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PRIMAVERA

**Capital Planning Application User's Guide
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Legal Notices

Oracle Primavera Capital Planning Application User's Guide

Contents

Introduction to Primavera Capital Planning

Primavera Capital Planning is an application for managing budget forecasts (both planned and in execution) for your company. It contains a Portfolio Manager, where the budget forecast planners in your company can gather cost and schedule information on projects (both planned and in execution) and perform analyses on "what if" scenarios. These scenarios are used to propose an optimal mix of projects for a portfolio, based on available budget targets and the strategic goals of the company.

Portfolio planners can create a portfolio for a specific "planning horizon" (for example, from 2014 through 2020) and then create multiple scenarios in that portfolio. Each scenario can use forecast numbers and actuals for both planned and active projects.

The scenario sheets have been set up to pull in the following data from your projects:

- General project information
- Project start and end dates
- Cash flow data (both forecasted and actual) from each project's Cost Manager

With this data, planners can forecast costs over a specific time period (called a "planning period"). They can then manipulate scenarios by:

- Including or excluding projects
- Pushing start dates for planned projects into the future
- Modify project end dates to change the project's duration
- Proposing different cash flow distribution numbers by manually editing the cashflow columns
- Negotiating proposed budgets with project managers

Once these scenario analyses have been completed, the best (or several best) scenario(s) can be sent to the executive decision makers for approval.

Once a scenario has been approved, Primavera Unifier:

- Marks the approved scenario "shared" so that project managers can see the approved dates and numbers. The scenario is set to read-only mode and can no longer be modified or deleted.
- Updates each project's original budget numbers with the proposed numbers on the approved scenario.
- Updates each project's monthly or yearly cash flow numbers with the proposed numbers on the approved scenario.
- Updates the project start date (if it was changed) for any planned projects that will begin during the portfolio's planning period.
- Locks the budget and cash flow numbers to prevent any further changes.

About Portfolio Budget Curves

Portfolio budget curves are part of the Cost Manager function. Users in the project can view these budget curves from the Cash Flow node of the Cost Manager (see *Viewing the Portfolio Cash Flow Curve* (on page 53)).

There are three of them:

▸ A **Shared Budget** curve. This curve shows your proposed numbers for the project. The project manager will not have access to this curve until you share a scenario. The project manager can include this curve on the cost worksheet, along with the forecast budget, or any other budget curve, in order to see the difference between the project's numbers and your proposed budget numbers.

▸ An **Approved Budget** curve. When a scenario is approved in the Portfolio Manager, the budgets for each project in the scenario are marked "approved." They are then locked and stored in the Portfolio Manager. An Approved Budget curve shows the approved budget for the project for that planning period (usually a year).

▸ An **Original Budget** curve. This curve is for a project in execution. This budget is the last approved budget for the project before it moved into its execution phase. This approved budget becomes the project's original budget; and this original budget, plus any changes that occur to the numbers during the life of the project, becomes the project's approved budget.

For example, an **approved budget** for the year 2015 might include a planned project for road construction that is scheduled to begin in 2017 with a budget of $100,000. The approved budget for the year 2016 will continue to include the planned road construction budget, with an addition of $15,000 to the forecasted budget. In the year 2017, the road construction project goes into execution, and the approved budget is $115,000. This figure becomes the **original budget** for the road construction project. From then on, as budget forecasting continues, the approved budget for the road construction will be the original budget, plus any changes that occur to the numbers during the life of that project.

What You Receive with this Application

Primavera Unifier has been installed on your system and the Primavera Capital Planning Application has been downloaded. With the Primavera Capital Planning Application, you receive the following components, already designed and configured for your use:

‣ Selected platform structure to support capital planning
‣ The Portfolio Manager and a Capital Planning portfolio

What you receive with this platform structure are two functional areas:

‣ uDesigner
‣ Unifier

The information in this document refers to instructions in the following PDF files:

‣ Primavera uDesigner User's Guide
‣ Primavera Unifier Administration Guide
‣ Primavera Unifier User's Guide

You can access these Guides from the **Help** menu on the menu bar.

In This Section

Platform Structure

Primavera Unifier is shipped with two functional areas:

‣ **uDesigner**
‣ **Unifier**

Primavera uDesigner

For Primavera uDesigner, under the **Company Workspace** tab, in **Administration Mode**, the following nodes in the left Navigator are populated with the components necessary for the Primavera Capital Planning Application.

> Following is a brief description of the platform modules and features that have been set up for Capital Planning operation. You can use these modules and features to make other changes to the Primavera Capital Planning business process forms, workflows, rules, cash flows, data cubes, and data structure; however, we do not recommend using these features until you are familiar with Primavera Unifier and how it works.

uDesigner > Portfolio Manager

This node contains a Capital Projects portfolio and a Capital Planning attribute (detail) form that sets up the manager. Although the Primavera Capital Planning Portfolio Manager is already designed and set up for use, you can use this node if you want to add or remove fields on the Portfolio Manager attribute form. For instructions on how to do this, see the *Primavera uDesigner User Guide*:

- ▸ "Portfolio Manager Overview" chapter
- ▸ "Designing a Form" chapter

Primavera Unifier

For Primavera Unifier, under the **Company Workspace** tab, in **Administration Mode**, the following nodes in the left Navigator are populated with the components necessary for the Primavera Capital Planning Application.

> Following is a brief description of the platform modules and features that have been set up for Capital Planning operation. You can use these modules and features to make other changes to the Primavera Capital Planning business process forms, workflows, rules, cash flows, data cubes, and data structure; however, we do not recommend using these features until you are familiar with Primavera Unifier and how it works.

Access Control

This node is where you can grant administrative and user permissions to specific users and groups.

User Administration

This node lists the following groups, to which you can add users so that they have access to the application. These groups have already been given a set of default permissions.

- ▸ **All Company Users** (includes the user in an umbrella group for company-level permissions to the Document Manager and to company-level business processes)
- ▸ **Company Administrators** (identifies the user as a company administrator)
- ▸ **Creator** (identifies the users as the creator of a business process, report, etc.)
- ▸ **Project Administrators** (identifies the user as a project administrator)
- ▸ **Reviewer** (identifies the user as a reviewer, usually on a workflow step for a business process or a drawing or document in the Document Manager

Use this node to add users to Primavera Unifier and assign users to groups. See ***Add Users to Your Company***(on page 16).

Configuration

This node and this subordinate node with appropriate data for Primavera Capital Planning operation:

- ▸ Portfolio Manager > Capital Projects

Although the Portfolio Manager is already designed and set up for use with this application, you can use this node if you want to make changes to the configuration of the Portfolio Manager. For instructions on how to do this, see the *Primavera Unifier Administration Guide*:

- ▸ "Configure the Portfolio Manager" topic in the "Portfolio Manager Setup" chapter

Standards & Libraries

This node and the following sub-nodes contain appropriate data for Primavera Capital Planning operation:

- ▸ Cash Flow > Data Sources
- ▸ Cash Flow > Distribution Profiles
- ▸ Period Structure with a January to December Planning Period

Although the Standards & Libraries node is already set up for use with this application, you can use this node if you want to change cash flow data sources, distribution profiles, or the planning period for the portfolio. For instructions on how to do this, see the *Primavera Unifier Administration Guide*:

- ▸ "Setting Up Cash Flow" topic in the Cost Management Setup chapter
- ▸ "Configure the Portfolio Manager" topic in the Portfolio Manager Setup chapter

Templates > Shells

This node contains a **Projects** shell node. Under the Projects node are the following template components with appropriate data for Primavera Capital Planning operation:

- Access Control
- User Administration > Users (default user: **Coadmin**)
- User Administration > Groups > shell level group permissions for All Project Users, Creator, Project Administrators, Reviewer
- Cost Manager > Cash Flow
- Document Manager > Documents (contains a default folder structure)

Although a shell template is already designed and set up for use with Primavera Capital Planning functions, you can use this node to change the shell template. Each shell template contains a template to set up your project, and these (optional) pieces that will be included in the template:

- Access control and user/group administration to automatically add users to the shell
- A Cost Manager with a capital planning cash flow
- A Document Manager to store drawings, spreadsheets, image files, specifications, and other documentation about the project

For instructions on how to change the shell template, see the *Primavera Unifier Administration Guide*:

- "Creating a Shell Template" topic in the   Shell Administration chapter

Portfolio Manager Sheet

With this application, you receive a template for the scenario sheets that you use to create the scenarios for analyzing and forecasting capital budgets. It has been set up to automatically add all your active projects to the sheet as rows.

The template contains:

- The planning options for the scenario sheet, such as the period structure and data linking options
- Project phases that identify a project as planned or in execution
- The data sources to be used for the analysis, such as project dates and cash flow sources
- The query that will extract the project data that should be included on the scenario
- The column layout that will appear on the scenario sheet

The scenario sheet contains the following columns of information:

- Project Name

▸ Project number
▸ Project type
▸ Project state
▸ Estimated budget
▸ Start date
▸ End date
▸ Cash flow columns for each year in the planning period

Primavera Unifier collects the budget and projection numbers from each of your projects' Cost Managers and displays them in these cash flow columns.

Cash Flow

With the Primavera Capital Planning application, you receive a capital planning cash flow record with a family of curves to support capital planning needs. Following are the curves that are included:

▸ Baseline
▸ Forecast
▸ Original Budget
▸ Shared Budget
▸ Approved Budget
▸ Actuals

Once your projects are in operation and your Portfolio Manager sheets are set up, Primavera Unifier will collect budget/forecast and actuals data from the project cash flow curves.

Setting Up the Project Delivery Application

The Primavera Capital Planning Application has been designed and configured for immediate use. However, as the application administrator, there are a few actions you need to take to complete the setup before you can use the application:

 ▸ ***Add users to the company*** (see "***Logging In and Out of the Project Delivery Application***" on page 15)
 ▸ ***Create a project*** (on page 23)
 ▸ ***Assign users to the project*** (see "***Assign Users to the Project and Groups***" on page 23)
 ▸ ***Configure the Portfolio Manager*** (on page 25)

> You may also have been given access to additional features of Unifier and uDesigner. You can use these features to make other changes to the Primavera Capital Planning business process forms, workflows, rules, cash flows, data cubes, and data structure; however, we do not recommend using these features until you are familiar with Primavera Unifier and how it works.

In This Section

Logging In and Out of the Project Delivery Application

 ▸ ***To log into Primavera Unifier***

1) Open the Primavera Unifier Login window. In Microsoft Internet Explorer, enter the web address.

   a. If you are on the Oracle Cloud then this web address will come from Oracle Cloud Provisioning.

   b. If you are an on-premises user, use the web address that your site administrator gave you.

   The web site opens.

2) Look for the **Login: Primavera Unifier** field in the upper right portion of the web page. Click the Primavera Unifier link. The Primavera Unifier Login window opens.

3) Enter your user name: **coadmin**.

4) Enter the password that was set for you during the Unifier installation.

5) Click **Login**. Primavera Unifier opens to your user home page.

▶ *To log out of Primavera Unifier*

Click the **Logout** link in the upper-right corner of the Primavera Unifier window.

Add Users to Your Company

The first task in setting up the Capital Planning application is to add your company users. There are three ways to add company users.

▶ Oracle Identity Management (OIM): If you are set up to use OIM, it automatically adds users to your Primavera Unifier company. For information, refer to the documentation provide with OIM.

  ▸ You cannot manually add users or add users via CSV file.

  ▸ You will have to *manually add users to company-level groups* (see "*Manually Add Users to Your Company*" on page 18).

▶ Import company users via CSV file: If you are not set up to use OIM, you can *import users using a CSV file* (see "*Import Company Users via CSV File*" on page 21).

  ▸ You will have to *manually add users to company-level groups* (see "*Manually Add Users to Your Company*" on page 18).

▶ Manually add company users: If you are not set up to use Oracle Identity Management, and you will not be importing users via CSV file, you can *manually add company users* (see "*Manually Add Users to Your Company*" on page 18).

The process of adding users also includes assigning them to user groups.

▶ *To add users to your company*

1) Go to the **Company Workspace** tab and switch to **Administration Mode**.

2) Click **User Administration > Company Users** in the left Navigator.

3) Click the **New** button. The Edit User window opens.

4) Use the information in the table below to complete the fields of the General tab.

In this field:	Do this:
First Name, Last Name	Enter the first and last name of the user. These are required fields.
Title	Enter an optional company title for the user.
E-Mail	Enter the user's email address, which will be used to send system notifications to the user, and will display in the user's contact information. This is a required field.
Work Phone	Enter the user's work telephone number.
Mobile Phone	Enter the user's mobile telephone number.

