

Oracle  
**Primavera**  
**Unifier uCAD Installation Guide**

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# Introduction

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Primavera Unifier uCAD is an AutoCAD plug-in: a desktop client application that allows space managers to graphically define levels/floors and spaces based on customer-specific space definitions and details. It works in conjunction with Primavera Unifier's Space Manager and provides a seamless integration between AutoCAD and Primavera Unifier.

Installing and configuring uCAD provides the following capabilities:

- ▶ Dynamic level and space data creation and updates between Primavera Unifier and AutoCAD.
- ▶ Ability to integrate with multiple Primavera Unifier environments by leveraging the connections created under uClient Configurator.
- ▶ Link uCAD space objects and polylines with Primavera Unifier's Space Manager Levels and Space records.
- ▶ Ability to associate attributes to drawing objects to designate their space locations.
- ▶ Ability to publish AutoCAD drawings with uCAD Space information to Primavera Unifier.
- ▶ Ability for Primavera Unifier users to view published drawings.
- ▶ Ability to keep uCAD's Space and Level attribute form designs in sync with Primavera Unifier via an Auto Synchronize feature.

For information about using uCAD refer to the following topics in the *Unifier User Guide*:

- ▶ Working with the uCAD Plugin
- ▶ Working in AutoCAD with the uCAD

# Prerequisites

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The client hardware and software requirements are the same as those specified for the Primavera Unifier system. In addition, your desktop system must have a supported AutoCAD version installed.

For hardware and software requirements, and supported versions of AutoCAD , refer to the:

- ▶ Unifier Tested Configurations for on-premises deployments
- ▶ Client System Requirements for Cloud deployments

# Installing the uCAD Application

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These instructions are for new and existing Unifier users who are installing or updating the uCAD application. You must have administrator privileges to install uCAD or uClient software.

This installation automatically installs the Unifier Client Configurator (uClient), which is used to establish a connection from the uCAD client application to one or more Unifier environments. uClient allows you to create connections to one or multiple Unifier environments, which can be later used by uCAD to communicate with the Unifier server. If you have a previous uClient release already installed on your system, the installation of a newer release will automatically update the previous version. It is not necessary to uninstall previous versions to upgrade.

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**Note:** You must install uCAD and uClient Configurator on each computer on which you intend to use the functionality. If you access Unifier from a computer where these applications are not installed, any attempt to upload, download or attach files will display an error message.

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## Download the uCAD Plug-in

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**Note:** If you have not already installed uCAD application, this installation will also install the uClient Configurator.

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### To download the uCAD Plug-in

- 1) Sign in to Primavera Unifier.
- 2) Click on the **Help** icon (the question mark symbol) link in the upper right portion of the Primavera Unifier window.
- 3) Click **Download Plugins** to open the **Support** window.
- 4) Click **Click here to download uCAD plug-in** to open the file download window.
- 5) Save the **uCADInstaller.zip** file to your machine or network drive. This zip file contains the installation file.

## Install the uCAD Plug-in

You must have a supported version of AutoCAD installed on the machine on which you will be installing uCAD.

If you have not previously installed uCAD plug-in, the installation will also install the uClient Configurator application.

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**Note:** You must have administrator privileges to install uCAD plug-in.

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### To install uCAD

- 1) Sign out of the Primavera Unifier system. Close any other open applications (especially AutoCAD) and browser windows.
- 2) From the downloaded zip file, double-click the installation file **uCADInstaller.exe** to begin the installation. The **Welcome** screen of the uCAD Setup Wizard opens.
- 3) Click **Next**. The License Agreement window opens.
- 4) Read the License Agreement, then select **I Accept the terms of this agreement**. Click **Next**. The Choose Destination Location window opens  
The application files will be installed in the following folders by default.

For 64-bit Windows, the default installation folder is C:\Program Files (x86)\Oracle\Primavera-Unifier\uCAD

For 32-bit Windows, the default installation folder is C:\Program Files\Oracle\Primavera-Unifier\uCAD

- 5) Click **Next** to start the installation process.
- 6) When the installation is complete, the Setup Complete window opens. Click **Finish** to exit the setup window.
- 7) Close any windows that may remain open on the desktop upon completion of the installation.

