



What's New

New Features in Primavera Unifier 21

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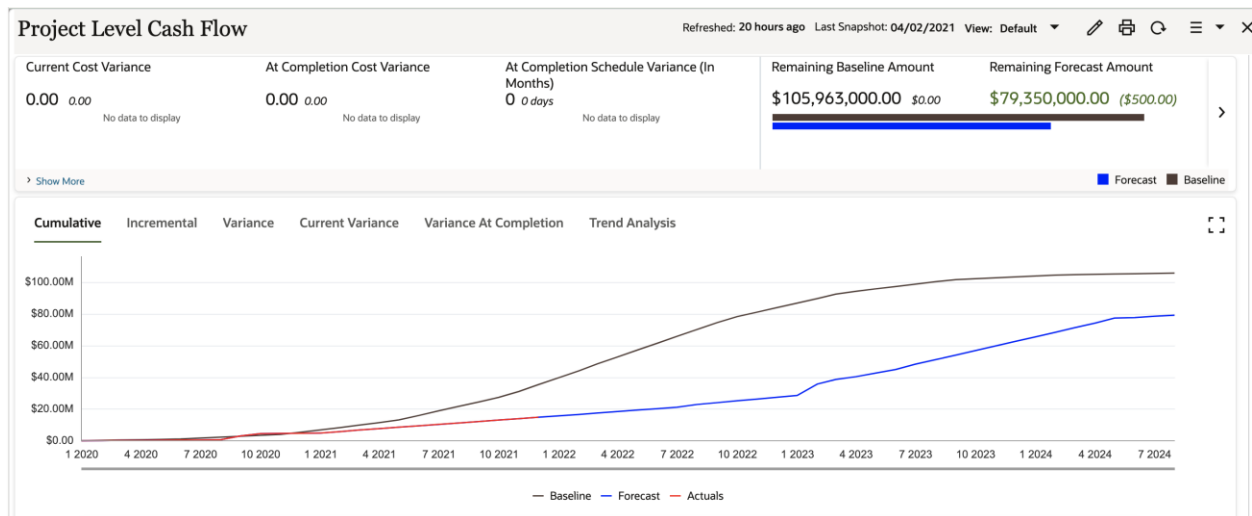
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Features introduced in 21.12

See the [Primavera Unifier](#) free video series

Removal of Features and Tools

Prior to 21.12, the Classic View of a Cash Flow was available through the gear icon. This option is no longer available.



Additional Removal of Features and Tools

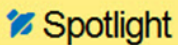
The following features and tools are removed in version 21.12:

- Classic UI in the Portfolio Manager
- Public Searches
- Xcelsius Custom Dashboards
- uCad Plug-in
- Project Performance Module & Earned Value Module
- Configuration of Discussion Groups in Workflow Business Process Setups

Admins: Please refer to the Bidder Password Changes Day 1 Impact insert on page 7.

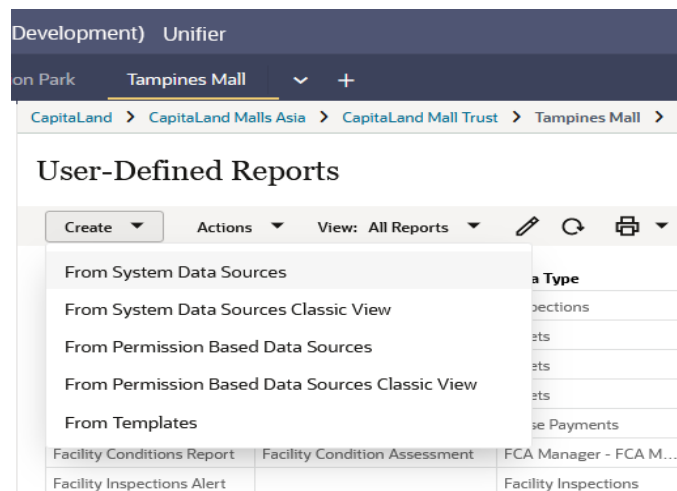
Features introduced in 21.11

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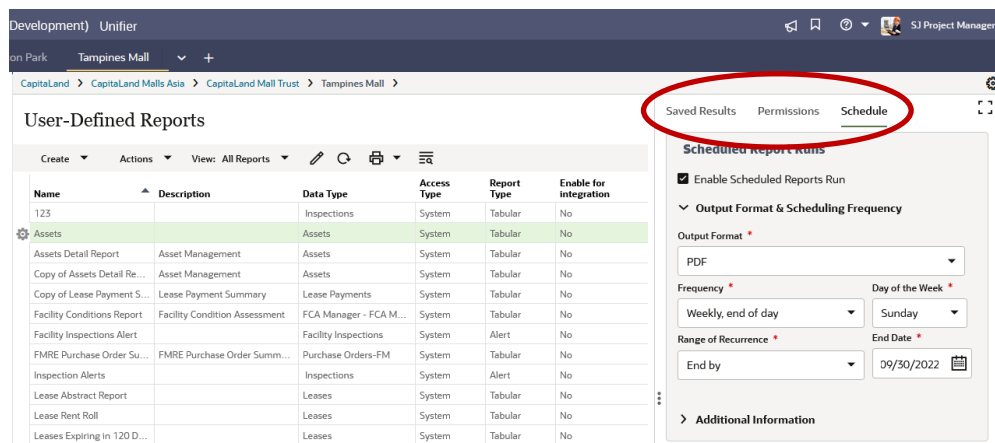


Create and Edit User-Defined Reports in the Standard User Interface

User-Defined Reports at both the shell and company levels are now presented in the Standard user interface. The Create menu offers options to create a UDR using either the Standard UI or the Classic View for all report types: tabular, cross-tabular, summary, and alert.



The details pane of the UDR log now shows Saved Results, Permissions, and Schedule tabs.



Creating a new UDR using the Standard UI is done entirely within a single frame, with tabs for functions that are specific to that report type. Shell-level UDRs also feature a tab to specify Workspaces. Put away the UDR creation window by Canceling it or click on the X at the top right corner of the window.

Push Functionality to Shell Templates

Customers can now push components from an update source shell template to their own copied shell templates. It is also possible to push components from one shell template to another shell template of the same type. At present, the following functionalities support push capability:

- Access Control
- Business Process & Workflow Setups
- Gates
- Dashboards
- Rules
- Cash Flow
- Commitment Funding Sheet
- Document Manager
- Schedule Sheets
- Custom Calendars
- General Spends SOV
- Payments SOV
- Summary Payments SOV

Microsoft Excel Support in the Bidder Portal

Bidders can now create new bid line items or update existing bid line items using a Microsoft Excel template. They can also export bid line items and update fields such as bid quantity and warranty information, add attachments, and import those lines into the bid request or add new line items to the template.

In uDesigner, the Bidder Upper Form must be set to allow adding and modifications of line items.

The screenshot shows the 'Options' tab of the Bidder Upper Form. The 'Line Items' section is circled in red and contains the following settings:

- ☒ Allow Add/Remove/Copy line items
- ☒ Allow attachments to line items
- ☒ Allow modifying line items
- ☒ Allow attachments to the saved line items

Other visible settings include:

- Select Actions:**
- Attachments:**
 - ☒ Add Attachments to record
 - ☐ Remove Attachments from record
- Source for Record and Line Item Attachments:**
 - ☐ Document Manager
 - ☒ My Computer
- Document Manager Attributes for Record and Line Item Attachments:**
 - ☒ Update attributes for already Published Documents

Users will now see the option to export and import items to and from Excel.

The screenshot shows the 'Requests for Bid' section of the Bidder Portal. The 'Line Item List' tab is active, displaying a table of line items. A context menu is open over the table, showing options to export line items to CSV or Microsoft Excel. The 'Line Item Details' panel on the right shows the details for the selected line item (005, Lighting).

No.	Short Description	Cost
005	Lighting	0.00
004	Fire Supp	0.00
003	Scaffoldin	0.00
002	Turntable	0.00
001	Requirem	0.00

Line Item Details:

- Requester Short Description: Lighting
- Bid Line Number: 0
- Short Description *: Lighting
- Unit Price *: 0.00

See also important Day 1 Impacts of bidder password changes on page 7 of this document.

Audit Log Tracking of Schedule Start Date Changes

The Audit Log in the Schedule Manager's Master Schedule Sheet will track when the project schedule start date changes due to an update in shell properties. The Audit Log will show entries for both the old and new Schedule Start Date.

Ability to Control Evaluation of Condition-Based BP Creators

Starting with this version of Unifier, a designer can choose the steps where condition-based BP Creators are evaluated by specifying an option in the workflow Action Properties. This enhancement is applicable in company and project/shell workflow business processes. In a workflow Action Properties window, check "Do not evaluate condition based on auto creation".

The screenshot shows the 'Action Properties' dialog box. It contains the following fields and options:

- ActionName:** Send for Response
- Description:** (Empty text box)
- Record Status:** (After this action) Open
- Select Data Elements to capture Action Information:**
 - Taken By:** Unifier User
 - Action Name:** Title
 - Taken On:** Select One
- ☐ Generate Event Notification ?
- ☒ Do not evaluate condition based auto creation ?

A tooltip is displayed over the 'Do not evaluate condition based auto creation' checkbox, stating: "The conditions specified for the auto creation are not evaluated for the steps where this option is enabled, which improves the performance and reduces unnecessary processing when the record moves forward."

At the bottom, there is a 'Business Process Name' dropdown, 'Add...' and 'Remove' buttons, and a 'Close' button.

Commitment Funding Sheet: UX/UI Uplift

The Commitment Funding Sheet now uses the Standard UI, following the UI structure of the Project Funding Sheet. The base record, operative currency, and the unassigned value are at the top. Icons in the toolbar include row and column controls, view management, fund assignment, find commands, and a menu for additional functions.

Enforce Uploading of Camera Photos Only in the Unifier Mobile Application

With this enhancement, an administrator can specify the device camera as the only source for attachments. This ensures that field users will not upload images from the photo gallery, and helps validate that photos were taken at the respective site and on a specific day. In the business process general configuration, enable Mobile Application and check the box to "Allow camera as the only source for attachments and image fields"

Bidder Password Changes: 21.11 Upgrade Impact

Unifier 21.11 brings in feature enhancements with regards to the way bidders' passwords are stored and managed. The feature enhancements are in support of on-premise deployments where password management is handled by Unifier. This standardization impacts 'username' creation for Cloud customers as explained in the relevant sections below. Customers should evaluate the information below, before upgrading.

What has changed?

- Bidders must access the bidder portal through the regular Unifier URL. The Bidder URL field in the Company Properties page has been removed.
- The old URLs will still work. If existing bidders use the old bidder portal URL, they will be redirected to the regular Unifier login URL.
- The landing page seen post login, is based on the user type in Unifier. When a user logs in and if the login username is an email address, then the system will check for user type associated with the username. If the username is tied to a vendor account in the Master Vendor List, then the bidder landing page will be seen.