In this field:	Do this:
Home Phone	Enter the user's home telephone number.
Pager	Enter the user's page number.
Fax	Enter the user's fax number.
Address	Click the **Select** button to add a company address to the user profile (From Edit Company, Address Tab)
Time Zone	Choose the default time zone for the user.
Date Format	This setting controls the display of dates on reports, business process forms, etc.
Status	New users are Active by default. Status can be Active, Inactive or On-hold. Neither Inactive nor On-Hold users can login to Primavera Unifier: **Active**: User is listed in Project or Shell Directory, in User/Group Picker; and user can login and participate in a project or shell. **Inactive**: User's name does not appear anywhere for selection on any project-or shell-related functions or User Picker. User cannot login, but they can be given permissions and added to groups. **On-hold**: User can be added to a project or shell and assigned as a participant in a business process workflow but cannot login. Normally used to pre-assign users to a new project or shell before activating it. **Active** and **On Hold** users will be counted against your user license terms; **Inactive** users will not.

5) Click **Apply** to save changes, then click the **Security** tab.
6) Use the information in the table below to complete the fields of the Security tab.

In this field:	Do this:
Login Username	Enter the Users Login ID (required). This value can be changed by the System or Company Administrator but not by the User.
Password	Enter the value the user will use as their Login ID. Passwords must match the company Security/Password policy, if one is in force.
Confirm Password	Confirm password by re-entering.
View Password Policy	Click this link to view your company's Security/Password policy. A password that does not comply will generate a warning message.

7) Click **Apply**, then click the **Groups** tab.

On this tab, you will add the user to groups that reflect the user's responsibilities. Add the user to the groups that are appropriate. The groups that have been provided for the Project Delivery application are:

▸ **Creator** (identifies the user as a creator of an element such as a business process)

▸ **All Company Users** (includes the user in an umbrella group for company-level permissions to the Document Manager and to company-level business processes)

▸ **Reviewer** (identifies the user as a reviewer, usually on a workflow step for a business process or a drawing or document in the Document Manager)

▸ **Project Administrators** (identifies the user as a project administrator)

▸ **Company Administrators** (identifies the user as a company administrator)

> We recommend that you add all your users to groups. The groups have been given default permissions to the features and functions of the application, so you do not need to grant the user any other permissions. These groups will be automatically included in workflow step assignments and in the template that you use for creating a new project.

1) To assign the user to a group or groups, select the group name(s) and click **Add**.

2) Click **OK** to save the user information and exit the window.

Manually Add Users to Your Company

You will need to use these instructions if you are not using OIM to provision your users, and are not using a CSV file to import your company users.

▶ *To manually add users to your company*

1) Go to the **Company Workspace** tab and switch to **Administration Mode**.
2) Click **User Administration > Company Users** in the left Navigator.
3) Click the **New** button. The Edit User window opens.
4) Use the information in the table below to complete the fields of the General tab.

In this field:	Do this:
First Name, Last Name	Enter the first and last name of the user. These are required fields.
Title	Enter an optional company title for the user.
E-Mail	Enter the user's email address, which will be used to send system notifications to the user, and will display in the user's contact information. This is a required field.
Work Phone	Enter the user's work telephone number.
Mobile Phone	Enter the user's mobile telephone number.
Home Phone	Enter the user's home telephone number.
Pager	Enter the user's page number.
Fax	Enter the user's fax number.
Address	Click the **Select** button to add a company address to the user profile (From Edit Company, Address Tab)
Time Zone	Choose the default time zone for the user.
Date Format	This setting controls the display of dates on reports, business process forms, etc.
Status	New users are Active by default. Status can be Active, Inactive or On-hold. Neither Inactive nor On-Hold users can login to Primavera Unifier: **Active**: User is listed in Project or Shell Directory, in User/Group Picker; and user can login and participate in a project or shell. **Inactive**: User's name does not appear anywhere for selection on any project-or shell-related functions or User Picker. User cannot login, but they can be given permissions and added to groups. **On-hold**: User can be added to a project or shell and

In this field:	Do this:
	assigned as a participant in a business process workflow but cannot login. Normally used to pre-assign users to a new project or shell before activating it. **Active** and **On Hold** users will be counted against your user license terms; **Inactive** users will not.

5) Click **Apply** to save changes, then click the **Security** tab.

6) Use the information in the table below to complete the fields of the Security tab.

In this field:	Do this:
Login Username	Enter the Users Login ID (required). This value can be changed by the System or Company Administrator but not by the User.
Password	Enter the value the user will use as their Login ID. Passwords must match the company Security/Password policy, if one is in force.
Confirm Password	Confirm password by re-entering.
View Password Policy	Click this link to view your company's Security/Password policy. A password that does not comply will generate a warning message.

7) Click **Apply**, then click the **Groups** tab.

On this tab, you will add the user to groups that reflect the user's responsibilities. Add the user to the groups that are appropriate.

> We recommend that you add all your users to groups. The groups have been given default permissions to the features and functions of the application, so you do not need to grant the user any other permissions. These groups will be automatically included in workflow step assignments and in the template that you use for creating a new project.

The company-level groups that have been provided for the Project Delivery application are:

▸ **Creator** (identifies the user as a creator of an element such as a business process)

▸ **All Company Users** (includes the user in an umbrella group for company-level permissions to the Document Manager and to company-level business processes)

▸ **Reviewer** (identifies the user as a reviewer, usually on a workflow step for a business process or a drawing or document in the Document Manager)

▸ **Project Administrators** (identifies the user as a project administrator)

▸ **Company Administrators** (identifies the user as a company administrator)

1) To assign the user to a group or groups, select the group name(s) and click **Add**.

2) Click **OK** to save the user information and exit the window.

Import Company Users via CSV File

If you have a large number of users to add, you can use a CSV file to import user records. The process entails:

‣ Exporting the CSV file structure

‣ Entering user information in the CSV file

‣ Importing the CSV file into Primavera Unifier

> You can use this method only if you are not using OIM to provision users to your company.

▶ *To export a copy of the CSV file structure*

1) Go to the **Company Workspace** tab and switch to Administration mode.

2) Click **User Administration > Company Users** in the left Navigator.

3) Click the **File** menu and choose **Export > Export Structure**. A confirmation window opens. Do one of the following:

   ‣ Click **Open** to open the file in Microsoft® Excel (or other editor that supports CSV files). You can save the file from here after previewing it.

   ‣ Click **Save** to save the file to your local drive. Enter a name for the file and click **Save**.

▶ *To enter user information in the CSV file*

1) Open Microsoft® Excel (or other program compatible with CSV format), and open the CSV file you just saved.

2) Enter or modify user information in the spreadsheet. Note the following:

   ‣ Retain the structure of the exported template. Do not delete or add columns, or change the order or names of the columns; doing so will cause import failure.

   ‣ Valid information must be entered into columns corresponding to required fields. An asterisk in the column header indicates required fields. (Expand the columns to see the asterisks if necessary.)

   ‣ For non-text-entry fields (Time Zone, Date Format, Address), enter the corresponding code. Valid codes are found in the *Primavera Unifier Reference Guide.*

   ‣ Non-required fields (column heading does not have an asterisk) are optional. You may enter information or leave these fields blank.

   ‣ Usernames can have the characters A-Z a-z 0-9 but not a space or a special character @, dash or underscore. Usernames cannot be more than 64 characters long. See the *Primavera Unifier Reference Guide* for the list of valid entry codes for non-text-entry fields.

- ▸ The *Primavera Unifier Reference Guide* is available on the Primavera Unifier Online Documentation Library located at http://download.oracle.com/docs/cd/E40872_01/index.htm.

3) Save in CSV format.

▸ ***To import the CSV file into Primavera Unifier***

1) Go to the **Company Workspace** tab and switch to Administration mode.
2) Click **User Administration > Company Users** in the left Navigator.
3) Choose **New > Import** to import the completed CSV file.
4) Click **Browse** and navigate to where you saved the file.
5) Click **OK** to import. New users are created and existing users are updated.

   If any rows contain errors, no rows are imported. Error messages are listed in the CSV file.

▸ ***To fix import errors***

If you receive the Confirmation message: "Import could not be completed. Do you want to download a file with errors shown?"

1) Click **Yes** to open the CSV file.
2) Fix the rows that contain errors. The error file will explain the nature of the import failure.
3) Re-import the file.

Once you have imported your users....

You will have to manually ***add users to company-level groups*** (on page 22).

Add Users to Company-Level Groups

Use these instructions if you have:

- ▸ Used OIM to provision users to your company.
- ▸ Imported users via CSV file.

▸ ***To add users to company-level groups***

1) Go to the **Company Workspace** tab and switch to **Administration Mode**.
2) Click **User Administration > Groups** in the left Navigator. The Groups log opens.
3) Open the **Group** to which you want to add users.
4) Click the **Members** tab. The User/Groups picker shows all company users.
5) Add users to the group as needed. To select multiple users for a group, hold down the **CTRL** key and select the names.
6) Click **OK** to save the selection, and **OK** again to save the group.

Create a Project

Once you have added your users to your company, the next step is to create a project.

The Capital Planning Application is shipped with an anchor shell called "All Projects." You will need to create at least one project under this shell. We have provided a shell template to use to create the project. The template includes all the functions and features you will need for Capital Planning operation.

When you create this project, and whenever you create additional projects, the Capital Planning Application adds the project to the Portfolio Manager Sheet.

▶ ***To create a project***

1) Click the **Company Workspace** tab and switch to **Administration Mode**.
2) In the left Navigator, click **Company Sponsored Shells > Project**s. The Projects log opens in the right pane.
3) On the tool bar, click the **Copy** button. The Select Projects/Templates To Copy From window opens.
4) Click the **Copy From** drop-down menu and choose **Template**. A list of the templates that have been created appears. The template called PROJECT TEMPLATE has been provided for you.
5) Select **PROJECT TEMPLATE**.
6) In the list of **Select Modules**, check all the modules on the list.
7) Click **OK**. The Project Details window opens.
8) Fill in the fields on the **General** tab. Red asterisks denote required fields.

> **Note**: The **Location** field specifies what shell the project should reside in. In this case, it should be **All Projects**.

9) Click the **Currency** tab.
10) In the **Default Currency** field, specify the currency the project will use.
11) Click **OK**. The project name appears on the Projects log.

Assign Users to the Project and Groups

Once you have added users to the company, you can then assign them to your project.

▶ *To add users to the project*

1) Go to the **Company Workspace** tab and switch to Administration mode.

2) Click **Company Sponsored Shells > Projects > [your project] > User Administration > Users** in the left Navigator. The Users log opens.

3) Click **New**. The User/Group Picker opens.

4) Select one or more users to add to the project. To add multiple uses, hold down the **Ctrl** key and select the names.

5) Click the **Add** button.

6) Click **OK** to add the users to the project.

> **Note**: By default, new users will have a status of **Active**. You can change the status by selecting the user from the list and clicking **Open**.

After you add users to your project, we recommend assigning them to the groups that reflect the users' responsibilities in the project. These groups are already configured with permissions, so you will not have to grant multiple permissions to each user. The project-level groups that have been provided for the Capital Planning application are:

▸ **All Project Users** (identifies all the users in the project)

▸ **Project Administrators** (identifies the user as the project administrator)

▸ **Reviewer** (identifies the user as a reviewer, usually on a workflow step for a business process or a drawing or document in the Document Manager)

▸ **Creator** (identifies the user as the creator of a business process record, a report, or a document in the Document Manager)

▶ *To assign users to project groups*

1) Click **Company Sponsored Shells > Projects > [your project] > User Administration > Groups** in the left Navigator. The Groups log opens, showing the project-level groups that have been provided for the Capital Planning application.

2) On the log, double-click the group to which you want to add project users.

3) Click the **Members** tab.

4) Click **Add**. The User/Group Picker opens showing all the users you added to your company.

5) Select the users you want to add to the group. To add multiple uses, hold down the **Ctrl** key and select the names.

6) Click **Add**, then click **OK**.

7) On the Group ID window, click **OK**.

Configure the Portfolio Manager

Each portfolio needs a defined period of time in order to be able to calculate costs for the forecasted budget. (Currently, Primavera Unifier supports only yearly time periods.) Creating a period structure designates the time scale for the period, the format the period should appear in at runtime on the period picker, and whether or not the period is active (available for use at runtime).

Once you have created a period structure, it cannot be deleted. In addition, once a period is in use in a deployed Portfolio Manager, it cannot be modified or inactivated.

To create a period structure

1) Go to the **Company Workspace** tab and switch to Admin mode.
2) Click **Standards & Libraries > Period Structure** in the left Navigator.
3) Click **New**. The Period structure window opens.
4) Use the information in the table below to complete the fields in the Period Structure window.
5) Click **OK**.

