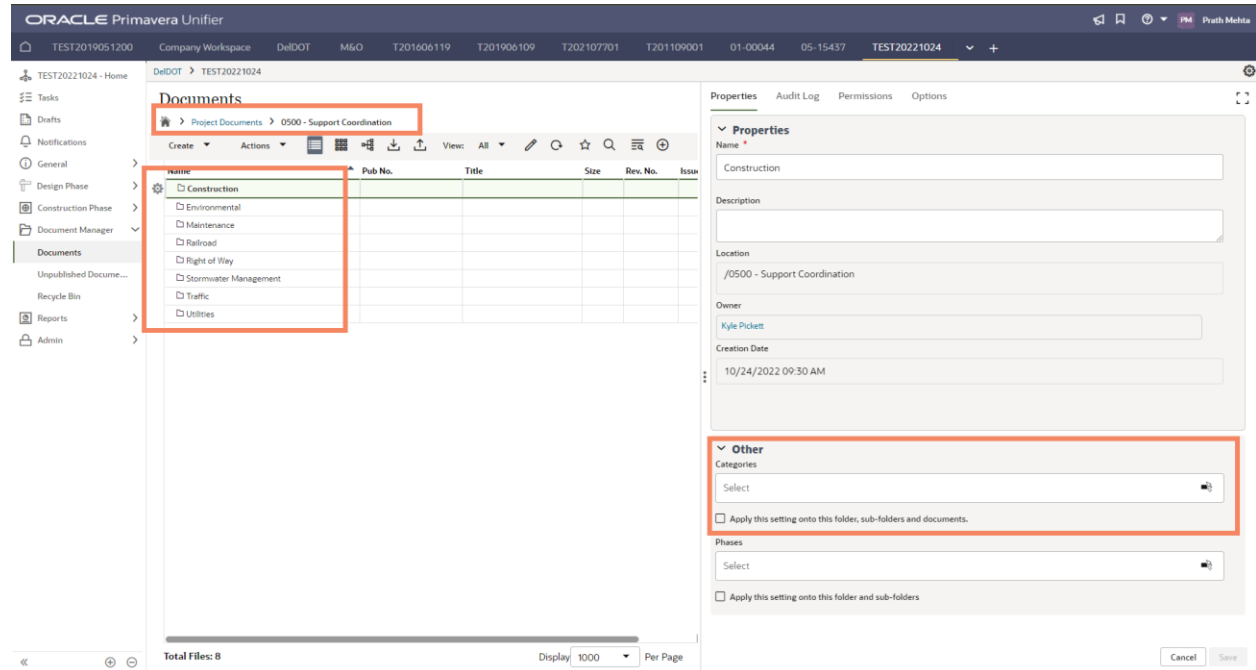
Project Letting

The purpose of the Project Letting process is to provide Contract Administration staff of DelDOT with a tool to track the project from PS&E completion to the execution of the Construction Contract. The current process in the Unifier is a placeholder and will be further developed in the future. The Project Letting process is available for Contract Admin users.

Support Sections:

After issuance of the PNR to a project the work performed, and work product developed by various support sections of DelDOT can be stored in the Document Manager section of the Unifier. The Document Manger is a file manager that can be used to store the project artifacts.

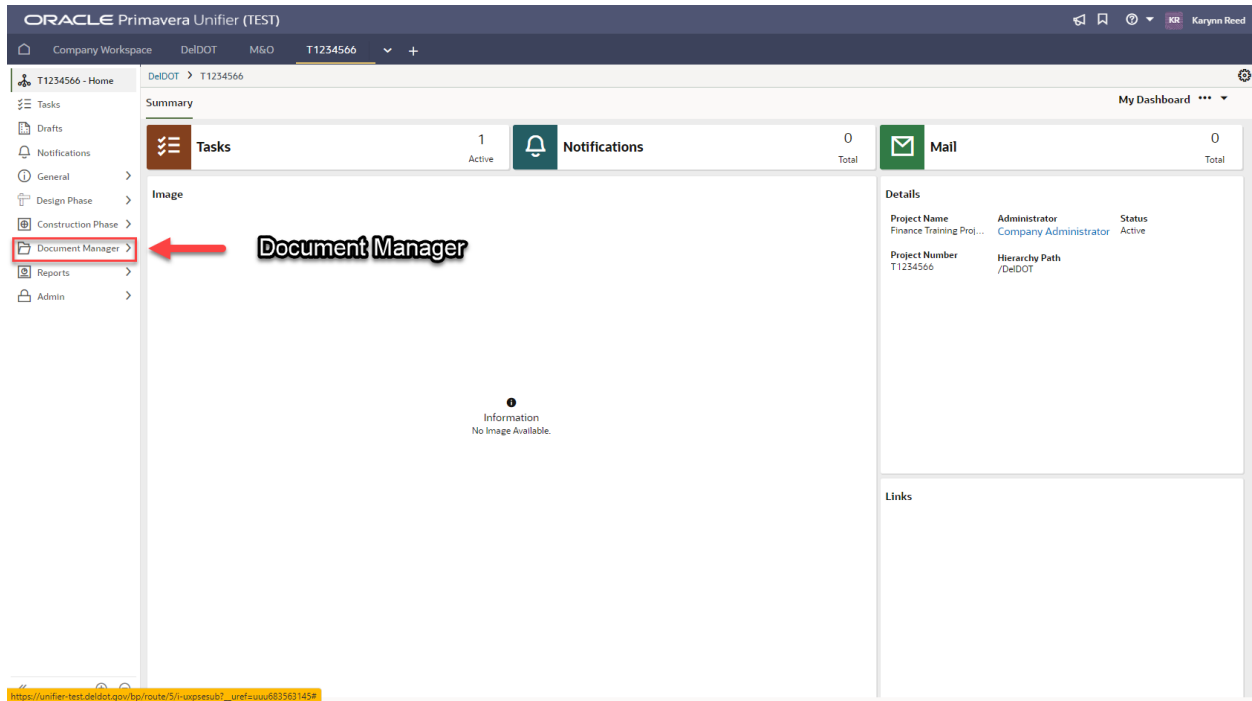
The following image indicates the location of the document folder that can be used to store documents prepared during the project development phase. Project Documents > 0500 – Support Coordination and folders includes section for Construction, Environmental, Maintenance, Railroad, Right of Way, Stormwater Management, Traffic and Utilities.



