What's New
New Features in Primavera Unifier 19

Features introduced in 19.8

🌟 Spotlight

Improved the way you can assign permissions to the Documents and Folders.

Starting with this release, you can assign permissions to files and folders from the Document Manager (DM) log (company-level, shell-level, and project-level). In a DM log, click the Actions toolbar options and click Permissions option.

You can also assign permissions to multiple items, in bulk. When you select multiple files and click Permissions, the Permissions window opens, and it will not contain any permissions, even if some of the selected documents have user permissions assigned to them. When you select multiple files and click Permissions, you need to assign permissions to the users either individually, or by way of inheriting from the parent folder, if applicable.

Alternatively, you can opt to click the gear icon and click Permissions.

👍 Other Enhancements

The removal of the top navigation switch used for toggling between classic and standard views of business processes, forms, and shell dashboards in 19.9.

Features introduced in 19.7

🌟 Spotlight

Click Open on the cost sheet to view its new inline-grid design. The layout opens in the same tab, allowing you to navigate to other nodes in Unifier. Click X in the top-right corner to close the cost sheet and return to the Cost Sheet log.
Click on a CBS Code link to open the details pane, where you can make changes, add attachments/notes, and change fund assignment order. Click the toolbar to Manage Rows, Add Columns, Forecast, Refresh, Print, Find on Page, Expand All Groups, and access Menu Options.

Add rows by hovering over a row and clicking the gear icon. Choose Add Sibling or Add Child. In the toolbar, choose Manage Rows to open the cost sheet grid over the original cost sheet.
Click Add Column in the toolbar or menu options to open the Add Column details window. Use the pull-down menu to select a data type. The datasource menu will auto-populate with data sources related to the chosen data type. Select data format, display mode, column total, and column position before creating the new column. To insert a column from the cost sheet window, right-click the heading of any column and choose Insert from menu.

In Manage Rows, add sibling and child rows to cost sheet.
Add Custom Attributes columns to a Work Breakdown Structure Sheet. Data Format is now displayed in both currency and decimal.

In the Earned Value Analysis report, set record-level permissions and schedule recurring reports. In EVA reports, select a report and assign permissions for the specific report. You have the option to select multiple reports and assign permissions for every report. You can also select a report in the EVA report list and make changes to a report in the details pane.
A linked record column is now available in the WBS Sheet. Click on the link icon in the linked record column to open details pane to the right of WBS Sheet. All records linked to WBS code appear in the details pane, where you can perform a variance analysis or run a variance analysis history. Auto-create a Variance Analysis record by right-clicking WBS Sheet record and choosing Create Variance Analysis Record.

Company authentication key is now used only for cloud admin and P6 gateway integration. As part of the upgrade process, the system will automatically create an Integration user with the company short name as the Integration User and the existing authentication key as the password.

- User Name - ${Company shortname}
- Password - {Existing authentication Key}
- First Name - ${Company shortname}
- Last Name - ${Company shortname}
- Time Zone - Company timezone as seen in the Background Jobs
- Language - Company language as seen in the Internationalization node

If a company does not have an authentication key, then the integration user will not be created.

If a customer has an integration user ${Company shortname}, then Unifier will leave it unchanged.

All web services will still be accessible by Company shortname or authentication key, and it will not have any impact on existing customer’s webservice methods.
The original authentication key remains the same for existing users.

Click on Unifier Login button in an email notification to display the E-Signature log. After signing in, Unifier displays the shell log where the E-signature will be completed.

When a business process record is linked to an email, view the linked BP list in the Standard View of business process records. When you send or reply to an email with a linked BP record, the information is recorded for that BP record. The text -- This mail and any future replies are linked to business process records -- appears in an email linked to Business Process records.
Add editable data elements to hidden blocks. This enhancement applies to all forms in Unifier. You can change the behavior of data elements from read-only to editable or editable required in a hidden block.

Tooltip is now an available field in the Data Element Properties window, enabling you to create mouse-over text for data elements in the Cost Attribute form. Users will see the mouse-over text in Cost attributes in the new Cost Sheet interface.