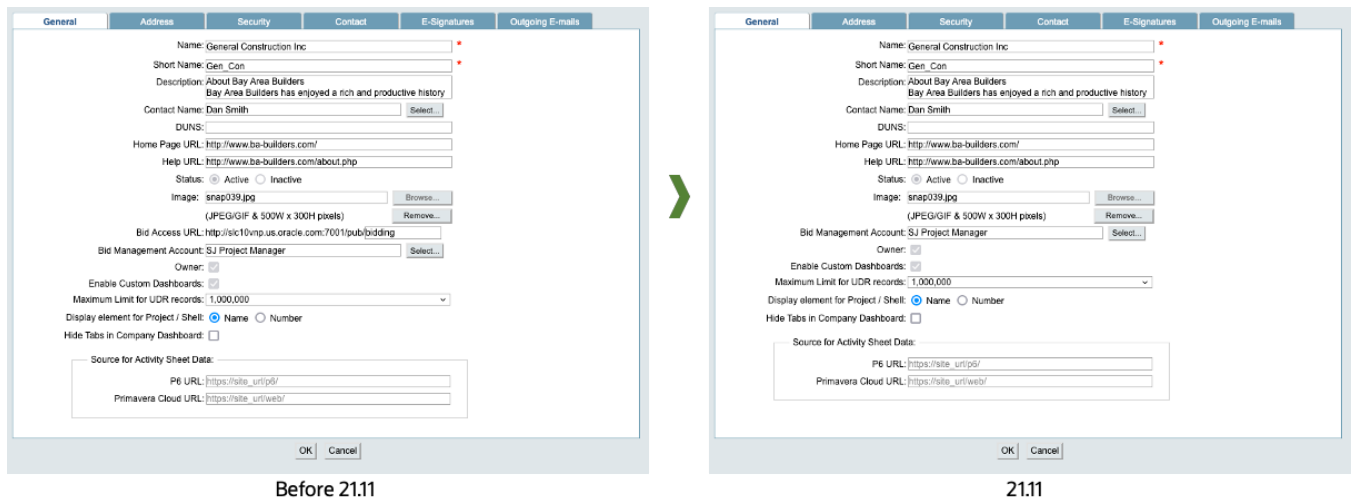


Figure 1: Unifier 21.11 does not have Bid Access URL in company properties

Why was this change made?

- To meet enhanced security compliance standards
- To standardize and simplify the login process for password management and user authentication
- Ease of use – Bidders can now change their passwords on their own without having to rely on the bid package requestor

Who is affected?

- Unifier 21.11 requires unique “login usernames” across bidder users and standard users for authentication purposes
- The potential list of bidders known as Vendors, for a given company is stored in the Master Vendor List BP (Vendor) at the Company level. For bidders who are participating in a bid, the “login username” is same as the email address entered in the data element: *uuu_user_id* in Vendor BP at the company level
- The below table lists the possible scenarios where usernames are not unique

SCENARIO	IMPACT	RESOLUTION																				
<p>Applicable to both Cloud and On-Premise customers</p> <p>If the same email address is used in the <code>uuu_user_id</code> field of multiple Vendor records of the Master Vendor List.</p> <p>Existing behavior for Cloud customers – The vendor gets created as a bidder in Primavera Administration <u>only</u> when the vendor is invited for the very first time through an RFB process in the Proposal Management tab.</p> <p>There is no change to this behavior.</p>	<p>The vendor that was created first as a bidder, will be able to login to the bidder portal.</p> <p>Example:</p> <table><tr><th>Company Name</th><th><code>uuu_user_id</code></th><th>Vendor Record creation Date</th><th>Invited as bidder on</th></tr><tr><td>C1_US</td><td>abc@company.com</td><td>Jan1 2020</td><td>Jan 31st 2020</td></tr><tr><td>C1_CN</td><td>abc@company.com</td><td>Jan1 2020</td><td></td></tr><tr><td>C1_UK</td><td>abc@company.com</td><td>Jan1 2020</td><td></td></tr><tr><td>C1_IN</td><td>abc@company.com</td><td>Jan1 2020</td><td>Jan 15th 2020</td></tr></table> <p>When abc@company.com logs in to Unifier, the user is a member of C1_IN and not C1_US</p>	Company Name	<code>uuu_user_id</code>	Vendor Record creation Date	Invited as bidder on	C1_US	abc@company.com	Jan1 2020	Jan 31 st 2020	C1_CN	abc@company.com	Jan1 2020		C1_UK	abc@company.com	Jan1 2020		C1_IN	abc@company.com	Jan1 2020	Jan 15 th 2020	<p>Ensure that the vendor emails (data element: <code>uuu_user_id</code>) for all vendor records are unique.</p>
Company Name	<code>uuu_user_id</code>	Vendor Record creation Date	Invited as bidder on																			
C1_US	abc@company.com	Jan1 2020	Jan 31 st 2020																			
C1_CN	abc@company.com	Jan1 2020																				
C1_UK	abc@company.com	Jan1 2020																				
C1_IN	abc@company.com	Jan1 2020	Jan 15 th 2020																			
<p>If a Standard, Collaborator or Portal user is created first and then a vendor with the same username is invited to bid for the first time.</p> <p>Pre-21.11 behavior for Cloud customers – Primavera Administration will not create a bidder. Pre-21.11, such a user could login to the bidder portal using the same login credentials through the dedicated Bidder portal URL.</p> <p>Existing On-premise customers – Unifier sends a different password that can be used to login to the bidder portal.</p>	<p>For Cloud and on-premise customers – Since the bidder portal has been removed, the user will always be taken to the standard Unifier landing page.</p>	<p>If a user needs to be able to login as a Standard, Collaborator or Portal user as well as be able to respond to bids as a bidder, then <u>the email addresses used for login must be different</u>. The email address used in login username field of User Properties must be different from the one used in ‘<code>uuu_user_id</code>’ field of the Vendor record.</p>																				

Is there an easy way to find login usernames that are same between regular Unifier users and Vendors?

Go to go to "My Oracle Support" (<https://support.oracle.com/portal/>) and refer to the following knowledge management article: Enhancement on How Unifier Handles Bidder Passwords (Doc ID 2819828.1)

Is there any potential solution when email address cannot be changed?

Some email servers allow aliases in the email address. As an example, both abc@company.com and abc+1@company.com may be associated with a user "abc". This user will receive emails when either of the email address is used.

In Unifier, these are treated as two different usernames. As a result when email addresses are used as login usernames, the system will allow such logins.

Suggested action - Consult your company's IT administration to check if the above is a feasible solution.

What about issues post upgrade?

The below table lists the possible scenarios that may cause issues to the enhancement and how Unifier handles such situations

SCENARIO	IMPACT	RESOLUTION
Creating a new vendor record with existing email address	Once the user tries to save/submit a vendor record, Unifier checks if the entered email exists as the username for any other vendor and for any other Unifier user. If the entered email already exists, Unifier does not allow the user to save/submit the record.	User must change the email (data element: <i>uuu_user_id</i>) and resubmit the record.
Creating a new company user or partner user.	If an Administrator tries to create the username with existing username (across regular users and bidder emails), then Unifier checks for any duplicates and does not allow the creation of a new user.	User should ensure to use a unique username for every user.

What are the other changes?

Bidder credentials

Bidders can still use the existing credentials to log into Unifier bidder portal.

Send Password Functionality (**Applicable only for on-premise and not for Cloud customers**)

With 21.11, bidders will be allowed to manage passwords by themselves

- Since bidders can now reset their own passwords, bid package requestors (RFB record owners) need not send passwords to bidder users. Hence, *Send Password* functionality will be removed from these places in RFB record: Proposal Management tab-Action menu options and in the Record Details tab of the Comparison sheet.

Send password: Pre-21.11 on left and Post 21.11 on the right

The image shows two screenshots of the 'Proposal Management' tab in the Unifier system. The left screenshot (Pre-21.11) shows a table with a status column and an 'Actions' dropdown menu. The 'Send Password' option is highlighted with a red circle. The right screenshot (Post 21.11) shows the same interface, but the 'Send Password' option has been removed from the 'Actions' dropdown menu.

Comparison Sheet: Pre-21.11 on left and Post 21.11 on the right

The image shows two screenshots of the 'Record Details' tab in the Unifier system. The left screenshot (Pre-21.11) shows a 'Requestor Estimates' section with a 'Send Password' option highlighted by a red circle. The right screenshot (Post 21.11) shows the same interface, but the 'Send Password' option has been removed from the 'Requestor Estimates' section.

Features introduced in 21.10

See the [video version on YouTube](#).

See also the [Primavera Unifier Platform](#) free video series



Bulk Creation Capabilities Using Microsoft Excel

Support for Microsoft's XLSX file format for bulk creation of business process records and line items is now extended to classic Payment Applications, SOV Summary Payment Applications, and General Spends.

The screenshot shows the Oracle Primavera Unifier (Development) interface. The top navigation bar includes 'Company Workspace' and 'JHC Faculty Building Bathroom Renovations'. The left sidebar lists various modules like Alerts, Tasks, E-Signatures, Drafts, Mailbox, Information, Gates, Document Manager, Financial Analysis, Budget Management, Commitments, Change Management, Actuals, Invoice, Journal Entry, Project Management, and Field Management. The main area is titled 'Payment Application'. A red circle highlights the 'Actions' menu, which is open, showing options like 'Export CSV Template...', 'Export Microsoft Excel Template...', 'Data From CSV File ...', and 'Data From Microsoft Excel File ...'. The background table lists payment applications with columns for Record, Title, and Vendor Pay App #.