In this field:	Do this:
Period Structure	Enter a name for the period structure.
Description	Enter a description of this period. This is not mandatory, but is recommended.
Status	Specify whether this period is active (available for use) or inactive.
Period Settings	Specify the time scale for this period. Period: Select the time period for the analysis. This list shows years, each beginning with a month in the year and ending at the end of the month preceding the beginning month. Identify Period By: Use this option to accommodate time periods that span across two years. For example, if your fiscal planning period is from July 2010 to June 2011, use this option to tell Primavera Unifier that the planning year is based on either a starting month of July or an ending month of June. Format: Specify the format the date should appear in: For Year, YYYY or YY

Using the Capital Planning Application

The core of the Capital Planning Application is the Portfolio Manager. Using this application entails using the Portfolio Manager to gather cost and schedule information on projects (both planned and in execution) and perform analyses on "what if" scenarios.

Use the information in the following topics for instructions on:

▶ *Logging In and Out of the Capital Planning Application* (on page 27)
▶ *Setting Your Work Preferences* (on page 29)
▶ *Working in a Project* (on page 32)
▶ *Using the Portfolio Manager* (on page 34)

In This Section

Logging In and Out of the Capital Planning Application

▶ *To log into Primavera Unifier*

1) Open the Primavera Unifier Login window. In Microsoft Internet Explorer, enter the web address.

   a. If you are on the Oracle Cloud then this web address will come from Oracle Cloud Provisioning.

   b. If you are an on-premises user, use the web address that your site administrator gave you.

   The web site opens.

2) Look for the **Login: Primavera Unifier** field in the upper right portion of the web page. Click the Primavera Unifier link. The Primavera Unifier Login window opens.

3) Enter your user name: **coadmin**.

4) Enter the password that was set for you during the Unifier installation.

5) Click **Login**. Primavera Unifier opens to your user home page.

▶ *To log out of Primavera Unifier*

   Click the **Logout** link in the upper-right corner of the Primavera Unifier window.

If You Need Help

If you need help with an operation in Primavera Unifier, there are a number of resources to help you.

Online Help

If you have a question or need further assistance regarding a specific feature, review the online help.

To Access Online Help:

Click the **Help** menu from any Primavera Unifier window, and choose one of the following:

Primavera Unifier Help: Accesses the online help system.

Download PDF > Primavera Unifier Administrators Guide: Allows you to download the *Primavera Unifier Administrators Guide*. You must have Adobe Acrobat Reader installed (available free at www.adobe.com).

Download PDF > Primavera Unifier Users Guide: Allows you to download the *Primavera Unifier Users Guide*. You must have Adobe Acrobat Reader installed (available free at www.adobe.com).

Download PDF > Primavera Unifier Reference Guide: Allows you to download the *Primavera Unifier Reference Guide.* You must have Adobe Acrobat Reader installed (available free at www.adobe.com).

Download PDF > Primavera uDesigner Users Guide: Allows you to download the *Primavera uDesigner Users Guide*. You must have Adobe Acrobat Reader installed (available free at www.adobe.com).

Where To Get Support

If you have a question about using Oracle products that you or your network administrator cannot resolve with information in the documentation or help, click **http://support.oracle.com/**. This page provides the latest information on contacting Oracle Global Customer Support, knowledge articles, and the support renewals process.

Access To Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit **http://www.oracle.com/us/support/contact-068555.html** or visit **http://www.oracle.com/us/corporate/accessibility/support/index.html** if you are hearing impaired.

Setting Your Work Preferences

Before working with the application, it is a good idea to set your working preferences, such as your password, language, time zone, date format, default viewer, file transfer option, default login view, and email subscriptions.

To set your preferences, click the **Preferences** link in the upper-right corner of the Primavera Unifier window. The User Preferences window opens to the General tab, showing your company contact information.

Set or Change Your Password

If your company is using Oracle Identity Management (OIM) to provision users, you cannot use these instructions to change your password. You must use OIM. For information, see the documentation that is provided with OIM.

▶ *To set or change your password*

1) Click the **Security** tab.
2) Enter your current password.
3) Enter a new password, then reenter it to confirm the change.
4) When finished, click **OK**.

▶ *To specify security questions for your password*

If you forget your password, you can recover it by answering questions that you set up yourself. You can add up to three secret questions. These questions will be presented if you click the **Forgot Password?** link on the Primavera Unifier login window. After you answer the question(s), you will receive e-mail notification of your new password.

1) Click the **Security** tab.
2) Under **Password Recovery Secret Questions**, select a question and enter the answer. You can add up to three Secret Questions.
3) Click **OK**.

Specify Your Time Zone and Date Format

The Time Zone setting affects the date stamp that appears on the actions that you perform in Primavera Unifier, such as saving or uploading files, running user-defined reports, and due dates of tasks assigned to you. The date stamp is effective as of 12:00 AM in your time zone. For example if your time zone is Eastern Standard Time, and your task is due August 1, then at 12:00 AM August 1 your task is due — even if it is only 9:00 PM July 31 in Pacific Standard Time.

The Date Format determines how date fields appear to you in Primavera Unifier.

▸ *To set the time zone*

1) Click the **Options** tab.
2) Click the **Time Zone** drop-down menu and select a time zone based on your locale.

▸ *To set the date format*

On the **Options** tab, click the **Date Format** drop-down menu and select a date format.

Choose a File Viewer Option

The file viewer option determines how Primavera Unifier displays files (such as documents or drawings) that are attached to business processes or stored in the Document Manager and opened from within Primavera Unifier.

You can choose a default viewer, which will be used to open most file types in Primavera Unifier. You can also specify exceptions to this. For example, a user may choose Primavera Unifier Viewer as the default viewer, which will be used to open most file types, but then choose to open a few file types such as drawing files and image files using the native applications that reside on the user's desktop machine.

▸ *To choose a file viewer option*

1) Click the **Options** tab.
2) Choose a Default Viewer option.
   ▸ **Native:** Documents are opened in their native applications; for example, Microsoft® Word documents are opened in Microsoft Word. The native application will not display graphical markups. This option requires that users have the native application installed on their machine in order to view the document.

   > **Note**: Primavera Unifier automatically displays document markups using the AutoVue viewer without having to change your options.

   ▸ **Primavera Unifier Viewer:** Documents are displayed in the AutoVue viewer, which can display virtually any type of file. Documents are opened in a read-only view that supports adding graphical markups and text comments (in attachments to business process and other records, or files in the Document Manager).

▸ **Viewer Exceptions**: Here you can specify exceptions to the default viewer. For example, while you may want the default viewer to be native, you might want drawing files to be viewed in Primavera Unifier's AutoVue viewer. In the Always User Native or Always Use Primavera Unifier fields, enter the file extension identifier (such as .doc, .txt, or .dwg) of the files you want to override the default. Omit the period before the extension. You can enter multiple file extensions, separated by a semi-colon. For example, enter doc;txt;dwg.

3) When finished, click **OK**.

Choose a File Transfer Option

The **File Transfer** option determines how files are transferred between Primavera Unifier and your local system. File transfers include uploading and downloading documents to and from the Document Manager, or attaching files from your local system to a business process, cost or funding sheet cell, schedule sheet or uMail message.

There are three file transfer methods.

▸ **Basic:** this option uses HTML. It can be used on any Primavera Unifier-compatible machine. It has the most basic functionality, allowing single-file selection for uploads and downloads, and will resolve drawing reference files after upload.

▸ **Intermediate:** this option uses Oracle Java SE Runtime Environment (Java). In addition to basic functionality, it supports the selection of multiple files and folders for uploading and downloading. It will resolve reference file relationships in DWG and DGN drawing files. This process takes place on the server (that is, reference files should already be uploaded to Primavera Unifier or be part of the current upload process). See the *First Time User Setup Guide*, File Transfer Option, for details on supported Java versions and the URL for Java downloads.

▸ **Advanced:** this option uses Java and Primavera Unifier File Transfer Utility. It provides the greatest flexibility for uploading and downloading documents and folders, especially drawing files. In addition to the Intermediate functionality, its advanced functionality for managing reference file relationships in DWG and DGN drawing files makes it easier for users to locate, upload, revise, and download reference files. The resolve process is done on your local system. The process will make sure that all reference files are included in the upload and will automatically bundle necessary files as needed.

The Advanced option requires the download and installation of Primavera Unifier File Transfer Utility and Java. The Primavera Unifier File Transfer Utility installation file and instructions are available for download from within Primavera Unifier; click the **Support** link, then choose the Download tab. See also the *First Time User Setup Guide* for details on supported Java versions and the URL for Java downloads.

File Transfer Option	Requires additional software	Allows additional file properties	Allows upload / download of multiple files	Allows upload / download of folders	Allows drag-&-drop file selection	Resolves reference files	Resolve process is done locally
Basic	none	Yes	No	No	No	Yes	No
Intermediate	Oracle Java SE Runtime Environment (Java)	Yes	Yes	Yes	Yes	Yes	No
Advanced	Java (plus Primavera Unifier File Transfer Utility)	Yes	Yes	Yes	Yes	Yes	Yes

▶ *To choose a file transfer option*

1) Click the **Options** tab.

2) Choose a File Transfer option: **Basic**, **Intermediate**, or **Advanced**.

3) When finished, click **OK**.

Working in a Project

A project is a "collaboration space" that allows project users to collaborate on and coordinate the execution of a project. Your project contains the project delivery functions and features you will use to perform your job. It contains nodes in the left Navigator in which you can accomplish the project delivery tasks.

In the project are these nodes:

- ▶ Alerts
- ▶ uMail
- ▶ Mailbox
- ▶ Collaboration
- ▶ Information
- ▶ Document Manager
- ▶ Reports
- ▶ Project Delivery

For information about these nodes, see **Open the Project** (on page 33).

Open the Project

▶ *To open a project*

1) Go to the **All Projects** tab and switch to User mode. The Project log opens, listing all of the projects to which you have access.

2) Select the project and click **Open**, or double-click the project name. The project home page opens, providing an overview of the project.

   When you open the project home page, the Navigator expands, providing access to the following features:

   - ▶ In the right pane is the **Project Summary**, showing a snapshot of the overall project.
   - ▶ **Alerts:** You can create customized alerts to alert you to a condition or event in Primavera Unifier that you specify.
   - ▶ **uMail:** An internal Primavera Unifier e-mail feature that allows Primavera Unifier project team members to communicate with each other and maintain a record of the communications.
   - ▶ **Mailbox:** The Mailbox is the repository that collects external emails related to the project. These emails can come from project members or from external users who do not use Primavera Unifier. From the Mailbox, project users can forward the emails to appropriate members, flag them for review, and reply to them. In addition, these external emails can be linked to business process records.
   - ▶ **Collaboration (Tasks, Messages, Drafts):** Lists current business process tasks that have been assigned to you, that you have been copied on, and draft copies that you have saved. Tasks and Drafts are not available for View-Only projects. Messages are available for View-Only projects, but you cannot add general comments.
   - ▶ **Information:** Shows a **Directory** of project team members and under **General**, a list of simple-type business processes.
   - ▶ **Document Manager:** Repository of project documents, allowing collaboration, revision control, markups, etc.
   - ▶ **Reports:** Gives you access to the reports you received with this application.

View the Project Directory

The Project Directory lists contact information for your fellow project team members.

To view the Project Directory

Open a project and click **Information > Directory** in the left Navigator. The log lists all of the members of the project team and their contact information.

Contact Team Members

You can view the contact information of fellow team members and send e-mail or uMail from within Primavera Unifier.

▶ *To view a team member's user profile*

1) In the Project Directory, select the user from the list and click **Open**. The View User Profile window opens.

2) In the Contact Information selection list at the top of the window, choose one of the following:

   ▸ **Current Project:** Displays contact information specific to the current project, such as an on-site address or cell phone.

   ▸ **Company Contact Information:** This is the member's company contact information.

▶ *To send an e-mail using an external e-mail program*

Do one of the following:

   ▸ In the **Project Directory,** select a team member's name and click **Send e-mail**.

   ▸ From the **User Profile** window, click the e-mail address.

   This will open an e-mail dialog box using your default e-mail program (for example, Microsoft Outlook). The **To:** field will be populated automatically with the member's e-mail address. E-mail sent through your external e-mail program will not be saved as part of the Primavera Unifier project record.

Using the Portfolio Manager

The Portfolio Manager is where the budget forecast planners in your company can gather cost and schedule information on projects (both planned and in execution) and perform analyses on "what if" scenarios. These scenarios are used to propose an optimal mix of projects for a portfolio, based on available budget targets and the strategic goals of the company. Your Portfolio Manager has been shipped with a default portfolio called Capital Projects. In this portfolio you can create multiple scenario sheets to test "what if" budget plans.

