Oracle
**Primavera Unifier
General User Guide**

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Oracle Primavera Unifier General User Guide

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Contents

Getting Started with General Operations

Within our documentation, some content might be specific for cloud deployments while other content is relevant for on-premises deployments. Any content that applies to only one of these deployments is labeled accordingly.

Primavera Unifier is a project lifecycle management solution for capital planning, project delivery, cost control, and facilities and real estate management. Unifier provides governance across all project phases, from planning and building to operations and maintenance.

There are two modes of operation:

▶ **User** mode :

Used to enter and access information and perform tasks. Most users do their work in **User** mode. The **User** mode allows users to perform day-to-day activities, collaborate through business processes and Mailbox, maintain managers (for example, Cost Manager, Schedule Manager, and Document Manager), and run reports.

▶ **Admin** mode :

Used for all administrative tasks to set up and configure features and modules. Access to **Admin** mode functions is usually limited to a few users within a company. Company administrators work in **Admin** mode to set up, for example, company, program, and project or shell properties, user permissions, templates for major features, data structures, and configure and set up business process (BP) workflows.

You can switch between modes using the mode icon

> **Note**: The instructions and information presented in the Unifier documentation is based on an out-of-the-box setup and before being customized by the user.

Permissions (Access Control)

The ability to utilize a specific function depends on the **Permissions Settings** (accessed in **Admin** mode). At the **Company Workspace** (company level) > **Admin** mode > **User Administration** > **Access Control** functional node, you can access permission settings for:

▶ Administration mode access
▶ User mode access

Access to Unifier functionality is granted through **Access Control** or **Permissions**.

> **Note**: This option is not available in **Home** workspace because the **Home** workspace does not support the **Admin** mode.

The Unifier user guides are:

▶ Unifier General User Guide
▶ Unifier Programs, Shells, and Projects User Guide
▶ Unifier Business Processes User Guide

▸ Unifier Managers User Guide

Each user guide explains how to use specific parts of the application.

The following explains how to work with Unifier:

▸ Consent notices
▸ Cookies policy
▸ Information for first time users
▸ System configuration
▸ Browsers and settings
▸ User interface
▸ Sign in
▸ Self-service portal
▸ Security
▸ File viewer
▸ Modes of operation
▸ Navigation
▸ Modules overview
▸ Common procedures
▸ P6, Unifier, and Gateway
▸ Reports
▸ Mobile device

In This Section

About Consent Notices (Users)

Consent notices alert you to the need to protect personal information (PI). You and your organization might be collecting, processing, storing, and transmitting PI. When you accept a consent notice, your consent covers the collection, processing, storing, and transmission of PI data in all areas of Unifier and means of retrieving data from Unifier including but not limited to project export, downloaded tables, reports, documents, web services, API, and Unifier. If you refuse consent you might not be able to access some areas of Unifier.

You may be asked to provide consent to show that you understand the need to treat PI as secure data. You may also be asked to provide consent for your organization to collect, process, store, and transmit your PI. If you refuse consent you will be denied access to Unifier.

Cookies Policy

Oracle might use cookies for authentication, session management, remembering application behavior preferences and performance characteristics, and to provide documentation support.

Also, Oracle might use cookies to remember your log-in details, collect statistics to optimize site functionality, and deliver marketing based on your interests.

When using Unifier, the server may generate cookies and send them to the user's browser. The user's machine stores the cookies, either temporarily by the browser, or permanently until they expire or are removed manually.

Each user that signs in to Unifier web will see a notification banner (Cookies in Unifier) that notifies the user that Unifier uses cookies. This banner has a link to the Unifier cookie policy which explains what information is being tracked by way of cookies. The user must click **Got It** in order to access the rest of the Unifier application.

Oracle might use cookies for authentication, session management, remembering application behavior preferences and performance characteristics, and to provide documentation support. Also, Oracle might use cookies to remember your log-in details, collect statistics to optimize site functionality, and deliver marketing based on your interests.