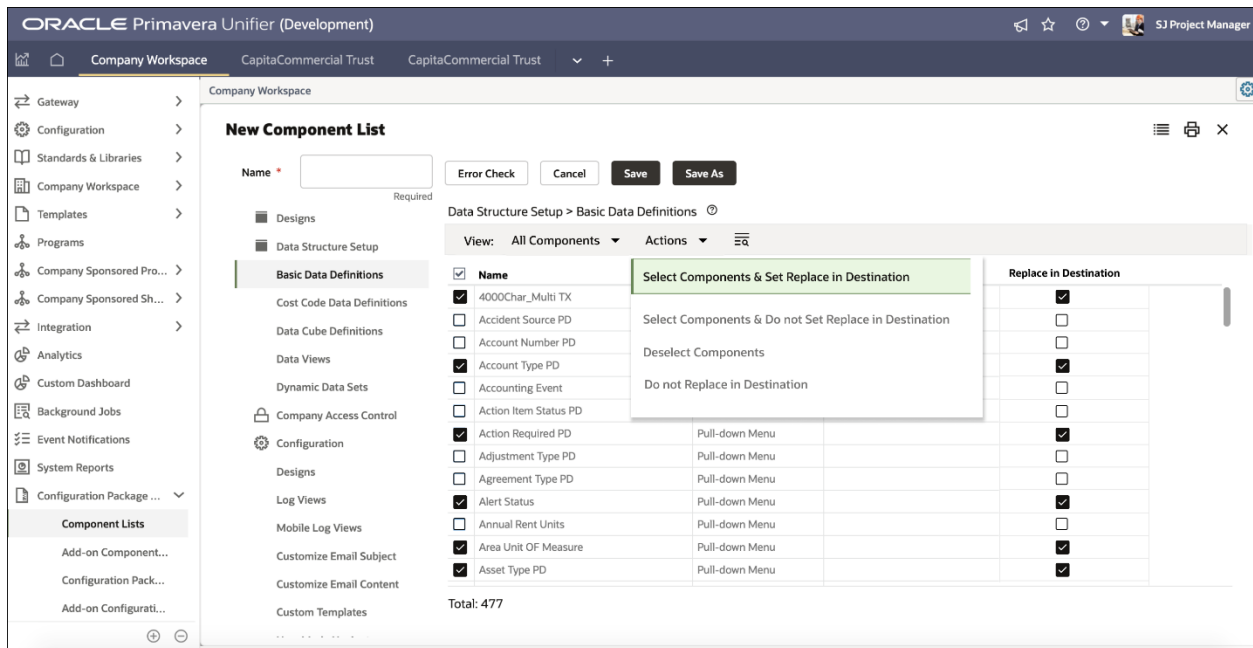
Record	Title	Vendor Pay App #
PAY-0001	Furnishings June	1233423433
PAY-0002	Furnishings May	1233423432
PAY-0003	CON-35436101 Final I...	CON-35436101-PAY-0...
PAY-0004	Contract Veum and Sons	DES-54681648 Final In...
PAY-0005	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0006	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0007	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0008	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0009	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0010	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0011	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0012	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0013	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0014	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0015	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0016	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0017	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0018	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0019	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0020	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0021	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0022	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0023	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0024	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0025	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0026	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0027	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0028	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0029	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0030	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0031	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0032	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0033	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0034	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0035	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0036	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0037	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0038	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0039	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0040	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0041	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0042	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0043	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0044	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0045	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0046	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0047	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0048	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0049	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0050	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0051	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0052	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0053	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0054	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0055	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0056	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0057	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0058	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0059	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0060	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0061	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0062	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0063	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0064	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0065	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0066	Contract Veum and Sons	CON-35436101-PAY-0...
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PAY-0068	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0069	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0070	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0071	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0072	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0073	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0074	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0075	Contract Veum and Sons	CON-35436101-PAY-0...
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PAY-0078	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0079	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0080	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0081	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0082	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0083	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0084	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0085	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0086	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0087	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0088	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0089	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0090	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0091	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0092	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0093	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0094	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0095	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0096	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0097	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0098	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0099	Contract Veum and Sons	CON-35436101-PAY-0...
PAY-0100	Contract Veum and Sons	CON-35436101-PAY-0...

The Bid Comparison Sheet also supports export to XLS file format, but CSV export is no longer supported. In the XLS file, the Requestor Estimates column is locked and the colors used in the Bid Comparison Sheet are replicated in both the Record Details and Line Items tabs.

	A	B	C	D	E	F	G
1	This file contains the proposals received for - RFB-001: Lumber for Cafeteria Building.						
2	The content of this file is for information purpose only and cannot be used to import data into the system.						
3	The upper form data has been exported into the Record Details worksheet. The line item data has been exported into the Line Items worksheet.						
4							
5	Proposals for the following Vendors have been exported along with the Requestor Estimates.						
6	Beehive Services, Southland Lumber						
7							
8		Requestor Estimates	Beehive Services	Southland Lumber			
9							
10	Total	100000	90000	110000			
11	Variance	0	-10000	20000			
12							
13	Certification	Any Legitimate certificate from USA	Construction Manager Certification Institute	American Institute of Constructors (AIC)			
14	Insurance	Any worldclass Insurance	Contractor General Liability Insurance	Builder's risk insurance			
15	Warranty	7 Years	7 Years	5 Years			
16	PM Comments	Quality is our high priority. Please make sure to deliver on time.	Price High, Reliable Contractor, Shortlisted	Least Quote, Reliable Contractor, Shortlisted			
17	Order Delivery Date	5/15/2020	5/15/2020	5/5/20			
18							
19							
20							
21							
22							
23							
24							

Configuration Package Enhancements

When importing a configuration package into an environment, you can now define which elements are updated by the new configuration package. When creating an export configuration package, you can select which components will override existing components. When importing a configuration package, you can select options to override existing components or create components that do not already exist.



No Rounding of Decimal Values in SOV Pay Apps and SPAs

In previous versions of Unifier, decimal values in SOV Payment Applications and SOV Summary Payment Applications would be rounded to two decimal places. With this enhancement, SOV Pay Apps and SPAs will honor the precision specified in the SOV sheet.

ORACLE Primavera Unifier (Development) Unifier

Company Workspace San Jose Recreation Park

Configurable Modules > All Projects > San Jose Recreation Park

Schedule of Values - Contract Summary type3 (uxcons-0017) Currency: United States Dollar (USD)

Ref	Cost Code	Code Name	Item Unit Cost	Quantity this Period	Amount this Period	Requested This Period	To Be Paid TP	Material Stored Retainage %	EAC	Commit Remaining Balance
1	1		\$0.00	0	\$0.00	\$0.00	\$0.00	0	0	\$7,000
2	1.1	01700 Execution Requir...	\$0.00	0	\$0.00	\$0.00	\$0.00	0	0	\$7,000
3	2		\$45.67	80.3528	\$3,669.71	\$3,669.71	\$3,669.71	0	0	\$5,508
4	2.1	01700 Execution Requir...	\$45.67	45.5678	\$2,081.08	\$2,081.08	\$2,081.08	0	0	\$4,547
5	2.2	01900 Administrative Re...	\$45.67	\$4,785	\$1,588.63	\$1,588.63	\$1,588.63	0	0	\$991

ORACLE Primavera Unifier (Development)

Company Workspace San Jose Recreation Park Expansion Project Test

Payment application with Summary

Record Details Workflow Progress Attachments

Payment application with Summary - Project No. SRP - 004 - Mozilla Firefox

Payment application with Summary

General Standard

Quantity	Scheduled Value	Total Previous Payments	Quantity this Period	Amount this Period	Other Amount this Period	Requested This Period	Stored Materials Amount	Completed and Stored To Date
0	\$7,000.00	\$0.00	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
0	\$7,000.00	\$0.00	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
120.5643	\$5,506.17	\$0.00	80.3528	\$3,669.71	\$0.00	\$3,669.71	\$0.00	\$3,669.71
100.0001	\$4,547.00	\$0.00	45.5678	\$2,081.08	\$0.00	\$2,081.08	\$0.00	\$2,081.08
20.5642	\$939.17	\$0.00	\$4,785	\$1,588.63	\$0.00	\$1,588.63	\$0.00	\$1,588.63

New Interface for Bookmarks

It is easier to use Bookmarks in this version of Unifier, and there is new functionality. Click and drag bookmarks to change their order and click on the four buttons at the top of the pane to set a Bookmark, remove one, rename one, or to mark – and unmark – a default bookmark. Click on the text of a bookmark to go there.

Bookmarks

Bookmark this Page Remove Rename Mark as Default

San Jose Recreation Park Expansion - Daily Reports	111
Lease Payments	111
San Jose Recreation Park Expansion - Incident Reports	111
Home - Master Service Agreements	111
Home - PM-Roles	111
Home - Employees	111
All Properties - RE00000 - All Properties - Home	111
SITE-00 - SITE-00 - Home	111
REGION-00 - REGION-00 - Home	111
Tampines Mall - Tampines Mall - Home	111
CapitaLand - CapitaLand - Home	111

User Interface / User Experience Improvements (UI/UX)

The standard interface has been applied to the following areas, with some further enhancements in some areas:

- Funding Sheet
- Cash Flows
- Line Item History
- Work Packages
- Planning Manager
- Company Cash Flow, Cost Sheet, & Funding Sheet
- Commitment Funding – Log & Sheet

- Filtered Records of Vendors
- Password Policy Link
- Cash Flows for Summary Curves
- Cash Flow Properties when Copying from a Template

UI/UX: Funding Sheets

As part of the UI/UX enhancements in the Funding Module, the standard view has been implemented for manual funding activities at the Funding Sheet, Commitment, and BP levels. Improvements over the classic view include:

1. Transactions are seen in rows, while funds are seen in columns.
2. All transactions *and* the ability to assign funds are visible in a single window.
3. Available funds are shown at the top of the window and won't scroll out.

UI/UX: Cash Flow – Audit Log & Snapshot Log

In the Project-level Cost Manager grouping node, the Cash Flow Snapshot and Audit Logs are now rendered in the standard UI.

The screenshot displays the Oracle Primavera Unifier (Development) Unifier interface. The top navigation bar shows the project path: All Projects > San Jose Recreation Park. The left sidebar contains a menu with options like Alerts, Tasks, E-Signatures, Drafts, Mailbox, Information, Directory, Gates, Configurable Modules, and Cost Manager. The Cost Manager section is expanded, showing Cash Flow, Cost Sheet, Funding, and Schedule of Values. The main content area displays the 'Audit Log: Oct 04 Large PO Cash Flow' overlay. This overlay includes a table with columns: Date, Event, Action, Field, Old Value, New Value, User Name, Proxy User, and Attachment. The table lists four update events from 10/06/2021 12:54 AM to 10/06/2021 01:50 AM, all performed by 'SJ Project Ma...'. To the right of the table, there is a legend for 'Actuals' (red) and 'Forecast' (yellow), and a small chart area.

UI/UX: Line Item History

A Line Item History will now open in a new overlay, similar to an audit or snapshot log. Right-click on any column to sort, show/hide, or prevent the column from scrolling.

UI/UX: Work Packages

Work Packages now have an interface consistent with that of the Project Cost Sheet. Like the Line Item History, you can right-click on any column to sort, show/hide a column, or lock a column from scrolling.

UI/UX: Planning Manager

The Planning Manager is now available in the standard interface – including both the Planning Sheet and Planning Items. Column groupings in the standard UI are now available in the Views menu.

UI/UX: Company Cash Flow, Cost Sheet, & Funding Sheet

Company Cash Flows can now be created and viewed in either classic view or using the standard interface.

The Company-level Cost Sheet also uses the standard interface. Because there is only one company cost sheet, there is no 'log' view. Instead, when you access the Cost Sheet in the Company workspace, you will immediately see the Cost Sheet.

Initially, no columns are shown; add those as needed. Rows are automatically shown with projects rolled up. To modify columns, right click on a column header and select "Properties". Drill down into any project's cost sheet by clicking on its number.