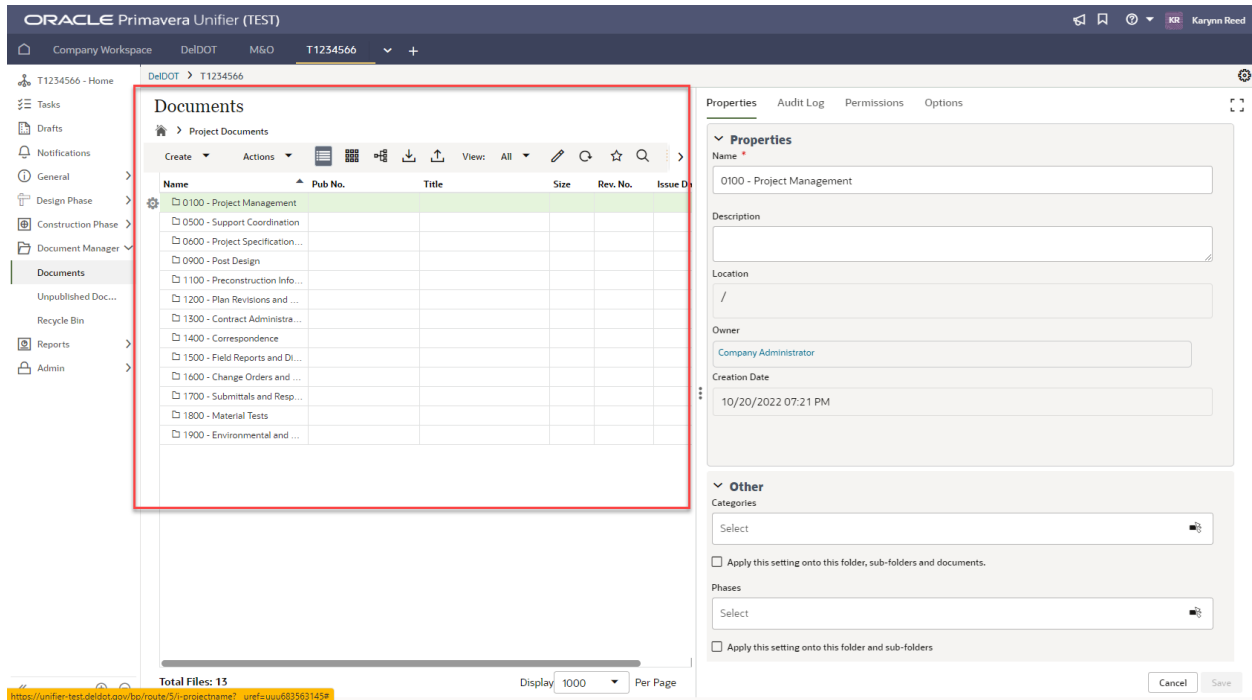
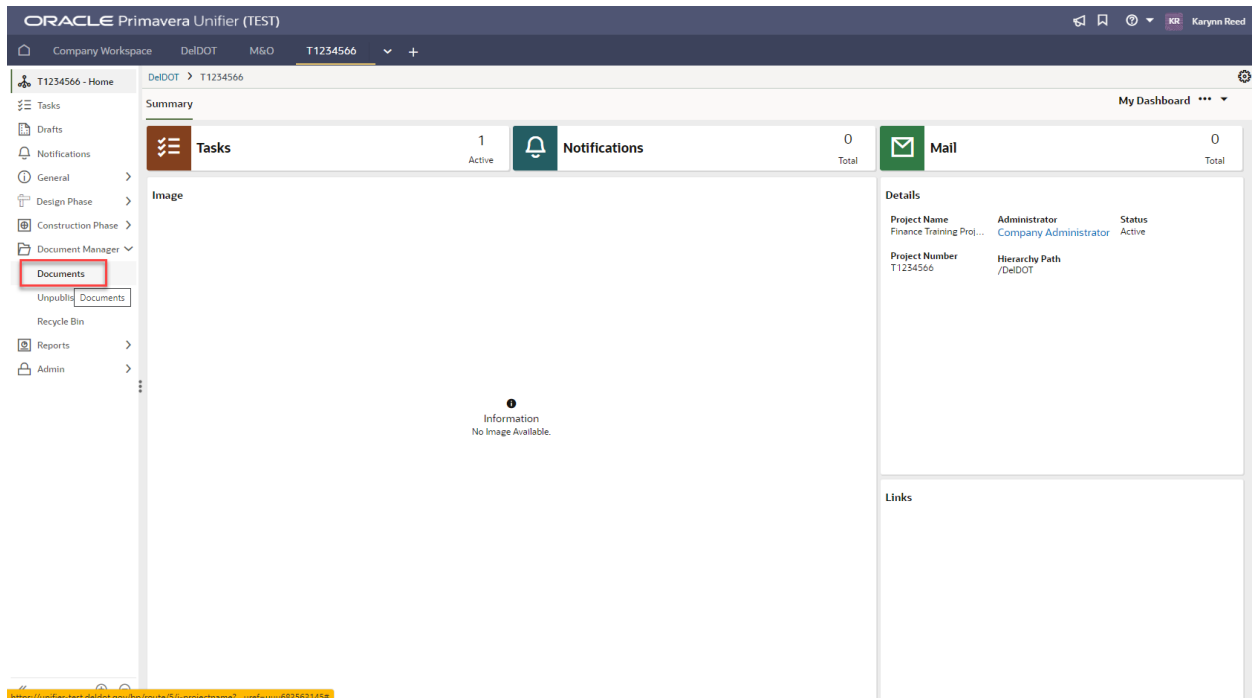
Additionally, documents and folders can be assigned appropriate project phase to further categorize or tag documents. More information on Document Manager is outlined in the next section.

Document Manager:

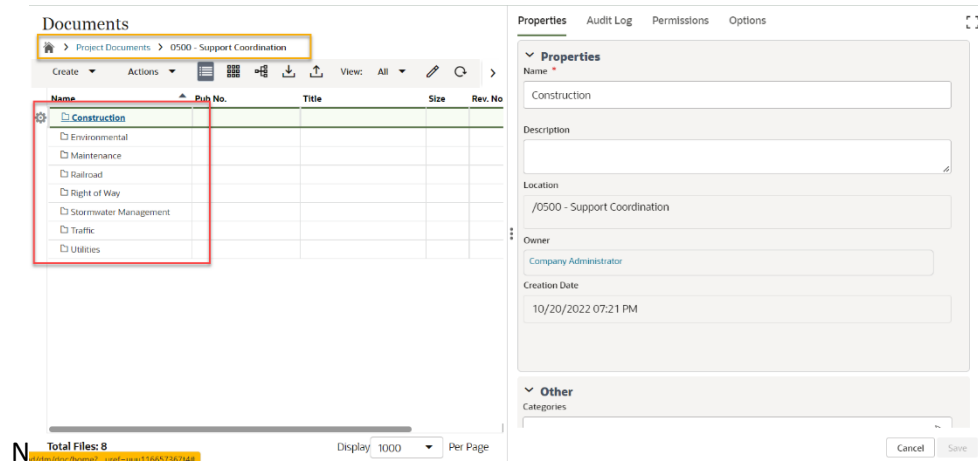
All files needing to be uploaded in Unifier are to be added through the “Document Manager.” To open the “Document Manager” go to the project and click the drop down on the left for “Document Manager”.