For more information on Oracle's data collection processes and privacy commitments, see:

Oracle Cloud Services Agreement

http://www.oracle.com/us/corporate/contracts/saas-online-csa-us-1894130.pdf

Oracle Privacy Policy

https://www.oracle.com/legal/privacy/services-privacy-policy.html

Oracle Data Processing Agreement

https://www.oracle.com/corporate/contracts/cloud-services/

Product Accessibility Information

Oracle Primavera Unifier is an accessible application. This topic includes guidelines and tips regarding accessible product usage.

Keyboard Shortcuts

The list of keyboard shortcuts for Oracle Primavera Unifier and Oracle Primavera Portal (access point for your Oracle Primavera applications), including page-specific and browser-specific keyboard shortcuts, can be accessed in the ***Navigating Unifier Using a Keyboard*** (on page 11) topic, below.

Common Symbols, Icons, and Tabs: What to Expect

The following are common symbols, icons, and tabs in the application and what they signify for the user.

Asterisks

An asterisk (*) after a column or field name indicates that the field is required. The field must be populated with valid information or users will encounter an error.

In This Section

Navigating Unifier Using a Keyboard

You can use your computer keyboard to navigate throughout the Unifier application. Use the Tab key on your keyboard to cycle through elements within the application and press the Enter key on your keyboard to access them. Use the application keyboard shortcuts to access frequently used or important functionality.

> **Note**: The keyboard shortcuts may change depending on the browser you use.

Main Content Area

Use Ctrl and + or Ctrl and - to zoom in and zoom out anywhere in the application.

Use the Tab key on your keyboard to highlight the toolbar buttons and press Enter to make the action applicable.

Grids

A grid contains content rendered in a tabular format. Any grid has a similar method of interaction. Grids are extensively used in places such as the logs (ex: Business Process Record log, Line Item list, Document Manager log, Cost Manager log, Mailbox etc.), Sheets (ex: Cost Sheet, Funding Sheet, Cash Flow worksheet, Activity Sheet, Portfolio Manager Sheet etc.)

Only the rows that are visible are rendered. As you navigate up and down the table more items will be visible.

To enter the table, tab to it. Tabbing to the table will cause an overlay to be displayed with the message Press tab to skip over this widget. Press Enter, Esc or click to enter the grid.

Use Arrows or Tab and Shift + Tab to navigate through the table. To move focus to another cell when you reach the end of the row, use the Arrows or Shift + Tab.

Editable Grid

Any grid that has editable content has a similar method of interaction. Examples of such grids are the Line item grids seen in business processes, manual entry columns in Cost Sheet and so forth.

Press F2 or Enter to put the cell in edit mode.

To select a value from a list of values (from the fields of type 'Pull Down,' navigate to the cell by tabbing, and press F2 or Enter. Use Up and Down Arrows to highlight an option. Press Enter to select the option.

To select a value from a calendar picker (from the fields of type 'Date' and 'Date Only' pickers), navigate to the cell by tabbing, and press F2 or Enter. Use the Tab key to change the Month and Year selection and use the Up and Down Arrows to highlight an option. Press Enter to select the option.

Individual Web Elements

Hyperlink Fields
1) Tab to enter into the Hyperlink field.
2) Press Enter to view the Hyperlink field attributes.
3) Tab to the Name field and enter your choice.
4) Tab to the URL field and type in the URL.
5) Tab to access the Clear, Cancel, or Done options.
6) Press Enter to select choice and close the hyperlink field

Pull-Down
1) Tab into the cell.
2) Press Enter.
3) Use Up and Down Arrows to highlight the option.
4) Alternatively, type the value.
5) Press Enter to select the option.

Picker
1) Tab into the cell.
2) Press Enter.
3) Type a value for the Display Element.
4) Press Up and Down Arrows to highlight choice.

5) Press Enter to select choice and close picker.

Multi Select Input fields

Option 1:

1. Tab into the cell.
2. Press Up and Down Arrows to highlight choice.
3. Select your choice.
4. Press Enter to select

Option 2:

1. Tab into the cell.
2. Type a value.
3. Press Up and Down Arrows to highlight choice.
4. Press Enter to select.

Date Picker fields

Option 1:

1. Tab into the cell.
2. Type the date in the format specified.
3. Press Enter.
4. Tab out of the cell

Option 2:

1. Tab into the cell.
2. Use the Up, Down, Left, and Right arrows to select a value.
3. Tab to select the Action button.
4. Press Enter.