## Configure uCAD

After installing uCAD, you can configure it. This consists of the following:

- ▶ View uCAD connections. This allows you to verify that all necessary connections have been created. These connections are maintained in the uClient Configurator.
- ▶ You can optionally configure uCAD to automatically synchronize with your AutoCAD designs.

### To open the uCAD Configurator Window

From the Windows **Start** button, click **Start, Oracle, Primavera-Unifier, uCAD, uCAD Configurator**. The uCAD Configurator window opens, listing the connections and import options for your implementation.

### About the connections

uCAD connects to Primavera Unifier to download level-type and space-type design definitions (the properties of which correspond to the attribute forms you designed in uDesigner for the Space type and Level type records). These designs must be imported into Primavera Unifier before uCAD can take advantage of them. (Refer to the *Unifier Administration Guide* for instructions on how to design and import these forms into Primavera Unifier).

The connections between uCAD and Primavera Unifier are setup in the uClient Configurator.

### To view connection details

- 1) Open the uCAD Configurator window.
- 2) Click on each connection listed in the window. This displays the connection name and details, and the last date designs were imported.

These connections are created and maintained in the uClient Configurator.

### To access uClient Configurator and create connections

- 1) If you have not already done so, you must create the connections in uClient that will be used by uCAD. From the Windows **Start** button, click **Programs, Oracle, Primavera-Unifier, uClient**. The uClient Configurator window opens.
- 2) For details about setting up connections in the uClient Configurator, see Setting Up Primavera uClient Configurator.

### About Auto Synchronization

uCAD enables you to integrate your AutoCAD drawings with Primavera Unifier Space Manager. In order to do this, you must first import Space Manager designs into uCAD. These designs include level-type, space-type, and the data elements on the Space Manager attribute forms that have been enabled for uCAD Integration in uDesigner.

This import process can be done manually, or you can choose the uCAD Auto Synchronization option. When this option is enabled, uCAD will check for any new space types that have been imported into Primavera Unifier from uDesigner, or any changes to the data elements enabled for uCAD Integration in existing level or space types.

With Auto Synchronization enabled, uCAD tries to connect to Primavera Unifier when you open a drawing file that was previously set up with a connection to check if there have been any changes to the design. This is done in the background. If the application detects changes, you are asked if you want to import them into Primavera Unifier. If you ignore the message, you can continue working with the drawing file. If you accept the changes, close the drawing file so that uCAD can rebuild the menu structure and map data to the new imported design.

If you choose not to enable Auto Synchronization, you must manually import any new designs.

For more information about this process, see *Working in AutoCAD with the uCAD Plug-in*.

### **To enable auto synchronization of drawing file changes between AutoCAD and Primavera Unifier**

- 1) Open the uCAD Configurator window, and select the **Connections** node.
- 2) Click the **Edit** button.
- 3) Select **Auto Synchronize of Design** and click **OK**.

### **To manually import Space Manager designs for the Levels and Space types**

- 1) Open the uCAD Configurator window.
- 2) Click on a connection listed in the Connections node.
- 3) Click the **Import** button.

## **Setting Up Primavera uClient Configurator**

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The Primavera uClient Configurator allows you to create and maintain a connection to Primavera Unifier from your desktop and to create connections to different Primavera Unifier environments.

To set up the uClient Configurator, you must complete the following sequential steps:

- 1) Install the Primavera uClient Configurator
- 2) Create, or edit, a connection
- 3) Set up proxy information

### **Units of Measure**

Unifier supports the “Sq Ft” (Square Foot) and “Sq Meter” (Square Meter) units, as default units.

If you want to use any other units of measure in AutoCAD versions 2015, 2016, and 2017, you must configure those units in Unifier by following these steps:



- 1) In Unifier, go to your **Company Workspace** tab, **Data Structure Setup** node, and **click Data Definitions** sub-node to expand.
- 2) Click **Basic**.
- 3) Click **Find**, search for "SYS Space Unit of Measure," and open it. The **Modify Data Definition** window opens.
- 4) Click the **Data Set** tab, click **Add** and add your units.