Portfolio management entails collaboration and negotiation between you, as the budget forecaster, and the project managers in your company. At their respective project levels, project managers maintain project information and create cash flow budgets and projections in the Cost Manager. This information is used in the Portfolio Manager scenario sheets.

During your scenario analysis, you will likely be in touch with project managers to negotiate these numbers and dates until you reach agreement.

View and Open Portfolios

Portfolios are grouped by their portfolio type. This application is shipped with a portfolio type called Capital Projects. Scenarios are grouped under portfolios.

To view portfolios

1) Go to the **All Projects** tab and switch to User Mode.
2) In the Navigator, click **Portfolio Manager**. Primavera Unifier expands the navigator to show the portfolio types currently loaded into Primavera Unifier.
3) In the Navigator, click **Capital Projects**. Primavera Unifier displays the portfolios for this type in the right pane.

To open a portfolio

1) Go to the **All Projects** tab and switch to User Mode.
2) In the Navigator, click **Portfolio Manager**. Primavera Unifier expands the navigator to show the portfolio types currently loaded into Primavera Unifier.
3) In the Navigator, click **Capital Projects**. Primavera Unifier displays the portfolios for this type in the right pane.
4) Double-click the name of the portfolio you want to open.
5) Primavera Unifier opens the portfolio to either:
   ‣ The scenario that has been marked for sharing
   ‣ The most recently updated scenario

Sort a Portfolio Log

You can sort the portfolio log by portfolio name into ascending or descending alphanumeric order. To do so, click the triangle icon on the right side of the Portfolio Name column.

Delete a Portfolio

‣ *To delete a Portfolio*

1) Open the Portfolio Manager log.
2) Select the portfolio(s) you want to delete.
3) On the toolbar, click the **Delete** button.

About Scenario Sheets

As the budget forecast planner, you can create scenarios to plan an optimal portfolio of projects for the company, based on available budget targets and strategic goals.

Portfolio management entails collaboration and negotiation between you, as the budget forecaster, and the project managers in your company. At their respective project levels, project managers maintain project information and create cash flow budgets and projections in the Cost Manager.

In the Portfolio Manager, on the scenario sheets you create, Primavera Unifier collects the budget and projection numbers from the projects' Cost Managers, as well as project start and end dates from the project information.

During a scenario analysis, you can:

a) Apply regional budget targets

b) Group the projects in the scenario according to project characteristics

c) Sort and filter the rows of project data and analyze the summary totals

d) Accept the project managers' budget numbers or propose new numbers

e) Accept the schedule dates, or remove or postpone planned projects

f) Create additional scenarios to reflect other possible forecasts

> **Note**: The numbers you propose in a scenario will NOT affect a project's live data. Your proposed numbers are stored only in the Portfolio Manager and will not affect live project data until a scenario has been approved by your company management.

During this analysis, you will likely be in touch with project managers to negotiate these numbers and dates until you reach agreement.

Project managers will not see the changes you make on the scenario sheet. Instead, the project managers must create a "shared" type of portfolio budget curve. This curve shows your proposed numbers for the project. The project manager can include this curve on the cost worksheet, along with the forecast budget, or any other budget curve, in order to see the difference between the project's numbers and your proposed budget numbers.

In order for them to see the curve, you must share the scenario (see *Share a Scenario* (on page 50)).

Once you have completed a budget forecast analysis using these scenarios, you can send the best (or several best) scenario(s) to the executive decision makers for approval by "sharing" the scenario.

Overview of a Scenario sheet

Following is an example of a scenario sheet, shown in sections:

These columns are fixed. They will always appear on the sheet.

An icon in the second column means the project is linked to the project data, and the data on the scenario sheet will be updated whenever you open the sheet.

		Project Name	Stage	Estimated Total	Contact Name	Prior Actuals	2011 ▶	2012	2013
1	⟋	Seattle Public Utilities – So	Execution	2,759,989	John Doe	2,759,989	2,759,989	2,759,989	2,759,9
2		Cooler Replacement	Planning	17,239,285	Bruce Boche	17,239,285	17,239,285	17,239,285	17,239,2
3	⟋	Foundation Repair	Execution	259,916	Bob Johnson	259,916	259,916	259,916	259,9
4		North Campus	Execution	7,238,491	Brian Nash	7,238,491	7,238,491	7,238,491	7,238,4
5		Pacific Region A	Execution	7,259,916	Barbara Nash	7,259,916	7,259,916	7,259,916	7,259,9
6	⟋	Seattle Public Utilities – No	Planning	5,429,916	Kevin James	5,429,916	5,429,916	5,429,916	5,429,9
7	⟋	EPMC Project	Planning	7,259,916	Mike Smith	7,259,916	7,259,916	7,259,916	7,259,9

These columns and their content will vary. They are configured by your administrator to appear on the sheet.

These year columns can extend up to 15 years. In addition, a certain number of years (0 to 5) may break down to show monthly columns, depending on how your administrator has designed the sheet.

		Project Name	Stage	Estimated Total	Contact Name	Prior Actuals	2011 ▶	2012	2013
1	⟋	Seattle Public Utilities – So	Execution	2,759,989	John Doe	2,759,989	2,759,989	2,759,989	2,759,9
2		Cooler Replacement	Planning	17,239,285	Bruce Boche	17,239,285	17,239,285	17,239,285	17,239,2
3	⟋	Foundation Repair	Execution	259,916	Bob Johnson	259,916	259,916	259,916	259,9
4		North Campus	Execution	7,238,491	Brian Nash	7,238,491	7,238,491	7,238,491	7,238,4
5		Pacific Region A	Execution	7,259,916	Barbara Nash	7,259,916	7,259,916	7,259,916	7,259,9
6	⟋	Seattle Public Utilities – No	Planning	5,429,916	Kevin James	5,429,916	5,429,916	5,429,916	5,429,9
7	⟋	EPMC Project	Planning	7,259,916	Mike Smith	7,259,916	7,259,916	7,259,916	7,259,9
		Totals		297,759,989		297,759,989	297,759,989	297,759,989	297,759,989
		Targets		1,923,09				4,653,092	
		Difference		-671,987				-3,901	

Current Project Data — Current project data is shown here when the selected project's data differs from the portfolio.

Default Scenario | 10% Budget Reduction | 10% Budget Overage ✚ ⚙

This bar indicates the left border of the scrolling feature. The columns on the left of this bar will always be visible when you scroll through the columns on the right.

Use this scroll bar to move through the columns on the sheet.

You can resize columns by dragging the column margins with the mouse.

	Totals		297,759,989		297,759,989	297,759,989	297,759,989	297,759,989
	Targets		1,923,09				4,653,092	
	Difference		-671,987				-3,901	

Difference is calculated by Unifier and shows the difference between the target number and the total.

Targets are the target numbers the planner has designated for these totals. The planner enters the targets manually in this row.

Totals shows the sum of the amounts in each numeric column.

Total		$60,409.36	$2,783,508.77	$1,576,023.39	$112,631.58	$69,298.25
Target		$0.00	$2,000,000.00	$0.00	$0.00	$0.00
Difference		-$60,409.36	-$783,508.77	-$1,576,023.39	-$112,631.58	-$69,298.25
Current Project Data		$7,777.78	$994,444.44	$892,222.22	$7,777.78	$16,666.67

Scenario 1

Click the tabs to move from one scenario sheet to another.

This section of the sheet will display the current project data for any project row that you select in the grid above.

Open a Scenario Sheet

On the Portfolio Manager log, double-click the portfolio that contains the sheet you want to open.

Primavera Unifier displays one of these scenario sheets:

‣ The scenario sheet marked "shared"

‣ The scenario sheet that was last updated, if there is no shared scenario

Unlink and Link Projects

When you create a scenario, Primavera Unifier populates the sheet with all the projects that have met the criteria for inclusion on the sheet. (These criteria were set up in a query that was included in the Portfolio Manager configuration.) This is a dynamic process that occurs whenever you open a scenario sheet. The projects that appear on the sheet will fluctuate, depending on whether they still meet the criteria for inclusion. For example, a project that was previously on the sheet may be dropped from the sheet if it no longer meets the query criteria. Another project may be added to the sheet because it now meets the query criteria.

According to the Portfolio Manager configuration, all the projects on the scenario sheet will be automatically linked when you first open the scenario sheet. The data on the scenario sheet is linked to the project data and is updated every time you open the sheet. Any new project that is added to the sheet will also be linked.

You can unlink one or multiple projects from the scenario sheet. If they are unlinked, the data on the scenario sheet is not linked to the project data, and will not be updated by changes in the project data. Any new project that is added to the sheet will also be unlinked.

▶ *To unlink a project from the scenario sheet*

1) Select the project row(s) you want to unlink.

   ▸ For a single project row, click the link icon in the second column, or click the **Link/Unlink** button.

   ▸ For multiple project rows, click the **Link/Unlink** button.

   When the project is unlinked, Primavera Unifier will delete the link icon in the second column beside the project(s) name(s).

2) Click the **Save** icon.

   You can also unlink a project by editing any cell in the row. Once you start editing, Primavera Unifier will automatically unlink the project from the project data.

   If an unlinked project shows a discrepancy between the actual project data and the data you entered on the sheet, Primavera Unifier will display the numbers in italics and flag the actual cell data that differs with a dark bar.

▶ *To link a project back to the sheet*

1) Select the project row(s) you want to link.

   ▸ For a single project row, click the link icon in the second column, or click the **Link/Unlink** button.

   ▸ For multiple project rows, click the **Link/Unlink** button.

   When the project is linked, Primavera Unifier will display a link icon in the second column beside the project(s) name(s).

2) Click the **Save** icon.

Remove a Project from a Scenario

Your Portfolio Manager has been configured to automatically add and remove projects to and from a scenario sheet when they meet the correct inclusion/exclusion criteria. However, you can manually remove a project from the scenario sheet.

At the bottom of the scenario window, Primavera Unifier displays a "candidates list" showing all the projects that have met the query criteria for inclusion on the scenario sheet. The candidate list shows only those projects that have not been added to any other portfolio for the same planning period. Also, it does not show any projects that have already been added to the scenario.

Remove a project from a scenario

When you remove a project from a scenario, Primavera Unifier moves the project back to the candidates list at the bottom of the window. If that project continues to match the query criteria for inclusion on the scenario, it will remain on the candidates list; otherwise, it will drop from the list.

To remove a project

1) Select the project in the scenario.

To select multiple projects, hold down the CTRL key on your keyboard and click on the projects. To select all the projects, highlight the first project then hold down the SHIFT key and select the last project.

2) Click the Remove arrow. Primavera Unifier removes the project(s) from the scenario and recalculates the numbers.

Edit Numbers on a Sheet

A primary function of scenario sheets is to make it easy for you to modify numbers and see the resulting budget analysis quickly. You can edit the following numbers on the scenario sheet:

‣ Cash flow projections
‣ Targets for cash flows and numeric columns
‣ Start and end dates for planned projects

When you edit any of these numbers, Primavera Unifier dynamically updates totals and calculates the differences between target numbers and those totals; however, it does NOT change a project's live data. Your proposed numbers are stored only in the Portfolio Manager and will not affect live project data until a scenario has been approved by your company management.

> **Note**: When you edit numbers in any project row, Primavera Unifier automatically unlinks that project row from the project data.

‣ *To edit numbers on the sheet*

1) Double-click the cell containing the number you want to change. The cell becomes editable.

> **Note**: If any yearly projections have been broken down into months, you must make your edits in the month cells, not the yearly total.

2) Enter the change.

3) Press the **Enter** key on your keyboard, or press the Tab key to move to the next editable cell in the row.

Primavera Unifier updates the values in the Total and Difference rows for this column, and flags the cell to indicate that there is a discrepancy between the number you entered and the project data.

> **Note:** To leave a cell without saving your changes, press the ESC key on your keyboard. Primavera Unifier restores the original numbers to the cell.

4) Click the **Save All** button.

Drill Down to Project Data

During the planning cycle, you might need quick access to project data in order to view project characteristics, schedule activities, cost data, cash flow data, and other information. In addition, you might need to update some of this data as you are working on a scenario. For this purpose, the project names on a scenario sheet are hyperlinked to the project. If you have permissions, you can open the project's landing page from the scenario sheet and view or edit data directly in the project.

▶ **To drill down to project data**

On the scenario sheet, click the hyperlinked project name. Primavera Unifier opens the project landing page in a new window. From this page, you can navigate to project data and view or edit it directly.

The scenario sheet remains open in a separate window so that you can easily work on both the project data and the scenario sheet at the same time.

Change Start Dates

You can change the start dates of planned projects, but not those in execution. When you change a start date, Primavera Unifier shifts the end date to preserve the project duration, and also shifts the cash flow numbers (excluding pre-actuals) left or right to preserve the cash flow distribution.