Number Fields

1. Tab into the cell.
2. Enter the value.
3. Tab out of the cell.
4. Text Fields
5. Tab into the cell.
6. Enter the string.
7. Tab out of the cell.

Using Shortcut Keys

The following tables list the menu options that have shortcut keys. If an option is not listed, it does not have a shortcut key.

Function Keys Supported in Unifier

Command	Function Key
Reload / Refresh	F5
Close browser windows	Alt + F4

Hot keys Supported in the Editable Grid of Unifier

Command	Hot Key
Select All	Ctrl A
Cut	Ctrl X
Copy	Ctrl C
Paste	Ctrl V
Undo	Ctrl Z
Redo	Ctrl Y

Keyboard End User Information (oj-navigation-list)

The following table explains the user information for oj-navigation-list:

Target	Key	Action
List Item	Enter or Space	Selects list item.
	Up Arrow	Moves focus to the previous visible list item.
	Down Arrow	Moves focus to the next visible list item
	Right Arrow (Left Arrow in RTL)	For horizontal navigation list and focus will be moved to next visible item.
	Left Arrow (Right Arrow in RTL)	For horizontal navigation list and focus will be moved to previous visible item.
	Home	Moves focus to the first visible list item.
	End	Moves focus to the last visible list item.
	F2	If focus is on a list item, then pressing F2 will make its contents accessible using TAB.
	Esc	When F2 mode is enabled, press Esc to exit F2 mode.
	Shift+Tab	Move focus to hierarchical menu option. This is only

Target	Key	Action
		applicable for sliding navigation list and when hierarchical menu option is enabled.
Group Item	Right Arrow (Left Arrow in RTL)	If focus is on collapsed node, expands the sub list.
	Left Arrow (Right Arrow in RTL)	If focus is on expanded node, collapses the sub list.
List Item in sublist	Esc	Applicable only for sliding navigation list. If focus is in a sublist, then it closes the sublist and moves focus to the parent list item.
Hierarchical Menu button	Enter	Open menu. Refer to the menu keyboard documentation. This target is visible only for Sliding Navigation List.
	Tab	Moves focus to current list item. This target is visible only for Sliding Navigation List.
	Shift + Tab	Moves focus to Previous Icon. This target is visible only for Sliding Navigation List.
Overflow Menu button	Enter or Space	Open menu. Refer to the menu touch documentation. This is applicable only for Horizontal Navigation List when overflow is set to pop-up.
Previous Icon or List Header	Enter	Collapses the sublist and slides to parent list. This target is visible only for Sliding Navigation List.
	Tab	Moves focus to Hierarchical Menu option. This target is visible only for Sliding Navigation List.

Information for First Time Users

You need to have Administrator privileges, on the local machine, before you can configure your computer for use with Primavera Unifier and install certain plug-ins. Always review this information with your IT department.

Configuring Your System for Unifier

Ensure that the necessary browser settings (within the supported browsers) are configured for the computers that access Unifier. For the full list of system requirements and versions refer to *Unifier Tested Configurations* (on-premises only) or go to *Client System Requirements* (cloud and on-premises).

Supported Browsers and Settings

You can use Primavera Unifier with the following supported browsers:

- **Microsoft Edge**
- **Mozilla Firefox**
- **Google Chrome**
- **Apple Safari**

> **Notes**:
>
> - For the full list of system requirements, supported software, and versions, refer to the *Tested Configurations* document.
> - For additional information about plug-ins, go to: https://www.java.com/en/download/help/enable_browser.xml, or https://www.java.com/en/download/faq/chrome.xml.

Microsoft Edge

Refer to Microsoft Edge Help to see the details on language settings and how to set up the options explained here.