Example

If you are using inches as unit of measure in AutoCAD, then add the unit by entering "Sq Inches" as the value and label.

<b>Units in AutoCAD</b>	<b>Units in Unifier Setup</b>
Inches	Sq Inches
Feet	Sq Ft
Miles	Sq Miles
Millimeters	Sq Millimeters
Centimeters	Sq Centimeters
Meters	Sq Meter
Kilometers	Sq Kilometers
Microinches	Sq Microinches
Mils	Sq Mils
Yards	Sq Yards
Angstroms	Sq Angstroms
Nanometers	Sq Nanometers
Microns	Sq Microns
Decimeters	Sq Decimeters
Dekameters	Sq Dekameters
Hectometers	Sq Hectometers
Gigameters	Sq Gigameters
Astronomical Units	Sq Astronomical Units
Light Years	Sq Light Years
Parsecs	Sq Parsecs

## Step 1: Install the Primavera uClient Configurator

The Primavera uClient Configurator is installed automatically when you install the uCAD plug-in. You must have administrator privileges to install the uClient software. Access the uCAD plug-in and installation instructions as follows:

- 1) Sign in to Primavera Unifier.
- 2) Click on the **Help** icon (the question mark symbol) icon in the upper right portion of the Primavera Unifier window.
- 3) Click **Download Plugins** to open the **Support** window.

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**Note:** The Primavera uClient Configurator will be installed when you install the plug-in.

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## Step 2: Create, or Edit, a Connection

To create a connection:

- 1) From the Windows **Start** button, click **Start, Oracle, Primavera, Unifier, uClient**. The uClient Configurator window opens.
- 2) Select **File, New Connection**. The New Connection window opens.
- 3) Enter the following information in the New Connection window.
  - ▶ **Connection Name:** Give the connection a descriptive name (for example, Primavera Unifier Production or Primavera Unifier Staging). Each connection name must be unique, and can be up to 50 characters.
  - ▶ **URL:** Use the Primavera Unifier URL address your company administrator sent you. Note: You must enter the entire address, including http or https.
  - ▶ **Company Short Name:** This is the company short name of the company to connect to. The short name is case sensitive. You can find the short name in the Edit Company window in Primavera Unifier.
  - ▶ **User Name:** Enter your Primavera Unifier user name.
  - ▶ **Password:** Enter your company authentication code.
  - ▶
  - ▶

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- 4) To ping Primavera Unifier and make sure the information you entered is correct, click the **Test** button.
  - 5) When you have completed the New Connection window, click the **OK** button. The connection is added to the Connections node in the uClient Configurator window.

To modify an existing connection:

- 1) Open the Primavera uClient Configurator window.
- 2) Click the **Edit** button. The Edit Connection window opens.

- 3) Edit the Connection Name, or your User Name or Password. The company short name and URL are not editable. If you need to change the company short name or URL, you must delete this connection and create a new one.

To delete a connection:

- 1) Open the Primavera uClient Configurator window.
- 2) Click the **Connections** node, then select the connection to delete.
- 3) Select **File, Delete Connection**. The connection is deleted.

### Step 3: Set Up Proxy Information

This step is necessary if your machine is behind a firewall. Set up proxy information as follows:

- 1) In the Primavera uClient Configurator window, click **Proxy Server**. The right pane of the window displays the current proxy server setup information.
- 2) Click the **Edit** button. The Proxy Server Setup window opens.
- 3) Select the **Use Proxy Server** option.
- 4) For **Proxy Server** and **Port**, consult your IT department for details on your local setup.
- 5) When you have completed the window, click the **OK** button.

## Uninstalling uCAD

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If necessary, you may uninstall the uCAD Application as follows:

- 1) From the Windows **Start** button, click **All Programs, Oracle, Primavera-Unifier, uCAD, Uninstall uCAD**. The uninstall process begins.
- 2) Click **Finish** to acknowledge the completion of the Uninstall process. Close the **Add/Remove Programs** window. If you uninstall uCAD, uClient Configurator will also be uninstalled automatically.

# Copyright

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Oracle Primavera Unifier uCAD Installation Guide

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