Reservation business processes are enhanced with a new design. Calendar buttons function in the same way as other calendar-enabled BPs – for example, zoom in and zoom out of the Calendar grid. The Reservation From and To button is editable. After saving, values selected in The From and To fields are updated in the upper form of Reservation BP. Click on schedules to opens the Usable Space Reservation screen, which is in the same space as the Room Reservations window.
Schedule of Values sheet log is now enhanced with new design. In user mode, General Spends, Payment Applications, and Summary Payment Applications are enhanced with the new log header, toolbar, grid, and right details pane.

Run recurring jobs, such as scheduled user-defined reports, for shells in specific time zones. If you do not set a shell-specific time zone, then the company-level time zone will be the default time zone for background jobs. This enhancement only impacts shells, and not standard projects.

Features introduced in 19.6
No new features are introduced in 19.6.

Features introduced in 19.5

Advance workflows to the next step as soon as the resulting action is determined. This feature allows the workflow to be advanced without waiting for all assignees to take action. When the Completion Policy of the workflow step is set to All – Majority or All – Consensus, select this option: Advance workflow when next step is determined.

Unifier auto-creates variation reports every reporting period when a Control Account is not performing. The WBS Sheet is updated with Variance Analysis, and a new tab Variance Analysis Setup is available for each WBS code.

A new preconfigured business process assigns both CBS and WBS codes to cost items, enabling you to track expenses by WBS.

Create configurable columns in the WBS Sheet. WBS Sheet now has similar functionality as the Cost Sheet. Roll-up data is available from the following sources: Activity Sheet, Cost BP sub-types WBS/CBS, EVM Sheet, and Formula columns.

Define a rate using a formula based on another cost type. When you edit the cell Price/Unit, click the Formula icon to open a formula builder window.

Attachments of Project Mailbox are now available for publishing in the Document Manager of the project/shell. Set the visibility of Unpublished Attachments under Project Mailbox in Access Control. A new folder under the Project Mailbox node contains unpublished mail attachments available for publishing.

When cash flows are created using templates, the permissions set in the Cash Flow template is carried over to all created cash flows.

New UI enhancement for Document Type BPs. Document type business processes without folders can now be sorted by Name attribute. Other UI improvements include creating, opening, revising, and removing attachments from line items. You can also now copy a folder and its content into another location. After folder creation, either create a folder or a line item.
Project Directory is enhanced with the ability to view the directory list with Users/Groups, Users, and Groups. Preview the user profiles on the right pane and send email to users and groups via the Send Email button.

Classic Payment Application BP enhanced with new UI framework. The redesigned grid is similar to the grid in the General Line Item BP.

User Defined Report Log is updated with new UI framework.

UI improvements for the Non-Workflow BP permissions and Worksheet permissions in Cost Manager. You can now assign user and group permissions in a tabular format. Permissions to multiple records can be assigned by Actions > Permissions option. Permissions to individual items can be viewed in the right pane of the respective logs.

Map pickers of the shell attribute forms to Analytic fields. Map the following pickers for both system-based and user-defined attributes: BP Data, User Data, Planning Data, User, Location, P6 Activity, and Auto-update Status Setup.

**Features introduced in 19.4**

**Spotlight**

Commitment-level cash flow curves are now supported in Analytics. In Analytics, select the Cash Flow tab to add commitment-type cash flows. The Data Mapping tab enables you to map the Data Source of the commitment curves.

Grid support in Payment Applications of Summary Payment Application SOV type is updated with new user interface including data input fields such as pickers, radio buttons, and check boxes. The Payment BP has a summary row. You can also create and modify Line Item and Cost business processes via updated grid.

Earned Value enhancements for ANSI-748:

- New node Earned Value Analysis Reports allows you to generate ANSI reports.
- Enhancements to Rate Sheet: Perform costing in Rate sheet using additional type of costs (labor, G&A) along with the standard rate. Each cost type can have categorization for reporting purposes, e.g., Direct, Indirect. The types can be defined in a priority order to calculate the values correctly.
- Assign the Control Account Manager as the owner of a business process record. When the new system data element uuu_obs_assignee is added to the OBS attribute form, then it is available in the Data Picker list. Assign an active Unifier user based on query conditions. Access control for the OBS Sheet has the permission Create and add users to Project, allowing users with this permission to add active users from the template or active project.

**Other Enhancements**
Copy workflows and detail forms from other business processes. In uDesigner Workflows, click New and select Copy From to open a selection of business process workflows to copy. Select a business process to open the Workflow Properties window.