Mozilla Firefox

Refer to Mozilla Firefox Help to see the details on language settings. If your internet settings are customized, contact your IT for more information. When finished, sign out of Unifier and close the browser completely in order for the new settings to take effect.

For plug-ins, follow these steps:

1) Open the **Firefox** browser, or restart it if it is already running.
2) From the Firefox Menu Bar, select **Tools**, then click **Add-ons**.
3) In the Add-ons Manager window, select **Plugins**.
4) Click to select the Java (TM) Platform plug-in (Windows), or the Java Applet Plug-in (Mac OS X).
5) Ensure that the option "**Ask to Activate**" or "**Always Activate**" is selected. For older versions of Firefox, click **Enable**. Note that if the button displays Disable, Java is already enabled.

Google Chrome

Refer to Google Chrome Help to see the details on language settings. If your internet settings are customized, contact your IT for more information. When finished, sign out of Unifier and close the browser completely in order for the new settings to take effect.

> **Note**: AutoVue viewing is not supported in Google Chrome.

Apple Safari

Refer to Safari Help to see the details on how to set up the options explained here.

 To use Apple Safari, open the browser preferences and set Java to run in unsafe mode. Go to **Preferences**, under Security select **Java**, then select **Run in Unsafe Mode**, and click **OK**.

For plug-ins, follow these steps:

1) Click on **Safari** and select **Preferences**.
2) Select the **Security** option.
3) Select **Allow Plug-ins**, then click on **Manage Website Settings**.
4) Click on the Java item, select one of the options: Ask, Allow, or Allow Always (from the drop-down list **When visiting other websites**).
5) Click **Done** and close the **Safari Preferences** window.

User Interface (UI) Content and Internationalization

The contents that appear in the Unifier application UI (also known as System Strings) cannot be modified by the Users. The System Strings are available in different languages, per user preferences.

Example

Sign In and Terms and Condition pages, Menus, Alerts, and Errors

In contrast, the content of the material created by the Users (also known as Custom Strings) can be translated into different languages. Refer to the "Translating Custom Strings (Internationalization)" section of the *Unifier Administration Guide*, for details.

Example

Business Process (BP) name, Data Element (DE) label, pull-down values, radio button, text in lines, navigation log names, and multi select values

Notes:

- The user input data (data entry) in Business Processes (BPs), attribute forms of various managers (Cost Manager, Document Manager, etc.), and other similar elements, when entered at runtime, cannot be translated.
- User's data entry must be saved "as-is" and include support for single and multi-byte characters UCS Transformation Format—8-bit (UTF-8).

For more information see "Internationalization" section, also.

User Name and Password

Before you can sign in to Primavera Unifier, you must have a user account, which will provide you with a Login Username and a Password that you can use to sign in to the Primavera Unifier system. Your Primavera Unifier Company Administrator(s) should be able to create your user account and provide you with your Login Username and Password.

> **Note**: If Oracle Primavera Customer Support Team is administering the setup and user administration for your company, you will receive your Login Username and Password directly from them.

Sign in for the First Time

To sign in to the Unifier for the first time:

1) Enter username and password.
2) Click **Sign In**.
3) Click **Accept** in the Consent Agreement.

The Password Recovery secret questions setup form is displayed.

To setup the security questions, if the system redirects you to the security setup form:

> **Note**: You would see a blurred background of the last instance before logging off if you logged in earlier but did not setup the security questions.

1) In the password recovery form, select the questions and enter the answers to the mandatory fields.
2) Click **Save** to save the entered values.
3) Click **Done** to exit the form. You are brought back to the instance that you were in before logging off.
4) Alternatively, click **Sign out** to exit the form if you do not want to setup the security questions.

To find if the company policy makes it mandatory for you to setup the password recovery secret questions:

1) Click the user control panel on the top right.
2) Click **Preferences**.
3) Click **Security**.

   The password recovery secret questions are marked as required fields with the selected questions and the answers provided at the time of login.

> **Note**: The answers are masked.

Forgot Password (on-premises only)

You can reset your own password by answering security questions, if this option is made available to you by the Administrator.