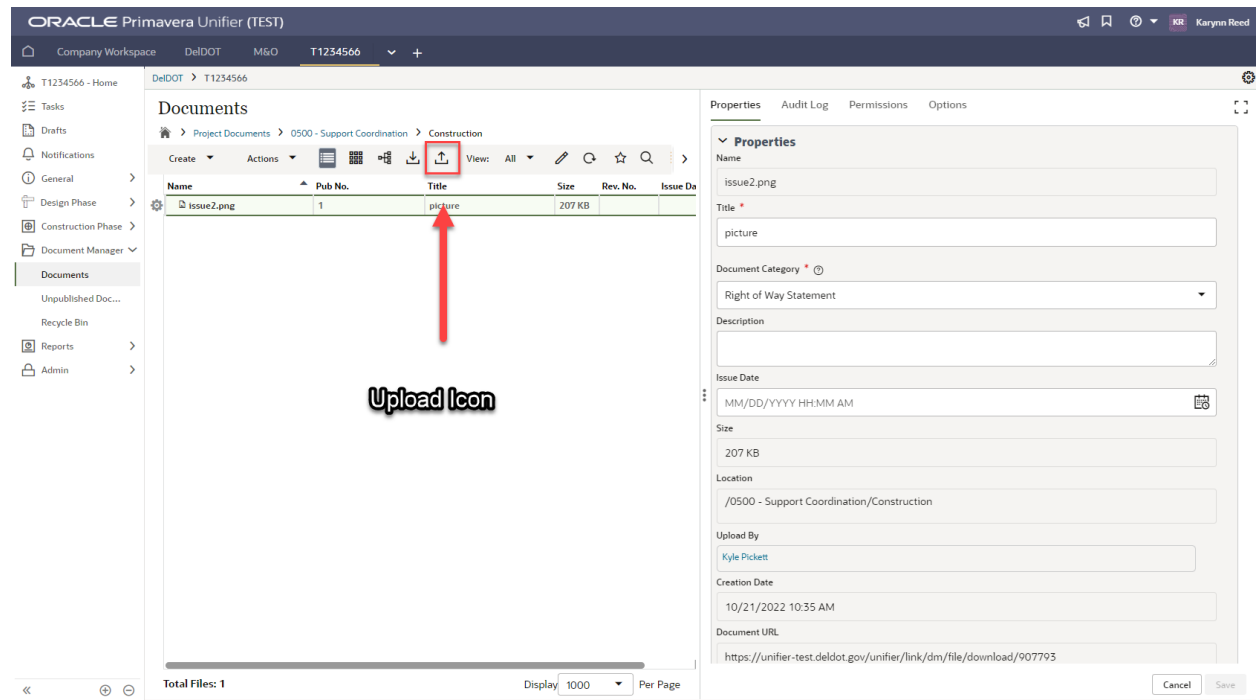
Click on the “Documents” under the drop down.



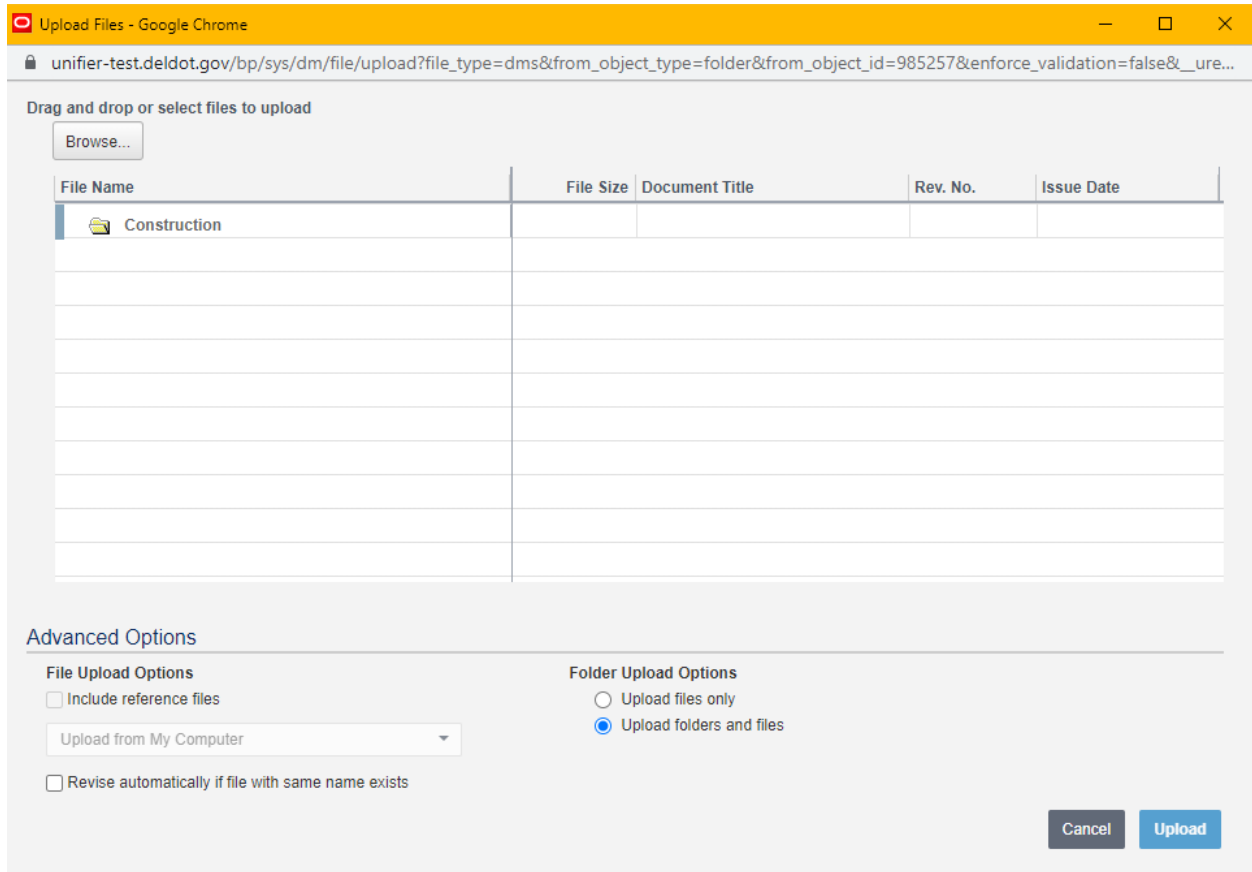
Click on the file that best suits the document type. For this example, “0500 – Support Coordination” is selected and then clicked on “Construction” After clicking on this folder click on the next folder name in this example “Construction” was chosen. If there were more folders under that folder then you would click on them and upload the document.



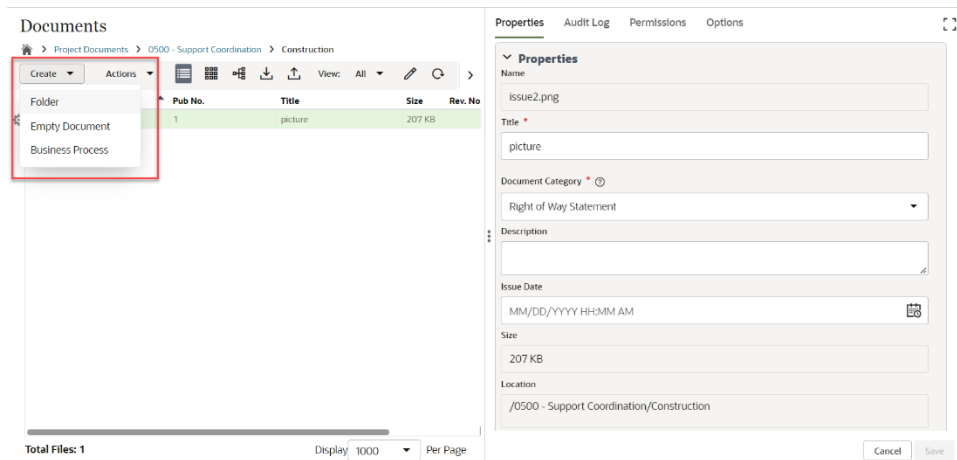
To upload a document to the folder click on the upload icon.