Day 1 Impact: users will not be able to access the "Options" tab, so they will not be able to modify account code maps.

	Project Number	Project Name	Company Cost	Estimate	Original Budget	Pending Budget Revisions	Approved Budget Revisions	Revised Budget	Original Commitments	Pending Commitment Changes
1	PRJ-008	Test Project 8	\$500.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2	PRJ-007	Test Project 7	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3	PRJ-006	Test Project 6	\$0.00		\$0.00	\$0.00	\$7,000.00	\$37,000.00	\$8,700.00	\$0.00
4	PRJ-010	Test Project 10	\$0.00		\$0.00	(\$10,000.00)	\$970,000.00	\$1,649,000.00	\$248,026.31	\$80,000.00
5	PRJ-001	Test Project 1	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6	PRJ-3333	Test 3333	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7	PRJ-2222	Test 2222	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8	PRJ-004	San Jose Recreati...	\$0.00		\$0.00	\$0.00	\$1,144,650.00	\$1,569,650.00	\$137,076,193.76	\$2,035,493.09
9	0001	sample std project	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$11,783,968.00	\$0.00
10	1123	PS CBS Shell - 5	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
11	PS-0004	PS CBS Shell - 4	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
12	PS-0003	PS CBS Shell - 3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
13	PS-0002	PS CBS Shell - 2	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14	PS-0001	PS CBS Shell - 1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$182,613.00	\$0.00
15	PR-004	Project Test 4	\$0.00	\$0.00	\$10,000.00	\$0.00	\$0.00	\$10,000.00	\$1,495.00	\$0.00
16	Test Project 3	PRJ-003	\$0.00	\$1,090.00	\$14,830,000.00	\$126,000.00	\$472,181.00	\$15,302,181.00	\$953,380.00	\$9,251.00
17	OZP-001	Oakland Zoo Proj...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
18	NPR001	New Park and Rec...	\$105,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$152,390.00	\$0.00
19	PRJ-1001	Los Gatos	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
20	PRJ-0091	FB Test Project	\$0.00	\$0.00	\$2,000,000.00	\$0.00	\$2,000,000.00	\$4,000,000.00	\$1,800,000.00	\$0.00
21	PRJ--07805	Expansion Project...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
22	PRJ-362-7526	Documentation Pl...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total			\$105,000.00	\$75,090.00	\$17,974,000.00	\$116,000.00	\$4,593,831.00	\$22,567,831.00	\$152,206,866.07	\$2,124,744.09

Cost Sheet Snapshots are also rendered in the standard interface. They retain the functionality of the classic user interface, including print, export, and finding snapshots on the page.

Snapshots are arranged in a log and open in a pop-up window to allow for comparisons from one cost sheet to another.

When you navigate to the Company Funding Sheet, right-click on the Funding Sheet to choose the standard view or the classic interface.

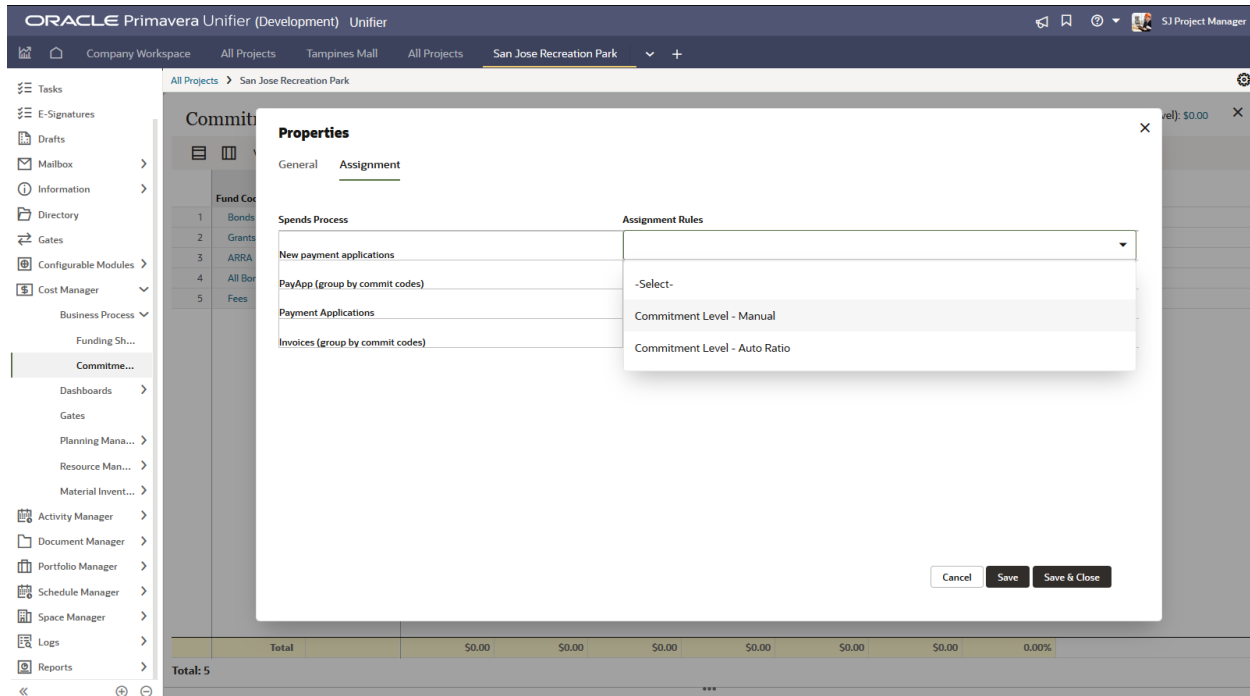
Day 1 Impact: The Filters available in the classic view have *not* been implemented in the standard interface, but they are still available under the classic view.

UI/UX: Commitment Funding – Log & Sheet

In the Funding node, the Commitment Log and Funding Sheet are both upgraded to the standard interface; similar to how SOV nodes operate.

A Commitment Funding Sheet can still be opened using the classic interface by clicking on the gear icon.

The Commitment Funding Sheet provides the option to manage rows and columns; a tabbed Properties dialog displays general information and handles assignment rules.



UI/UX: Filtered Records of Vendors

Instead of opening in a classic window, filtered vendor records now display in a new overlay window. The usual column controls apply here as well.

UI/UX: Password Policy Link

The Unifier Password Policy pane is redesigned at the user level.

UI/UX: Cash Flows for Summary Curves

The details pane of the Cash Flow log features enhancement in the interface and the basic cumulative, incremental graphs.

UI/UX: Cash Flows When Using Templates

When you create a cash flow worksheet from a template, the standard user interface is presented instead of the classic interface.

The screenshot shows the 'New Cash Flow Worksheet' dialog box in the Oracle Primavera Unifier (Development) Unifier interface. The dialog is titled 'New Cash Flow Worksheet' and has a 'Cancel' button and a 'Save & Close' button. It is divided into two main sections: 'General' and 'Curves'.

General Section:

- Name ***: A text input field with a 'Required' label.
- Description**: A text input field.
- Detail Level ***: A dropdown menu with 'Project / Shell' selected.
- Filter CBS Codes** and **Filter Summary CBS Codes**: Two radio buttons, both unselected.
- Rollup cashflow data to company/program?**: Two radio buttons, 'Yes' is selected.
- Time Scale**: A section with a 'Period Type' dropdown menu set to 'Standard Planning Period'.
- By**: A dropdown menu set to 'Month'.

Curves Section:

- Curves**: A section with an 'Add Curve' button and a dropdown menu.
- Baseline**: A curve with a green square icon, labeled 'Baseline'. It has 'Cost: Manual', 'Schedule: Manual', and 'Distribution: Manual'.
- Actuals**: A curve with a red square icon, labeled 'Actuals'. It has 'Cost: Cost Sheet - Approved Spends'.

Classic View Deprecation

The option to use the classic interface has been removed in these areas:

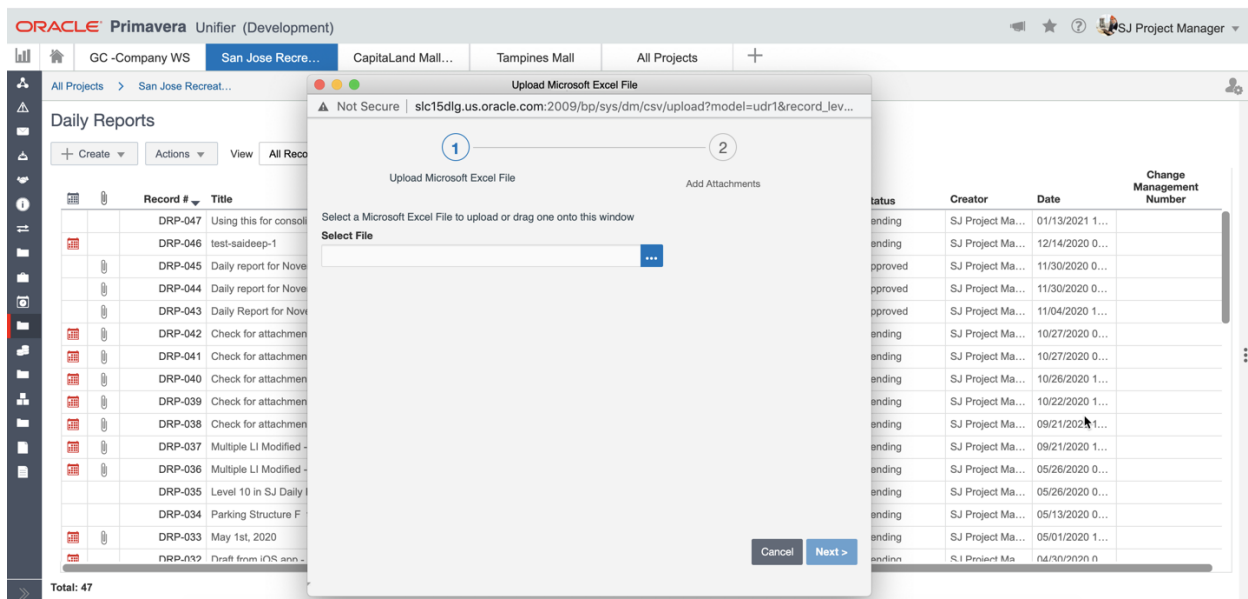
- Configurable Manager Code-Based Sheets
- Configurable Manager Code & Record-Based Sheets, and
- the Bid Comparison Sheet

Features introduced in 21.9



Microsoft .xlsm Format Now Supported

An earlier release of Unifier established the ability to use Microsoft Excel .xlsx files to import business process records and line items. This functionality supports more reliable import of Unicode UTF-8 characters found in many languages.