> **Note**: Enabling the user to use security questions to reset password must be done by the Administrator at the company level. Oracle recommends that the Administrators set up security questions so users can reset their own passwords.

If the option to use security questions to reset password has been made available, then Unifier directs you to the setup page to enter your security questions and proceed with changing your password.

If the option to use security questions to reset password has not been made available, then Unifier does not direct you to the setup page. In this case, you must contact your Administrator to request password reset.

To reset your password:

1) In the Primavera Unifier Sign In window, click **Forgot Password**.
2) Enter your user name and email address, and click **OK**.
3) Answer your Secret Question(s) and click **Submit**. You will receive an email notification containing your reset password. Use the new password to sign in to Primavera Unifier.

To add secret questions to use when resetting your password:

1) Sign in to Primavera Unifier, then click the **Preferences** link in the upper right portion of the Primavera Unifier window.
2) Click the **Security** tab.
3) Under Password Recovery Secret Questions, select a question and enter the answer. You can add up to three Secret Questions.

Sign In, Sign Out, and Session Timeout

Sign In and Sign Out

To access the Primavera Unifier **Sign In** window follow these steps:

> **Notes**:
> - The Sign In page appears based on the supported browser language. If the browser is not supported, the Sign In page appears in English.
> - After signing in to Unifier, the Unifier language will be based on the Language selected in the **Preferences**. See *Preferences* (on page 60) section for details.

1) Open your browser and enter the web address that your site administrator has provided for you.
2) Enter your user name.
3) Enter the password that was set for you during the Unifier installation.
4) Click **Sign In** to open the application.

To sign out of the Primavera Unifier:

1) Click your user name to open a contextual menu.
2) Click **Sign Out** from the upper right-corner of the Unifier window.

If you have trouble signing in, check to ensure that:

▸ The Caps Lock function is not on (user names and passwords are case-sensitive).
▸ You entered the correct user name and password.

If you still have trouble signing in, contact your Company Administrator or Oracle Customer Support.

After signing in for the first time, you may wish, or be required, to change your password.

> **Note:** Save your work often.

Session Timeout

Unifier displays a warning after five minutes of inactivity: **Session Inactive**.

▸ If you click **Stay Signed In**, then your session will remain active. This applies to Unifier sessions running in other browser tabs.
▸ If you do not respond, or if you are inactive for more than five minutes, then Unifier will terminate your session and displays an alert: **Your login session may have expired due to inactivity**.

When your session expires, the system redirects you to the sign in page if there are no active Unifier session running, or there are inactive Unifier sessions, in other browser tabs.

Signing In to Self-Service Portal

Portal Users

Portal users can access the Unifier website and Portal website. Once the Portal user logs in, the Portal landing page is displayed.

Self-Service Portal

Certain business processes can be enabled for access through the Self-Service Portal. The actions users can take through the Self-Service Portal are:

▸ Create a business process
▸ Modify a business process
▸ Add or remove business process attachments
▸ Add General Comments to a business process

Sign in to the Self-Service Portal

To sign into the Self-Service Portal Landing Page:

1) In your web browser, enter the URL you use to access Primavera Unifier, followed by /portal. For example: `https://your-web-address.com/portal`
2) Enter your Self-Service Portal user name and password.
3) Click the **Sign In**. The landing Page opens.

> **Note**: You must have the proper permissions to use the options indicated below.

Self-Service Portal Navigation

The Portal has a fixed **Home** tab along with Portal Business Processes (BPs) tabs.

▸ You can re-sequence the tabs through drag-and-drop.
▸ Unifier retains the last saved tab sequence.
▸ You cannot close the tabs.

To open or edit an existing record:

1) Click the business process tab. The business process log opens in the right-hand pane, listing all available records that you have permission to view.
2) Select the record from the log and click **Open** (or double-click the record from the log.) The record opens in the view-only mode.
3) To edit the details, click **Edit.**
4) To submit the edited record, click **Submit.**

> **Note**: You must have the proper permissions to create, view, or edit portal-enabled records.