▶ **To change a start date**

1) Double-click the date in the **Start Date** column. Primavera Unifier displays a calendar.
2) Choose the new date from the calendar and press the **Enter** key on your keyboard.

   Primavera Unifier shifts the end date and the cash flow numbers to reflect the change.

Before date change:

Start Date	End Date	Pre-Actuals	Total	▶	2012	▶	2013	2014	2015	2016
12/26/2011	05/31/2013	$7,777.78	$994,444.44		$892,222.22		$102,222.22	$0.00	$0.00	$0.00

After date change:

Start Date	End Date	Pre-Actuals	Total	▶	2012	▶	2013	2014	2015
04/26/2012	09/29/2013	$7,777.78	$994,444.44		$494,444.44		$500,000.00	$0.00	$0.00

How Primavera Unifier Distributes Cash Flow

Primavera Unifier stores all cash flow amounts by month in the database. The logic Primavera Unifier uses to distribute cash flow dollars is rendered in monthly allocations and presented as follows:

▶ If you move the start date backwards by (for example) three months, Primavera Unifier will move all the cash flow amounts (excluding the pre-actuals column) left by three months and display a zero dollar amount in the last three month columns for that year. Amounts from the following fiscal year will not move left.

▶ If you move a start date forward by three months, Primavera Unifier will move all the cash flow amounts (excluding the pre-actuals column) right by three months and display a zero dollar amount in the first three month columns. The cash flow amounts will continue to move forward in time, replacing the values of the next three months with the values of the past three months. If the cash flows through multiple years, the total for the next year will increase by the three months' amount, and the monthly cash flow for the last three months of the previous year will replace the new year's first three months. The rest of the new year's monthly values will move forward three columns.

Change Cash Flow Amounts

You can change the cash flow amounts of any project on the sheet, planned or in execution. When you change a number in the cash flow amounts, Primavera Unifier unlinks the project from the live project data.

To change a cash flow amount

1) Double-click the cell containing the amount you want to change.
2) Enter your change and press the **Enter** key on your keyboard.

   The project's **Total** amount and the year's total amount increases or decreases by the amount you entered. Primavera Unifier calculates the difference, indicates the edited column amounts in italics, and also places a dark bar at the top of the cell in the actual project data.

Before change:

perties	Project State	Total	◀◀ 2014	Jan 2014	Feb 2014	Mar 2014
	Execution	$0.00	$0.00	$0.00	$0.00	$0.00
	Planning	$0.00	$0.00	$0.00	$0.00	$0.00
	Planning	$65,000.00	$10,000.00	$0.00	$0.00	$0.00
	Planning	$0.00	$0.00	$0.00	$0.00	$0.00
	Planning	$0.00	$0.00	$0.00	$0.00	$0.00
Total		$599,684.21	$544,684.21	$53,631.58	$112,631.58	$52,631.58
Target		$0.00	$6,000.00	$0.00	$0.00	$0.00
Difference		-$599,684.21	-$538,684.21	-$53,631.58	-$112,631.58	-$52,631.58
		◀	III			
	Planning	$0.00	$0.00	$0.00	$0.00	$0.00

After change:

$15,000 added to Jan 2014 column.
Total column and 2014 year column increased by $15,000.

Dark bar added to cell in the actual project data that was changed by the edit.

Edit Project Information

Your scenario sheets will typically contain some project information. If this project information was configured to be editable, you can edit it. If you do so, these changes will NOT affect the project's live data. Your edits are stored only in the Portfolio Manager and will not affect live project data until a scenario has been approved by your company management. When the scenario is approved, specified edited shell information will be updated with the approved scenario data, and you will be notified by email of the updates.

You cannot edit:

‣ Project name
‣ Number
‣ Status
‣ Location

> **Note**: When you edit information in a project row, Primavera Unifier automatically unlinks that project row from the project data.

To edit project information

1) Double-click the cell containing the information you want to change. The cell becomes editable.
2) Enter the change.

3) Press the **Enter** key on your keyboard, or press the **Tab** key to move to the next editable cell in the row.

Primavera Unifier updates the information in this column, and flags the cell to indicate that there is a discrepancy between the data you entered and the project's data.

> **Note**: To leave a cell without saving your changes, press the ESC key on your keyboard. Primavera Unifier restores the original numbers to the cell.

4) Click the **Save All** button.

Hide or Show Columns

To make viewing information easier on either the scenario sheet or the project candidate list, you can hide any cash flow columns that might not contain data relevant to your current task.

To hide a column

1) Click the arrow beside the column name and choose **Columns**.
2) On the list that appears, select the check box beside the columns you want to hide. Primavera Unifier removes those columns from view.

To show a hidden column

1) Click the arrow beside the column name and choose **Columns**.
2) On the list that appears, de-select the check box beside the columns you want to show. Primavera Unifier opens those columns to view.

Filter the Scenario Sheet

To make viewing project information easier, you can use filters on both the scenario sheet and the project candidate list to narrow the focus of information to particular specifics, such as a date range, or a budget amount. For example, you might want to see only those projects in a specific date range, or only those projects with budgets greater than a specific amount, or projects of a specific type.

How you filter information depends on the column you choose to use as a filter.

To filter information using a text column

1) Click the arrow beside the column name and choose Filters.
2) In the text box that appears, enter the text you want to use as a filter, such as a project name or prefix.

Primavera Unifier displays those projects that match the text you entered.

To filter information using a date column

Click the arrow beside the column name and choose **Filters**.

▸ Choose **Before** to specify a date period before a particular date. Click the date on the calendar that appears. Primavera Unifier displays all the projects with a date value that occurs before the date you specified on the calendar.

▸ Choose **After** to specify a date period after a particular date. Click the date on the calendar that appears. Primavera Unifier displays all the projects with a date value that occurs after the date you specified on the calendar.

▸ Choose **On** to specify a specific date. Click the date on the calendar that appears. Primavera Unifier displays all the projects with a date value that matches the date you specified on the calendar.
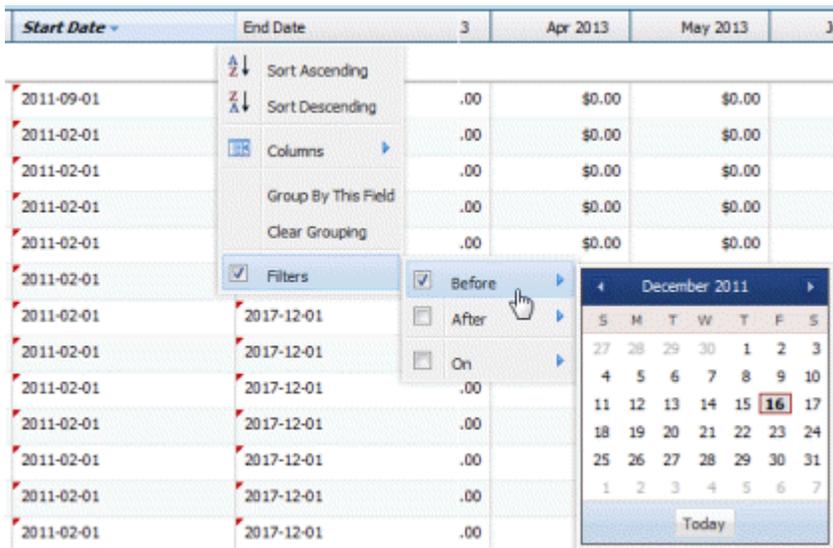
To filter information using a numeric column

Click the arrow beside the column name and choose Filters.

▸ Enter a number "**greater than**" a specific number to display all the projects with numbers in that column greater than the number you specified.

▸ Enter a number "**less than**" a specific number to display all the projects with numbers in that column less than the number you specified.

▸ Enter a number "**equal to**" a specific number to display all the projects with numbers in that column that match the number you specified.
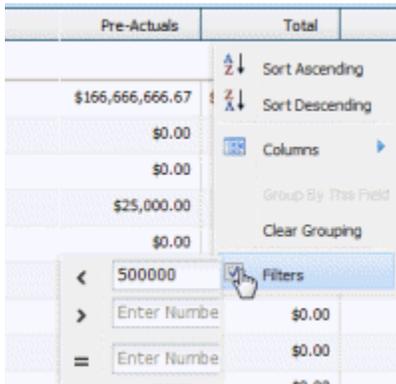
To return the sheet to an unfiltered state

To return the sheet to an unfiltered state, click the arrow beside the column name and deselect the Filters check box.

Group the Data on a Scenario Sheet

You can group the data on the sheet by column. Grouping data can make it easier to identify projects with similar characteristics, such as estimated cost or start date. You can group by any column except the **Pre-Actuals** and year columns. When you group data, Primavera Unifier displays a sub-total amount by group.

To group the data

1) Identify the column by which you want to group the data and click the down arrow beside the heading.
2) Select **Group By This Field**.

Primavera Unifier groups the data by the column value. Groupings are separated and identified by the column value you grouped on, such as **Project State** "In Execution" and "Planning."
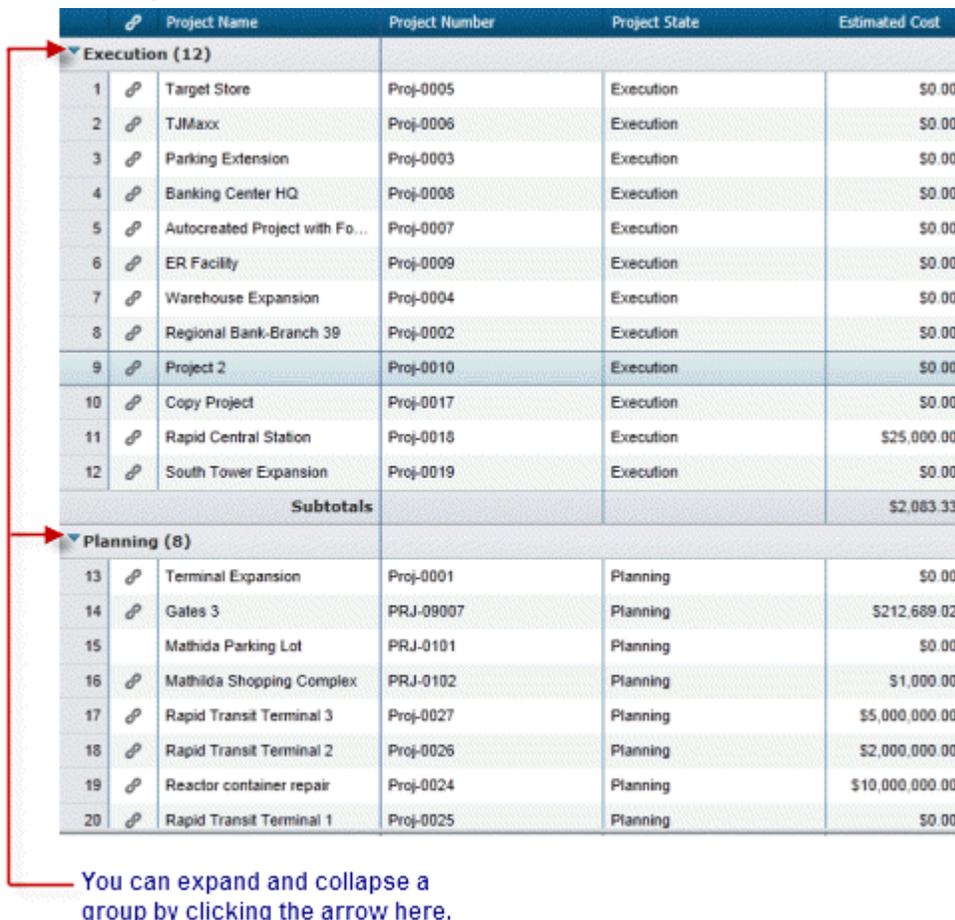
		Project Name	Project Number	Project State	Estimated Cost
Execution (12)					
1		Target Store	Proj-0005	Execution	$0.00
2		TJMaxx	Proj-0006	Execution	$0.00
3		Parking Extension	Proj-0003	Execution	$0.00
4		Banking Center HQ	Proj-0008	Execution	$0.00
5		Autocreated Project with Fo...	Proj-0007	Execution	$0.00
6		ER Facility	Proj-0009	Execution	$0.00
7		Warehouse Expansion	Proj-0004	Execution	$0.00
8		Regional Bank-Branch 39	Proj-0002	Execution	$0.00
9		Project 2	Proj-0010	Execution	$0.00
10		Copy Project	Proj-0017	Execution	$0.00
11		Rapid Central Station	Proj-0018	Execution	$25,000.00
12		South Tower Expansion	Proj-0019	Execution	$0.00
		Subtotals			$2,083.33
Planning (8)					
13		Terminal Expansion	Proj-0001	Planning	$0.00
14		Gates 3	PRJ-09007	Planning	$212,689.02
15		Mathida Parking Lot	PRJ-0101	Planning	$0.00
16		Mathilda Shopping Complex	PRJ-0102	Planning	$1,000.00
17		Rapid Transit Terminal 3	Proj-0027	Planning	$5,000,000.00
18		Rapid Transit Terminal 2	Proj-0026	Planning	$2,000,000.00
19		Reactor container repair	Proj-0024	Planning	$10,000,000.00
20		Rapid Transit Terminal 1	Proj-0025	Planning	$0.00

You can expand and collapse a group by clicking the arrow here.