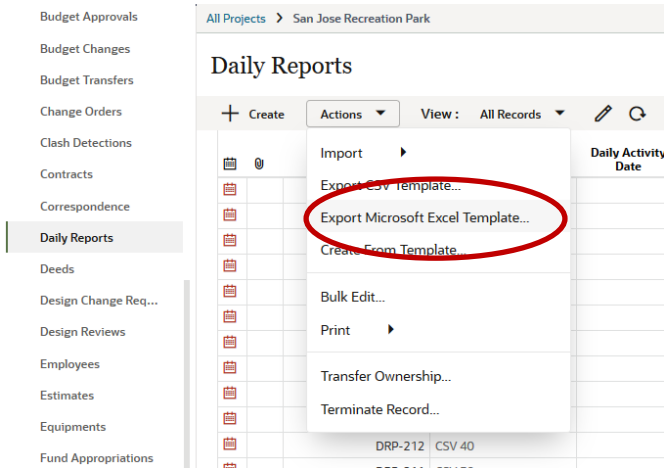


Starting with version 21.9, the Excel .xlsm file type is also supported for importing BP records and line items.

Features introduced in 21.8



Support for Bulk Creation of Records and Line Items using MS Excel Import



Previously, a user could export a CSV template and enter strings in a language using the UTF-8 character set. However, because CSV files are not compatible with UTF-8, a user would then need to use a text editor to make the file readable by Unifier.

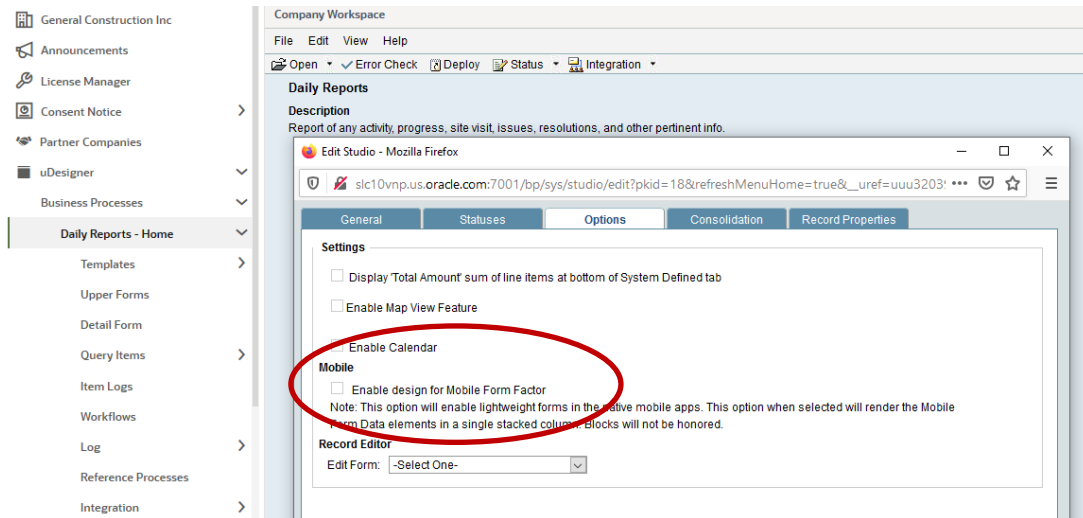
When a CSV file has Numeric or Date type fields, Unifier expects those values to be formatted as they are defined in the User's preferences. As a result, an error may occur if there is a format mismatch.

To avoid such errors, users will be able to use Microsoft Excel for the bulk creation of records – including those with line items. However, Payment Application BPs, General Spends BPs, and the RFB Bidder Portal BP do not support MS Excel imports.

Business Processes that offer template export now have an additional option to "Export Microsoft Excel Template..." Note that CSV functionality is still supported.

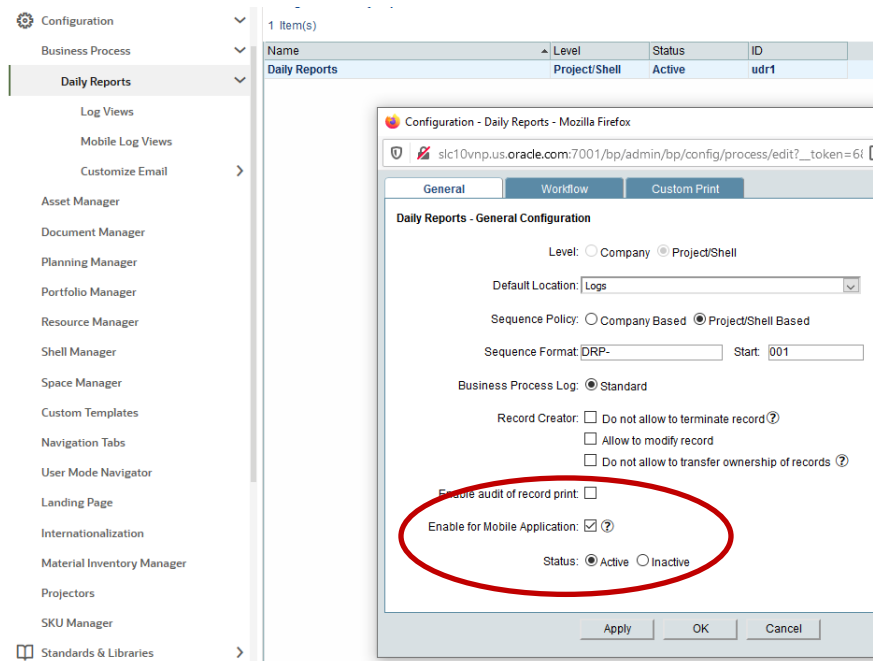
Mobile Form Factor Design

In the Options tab of the BP design, the previous label, "Enable for Mobile/Handheld" is changed to "Enable design for Mobile Form Factor". This can be enabled or disabled regardless of the published status. In the absence of a Mobile Form Factor design, the app will render the form data in the existing Standard view format.



The "Mobile Log" tab is removed from the Standard Log, Picker Log, and Line Item List. Oracle recommends that designers use Mobile Log Views to render log data in the mobile app. If no Mobile Log View is defined, the app will render the standard set of fields currently in place.

Day 1 Impact: this feature is available only to business process designs that have "Enable for Mobile Application" checked in their BP configuration and have "Enable for Mobile/Handheld" checked in uDesigner. The fields that can be added to a mobile form are those that are currently allowed and function as expected at runtime. Note that RFB and Project/Shell creation BPs cannot be enabled for mobile.



Best Practice Design Tips

1. The app will not display any required field that is in a hidden block. Design mobile elements so that an auto-population source for a required field is included as part of the mobile element list. Otherwise, field validation will prevent the user from submitting the form.
2. Any fields defined for use in auto-population, reverse auto-population, or formulas of a mobile field must be included in the mobile element list.

Audit Log Entry for Task Reassignment

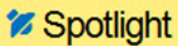
When an administrator re-assigns a task, the audit log will show the re-assignment, specifying

1. the previous assignee,
2. the new assignee, and
3. the administrator who carried out the task reassignment

Attachments	Comments	Linked Records	Linked Mail	Workflow Progress	<u>Audit Log</u>	Reference Records		
Audit Log: RFB-122								
Date ▾	Event	Action	Field	1 Old Value	2 New Value	3 User Name	Proxy User	Attachment
03/23/2021 09:43 AM	Task Reassignment	Task has been reassigned	Assignee	Janet Trillo	Amelia Bedilia	SJ Project Ma...		
03/23/2021 09:43 AM	Workflow>Bid Package Finali...	Send for Bid Initiation	Send to		SJ Project Manag...	SJ Project Ma...		
03/23/2021 09:42 AM	Workflow>Assemble Initial Bi...	Submit Bid Package	Send to		SJ Project Manag...	SJ Project Ma...		
03/23/2021 09:43 AM	Workflow>Bid Package Finali...	Send for Bid Initiation	Send to		SJ Project Manag...	SJ Project Ma...		
03/23/2021 09:42 AM	Workflow>Assemble Initial Bi...	Submit Bid Package	Send to		SJ Project Manag...	SJ Project Ma...		

Features introduced in 21.7 – Redwood Theme

See the [video version on YouTube](#).



Redwood Theme for Unifier: User Interaction & Interface Changes

Redwood is the name of Oracle's next-generation product and communication design, user experience platform, and brand design system. It's more than our applications adopting new branding, color, style, and typography; through a user-centric approach, we're continually making improvements to every task, flow, and interaction.

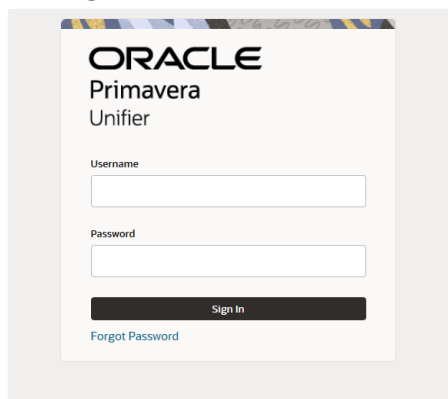
From version 21.7 onward, Unifier will be using the Oracle JavaScript Extension Toolkit (Oracle JET or "OJET"). As a result of using OJET 10.1.1,

1. OJET components used to build user interface screens are implemented as-is,
2. No changes are made to the native component behavior, and
3. Most components will provide keyboard navigation.

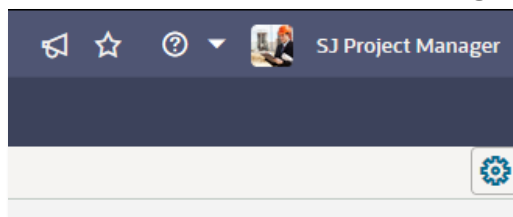
User interface screens in Unifier User mode that use OJET have undergone changes, primarily in colors, icons, and the font.

Here are highlights of the changes between the current version of Unifier and previous versions. For a video tour, see [our YouTube playlist](#).

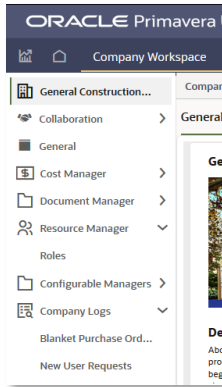
- The login screen has been updated.



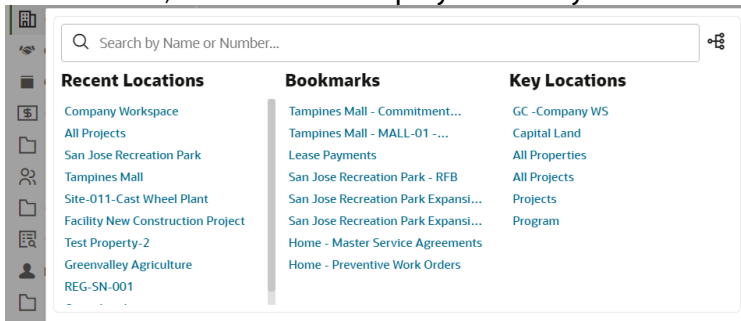
- The admin mode switch is now a cog with a square outline when it is enabled.