Copy one workflow at a time. The copied workflow data contains steps and their names, action links, sub-workflows that exist in the source BP design, any S-Step auto-creation process along with BP name, and any data elements that trigger Workflow action.

All form custom elements, linked, and standard elements are copied over to the new detail form. Form properties such as auto-population and reverse auto-population are copied over. Data pickers and all pickers that are part of the design are copied over. However, references for all pickers must be established in the destination BP post copy -- referenced BPs are not copied over. Tooltips are not copied over.

UI Enhancements:

- Cash Flow Log layout is updated with current standard UI log design. Log will now have log header, toolbar, grid and columns view, and right pane. Toolbar buttons include Create, Actions, View, Refresh, Print, and Find on Page. Grid columns view allows you to order, set default sort, adjust widths, etc. Right pane is visible by default and displays informatory message.
The log layout is similar to other Standard UI logs such as Cost Sheet and Planning Sheet logs.

- New UI is now available for custom reports, enabling you to run BI Publisher reports. The new UI does not have a log for the report. When you click on the report name node, a report page displays with fields for data.

The new UI will not have a log for this report.

- For those who have permission to run audit reports, the new UI is available for capturing data related to audits. When you click on the audit reports node, the Audit Report page displays with fields for entering data.
Click the Reset button to clear out your entries. It will not clear default values set by the system.

**Choose to receive SOV values in payment applications.** At run time, whenever you open a draft or an in-flight payment record and accept the merge alert, data elements which have Do not get latest SOV values when merging checked in uDesigner will not be refreshed with latest updated values from SOV.

**Features introduced in 19.3**

**Define the log for the Business Process Picker and Data Picker.** In uDesigner, configure business processes and data pickers from the Business Process log. For existing business processes that use the Advanced log structure, there will be no change at runtime. All other business process logs will use the new Picker log. In tabs, Group By tab replaces the Navigation tab in the Picker log.

**Scan files for viruses.** All types of files, including those in Document Manager, BP record attachments, Shell image, CSV import files, etc., will be scanned. If a threat is detected, Unifier sends a notification to the user who uploaded the file.

**Other Enhancements**

**Make Announcements available in Company Administration.** Company administrators are able to create announcements and define which users see them. In the Announcements node, company administrators have the option to send announcements to users in your company. Choose between single and/or multiple records to display as system-wide announcements to users.

**Mouse-hover text for data elements is available for various managers.** Include or edit mouse-hover text for data elements on a form in code-based, record-based, space, planning, document, and activity managers.
**Master Data Element can now be read-only.** Enter data efficiently by using Dynamic Data Sets to eliminate fields that are not necessary for specific conditions. Master data element of a Dynamic Data Set can be set to Read-Only.

**E-Signature updated with ability to switch between types.** Change the default e-signature type at the company, shell, and project level. Users receive a notification when switching between e-signature types. Automatically recall tasks with change of e-signature type in shell or project properties.

**Data Pickers Queries now support OR condition.** Create database queries to enable data pickers, including user data pickers, to extract records that appear on the picker list based on one, multiple, or all conditions.

**Company name is now displayed in the Workflow Progress window.** View the company and company name of the step-assignee in the workflow progress window. Click Workflow Progress tab in business process records to view Company name.

**ANSI EVM - WBS form & Sheet.** Create a Work Breakdown Structure Sheet with custom Work Breakdown Structure attributes, assign Work Breakdown Structure picker to a Business Process, and see rolled up amount from the Business Process as a new column in the Work Breakdown Structure. Also, define control-account for a more powerful earned value analysis by assigning control-account manager, using an Organization Breakdown Structure picker.

**ANSI EVM - EVM Graph additional filtering.** Filter the Organization Breakdown Structure by adding the Control Account Manager to the filter on the Work Breakdown Structure.