Self-Service Portal Home Page (Landing Page)

If your administrator has setup an active (**Home**) landing page, then the active (**Home**) landing page is displayed. If your administrator did not setup an active (**Home**) landing page, then a system-provided **Home** landing page is displayed. The system-provided **Home** landing page has the following attributes:

▸ This page contains pie-charts for each of the BPs.
▸ The pie-chart has status-based colors corresponding to the status of the BP.
▸ If there are no records for a given portal BP, then an informational text is displayed. Under each pie-chart a grid is displayed that contains the Record Number, Title, and Status information.
▸ Only the top five records are displayed, in descending order, based on the last updated date.
▸ You cannot open the record from the grid. When you click the pie-chart, Unifier opens the respective BP tab.

> **Note**: All the Portal enabled BPs will get a tile on the Portal landing page, based on user permission. If there are more than 3 BPs, then Unifier displays a scroll-bar for viewing more tiles. The order of tiles is determined by the most recently updated BP records.

Self-Service Portal Business Processes Log Page (Master Log - Business Processes Grouping Node)

The log page enables you to see the records and conduct the following:

▸ **Create**: To create new records.
▸ **Actions**: To select the following options for bulk selection of records:
  ▸ **Bulk Edit**: This option is displayed if you have the permission.
  ▸ **Print**: Provides user the ability to print multiple records as per the selected format (**HTML**, **PDF**, and **Custom**)
  ▸ **Transfer Ownership**: Transferring the ownership to another user. This option is available if you have the "Modify Ownership" permission.
  ▸ **Terminate Record**: Terminating a record. This option is available if you have the "Terminate Workflow" permission.
▸ **View**: To see the views that have been defined in Business Process Configuration. For example: All Records, Records Created by Me, Create New View, and Manage Views.
▸ **Edit View** (✎): To edit the view settings.
▸ **Refresh** (↻): To refresh the items on the page.
▸ **Print**: To print the log content, Export to CSV, or Export to Excel.
▸ **Search** (🔍): To open the Search window and search the log based on pre-defined uDesigner search fields.

‣ **Find Page** (⯊): To conduct a search within the displayed page content.

‣ **Help** (⑦): To view help options.

The gear (⚙) menu, displayed in front of each record when hovering over the record, enables you to:

‣ **Open**: To open a record.
‣ **Copy with Attachments**: To copy a record.
‣ **Copy without Attachments**: To copy a record.
‣ **Print - HTML**: To print a record.
‣ **Print - PDF**: To print a record.
‣ **Print - Custom**: To print a record.
‣ **Transfer Ownership**: To transfer the record ownership to another user. This option is available when the user has "Modify Ownership" permission, only.
‣ **Terminate Record**: To terminate a record. This option is available when the user has "Terminate Workflow" permission, only.

When you select a record, the log page displays a pane on the right-hand side of the page. Use this pane to see the record details and attachments by using the following tabs:

‣ **Record Details**
‣ **Attachments**

Self-Service Portal: Creating and Submitting a New Record (Existing Users Only)

1) Select a business process to work with from the log in the left Navigator.
2) Click **New**.

> **Note**: The **New** option displays if this element is designed in Unifier Configuration. If not, you need to click **Create**, as explained below.

3) Fill out the business process form.
4) Click **Submit**.

Self-Service Portal: Preferences (User Preference)

The **Preferences** window enables you to enter specific information by using the following tabs:

‣ **General**

   The Personal Information contains the First Name and Last Name fields, only.
‣ **Security**

   Some of the options are not available for cloud customers.
‣ **Email Subscription**

   This option is not available in Self-Service Portal.
‣ **Region Format**
‣ **Proxy**

   This option is not available in Self-Service Portal.
‣ **More**

See *Preferences* (on page 60) for additional details about the **Preferences** window.

Security Warnings

The first time you perform certain functions in Primavera Unifier, security warnings may appear from third party software confirming the use of Java plug-ins from these business partners.

Follow the instructions below to prevent the warnings from recurring every time that you use the functionality in Primavera Unifier that requires these certificates.

Preventing a Security Warning from Recurring

A first time user may receive a security warning. When prompted by your browser to acknowledge a security warning in Unifier, you may select your browser option to ignore future warnings. The setting to ignore warnings varies by browser.