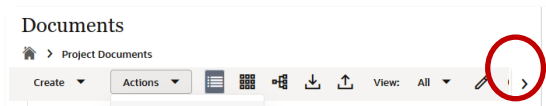
- The navigator now uses single-angle brackets to show or hide sub-nodes.



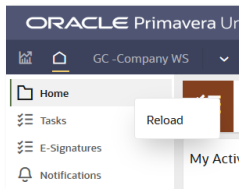
- Icons in the Navigator have been updated.
- In a new tab, a scroll bar is displayed when you hover over a long list.



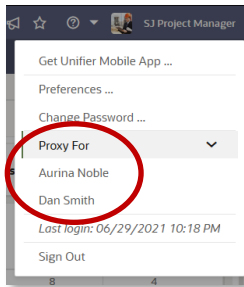
- Within toolbars, a multi-row arrangement is replaced by a single-angle bracket indicating there are more tools to use.



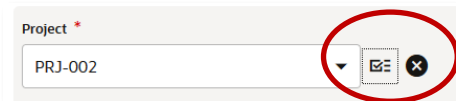
- When a log pane is narrow, the bottom information strip can be scrolled left and right.
- In previous versions of Unifier, each node in the navigator was a hyperlink. Now, right-click a node to refresh the screen and reload the log data.



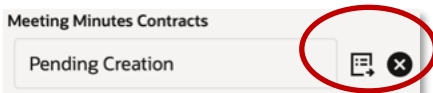
- When you want to act as a proxy user, the list of available users is shown in-line, rather than to the left of the user menu.



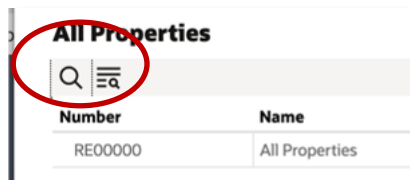
- When there's a sub-menu – such as within an Actions item menu-- the arrow has moved closer to the text label.
- In Date and Date/Time fields, the options to select "Today" and "Now" are no longer available.
- For quick searches, there is no separate search field. Instead, clear the word "Select" and then begin typing any sequence of letters.
- The word "Select" no longer appears in lists of values within pull-down fields.
- To clear the value in a pull-down field, highlight it and then press delete or backspace, followed by “enter” or a tab.
- When entering text, a required field has a label at its bottom-right corner; when you begin entering text, a character limit may be displayed.
- For a field that uses a picker, both the Selection and Clear buttons are no longer inside the field area; they are now outside the field, to the right.



- For fields that include BP manual auto-creation, the "Create" and "Clear" buttons are outside the value area.



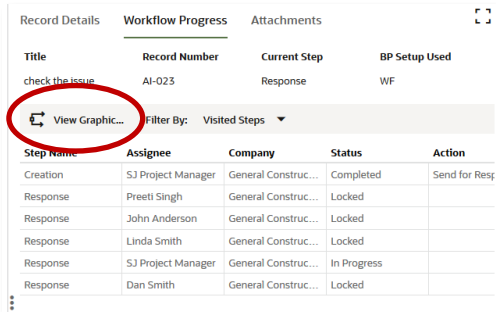
- The Comments area associated with a BP record is differently styled.
- The "Search" and "Find on Page" text actions are now represented by icon buttons in the same location.



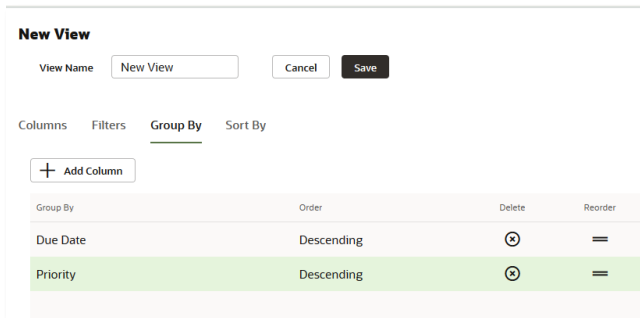
- The appearance of read-only fields has been changed.
- Icons for common actions have been updated.



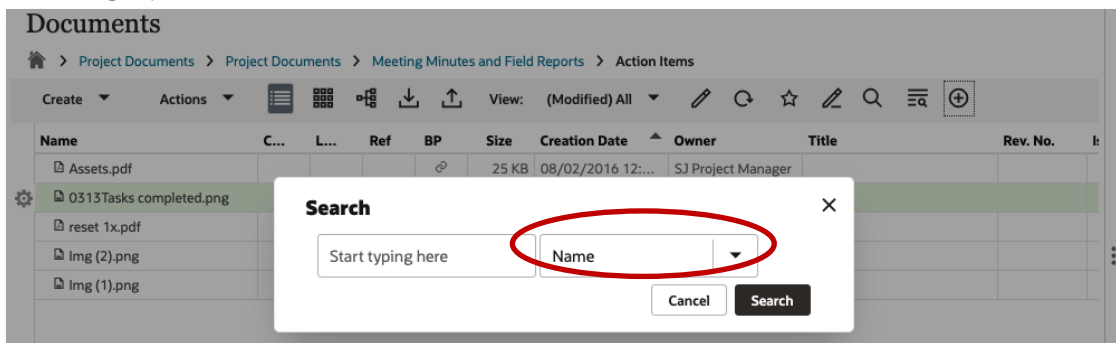
- Action buttons are inactive until a record is selected
- In User and Group pickers, the appearance of the Group indicator has changed.
- The location of the View Graphic button in the Workflow Progress tab has changed. It is now just above the progress log, above the Step Name.



- When editing or creating a new View, the Group By and Sort By tabs now use a table structure. The gear menu has been replaced with a single Add Column button. Controls to delete or reorder criteria are included in the table itself.



- And finally, in the Document Manager, Search now includes a separate drop-down for the category to search within.



Revision of Deprecation

In What's New 21.2, the notice of deprecation included all the functionality of Programs. As of 30 April 2021, User-Defined Reports and Custom Reports within Programs **will continue to be supported**; all the other functionality of Programs **will be deprecated**, including Summary, Cost Manager (Cash Flow & Cost Sheet) and Schedule Manager (Schedule Sheets & Activity Sheets).

21.4 – Deprecation Notice

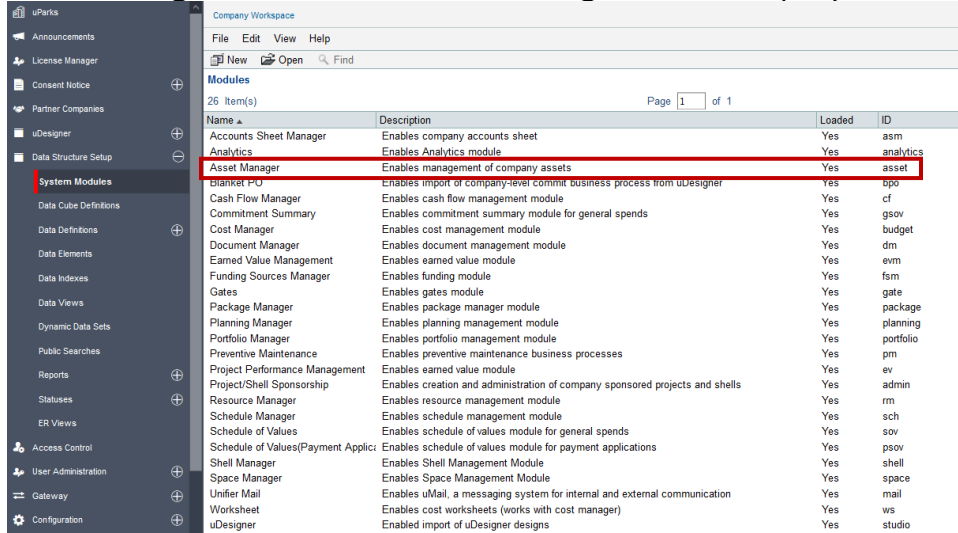
Support for the following items is deprecated. While they are supported in the current release of Unifier, they may not be supported in a future release.

1. **Business Processes of type Resource & Sub-Type**
 - a. **Resource Booking** – Resource booking business processes track personnel assignments at the company and shell levels. These BPs go through an assignment workflow to fill the personnel openings for a project. The process draws personnel only from the allocated roles on a project's or shell's allocation sheet.
 - b. **Timesheet** - Timesheet business processes track reportable time for personnel at both the company and project/shell level. They are used by individual personnel to enter hours worked. A timesheet BP is created under the Resource Manager, but is considered a type of cost BP in that it integrates with the Cost Manager to use cost codes at the company and project/shell level.
2. **uCAD - Unifier Plugin for AutoCAD:** uCAD enables you to integrate your AutoCAD drawings with Primavera Unifier.
3. **Custom print using Word & Adobe lifecycle** - In the Business Process Configuration window, the Custom Print tab allows you to customize the layout of a document, using either MS Word® (leveraging the XML style design) or PDF format (using Adobe® LiveCycle® Design View.)
4. **AutoVue Stamps** – This functionality enabled you to use AutoVue stamps in Unifier and can be used when files are reviewed using AutoVue
5. **XRef analysis** – Drawing files references i.e., files with extension 'dwg' & 'dgn' will not be scanned for references
6. **Public Searches** seen under Data Structure Setup – Previously, you could save searches for reuse in business process logs. The searches that you save are available in the logs for you to reuse, and to be used by other users as well if you mark your saved searches as public.

21.2 – Deprecation Notice

Support for the following items is deprecated. While they are supported in the current release of Unifier, they may not be supported in a future release.

1. **Asset Manager:** this module enables management of company assets.

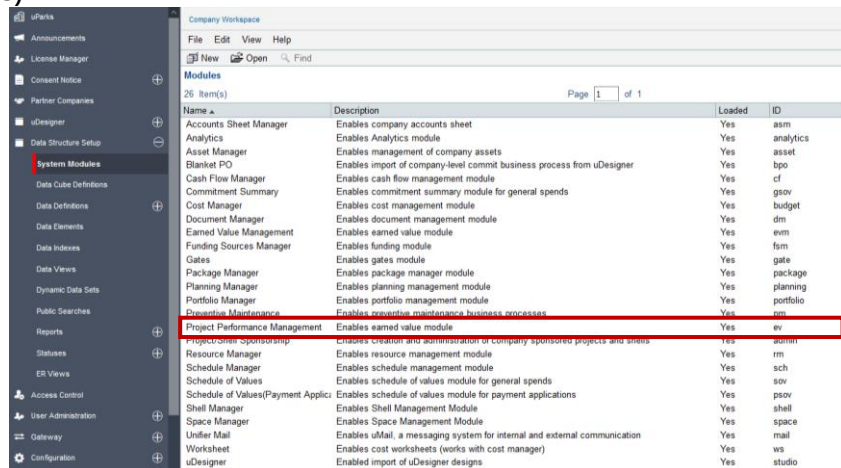


The screenshot shows the 'System Modules' list in the Unifier application. The 'Asset Manager' module is highlighted with a red box. The table lists 26 modules, each with a name, description, loaded status, and ID.