Once you have grouped the data, you can further refine the view by sorting and filtering the data within each group.

3) If you want to maintain the data in this grouping, click the **Save** icon. Whenever you open the sheet, it will display the data in this grouping.

To ungroup data

1) Click the down arrow beside the column heading.

2) Select **Clear Grouping**.

Sort the Data on a Scenario Sheet

To make data easier to locate alphanumerically on either the scenario sheet or the project candidate list, you can sort the information by column in ascending or descending order. To sort the sheet by column, click the arrow beside the column heading and choose **Sort Ascending** or **Sort Descending**.

You can also sort the data by multiple columns. To do so, hold down the Ctrl key on your keyboard and click the arrows beside the column headings you want to sort by.

Create a New Scenario

When you create a portfolio, Primavera Unifier automatically creates one initial scenario sheet. You can create additional scenario sheets.

To create a new scenario sheet

1) To add a new scenario sheet, click the plus sign at the bottom of the scenario sheet window.

Primavera Unifier adds a "new scenario" tab to the bottom of the window.

2) Enter a name for the new scenario and press the **Enter** key on your keyboard.

   You can include up to 30 characters in the name. Letters, numbers, hyphens, spaces, underscores, and special characters are allowed.

3) Click **Save All**.

   The project records that will be included on the scenario sheet are extracted from the database using a query that is part of your Portfolio Manager configuration. Whenever you create or open a scenario sheet, Primavera Unifier re-runs the query and adds or removes projects from the scenario depending on whether or not the project matches the query criteria. For example, a project that was previously on the sheet may be dropped from the sheet if it no longer meets the query criteria. Another project may be added to the sheet because it now meets the query criteria.

Edit the Name of a Scenario Sheet

1) At the bottom of the scenario sheet window, click on the tab showing the name you want to edit. The tab name becomes editable.

2) Change the name as necessary. You can include up to 30 characters in the name. Letters, numbers, hyphens, spaces, underscores, and special characters are allowed.

Copy a Scenario

1) At the bottom of the scenario sheet window, select the tab containing the scenario you want to copy.

2) Click the manage scenarios icon and choose **Duplicate Selected Tab**.

3) Click **Save**.

Primavera Unifier copies the scenario into a new tab, which you can rename. All the projects in the original scenario will be copied to the new scenario, including their linked or unlinked state, and current column widths, targets, sorting, etc. For the new scenario, Primavera Unifier will calculate the new totals and then calculate the variance to show the difference.

Click this icon.
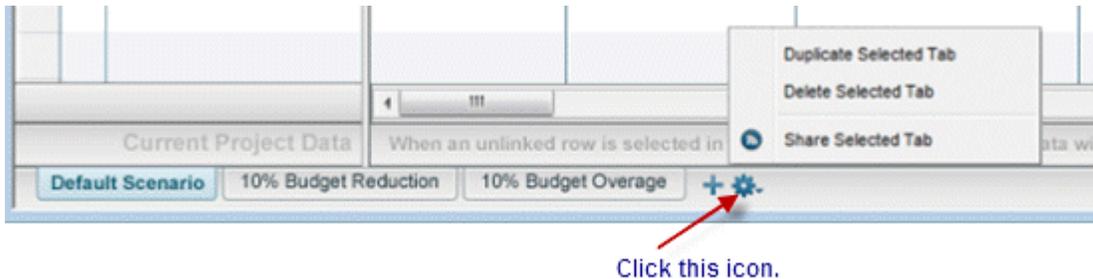
Share a Scenario

Sharing a scenario makes the budget numbers you propose available to project managers for viewing. Project managers will not see the changes you make on the scenario sheet itself. Instead, the project managers will use a read-only portfolio budget curve in their Cost Manager Cash Flow node to view both their original budget curve and a parallel scenario curve that shows the differences between their initial forecast projections and your proposed numbers.

In order for project managers to see the portfolio budge curve, you must share the scenario. For information about the portfolio budget curve, see "Creating Cash Flow Detail Curves in Projects and Shells" in Primavera Unifier Help.

You must have "full access" permission to share a scenario. You can share only one scenario at a time.

▶ **To share a scenario**

1) At the bottom of the scenario sheet window, select the tab containing the scenario you want to share.

2) Click the manage scenarios icon and choose **Share Selected Tab**.

Click this icon.
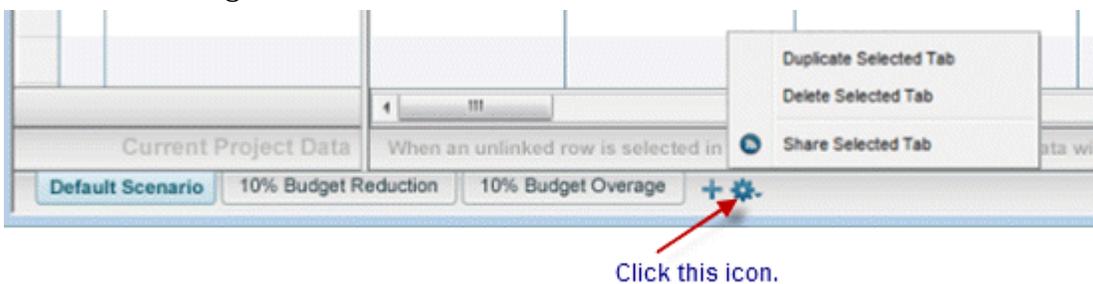
3) Click **Save All**.

Primavera Unifier visually marks the scenario tab with a "shared" icon and makes the scenario numbers visible on the portfolio budget cash flow curve for the project manager to see.

▶ *Stop sharing a scenario*

1) At the bottom of the scenario sheet window, select the tab containing the scenario you want to stop sharing.

2) Click the manage scenarios icon and choose **Stop Sharing Selected Tab**.

3) Click **Save All**.

Delete a Scenario

1) At the bottom of the scenario sheet window, select the tab containing the scenario you want to delete.

2) Click the manage scenarios icon and choose **Delete Selected Tab**.

Click this icon.
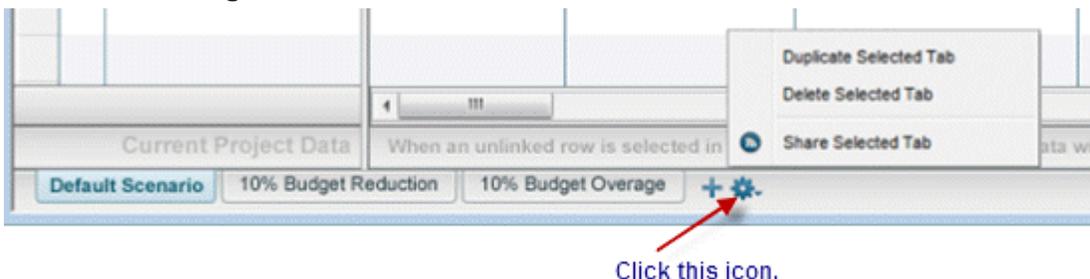
3) Click **Save All**.

Approve a Scenario

After management has approved a scenario for the portfolio, you can mark the scenario as "approved." You must have "full access" permission to approve a scenario.

Once you approve a scenario, Primavera Unifier:

▶ Marks the approved scenario "shared" so that project managers can see the approved dates and numbers. The scenario is set to read-only mode and can no longer be modified or deleted.

▶ Updates each project's original budget numbers with the proposed numbers on the approved scenario.

▶ Updates each project's monthly or yearly cash flow numbers with the proposed numbers on the approved scenario.

▶ Updates the project start date (if it was changed) for any planned projects that will begin during the portfolio's planning period.

▶ Updates the project/shell data with any project/shell information that was changed on the scenario sheet, and sends you an email notification of the updates

▶ Locks the budget and cash flow numbers to prevent any further changes.

To approve a scenario

1) At the bottom of the scenario sheet window, select the tab containing the scenario you want to approve.

2) Click the **Manage Scenarios** icon and choose **Approve Selected Tab**.

Click this icon.
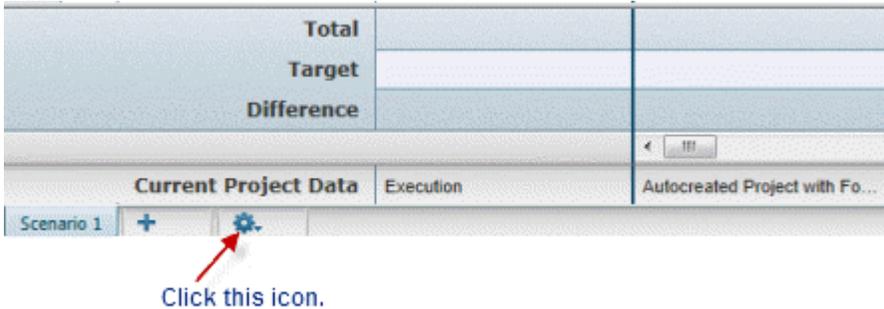
3) Click **Save All**.

   When you approve a scenario, Primavera Unifier automatically shares the scenario and visually marks the scenario tab with an **Approved and Shared** icon to indicate to project managers that this is the approved scenario.

Scenario approved and shared.
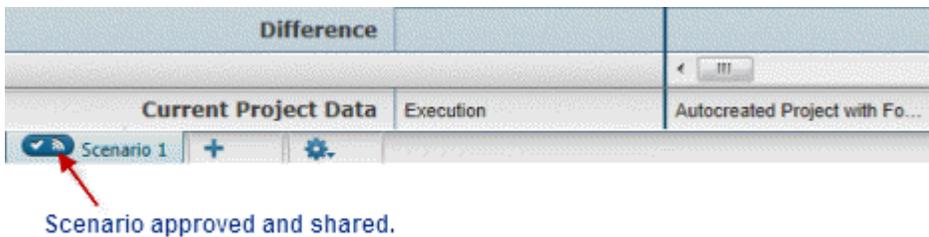
To "un-approve" a scenario

1) At the bottom of the scenario sheet window, select the tab containing the scenario you want to un-approve.

2) Click the manage scenarios icon and choose **Un-Approve Selected Tab**.

   The Portfolio Manager deletes the approval icon from the tab, but does not delete the shared icon. If you want to stop sharing the scenario as well, you must click the manage scenarios icon and choose **Unshare Selected Tab**.

3) Click **Save All**.

> **Note**: If you "un-approve" a scenario, Primavera Unifier does NOT reset dates to their original values. Date fields will retain the approved values.

Export a Scenario to Excel

To use scenario data for additional purposes, you can export your scenario sheets to Excel.

To export scenarios

Click the **Export** button at the top of the window. The Portfolio Manager will export all of your scenario sheets to Excel.

You will see a prompt at the bottom of the window, asking you to open or save the Excel sheets.

When you open the Excel sheet, it displays the data from each scenario sheet, arrayed in tabs and columns identical to the Portfolio Manager scenarios. The Excel sheet will include any formulas that were created in the Portfolio Manager for calculating values. The Excel sheet also honors the frozen columns, as well as the scrolling ability so that you can scroll through the cash flow columns.

Viewing the Portfolio Cash Flow Curve

With the Primavera Capital Planning application, you receive a capital planning cash flow that shows the following curves in an S-curve display. This cash flow is an aggregate of these curves for all the projects in the scenario.

- Baseline
- Forecast
- Original Budget
- Shared Budget
- Approved Budget
- Actuals

Once your projects are in operation and your scenario sheets are set up, Primavera Unifier will collect the curve data from the Cost Sheet in each project and produce the capital planning cash flow curves.

This cash flow curve contains a "shared" budget curve that shows your proposed numbers for the project. Project managers will not see the changes you make on a scenario sheet. Instead, they can include this curve on their cost worksheet, along with the forecast budget, or any other budget curve, in order to see the difference between the project's numbers and your proposed budget numbers.

▶ *To view the portfolio cash flow curve*

1) Go to the **All Projects** tab and switch to **User Mode**.
2) Open the project in which you want to see the cash flow curve.
3) In the left Navigator, click **Cost Manager > Cash Flow** and open the cash flow in the right pane.