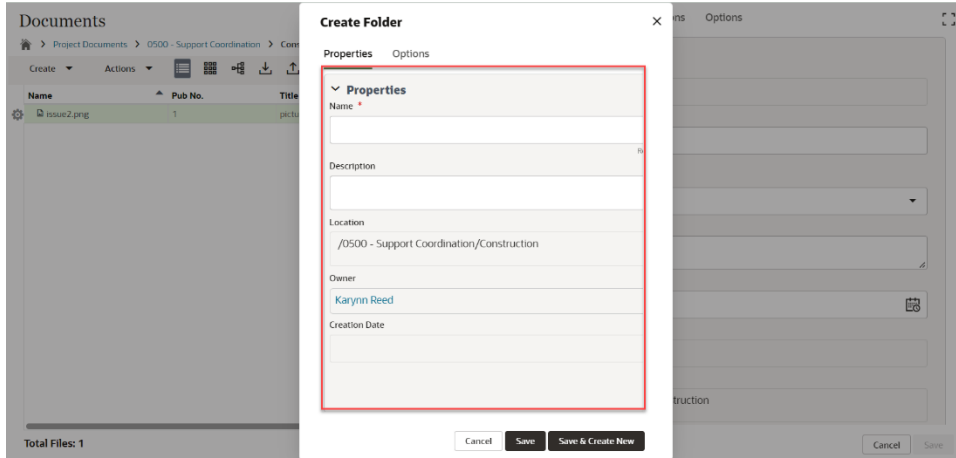
A pop up window should appear like below. Click on the “Browse” button to select from File Explorer (etc.). The user may also drag a file over and drop it into where the file name is and that will also upload the document in this window. Once ready, click on “Upload” at the bottom right hand corner of this screen.



When under the Document Manager the user can click on “Create” and create a folder for placing the documents.



Click on Folder and another window will open to fill out the information. Once done click on the “Save” button on the bottom right hand corner. If adding multiple folders, click on “Save and Create New” on the bottom right hand corner.

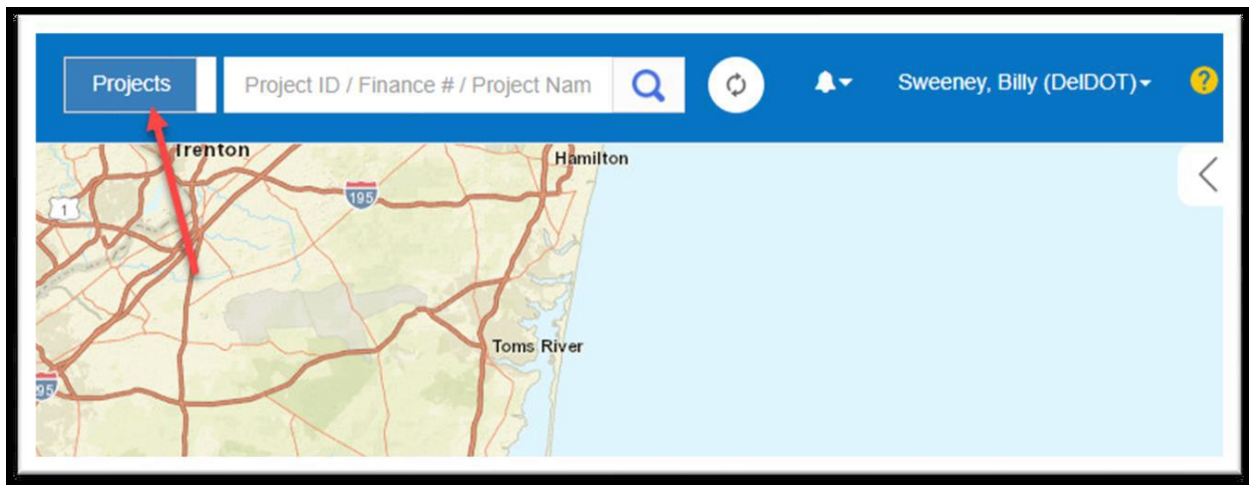


MEAP: Adding Locations

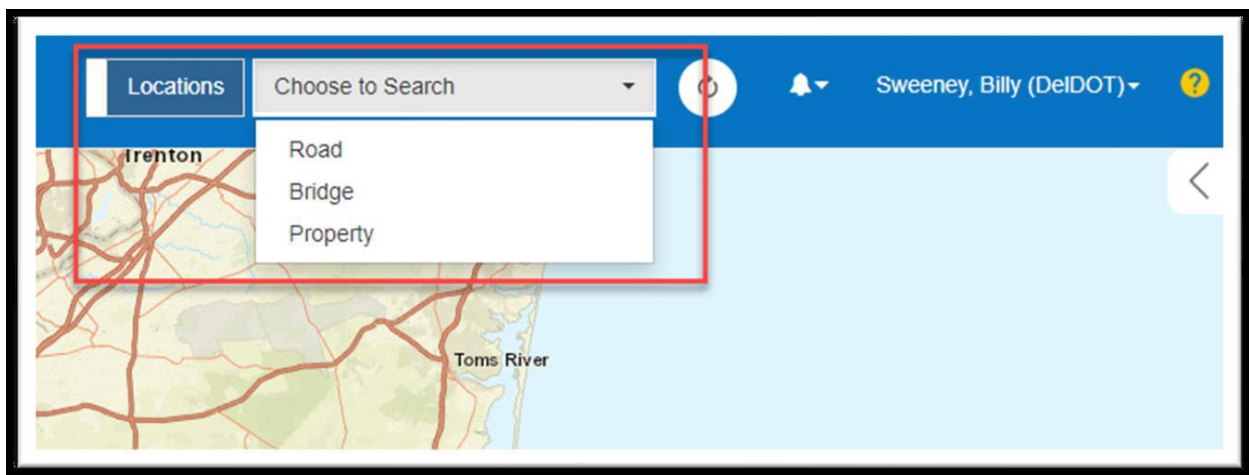
Log in to MEAP by going to <https://meap.dot.state.de.us/meap/> from a state computer. If you are working from home, you must remote desktop into a state computer for this URL to work.

Option 1: If you know the exact start and end mile point or it's a bridge with typical approach road work

Search by road, bridge, parcel number
Change the Projects Switch to Locations



Choose what type of asset you are going to search by (Road, Bridge, Property):



Based on what you choose, you get 3 different screens to fill out.

>

Search Road

Road Name / Road Id

New Castle

Find Locations

>

Search Bridge

Roadway Id / Bridge Id

New Castle

Find Locations

Once you search for a location, it gives you 3 different result screens:
 Road: Searched in Kent County for all roads with 110 in it

> [Back](#)

Search Results

Search...					
	Road # ↑		Road Name	Begin Mile	E
+	KC-00110-F		SPECTRUM FARMS ROAD	0	4
+	KC-14110A-F		DWIGHT COURT	0	0
+	KC-201100-F		DAVID HALL ROAD	0	0
+	KC-201110-F		DOVER CIRCLE	0	0
+	KC-202110-F		DOGWOOD DRIVE	0	0
+	KC-203110-F		LAKE COVE LANE	0	0

1 10 items per page 1 - 6 of 6 items

From here, you can click the Pencil icon next to the road you want to add, this will let you manually identify the Begin and End milepoints.