File Viewer Option

The following topics discuss the basic user preferences settings that should be configured before using Unifier for the first time.

For more information regarding all **Preferences** settings, see the *Preferences* (on page 60) topic below.

File Viewer Option (Select Default Viewer)

Primavera Unifier provides two methods of viewing files:

▸ Native
▸ Unifier Viewer

Unifier Viewer is the default option. The Viewer lets you view and markup documents. The markups are saved as markups without changing the original file. Native Viewer allows you to view most file formats in the application in which you created or regularly view them. In other words, if you view a .doc file in Native, Microsoft Word will open and display the .doc file.

Unifier User Interface

The Unifier user interface has both static and dynamic elements.

The following image displays the static elements of the Unifier user interface, and the explanation for each static element follows.
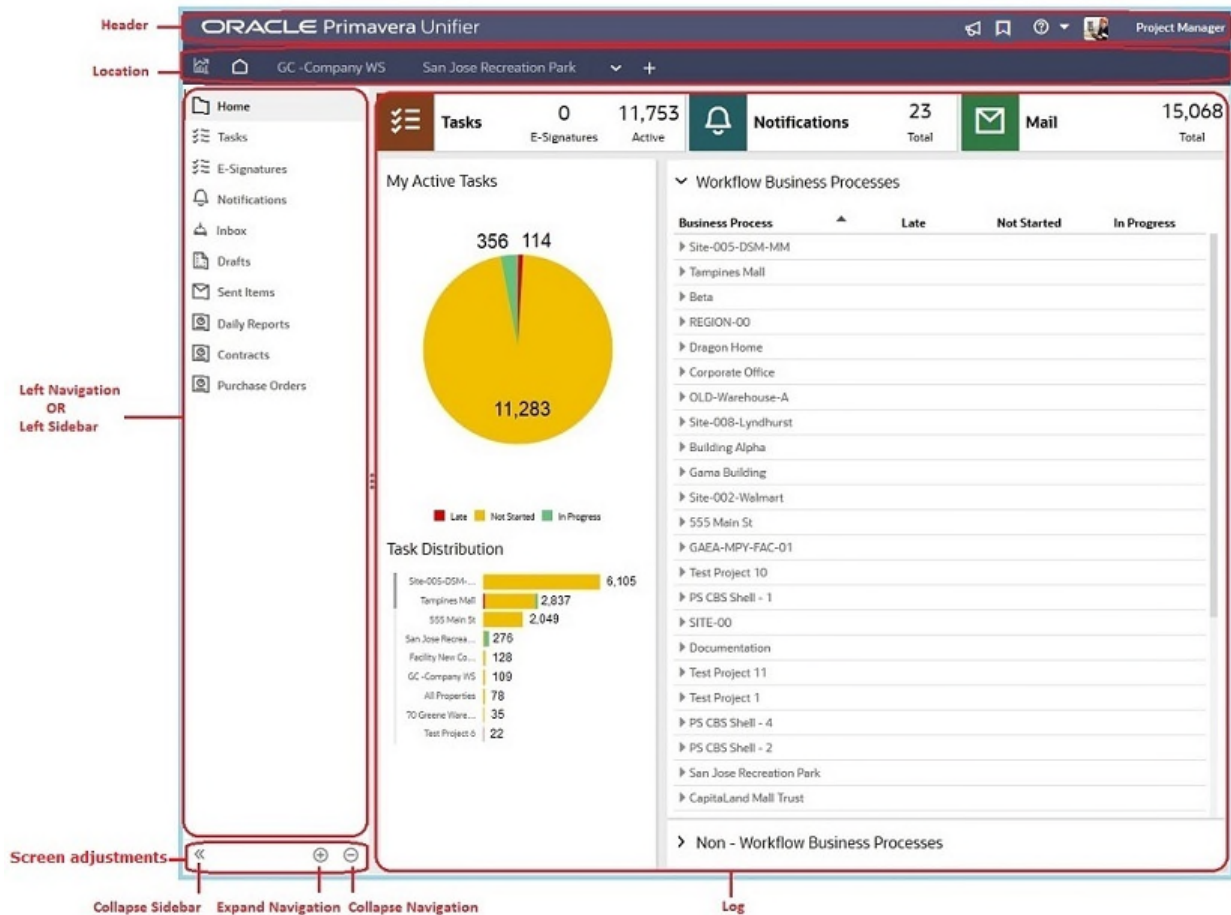
Unifier User Interface Header