Using the Document Manager

In Primavera Unifier, the Document Manager maintains all the files and documents for a project. Each project includes its own Document Manager, and another Document Manager resides at the company level. The manager ensures that employees and project members are always using the most current versions of documents and makes accessing and distributing documents efficient. Documents are organized into a "folder" structure to categorize them and make them easily available, much like a filing cabinet.

The Document Manager is integrated with business processes. You can initiate a business process directly from the Document Manager and automatically attach files and folders to it.

The **Documents** node in the navigator is where all documents—such as drawings, spreadsheets, image files, Microsoft Office files—are stored and managed. Under this node, at the project level, we have provided an extensive **Project Documents** node containing a folder structure to support an array of document types, such as Project Budgets and Schedules, Bids and Contracts, and Permits and Fees. You can upload, download, revise, or mark up all documents from this node. The Documents node has check-in/check-out, document lock, and revision history features for version control.

The **Unpublished Documents** node is the temporary, automatic repository for files that have been uploaded from local machines and attached to business processes, but which have not yet been "published" to the Documents node. When you upload a file from a local machine and attach it to a business process, the document is automatically stored in the Unpublished Documents node with a link to the business process to which it belongs. The link to the business process allows the administrator to review where the document originated from. This way, the administrator can control the documents that are accessible in the Document Manager. For example, a subcontractor might submit a Request for Information (RFI) with attached documents requesting input from the architect. The attached documents can be traced to the original business process through the link, and the documents will become available in the unpublished node. The administrator can then review the documents, decide where to store them, and publish them to the **Documents** node; or the administrator can decide not to publish them at all.

Notes:

- Attachments from text BPs, such as action items or RFIs, cannot be stored in this node because, by design, file attachments are in the comments; they are not added to the form itself.
- Drawing files are handled with the base file listed, and the associated reference files bundled with it, similar to a zip file.

Access Your Documents

▶ ***To access project documents***

1) Open the project and click **Document Manager** in the left Navigator.

2) Click **Documents > Project Documents**.

▶ ***To access company documents***

1) Go to the **Company Workspace** tab, switch to User Mode, and click **Document Manager** in the left Navigator.

2) Click **Company Documents**.

Open a Document

Documents can be opened in two ways:

▶ **Native:** Documents are opened in their native applications; for example, Microsoft Word documents are opened in Microsoft Word. This option requires that you have the native application installed on your machine in order to view the document.

▶ **Primavera Unifier viewer:** Documents are displayed in the AutoVue viewer, which can display any type of file. Documents are opened in a read-only view that supports adding graphical markups and text comments.

> **Note**: The File Viewer option is set in your User Preferences window, on the Options tab.

▶ ***To open a document***

1) Select a folder or subfolder in the folders view. The contents of the folder, including any documents, are listed in the Documents log.

2) In the log, select a document and click **Open** on the button bar, or double-click the document name. The document opens in the AutoVue viewer or native application, depending on the File Viewer option selected in User Preferences.

Copy a Document

Documents can be opened in two ways:

▶ **Native:** Documents are opened in their native applications; for example, Microsoft Word documents are opened in Microsoft Word. This option requires that you have the native application installed on your machine in order to view the document.

▶ **Primavera Unifier viewer:** Documents are displayed in the AutoVue viewer, which can display any type of file. Documents are opened in a read-only view that supports adding graphical markups and text comments.

> **Note**: The File Viewer option is set in your User Preferences window, on the Options tab.

▶ *To open a document*

1) Select a folder or subfolder in the folders view. The contents of the folder, including any documents, are listed in the Documents log.

2) In the log, select a document and click **Open** on the button bar, or double-click the document name. The document opens in the AutoVue viewer or native application, depending on the File Viewer option selected in User Preferences.

Move a Document or Folder

When a file is moved, any comments or markups are moved with it automatically. You can select and move multiple documents or folders at once.

▶ *To move a document or folder*

1) Select the document or folder in the Documents log.

2) From the **Edit** menu, choose **Move**. The Move Files/Folders window opens.

3) Select the target folder into which you want to move the document or folder.

4) Click **OK**.

Delete a Document

When you delete a document, it is moved to the Recycle Bin. Items in the Recycle Bin can be restored to their original location or permanently deleted. You can select and delete more than one document at once.

A document that is attached to a business process record is linked to it and cannot be deleted from the Document Manager. The document will show a linked records icon next to the document in the Business Process column of the document log. However, if the latest version of the document is not linked to a business process, the icon will not appear in the log. You can select the document and click **View > Revisions** to check if an older revision has linked records. In addition, a document may also contain links to business processes that are still in draft, and which will not appear as a link to the document until the record is sent.

> **Caution**: Use caution when deleting drawing-based or reference files. Deleting a linked reference file will cause the file to be marked as missing on the corresponding base drawing file.

Tip: If you need to remove a document that cannot be deleted, move it from its original location into another folder with limited user access.

▶ *To delete a document*

1) Select the document in the Documents log.

2) Click the **Edit** menu and choose **Delete**, or click the **Delete** button.

3) Click **Yes** to confirm. The document is moved to the Recycle Bin.

Upload Files

You can upload files directly from your local system into the Document Manager at the project or company level. The method for uploading files is based on the File Transfer option you chose in your user preferences: Basic (HTML-based), Intermediate (Java), or Advanced Java plus the Primavera Unifier File Transfer Utility).

The general upload procedures are the same whether you are uploading files to the Document Manager or attaching files from your local system to a business process record, cost sheet cell, etc.

> **Tip**: You can modify your File Transfer selection at any time. You must refresh the Documents node for the change to take effect. To do this, click the Documents node in the Navigator.

> **Note**: The file size for file uploads must be more than 0 bytes and less than 2 GB. Primavera Unifier cannot upload empty files from a local computer using any of the upload methods.

Upload Files Using the Basic HTML File Transfer Method

The HTML method of uploading files into the Document Manager is the most basic method. It has the advantage of allowing you to transfer files to and from the Document Manager without having to install a third-party plug-in. It allows single-file selection for uploads and downloads, and some drawing reference file handling. It does not support uploading or downloading folders, or empty documents.

▶ *To upload files using the basic (HTML) file transfer method*

1) In the project or Company Documents node, folders view, select the destination (target) folder into which you want to upload the files.

2) Click the **Upload** button or select **File > Upload**. The Upload Files and Folders window opens.

3) Click the **Browse** button and select the file to upload.

   You can add some properties information at this time in the **File Properties** box: document title, revision number, and issue date. This information is optional. This information can also be added or imported at a later time.

4) To add another file to upload, click **Add Row** and select the next file to upload.

   If you want to remove a file from the list, select the row and click **Remove**.

   Note: For more options, click the **Advanced Options** button at the bottom of the window. The File Upload window expands to reveal additional options for handling drawing and reference files and files of the same name.

5) Click **OK** to upload the files into the selected destination folder. A progress indicator will show the transfer rate and progress of the upload.

When the upload is complete, the completion summary will open. The time it takes to upload depends upon the number and size of the files. If any files failed to be uploaded, for example, duplicate file names, they will be listed on the summary.

6) Click **Close** to close the window.

> **Note**: If you have uploaded drawing and reference files marked as missing, see *Resolving Missing Reference Files* (on page 60).

Upload Files Using the Intermediate (Java) Method

In addition to its basic function, this option supports the selection of multiple files and folders for uploading and downloading. It will resolve reference file relationships in DWG and DGN drawing files. This process takes place on the server (that is, reference files should already be uploaded to Primavera Unifier or be part of the current upload process.

The procedure for uploading files using this method is the same as for the *advanced method* (see "*Upload Files Using the Advanced Method*" on page 58).

> **Note**: If you have uploaded drawing and reference files marked as missing, see *Upload Files Using the Advanced Method* (on page 58).

Upload Files Using the Advanced Method

This method uses Java in addition to the Primavera Unifier File Transfer Utility to provide the greatest flexibility and scalability for uploading and downloading files. This option supports drag-and-drop uploading and downloading of multiple files and folders. The file transfer process runs locally on your machine and will search for and retrieve drawing files from your system. You can choose to upload a drawing base file only, or a base file and references at the same time. It allows association of base files to reference files already stored in the Document Manager.

▶ *To upload files or folders*

1) In Documents node, folders view, select the destination (target) folder into which you want to upload the files.

2) Click the **Upload** button or select **File > Upload**. The Upload Files and Folders window opens.

3) Select the files to upload by doing one of the following:

   ▶ Open Windows Explorer. Select the files or folders that you want to upload and drag and drop them into the Upload window (holding down your mouse button, drag them into the Upload window, then release the mouse button). Repeat for any additional files or folders to upload.

‣ In the Upload window, click the **Add** button. Browse to and select the files or folders you want to upload. Click **Open**. Repeat for any additional files or folders to upload.

To select multiple files, hold down the **Ctrl** or **Shift** key on your keyboard and then click each file that you want to select.

For more options, click the **Advanced Options** button at the bottom of the window. The File Upload window expands to reveal additional options for handling drawing and reference files and files of the same name.

4) Click the **Upload** button.

The files will begin loading. As the files load, the progress bar shows the progress. The upload speed is dependent upon your system and connection and can take several minutes. When the upload is complete, the status and detailed log sections will be shown.

5) Review the log carefully. It will display the list of successfully uploaded files and display any errors in uploading. For example, if you try to upload two files or two folders with the same name; if you have duplicate files or folders, you will need to remove one before continuing; or if a file or folder could not be accessed on your local system for some reason.

6) (Optional) You can save a copy of the log as a text file for later review. Click the **Save to Log File** button. Navigate to the location to save the text file.

7) Close the window.

Advanced File Upload Options

Click **Advanced Options** on the upload window to reveal additional upload options.

File Upload Options	Description
Upload Reference Files	Select this checkbox if you are uploading drawing files (DWG or DGN) that have associated reference files. The Upload Reference Files options are: ‣ **Upload reference files from my computer**: The system locates the reference files on your local system based on the information in the base file header. ‣ **Auto-resolve references from project or shell Documents as Dynamic Links**: The system attempts to locate the reference file within project or shell documents based on the information in the header. As reference files are revised, the new revisions are linked automatically to the base file. ‣ **Auto-resolve references from project or shell Documents as Status Links**: The system attempts to locate the reference file within project or shell documents based on the information in the header. Even if reference files are

File Upload Options	Description
	revised, the base file continues to link to the originally linked version of the reference files.
Revise automatically if the file already exists	If you select this checkbox and upload a file into a folder that already contains a document in it with the same file name, the document will be automatically revised with the newly uploaded version. If you do not select this checkbox, you will not be able to upload a file with the same name. This is not applicable to uploading folders containing files with the same name as existing documents. Files in this case will be ignored and cannot be uploaded.
Folder Upload Options	These options are only applicable if you are using the **Advanced File Transfer** option.
Upload files only	If you select folders for uploading, only the files within the folders will be uploaded in a flat list.
Upload folders and files	Selected folders and their contents will be uploaded. If the folders do not already exist in the Document Manager, they will be created.

Resolving Missing Reference Files

If you included drawing files with reference files, and you are uploading reference files from your system, the Review References window will open. If you are using the Advanced option, the system will look for reference files on your system. If you are using the Intermediate option, the resolution process takes place on the server, so the system will expect the reference files to have been uploaded already or to be part of the current upload process.

To review and select reference files, you can:

▸ Click the **View Mode** drop-down menu and choose to view the drawing and reference files in a reference tree (displays the folder structure) or flat list (lists drawing and reference files in a flat list with path). All columns are sortable. By default, the sort will be on the link status to show all missing files at the top of the list.

▸ Review the summary portion of the window, which shows the total number of reference files to be uploaded, and if any are missing (system cannot locate them).

▸ *To manually locate and resolve missing reference files*

1) Select a file marked missing and click the **Resolve Missing** button.

2) Browse to the location of the missing reference file.

The reference file must be the same name as shown in the window (from the information in the drawing base file). You cannot choose a file with a different file name. Resolving a missing file will automatically resolve other missing reference files that have the same name and logical source path, so you do not need to resolve the same reference file on multiple base files.

3) If the wrong reference has been linked, select one or more files and click the **Unresolved** button to prevent uploading the reference. The file will remain on the list and be flagged as missing. If the file had other child references, the children will be removed.

4) Click **Next** when you are ready to upload the files.

Download Documents and Files

You can download copies of documents from the Document Manager to your local or network drive. As with uploading documents and folders, the procedure will depend on the File Transfer option you have chosen. By default, the latest version of a document will be downloaded.

▶ *To download a document (Basic file transfer option)*

1) Select the document to be downloaded. You can choose only one document at a time. Folders and empty documents cannot be downloaded.

2) From the **File** menu, choose **Download**, or click the **Download** button.