> Back

Search Results

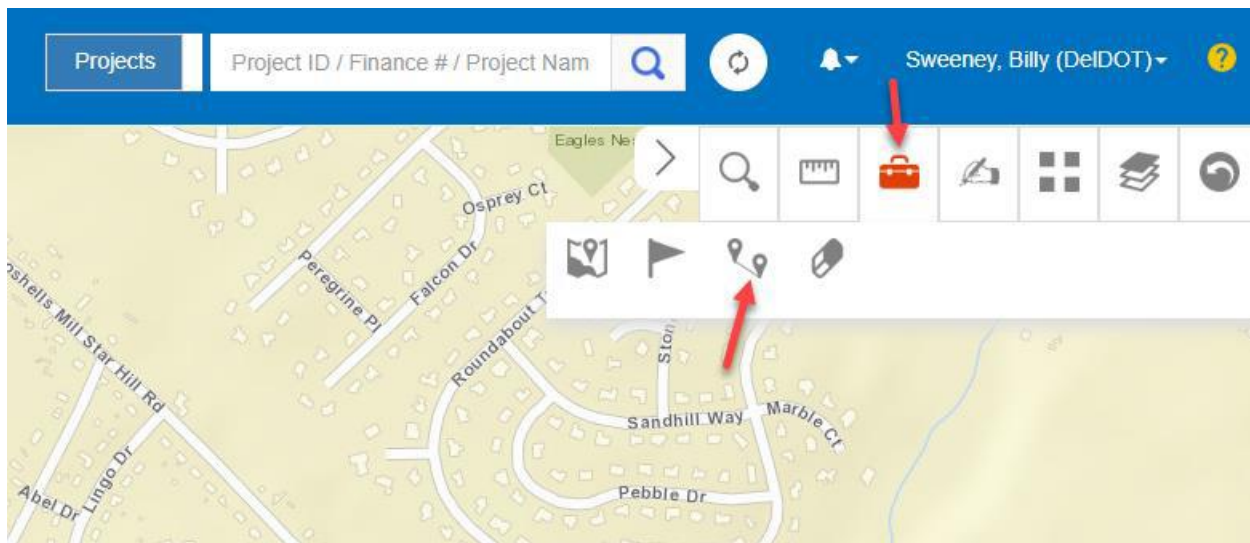
	Road # ↑	Road Name	Begin Mile	End Mile	Length
<input checked="" type="checkbox"/>	KC-00110-F	SPECTRUM FARMS ROAD	0.00	4.06	4.06
	KC-14110A-F	DWIGHT COURT	0	0.05	0.05
	KC-201100-F	DAVID HALL ROAD	0	0.53	0.53
	KC-201110-F	DOVER CIRCLE	0	0.04	0.04
	KC-202110-F	DOGWOOD DRIVE	0	0.07	0.07
	KC-203110-F	LAKE COVE LANE	0	0.33	0.33

10 items per page 1 - 6 of 6 items

Once you click the check mark, it'll add the road segment to the project and wait for publishing.

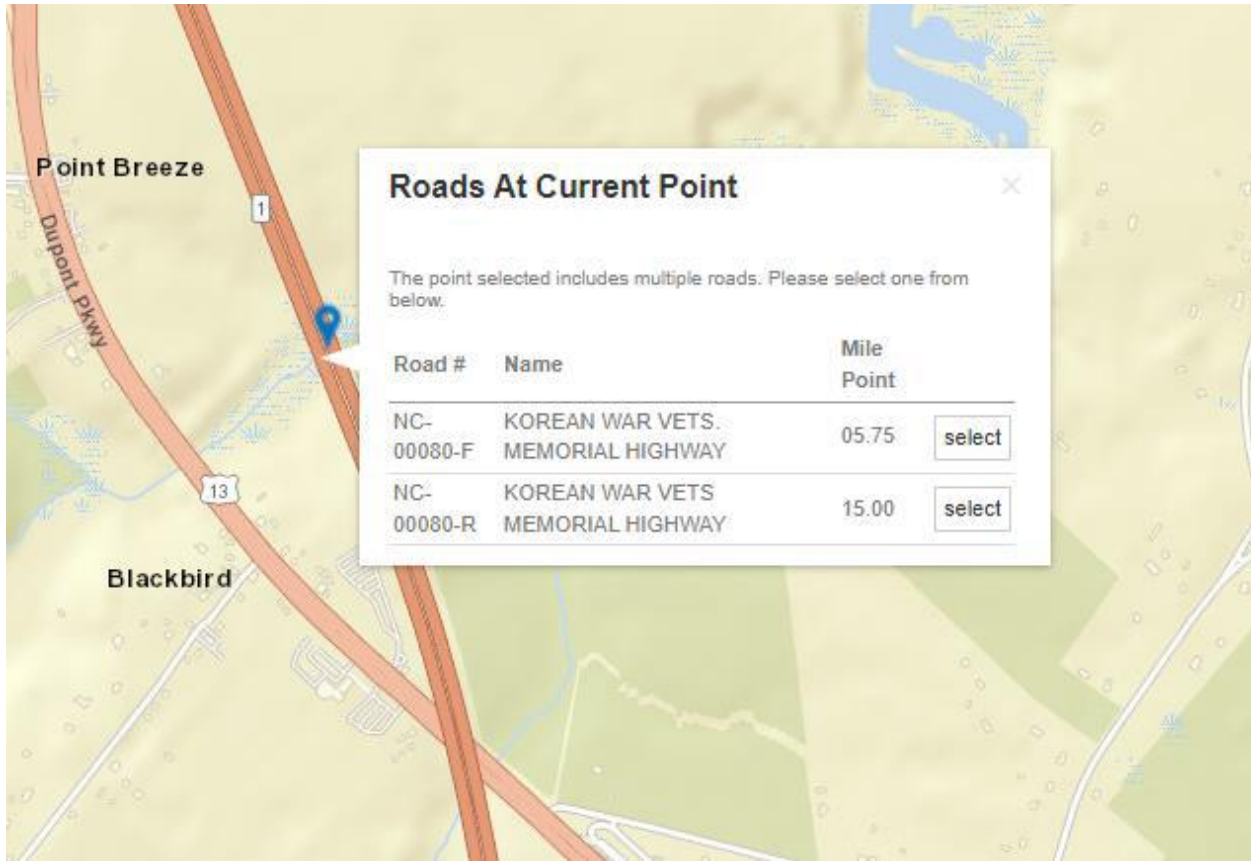
Option 2: If you do not know the exact mile point or if it's a bridge with extended road approach work

With the project open as explained above, zoom into your area of interest on the map, and open the tool box by clicking the arrow in the top right corner of the map, then the Identify/Query menu, then select the Location by 2 Points tool:

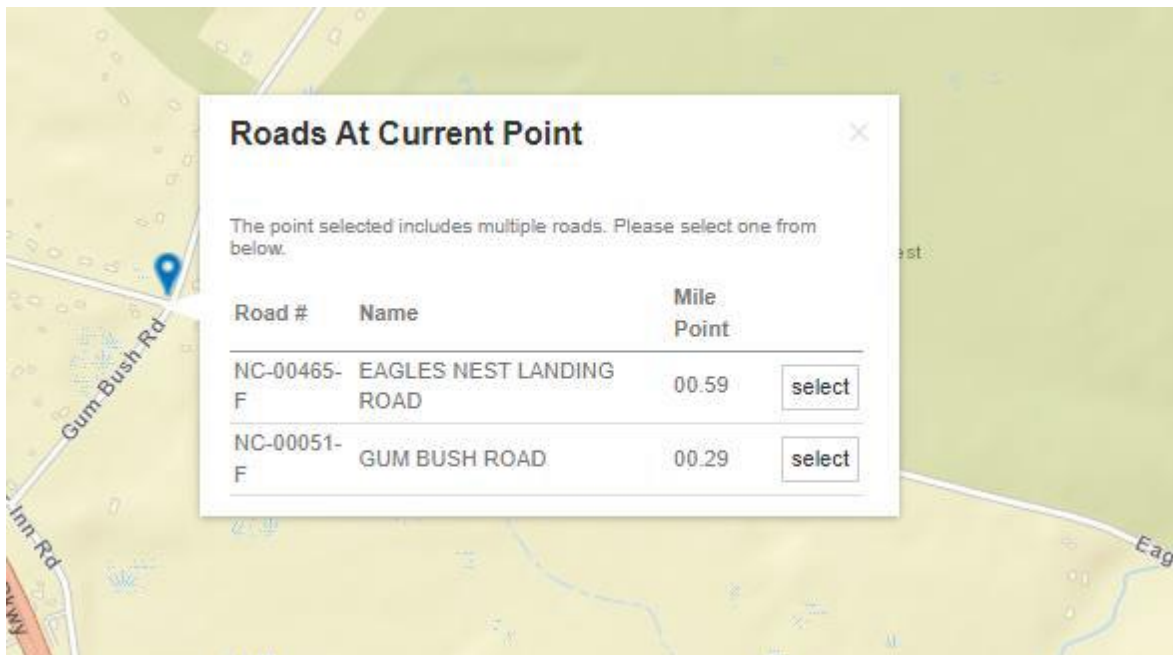


Then, just click on the roadway at the approximate start of the project. A couple of points to make about this tool. If, after selecting a location, you get a window like the one below, you must make sure to select the correct location. For dual highways like Route 1, US 13, I-95, etc...) the line where the road

number has a F is the Northbound or Eastbound lanes, where the R is the Southbound or Westbound lanes.

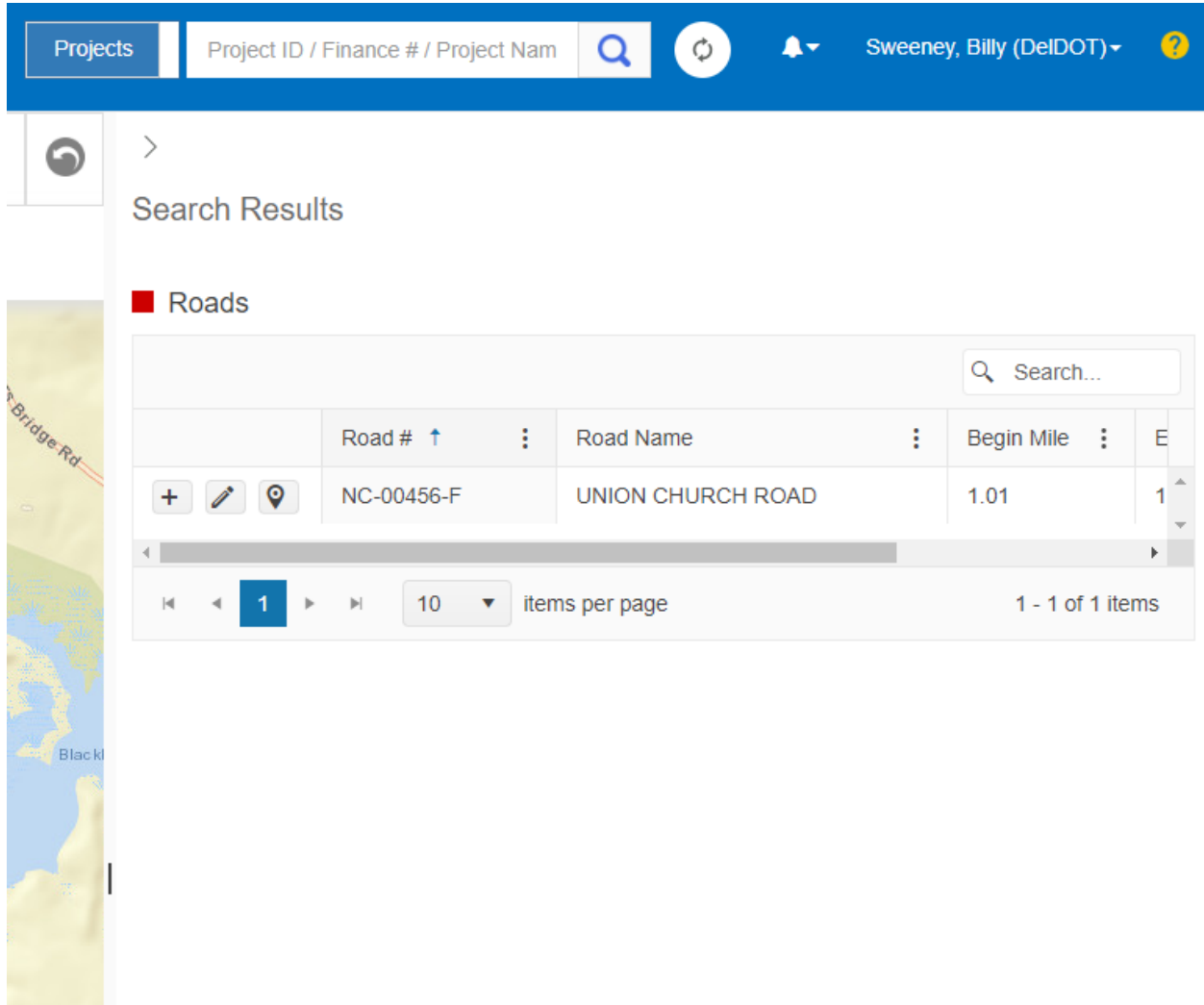


You will also get this window if you select a location at an intersection of two roads, like this:



Just select the appropriate direction or roadway by click the Select button on that line. Then, just click on the roadway where the approximate end of the project is. You may get the same exact window again, be sure to select the appropriate location or direction.

Once you’ve selected the appropriate start and end points, this window will open:






Click the Plus icon to add the location to your project.

If you are choosing a location that encompasses a bridge, you’ll get the following results:

>




Search Results

■ Roads

	Road # ↑	Road Name	Begin Mile	End Mile	Length
  	NC-00456-F	UNION CHURCH ROAD	2.33	2.54	0.21