**User interface enhancements:**

- **The Summary node in the Company Workspace is now the Summary tab.** Access the summary tab from the company workspace page. Organize data blocks in tiles and access tasks, notifications, and mail. Users now have the option to add multiple tabs to their company workspace dashboard.
- **Configurable Manager & Space Manager Logs are improved.** Code-based log, Code & Record, and Levels sheet log is updated with improved user interface at the company, shell, and project levels.
- **Shell landing page and Document Manager now support rolling images.** Upload multiple images to shell dashboards and see rolling images in the Image block. In the shell dashboard, click Details and select Images. Add multiple images to create a rolling display in the Summary tab of a shell dashboard. By default, images will rollover every two seconds in the image block.
- **Upload images from the Document Manager and see rolling images in the Image block.**
- **Calendar enabled in business processes.** Mini-calendar is displayed next to the Quick Entry calendar. Select years and months, irrespective of the selected view. Set time zone to display current time and day in Day and Week view.

**Features introduced in 19.2**
**Tooltip text for data elements in business processes:** View or modify system-defined tooltip text for data elements on a form. Add mouse-hover tooltips – such as mandatory text or explanation blurbs -- for data elements in upper forms and detail forms in a business process.

**Define format for query based data element:** In a business process form, view all types of values in the Query Based Data Element -- such as currency, record counts, and sum of all change orders. Also, choose to display currency symbols at the data element level.
Mark the check box to hide the currency symbol in cost-type business processes.

**Select languages:** Select the languages that are operational in your company. Display different languages at the company level and choose a default language. Change status of a language between active and inactive, and select default display. In company workspace, select the internalization node and set default language and status.

Click the Status box to select active or inactive, making the language selection visible in the application.

**Other Enhancements**
Update non-workflow BP permissions via integration: Update permissions of non-workflow records in bulk via web services. The Non-Workflow Business Process Permissions is now available for the Business Process Permissions, with Update and Get options.

Increase number of tabs in line item-type business processes: Business process forms can support up to 15 tabs to better accommodate data entry for multiple line items. Create up to 15 detail tabs, which includes the original 8 detail tabs and any query-based detail tabs.

Earned Value Enhancements:

- Assign rate sheet for actual costs: Choose a rate sheet to assign to the actual cost when assigning rates in the Activity Sheet.
- Organization Breakdown Structure: Maintain an organizational structure similar to the resource and role structures in the Master Rate Sheet. Maintain a hierarchy and define a form in uDesigner that captures all the necessary data.
- Units in graphs: The WBS and CBS can now capture units. Graphs can be switched between costs and units.

Interface and usability enhancements:

- Planning Sheet log: Planning Manager Sheet log layout now displays planning sheets in log.
- Calendar-enabled business processes: The Quick Entry Calendar is available for the Space Manager. In the calendar, view confirmed, tentative, extended, and clashing events. Next to the Quick Entry Calendar, use the mini-calendar to search through years and months relative to your selection. In the Day and Week View, see the current time in preferred time zone. You can also see upcoming events.
- Space and Level Attribute: In the Space Manager, view the Space attributes and Level attributes through an enhanced user interface, which provides minimized popups and better visibility of data.
- User/Group Picker: Choose between three different views in the picker user view, group view, and user/group view.

Features introduced in 19.1

A new user interface is now displayed in some Unifier modules, including Project/Shell cost sheet, worksheet, and work package logs. Click the icon at the top of the screen to toggle between the new (Standard) view and the previous (Classic) view.

- Business process record forms are updated for better visibility of data and access to information.
- Collapse or expand the left navigation to have a better visibility of content on the right pane.
- The new user interface of the BP form enables you to view the total amount associated with the line items that are filtered based on search parameters.
• The new user interface in Planning Manager, Classes in Code, and Record-Based Configurable Manager enables you to view attribute forms with minimized popup screens and better visibility of data.

Click icon at top of screen to switch to new view.

DocuSign and Adobe Sign can now be integrated with Unifier. Assign DocuSign or Adobe Sign to individual shells. Send Document Manager documents -- or documents attached to a business process record -- for review and electronic signatures to Unifier or non-Unifier users.

**Other Enhancements**

Select a 24-hour time format in User Preferences.

Open records when data is displayed in drillable blocks on dashboards in a Shell landing page.

Generate the Earned Value Analysis graph based on financial periods – weekly, monthly, and yearly.

In a text-type business process, view responses from other users who acted on the record. View a complete list of comments available to you while working on the record.

When a file is attached to a BP from Document Manager, republish the file back to DM using the publish path indicated on the BP form.
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Oracle Primavera Unifier What's New

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