   If the document is a drawing file with reference files, the Reference window opens, listing all drawing and reference files.

3) Click the **Download** button next to one of the files to download. The File Download window opens.

4) Click the **Save** button. The Save As window opens.

5) Browse to the location where you want to download the file and click **Save**.

6) If you are downloading drawing and reference files, repeat for each file.

▶ *To download a file or folder (Intermediate and Advanced file transfer option)*

1) Select one or more documents or folders in the documents log. Empty documents cannot be downloaded.

2) From the **File** menu, choose **Download**, or click the **Download** button. The Download Files and Folders window opens.

3) Browse to the location where you want to download the files.

4) Choose a document download option:

   ▶ If you are downloading a drawing file with references, you can download the reference files. Select the **Download Reference Files** checkbox.

   ▶ Choose **Download to the same folder as the base file** or **Download to the logical path** (which downloads the files to the folder structure as determined in the base file header).

5) Choose the folder download option:

 ▸ **Download files only:** Ignores any folder structure.

 ▸ **Download folders and files:** Downloads the files in the selected folder structure, creating new folders if necessary.

6) Click **Save** to begin the download.

Adding and Viewing Graphic Markups

You can add text comments or graphical markups to a document. You can even add a file attachment directly to the comment; for example, supporting documentation. Text comments are like notes that accompany the document but do not become part of it. Comments and markups can be added to the latest version of a document only. You can view but not add or modify comments or markups made to previous versions.

Think of markups as an invisible layer, like a sheet of acetate, that can be laid over the document. If multiple users create markups, each markup is on a separate sheet and can be viewed together, one at a time, or not at all. Markups are always associated with a text comment.

Text comments and graphic markups can be copied between business process records and the Document Manager, including:

 ▸ Comments added to documents in the Document Manager
 ▸ General comments added to business process records
 ▸ Comments added to file attachments on non-document-type records
 ▸ Comments added to file attachments (line item content) of document-type records
 ▸ Markups on file attachments that have been added to comments

Add a Comment

 ▸ *To add comments to a document*

1) Open the project and click **Document Manager > Documents** in the left Navigator.

2) In the documents log, open the document.

3) Click the **Comments** button. The **File Comments** window opens.

4) Add a text comment in the **Text Comments** box. You can click the **Spelling** button to run the spell check on your comment.

> **Note**: You also have the option of adding graphic markups and attaching a file to the comment. See the following sections for details. You must add some text in order to save the **View Comment**s window, even if you are adding graphical markups or attaching a file.

5) Click **OK** to save your changes and exit the **File Comments** window.

Add a Graphic Markup

Graphic markups are added through the comments function. These are stored with the document (e.g., a drawing) in the attached comment, but do not become part of the document itself.

▶ *To add a graphic markup*

1) In the project Documents log, select the document to mark up.
2) Click the **Comments** button. The File Comments window opens.
3) Click the **Markup** button. You can also click the **Graphic Markup** link, which appears as **Add** if there are no markups on the document, or **View** if there are existing markups with this comment.

   The **AutoVue viewer** opens displaying the document content. The window opens initially in view mode, which allows you to view and print the document only.
4) In the viewer window, click the **New Markup** tool or **File > New Markup**.

   If there are existing markups, the Markup Files window opens. Each saved markup session is listed in the window. Select the checkbox by the markups to view and click **OK**.

   The viewer switches to markup mode and the markup tools become available.
5) Add graphic markups to the document as necessary, using the tools on the horizontal toolbar.

   > **Note**: Each markup is a separate entity. The navigation pane on the left shows the Bookmarks tab and Markup Tree tab. The Markup Tree tab shows the markups. Click an entity to select it and delete, modify, etc.

6) Click the **Save** button or **File > Save** to save your markups.
7) Enter a name for the markup and click **OK**.

   > **Note**: Markups are saved as a single layer and are no longer editable once you close the window. Each markup is listed by name in the Markup Tree tab (in the viewer window) as a separate layer. To add another markup layer, click the **New** button.

8) When you have completed your markups, close the viewer window to return to the File Comments window.
9) Click **OK** to save and exit the File Comments window.

Attach Files to a Comment

If you want to provide additional information regarding a comment or markup, you can attach a file to the comment. The file attachment is associated with a specific comment. If you attach a file, you must also enter text in the Text Comments window.

You can add graphical markups to files that you attach to a comment, as long as it is in Draft mode. This means that you can add the markups to the attachment as long as the comment has not yet been saved, and the file attachments are accessible from the Add New Comments portion of the View Comments window.

▶ *To attach files to a comment*

1) Open a folder and select a document in the Documents log.

2) Click the **Comments** button. The View Comments window opens.

3) Add a comment.

4) Click the **Attach** button and choose one of the following:

   ▸ **My Computer** to attach the file from your local system. The procedure is the same as for uploading files to the Document Manager and depends on your File Transfer option.

   ▸ **Primavera Unifier Folder** to attach documents from the Document Manager. The window opens, displaying the project or shell Documents files and folders. Select the files and folders to attach and click **OK**. Folders are not attached. The contents of selected folders are attached in a flat list. Documents with duplicate files names will not attach.

5) When you are done attaching files, click **OK** to save the comment with the attachment. Once you save the comment with file attachments and markups, it cannot be modified.

▶ *To remove a file attached to a comment*

1) In the **Add New Comments** portion of the View Comments window, click the link next to **Attachments**. The Attachments window opens.

2) Select the file to be removed and click **Remove**.

▶ *To mark up a file attached to a comment*

1) In the **Add New Comments** portion of the View Comments window, click the link next to **Attachments**. The Attachments window opens.

2) Select the file and click **Markup**. Follow the procedures for marking up a document.

View Comments, Markups, and File Attachments on Comments

Documents with comments or markups are displayed in the documents log with an icon in the Comments column.

▶ *To view text comments*

1) Select the file with the **Comments** icon next to it.

2) Click the **Comments** button. The View Comments window opens.

   Any previously added comments, attachments, and graphical markups are listed in the Existing Comments (lower) portion of the View Comments window. As you add new comments, markups, or attachments, they are displayed in the Add New Comments (upper) portion of the window.

   Text comments are displayed in their entirety.

▶ *To view markups per comment*

1) In the Documents log, select the document to view.

2) Click the **Comments** button. The File Comments window opens.

3) Click the **Markup** button. The AutoVue viewer opens displaying the document content. The window opens initially in view mode.

4) To switch from view to markup mode, click the **New Markup** button or select **File > New Markup** and choose which existing markups to view.

▶ *To view or download files attached to a comment*

1) In the View Comments window, if there are file attachments to an existing comment, the number of file attachments will appear as a link. Click the link next to **Attachments**. The Attachments window opens listing the attached files.

2) You can do the following:

   ▸ To view any graphical markups made on the attached file, select the file and click the **View Markup** button.

   ▸ To view the file attachment, select it and click the **View** button. The file will open in the native application or the AutoVue viewer, depending on your File Viewer option in your user preferences.

   ▸ If any of the attached files is a drawing file, select it and click the **View References** button to view the associated reference files.

   ▸ To download a file attachment, select it and click the **Download** button. Follow the procedure for downloading files from the Document Manager.

3) Close the window.

Revising Documents

To revise a document, you replace the current version with a new one that you upload from your local machine. The new file does not necessarily have to have the same file name as the original. This is also how you populate an empty document in Primavera Unifier with the completed document from your local machine.

The newest version of a document is available in the Documents log. Earlier versions can still be accessible in the View Revisions window. When a document is revised, the file itself is never changed. It remains untouched. Each version is maintained separately.

The procedures for uploading the revisions depend on the file transfer method you have chosen. The procedures for uploading revisions are the same as for uploading files.

> **Note**: You can help control revisions by locking documents or checking them out prior to revising. If you have locked the file, you must unlock it before proceeding. If you have checked it out, you can revise it by checking it in, or cancel the check out before proceeding.

▶ *To revise a document using the revise function*

1) Do one of the following:

   ▶ If you are revising a file with a new version with the same file name, proceed to the next step.

   ▶ If the revised file has a different name, select the document in the documents log, click the **Properties** button and select the **Options** tab. Be sure the **Revisions must have the same file name** checkbox is not selected.

2) Select the document in the documents log. If you are using the Advanced File Transfer method, you can choose multiple documents to revise.

3) From the **Edit** menu, choose **Revise**. The Revise File window opens.

4) Do one of the following:

   ▶ If you are using the Basic or Intermediate File Transfer option, browse to the file to upload and click **OK**.

   ▶ For Advanced File Transfer Option, select one file at a time to revise and click the **Modify** button. Navigate to and select the file revision to upload. Click **Open**.

   > **Note**: You can click the Advanced Options button to expand the window. The options are the same as when uploading files into the Document Manager.

5) Click **Upload** to upload the revised file into the Document Manager.

The publication number (Pub. No.) of the file increases by one for each revision uploaded. For example, the first time you upload a document, the publication number is 1. If you revise it, the publication number becomes 2, and so on.

▶ *To revise a document automatically upon uploading*

1) Follow the procedure for uploading documents, based on your File Transfer option.

2) In the Upload window, click the **Advanced Options** button to expand the window.

3) Select the **Revise automatically if file with same name exists** option.

   If you are uploading a file that has the same file name as a document that already exists in the Document Manager target folder, that document will automatically be revised to the newly uploaded version.

Access Previous Revisions

You can view earlier versions of a revised document, including any comments or markups or linked business processes on previous versions.

▶ *To view earlier versions of a document*

1) Open the project and click **Document Manager** > **Documents** in the left Navigator.

2) Select a document in the log.

3) Click the **View** menu and choose **Revisions**. The View Revisions window opens, listing the current version and any previous versions of the document.

4) You can select one of the versions from the list and do the following:

   ▸ Click **Download** to download the selected version.

   ▸ Click **View** to open and view the document.

   ▸ Click **Comments** to view any comments added to the selected version.

   ▸ Click **References** to view any associated drawing reference files.

   ▸ Click **Linked Records** to view the list of business process records to which the selected version may be linked.

Check In and Check Out Documents

The Document Manager's check-in and check-out feature helps you have greater control over document revisions. If you need to revise a file, you have the option of checking it out, which locks it and prevents others from modifying it. It is available to other users as view only. You can make changes to the document as necessary, then check in the new revision.

The procedure for checking out a document is similar to downloading a document. The procedure for checking in a document is similar to the procedure for revising a document.

When a document is checked out, the check-out icon appears next to the document name in the Document Manager log.

▸ *To check out a document*

1) Select the document in the Documents log.

2) Click the **Check Out** button or click **Edit > Check Out**.

3) Download a copy of the file to your local system, using the download procedure for your File Transfer option.

> **Note**: If you cancel the download procedure, the document will still be checked out to you.

The **Check Out** icon appears next to the document in the log. You can upload a new revision and check the document back in, or you can cancel the check out without revising the document.

▸ *To check in a new revision of a document*

1) Select the document in the Documents log. Checked-out documents have an icon in the lock column.

2) Click the arrow next to the **Check Out** button and choose **Check In** or select **Edit > Check In**.

3) Do one of the following:

   ▸ If you are using the Basic or Intermediate File Transfer option, browse to the file to upload and click **OK**.

   ▸ For Advanced, select one file at a time to revise and click the **Modify** button. Navigate to and select the file revision to upload. Click **Open**.

> **Note**: You can click the **Advanced Options** button to expand the window. The options are the same when uploading files into the Document Manager.

4) Click **Upload** to upload and check in the revised file into the Document Manager.

The publication number (Pub. No.) of the file increases by one for each revision uploaded.

▶ ***To restore a checked out document without checking in a new revision***

1) Select the checked out document in the Documents log.

2) Click the arrow next to the **Check Out** button and choose **Cancel Check Out** or select **Edit > Cancel Check Out**.

The document will no longer be checked out.

▶ ***To ascertain which user has a document checked out***

1) Select the checked out document in the Documents log.

2) Click the **View** menu and choose **Audit Log**. The Audit Log report displays the complete history of the document, including who last checked out or revised it.

Lock and Unlock Documents

If you are the owner of a document, you have the option of locking the document to prevent it from being revised or modified. Once a document is locked, only the document owner (or an administrator with proper permissions) can unlock it.

When a document is locked, users can:

▶ View the document, revision log, and audit log.
▶ Download or copy the document.
▶ Create a shortcut to the document.
▶ Modify document permissions.
▶ Move a document, or move the folder containing the document.

When a document is locked, users cannot:

▶ Delete, revise, edit properties, transfer ownership, or add comments or markups.

▶ ***To lock or unlock a document***

1) Select the document in the Documents log.
2) From the **Edit** menu, click **Lock** or **Unlock**.