Name	Description	Loaded	ID
Accounts Sheet Manager	Enables company accounts sheet	Yes	asm
Analytics	Enables Analytics module	Yes	analytics
Asset Manager	Enables management of company assets	Yes	asset
Blanket PO	Enables import of company-level commit business process from uDesigner	Yes	bpo
Cash Flow Manager	Enables cash flow management module	Yes	cf
Commitment Summary	Enables commitment summary module for general spends	Yes	gsdv
Cost Manager	Enables cost management module	Yes	budget
Document Manager	Enables document management module	Yes	dm
Earned Value Management	Enables earned value module	Yes	evm
Funding Sources Manager	Enables funding module	Yes	fsm
Gates	Enables gates module	Yes	gate
Package Manager	Enables package manager module	Yes	package
Planning Manager	Enables planning management module	Yes	planning
Portfolio Manager	Enables portfolio management module	Yes	portfolio
Preventive Maintenance	Enables preventive maintenance business processes	Yes	pm
Project Performance Management	Enables earned value module	Yes	ev
Project/Shell Sponsorship	Enables creation and administration of company sponsored projects and shells	Yes	admin
Resource Manager	Enables resource management module	Yes	rm
Schedule Manager	Enables schedule management module	Yes	sch
Schedule of Values	Enables schedule of values module for general spends	Yes	sov
Schedule of Values(Payment Application)	Enables schedule of values module for payment applications	Yes	psdv
Shell Manager	Enables Shell Management Module	Yes	shell
Space Manager	Enables Space Management Module	Yes	space
Unifier Mail	Enables uMail, a messaging system for internal and external communication	Yes	mail
Worksheet	Enables cost worksheets (works with cost manager)	Yes	ws
uDesigner	Enables import of uDesigner designs	Yes	studio

2. **Resource Manager:** sub modules of the Resource Dashboard and Resource Sheets will be deprecated; Roles and Resources will remain.
3. **Custom Dashboards:** Dashboards (based on SWF) using the Xcelsius framework will be deprecated.
4. **Space Manager:** Sub-modules of Design Viewer and the AutoCAD will be deprecated. This does not impact the core Space Manager functionalities of Level and Space records, the Levels Sheet, and Stack Plans
5. **Programs:** Within Programs, User-Defined Reports and Custom Reports *will continue to be supported*; all the other functionality of Programs will be deprecated, including Summary, Cost Manager (Cash Flow & Cost Sheet) and Schedule Manager (Schedule Sheets & Activity Sheets).

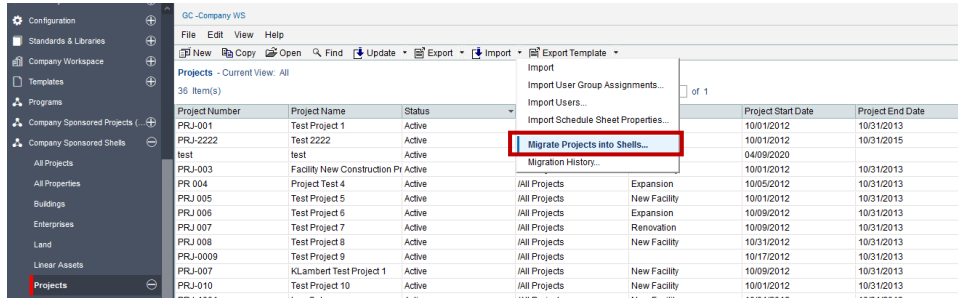
6. **Project Performance Management**
(formerly Earned Value Management):
This is Cost Manager
Earned Value;
deprecation of this
module does not
impact users with
Earned Value
licenses.



The screenshot shows the 'System Modules' list in the Unifier application. The 'Project Performance Management' module is highlighted with a red box. The table lists 26 modules, each with a name, description, loaded status, and ID.

Name	Description	Loaded	ID
Accounts Sheet Manager	Enables company accounts sheet	Yes	asm
Analytics	Enables Analytics module	Yes	analytics
Asset Manager	Enables management of company assets	Yes	asset
Blanket PO	Enables import of company-level commit business process from uDesigner	Yes	bpo
Cash Flow Manager	Enables cash flow management module	Yes	cf
Commitment Summary	Enables commitment summary module for general spends	Yes	gsdv
Cost Manager	Enables cost management module	Yes	budget
Document Manager	Enables document management module	Yes	dm
Earned Value Management	Enables earned value module	Yes	evm
Funding Sources Manager	Enables funding module	Yes	fsm
Gates	Enables gates module	Yes	gate
Package Manager	Enables package manager module	Yes	package
Planning Manager	Enables planning management module	Yes	planning
Portfolio Manager	Enables portfolio management module	Yes	portfolio
Preventive Maintenance	Enables preventive maintenance business processes	Yes	pm
Project Performance Management	Enables earned value module	Yes	ev
Project/Shell Sponsorship	Enables creation and administration of company sponsored projects and shells	Yes	admin
Resource Manager	Enables resource management module	Yes	rm
Schedule Manager	Enables schedule management module	Yes	sch
Schedule of Values	Enables schedule of values module for general spends	Yes	sov
Schedule of Values(Payment Application)	Enables schedule of values module for payment applications	Yes	psdv
Shell Manager	Enables Shell Management Module	Yes	shell
Space Manager	Enables Space Management Module	Yes	space
Unifier Mail	Enables uMail, a messaging system for internal and external communication	Yes	mail
Worksheet	Enables cost worksheets (works with cost manager)	Yes	ws
uDesigner	Enables import of uDesigner designs	Yes	studio

7. **Standard Projects:** (also known as Company Sponsored Projects) will be deprecated. Company Administrators are advised to migrate these projects to Company Sponsored Shells of CBS Cost Code type. This migration can be done using the option “Migrate Projects into Shells...” under the Import toolbar option of a CBS Shell Type



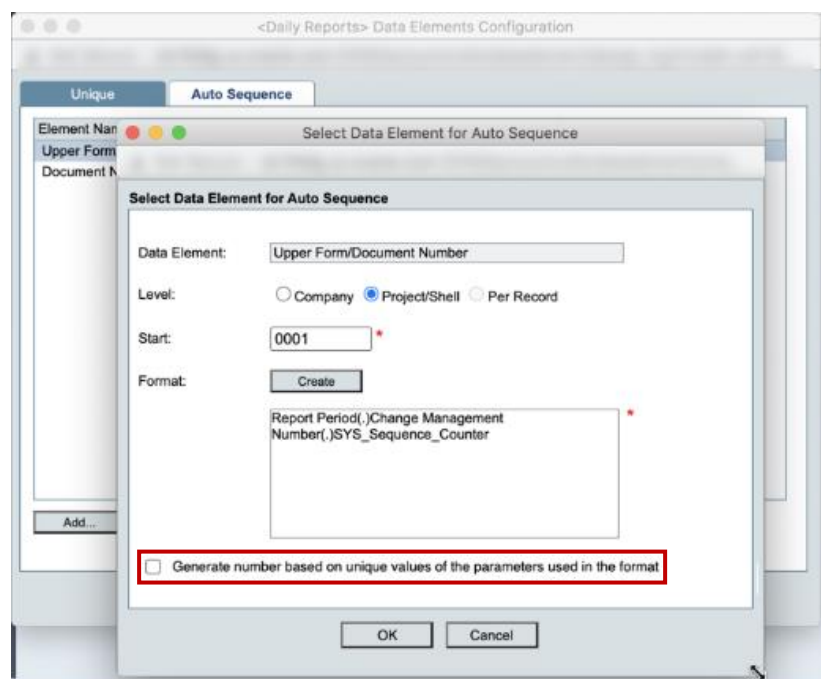
Features introduced in 21.6

Generate Sequence Numbers based on Unique Parameter Values

This feature is available for all business processes where auto-sequence numbering is currently supported. Automatic sequence numbers can now be created based on the parameters used in the formula definition. The auto-numbering sequence can be checked so that it is conditionally incremented. For example, in the Correspondence BP, document numbers can be incremented based on type.

<u>Record</u>	<u>Doc Type</u>	<u>Sequence</u>	<u>Document Number</u>
Record 1	Engineering Design	001	Engineering Design.001
Record 2	Engineering Design	002	Engineering Design.002
Record 3	Master Plan	001	Master Plan.001
Record 4	Engineering Design	003	Engineering Design.003
Record 5	Master Plan	002	Master Plan.002

In uDesigner, enable this by checking the box labeled “Generate number based on unique values of the parameters used in the format”.



Note: The **first** time the option is switched from unchecked to checked, the sequence numbering will start from the value specified in the 'Start' field of the "Select Data Element for Auto Sequence" setup. Subsequently numbers are incremented based on the last generated number.

If the option is switched back **off**, the sequence will continue from the previously generated number, unless the value in the 'Start' field has been changed.

Features introduced in 21.5

Support for Mobile Log Views

A Unifier administrator can now define mobile views for end-users, providing only relevant data. This eases processing demands on mobile devices, saves users from having to create filters, and reduces the amount of data being transferred.

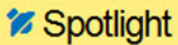
Working as an administrator, go to the Company Workspace > Configuration > Business Process. Any BP that is enabled for mobile has a new sub-node titled Mobile Log Views. Create one or more mobile-specific views with up to five columns in each view.

The screenshot shows the Oracle Primavera Unifier (Development) interface. The top navigation bar includes the Oracle Primavera logo and the text 'Unifier (Development)'. Below this, there's a breadcrumb trail: 'Company Work...' > 'Projects All' > 'Tampines Mall' > 'Oakland Zoo Pr...' > 'San Jose Recre...' > 'Projects All'. The left sidebar contains a list of navigation items: General Construction Inc, Announcements, License Manager, Consent Notice, Partner Companies, uDesigner, Data Structure Setup, Access Control, User Administration, Gateway, Configuration, Business Process, Daily Reports, Log Views, Mobile Log Views (highlighted), Customize Email, Document Manager, and Planning Manager. The main content area is titled 'Company Workspace' and 'Mobile Log Views'. It features a '+ Create' button and a 'Manage Views...' button. Below these buttons is a table with the following data:

No.	Name	Status	Last Modified Date	Last Modified By
1	All Reports	Active	05/04/2021 10:31 PM	SJ Project Manager
2	My January Reports	Active	05/05/2021 09:38 PM	SJ Project Manager
3	May Reports	Active	05/05/2021 09:38 PM	SJ Project Manager

Features introduced in 21.4

See the [video version on YouTube](#).