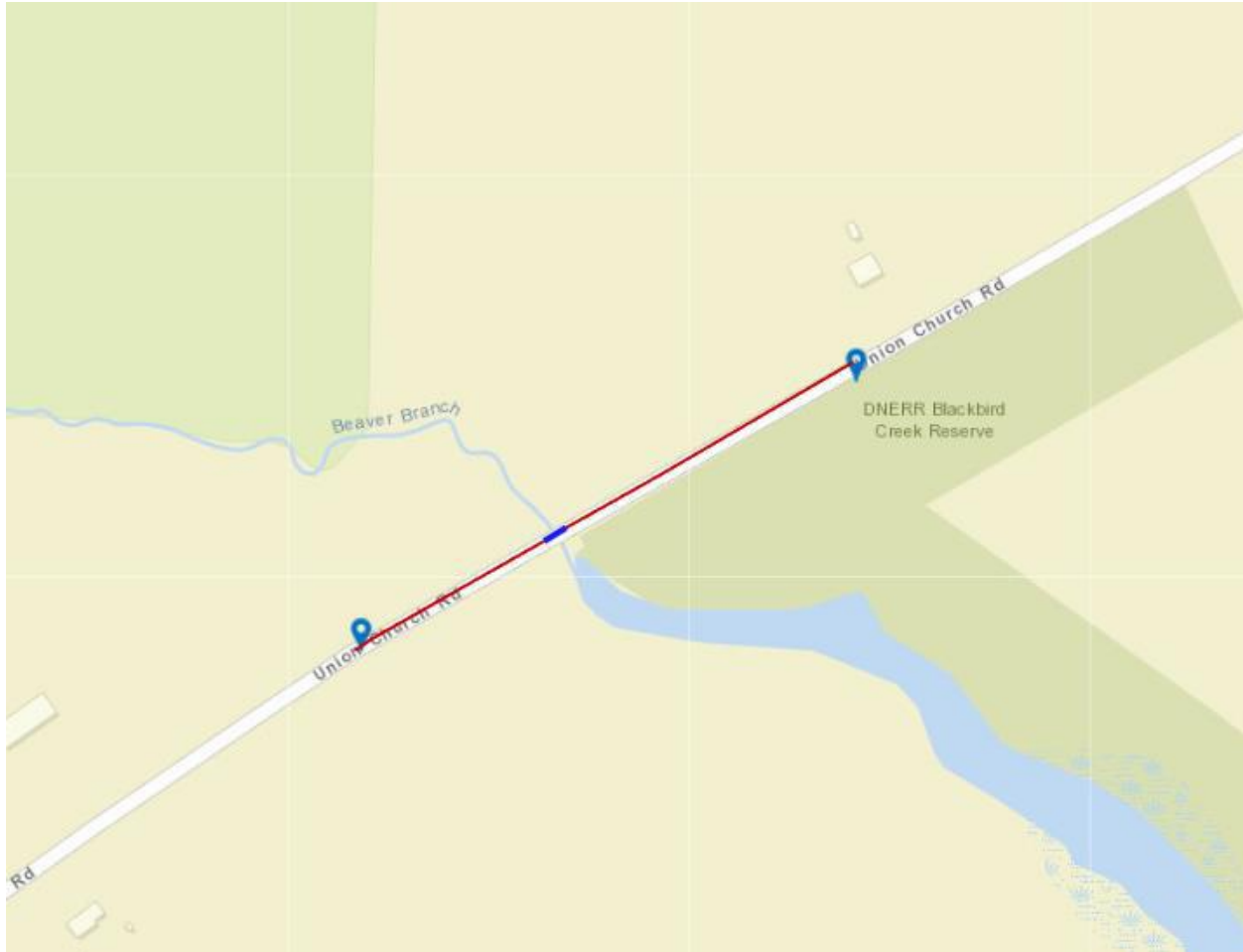
10 items per page 1 - 1 of 1 items

■ Bridges

	Bridge Id	Road Name	Road # ↑	Begin Mile	End Mile
  	1448 456		NC-00456-F	2.41	2.42

10 items per page 1 - 1 of 1 items

The map will look like this:



Notice how the red line is considerably longer than the blue line. The red line is the road portion of the location selected, and the blue line is the bridge portion. If you select only the Bridge location in the results, it will add both the bridge asset, as well as the road portion that crosses the bridge. If you want to include both the Road and Bridge assets, add the Road first in the results screen, then the Bridge:

>

Search Results

■ Roads

Search...						
	Road # ↑	Road Name	Begin Mile	End Mile	Length	
+ ✎ 📍	NC-00456-F	UNION CHURCH ROAD	2.33	2.54	0.21	

◀ 1 ▶ 10 items per page 1 - 1 of 1 items

■ Bridges

Search...						
	Bridge Id	Road Name	Road # ↑	Begin Mile	End Mile	
+ ✎ 📍	1448 456		NC-00456-F	2.41	2.42	

◀ 1 ▶ 10 items per page 1 - 1 of 1 items

This will give you a project location list that looks like this:

>

Project ID
2022-00001

Finance #
N/A

Project Name
Billy Test Project/April 2022 / \ : * ? " < > |









Publish Date
-

Publish By
-

[Detail](#)

[History](#) [Publish](#)

UnPublished Location

							Search...
	Type	Description	Begin Mile	End Mile	Length		
  		NC-00456-F	2.41	2.42	0.01	▲	
  		NC-00456-F	2.33	2.54	0.21	▼	

10 items per page 1 - 2 of 2 items

Notice in the type column that there is a bridge icon and a road icon.

From here, once you have added all of your locations to the project, and are ready to publish the locations, click the Publish icon:

>

Project ID
2022-00001

Finance #
N/A

Project Name
Billy Test Project/April 2022 / \: * ? " < > |









Publish Date
-

Publish By
-

[Detail](#)

[History](#) [Publish](#)

UnPublished Location

Search...						
	Type	Description	Begin Mile	End Mile	Length	
  		NC-00456-F	2.41	2.42	0.01	▲
  		NC-00456-F	2.33	2.54	0.21	▼

1 10 items per page 1 - 2 of 2 items

Keep in mind, the Publish no longer publishes to P6 and will not publish to Unifier. All Project Codes and Location log notes are found on the project location screen (see screenshot just above). To see the codes, click the Detail icon:

>

Project ID
2022-00001

Finance #
N/A









Project Name
Billy Test Project/April 2022 / \: * ? " < > |

Publish Date
-

Publish By
-

[History](#) [Publish](#) [Detail](#)

UnPublished Location

Search...						
	Type	Description	Begin Mile	End Mile	Length	
  		NC-00456-F	2.41	2.42	0.01	▲
  		NC-00456-F	2.33	2.54	0.21	▼

1 10 items per page 1 - 2 of 2 items

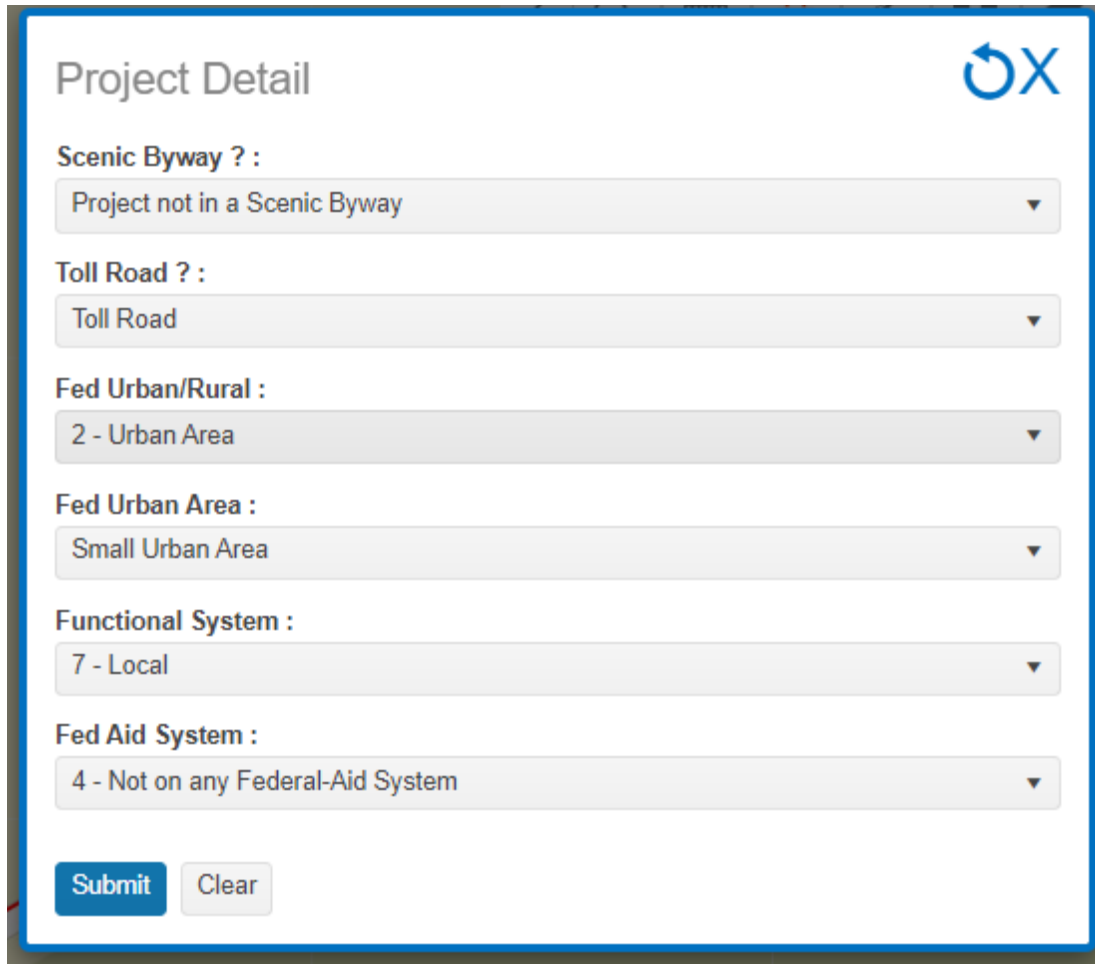
You will get a window like this:


Project Detail

Multiple Locations ? :	Yes - Multiple Locations
Senatorial Districts :	14
Representative Districts :	9
Maintenance Districts 1 :	Canal District
Maintenance Districts 2 :	
Scenic Byway ? :	Project not in a Scenic Byway
Fed Urban/Rural :	2 - Urban Area
Fed Urban Area :	Small Urban Area
Toll Road ? :	Toll Road
Functional System :	7 - Local
Fed Aid System :	4 - Not on any Federal-Aid System
County	New Castle

Last Updated By Billy.Sweeney@delaware.gov
 Last Updated On 09/23/2022 08:50 AM

If you are ever asked to edit one of these codes by Finance. This is the screen you go to. From here, click the pencil icon in the top right corner, and the screen will change to this:



Project Detail 

Scenic Byway ? :
Project not in a Scenic Byway ▼

Toll Road ? :
Toll Road ▼

Fed Urban/Rural :
2 - Urban Area ▼

Fed Urban Area :
Small Urban Area ▼

Functional System :
7 - Local ▼

Fed Aid System :
4 - Not on any Federal-Aid System ▼

Make the appropriate changes, and then click the Submit button in the lower left corner. If you want to cancel your changes, DO NOT CLICK CLEAR. Click the Reset icon in the top right corner of the screen, or the X button to cancel completely.

Lastly, the Location Log and Project Detail audit history can be found by click the History button in the Project Locations screen:

>

Project ID
2022-00001

Finance #
N/A

Project Name
Billy Test Project/April 2022 / \: * ? " < > |









Publish Date
-

Publish By
-

[Detail](#)

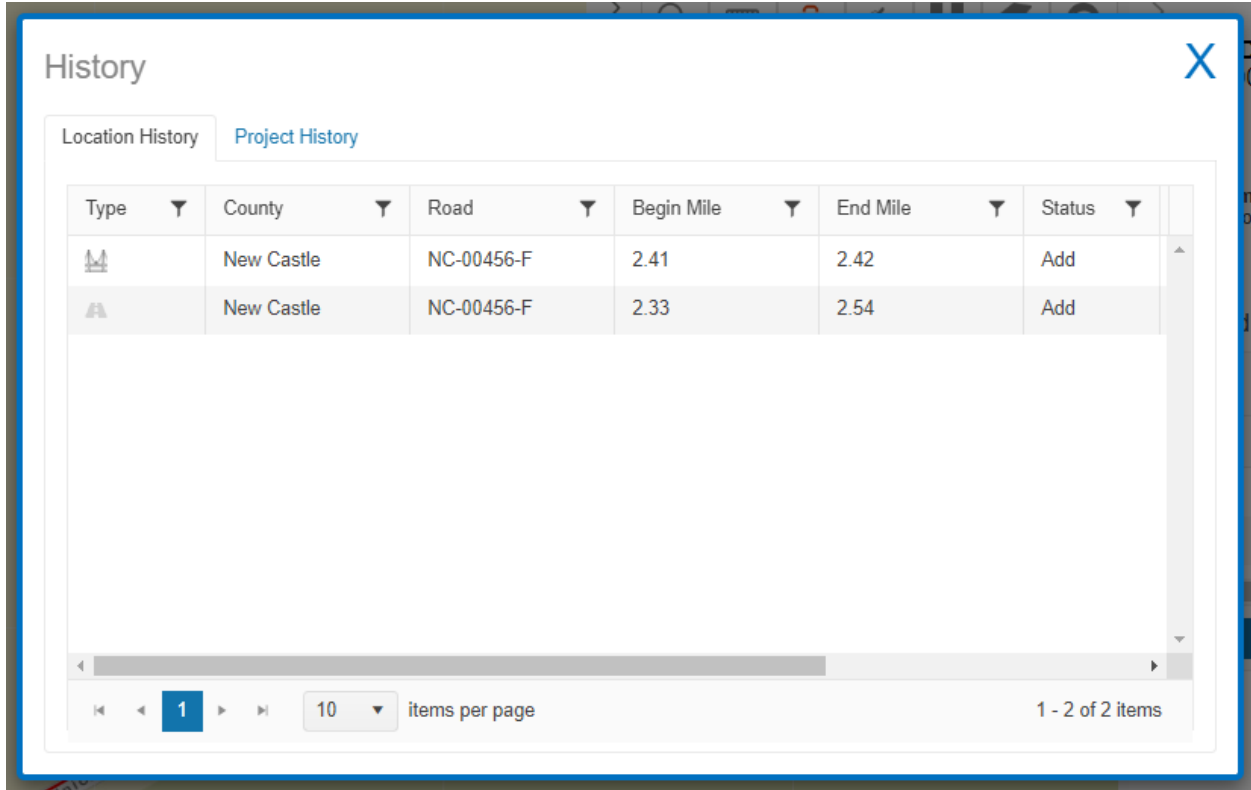
[History](#) [Publish](#)

UnPublished Location

Search...						
	Type	Description	Begin Mile	End Mile	Length	
  		NC-00456-F	2.41	2.42	0.01	▲
  		NC-00456-F	2.33	2.54	0.21	▼

1 10 items per page 1 - 2 of 2 items

This will bring up a window like this:



The Location History tab is the replacement to the Location Log in P6, and the Project History is the new tab that tracks the changes to the codes in the Detail window show previously. To give you an example, here is what this looks like if I had changed a code in the Details:

The screenshot shows a 'History' window with two tabs: 'Location History' and 'Project History'. The 'Location History' tab is active. Below the tabs is a table with the following data:

Changes	Updated By	Updated on
o Functional System was updated from <u>7 - Local</u> to <u>3 - Principal Arterial - Other</u>	Billy.Sweeney@d...	09/23/2022 08:55 AM

At the bottom of the window, there is a pagination control showing '1' of 1 items, '10 items per page', and navigation arrows.

Support:

DeIDOT and external consultant/contractor users are supported by Engineering Support group. Users are encouraged to reach out to Engineering Support for any explanation, trainings and/or enhancement opportunities.

Email: DOT.Unifier_Support@delaware.gov