Bluebeam Integration

- A user can choose whether a Review comment in Bluebeam becomes a line item in a Unifier report.
- Unifier also offers an interface to map attributes from comments and markups in a Bluebeam review session to Unifier data elements.
- Unifier can gather document markups and generate a checklist of items consisting of reviewers' comments.

Cash Flow Curve Upgrades

Activity sheets can be a data source for Cash Flow curves.

- Cash Flow CBS-type Baseline and Forecast curves at the Activity level can receive schedules for CBS Codes at the activity level from an Activity sheet.
- Cash Flow project/Shell Detail curves of both Baseline and Forecast type can be defined with schedule dates from Activity sheets.
- Cash Flow Project/Shell, CBS, and Summary CBS Actuals curves can receive data from Cost Sheet columns or from actual cost spread from the System Activity Sheet.

A Cash Flow Detail Curve can be created from within a Base Commit business process, either manually or using a template. The standard user interface is now used for Cash Flows and Worksheets.

The new UI is also used when you invoke a Schedule of Values from within a business process.

RFB: Hide Requestor Estimates from Bidders

When issuing a Request for Bid, the requestor can include estimated unit costs and amounts in the Requestor Package. However, the requestor may want to hide these from bidders. In uDesigner, open the Options tab of the General screen of the Requests for Bid business process. Choose which fields should be reset when a bidder is viewing a Detail Form, thus hiding estimated values from the bidder.

Existing customers who have leveraged the “Do not copy the values of these Bidder Detail Form fields from Requestor Detail Form” introduced in version 20 of the Request for Bid BP design will see the following changes in the bidder portal:

1. Line Items in the **Requestor Package > Standard tab** will have blank fields. This is applicable to all the previously submitted, closed bid RFB records.

2. If a bidder has already started creating the bid package post acceptance of the bid invitation, and in between the design has changed in uDesigner, line items in the "**Your Proposal**" tab will still show the values in the fields that were not meant to be copied over. (Note for future reference - Bidder line items are inserted from the Requestor Line Items into the database, once the bidder accepts the bid invitation. Subsequently, the line item values are fetched from the database. Changes made in uDesigner will not be reflected in the line items already coming from the database.). However, if the bidder is creating new line items, then the uDesigner options will be applicable.
3. If no changes are made in the design post-upgrade, any data element mentioned in the uDesigner Options tab will continue to be honored while the bidder is creating new line items in the "**Your Proposal**" tab. Note that the data element may have existed only in the Bidder detail form.
4. Undo accept behavior post-upgrade: If the bidder decides to withdraw the bid participation and does an Undo Accept, then all the line items in '**Your Proposal**' will be deleted. The next time that the bidder chooses to **accept** the bid invitation, the new line items that will get inserted into the '**Your Proposal**' tab will honor the latest settings in uDesigner.

Rate Sheet Supports Manual Creation

The Master Rate Sheet now allows manual definition of resources and roles; you can then assign those to activities created in a custom Activity Sheet. Within a user-defined view of the Master Rate Sheet, you can add new resources and roles as well as the default number of units per day and standard rates for those resources.

WBS Hierarchies in Manual Activity Sheets

Activity Sheets have been upgraded to show the WBS hierarchy within the Activity Sheet. User-defined views allow you to add, edit, and remove both column and row data in a user-defined view. Notes can be added to tasks and activities. Project activities can be scheduled based on the data date; the Activity Sheet can also be used to view project history.

WBS Enhancements

Work Breakdown Structure Sheets have been enhanced with additional functionality. WBS Templates can now be exported, and WBS Codes can be imported and exported using CSV. A WBS structure can be created by an external application using RESTful services. Views have been upgraded as well, with new filtering capabilities and column controls that permit greater integration with Activity Sheets.

On import, all new WBS Codes that are not already in the Project WBS Sheet will be created, and all existing WBS Code details will be updated if they are modified in the CSV file.

Users can bring data from Activity Sheets into a Project WBS Sheet. Planned, Actual, Remaining, and At Completion total costs and units can be displayed as read-only columns; these can also be hidden.

Re-Publishing Attachments to Document Manager

Document re-publishing has been made easier. In a business process record, use the Republish checkbox to copy or move attachments or line items already published to the Document Manager from one folder to another without having to manually republish each item. In uDesigner, business process forms have an additional checkbox titled “Automatically select all existing Record and Line item Attachments for Republish”. If the form property allows republish of attachments and if this additional checkbox is checked, then by default all the previously published attachments will now be automatically selected for republishing to Document Manager.

Workflow Assignee and CC List Enhancements

When a workflow step has conditions to filter out task assignees or cc'd users based on certain criteria, the displayed list will only show groups having at least one member who satisfies the filter criteria.

Evaluate Query-Based Data Elements on Creation

Query-based data elements are now evaluated as soon as they are created, not just when their records are opened or when a trigger element is changed.

Contractor User Type Renamed "Collaborator"

The "Contractor" user type introduced last year is now called a "Collaborator"; there are no functional changes to that user type.

CMX Code-Based Sheet Creation UI

Cmx Code-based sheet creation has been simplified. The Cancel and Save buttons apply to the properties of the entire sheet, and there isn't a separate option for the Segments grid.

Partner Users Grant Proxy Access to Owner Company Users

A partner user can now grant proxy access to a user of the Owner company. This allows owner company users to assist partner company counterparts with debugging, help using Unifier, or simply carrying out tasks in situations where the partner company is unable or unwilling to use Unifier. In the Company Workspace, the Security tab of the Company Properties window has a checkbox which governs whether partner users may assign owner company users as proxies. By default, this will be unchecked.

The Proxy tab for all users now has a Company column. When assigning a proxy, the User/Group Picker has a drop-down list to specify the proxy's company.

Features introduced in 21.1



Bluebeam Integration

Business Processes and the Document Manager can now integrate with the Bluebeam document review and markup platform. Configure Bluebeam in the Integrations node, which is now found in the Company Workspace beneath the Company Sponsored Shells node.

GC -Company WS Capital Land San Jose Recre... Portfolio Test Pr... Test Project 1

General Constructio... GC -Company WS

Bluebeam Studio Projects Setup

Enable Integration?
☒ Yes ☐ No

Client ID * ?
i8e1772a4-32a2-4746-a21a-018b0b6a7b55

Client Secret * ?
.....

Cancel Save

After Bluebeam integration is set up, Unifier users can use Bluebeam to add comments and markups to files that are within the Document Manager or attached to business process records.

Documents

Project Documents > Bluebeam Documents

Create Actions View

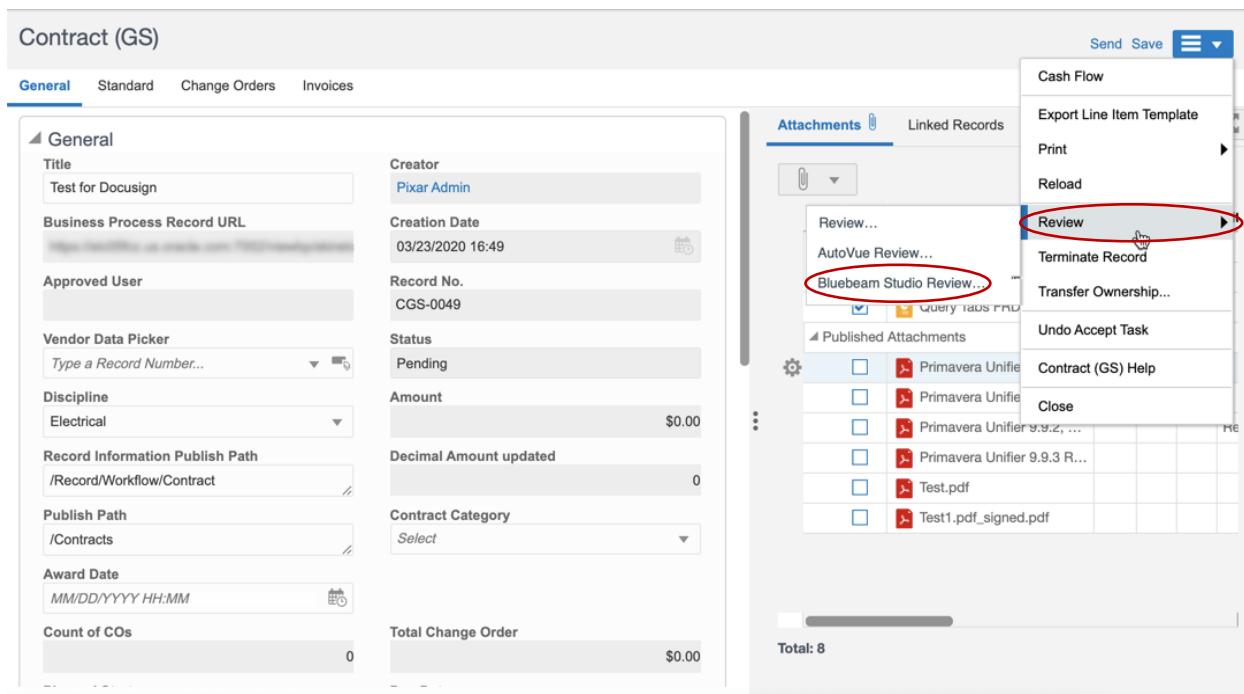
All [Icons] [Icons] [Icons] [Icons]

Name	Ref	BP	T
Unifier 9.8 Release Notes ...			
Primavera Unifier 9.9.3 Re...			
Primavera Unifier 9.9.3 Re...			
Primavera Unifier 9.9.2, 9...			
Primavera Unifier 9.9.2, 9...			
Primavera Unifier 9.9.2, 9...			
Primavera Unifier 9.9.2 Re...			
Primavera Unifier 9.13 Rel...			
Primavera Unifier 9.13 R...			

Properties Linked Records Audit Log Permissions Bluebeam Log Options

Received File Name	Rev. No.	Pub. No.	Session ID	Session Name	Status	Last Updated By	Last Updated
Not Available	1		078-093-518	Fifth Session	Active	Pixar Admin	09/25/2020
Not Available	1		577-624-397	Fourth Session	Finalized		09/17/2020

For a document in the Document Manager, Bluebeam activity can be tracked in the Bluebeam Log tab in the right pane. Documents attached to a business process log can be reviewed in Bluebeam by clicking on the document and then selecting Review > Bluebeam Studio Review...



Unifier Diagnostics

Unifier 21.1 has added capabilities to help troubleshoot issues encountered for commonly-performed operations:

1. Auto-Creation of business process records
2. Reverse Auto-Population of data elements

When you encounter an unexpected error, the system now generates an error code which you should reference when filing Service Requests with Oracle Support.

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Oracle Primavera Unifier What's New

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