The header section of the interface contains the following elements, from left to right:

▶ Unifier logo (Oracle Primavera Unifier)

Application name and environment.

▶ **Announcements** (megaphone icon 📢)

Enables you to view company-wide announcements. The announcements are sorted by **Title**, **Date** (creation date (Latest at the top), and **Announced By**.

When a new announcement record is unread, a red bubble count-indicator icon (📢) appears on top of the gray announcement icon (the megaphone icon). In the bubble icon, the number of unread announcements is displayed.

When there are no unread announcements, the bubble count-indicator disappears.

When you click the announcement icon (the megaphone icon), a grid appears that displays all of the unread announcements, highlighted in red. All the announcements are displayed in descending order, according to the date.

Once an announcement record has been read by a user, the title of the record is displayed in black.

▶ **Bookmarks** (🔖)

To bookmark a page. See *Bookmarks* (on page 79) for details.

▶ **View Help Menu** (question mark icon ⑦)

The **View Help Menu** has a contextual menu that enables you to access the following:

   ▸ **User Help**

     To access the Unifier User Help.

   ▸ **Admin Help**

     To access the Administrator Help.

   ▸ **uDesigner Help**

     To access the uDesigner Help.

   ▸ **Unifier Library**

   ▸ **Download Plugins**

     The Support window has two tabs:

     Contact

     Download (opens by default)

     For information about the **Contact** tab, read the topic: **Contact Support**.

     Download tab

     In the **Download** tab, you can see the following plug-in and applications. These plug-in and applications are available to download. A link to the installation instructions is available, where applicable.

     AutoVue WebStart

     Unifier Webservices WSDL

     Follow the links within each option to proceed.

   ▸ **Contact Support**

     The **Support** window has two tabs:

     Contact (opens by default)

     Download

     In the **Contact** tab, Contact Information section, you can see the name, phone, and contact instructions of someone at your company that you can contact when you need help with Primavera Unifier. For assistance, try this person first.

> **Note:** This information is available only if your company administrator has provided internal support contact information.

In the **Contact** tab, **eLearning** section, you see the location (Access), name of the contact (Contact), and any instructions that you might need in order to access the eLearning materials.

> **Note:** Your company may elect to provide access to the eLearning suite, where you can access interactive Primavera Unifier learning materials. Alternatively, your company may have its own customized support or training materials that can be accessed on an internal site/location. If your company administrator provides this contact information, it will be listed at the bottom of the window.

▸ **About Unifier**

Click to access:

Version number

Copyright information

Software agreement details for the Oracle Primavera Unifier

Cookie Policy

Privacy Policy

▸ Name of the user

Displays the name of the person who has signed in, and if you click on the name, you will be able to access the following features:

▸ **Get Unifier Mobile Help**

Enables you to open a new window and proceed to download the Unifier Mobile App. Follow the instructions on this window to get the Unifier Mobile App for both Android and iOS.

▸ **Preferences**

Click to open the Preferences window. The Preferences window has the following tabs:

- **General** tab
- **Security** tab
- **Email Subscription** tab
- **Region Format** tab
- **Proxy** tab
- **More** tab

See *Preferences* (on page 60) for details.

▸ **Change Password**

Enables you to open the **Change Password** window.

Note: The **Change Password** option is only visible for on-premises customers, not for cloud customers.

See *Change Password* (on page 78) for details.

▸ **Proxy For**

Click to expand the menu and see the list of individuals who selected you as their proxy and sign in as that person's proxy.

See *Proxy For* (on page 78) for details.

▸ **Last login: MM/DD/YYYY HH:MM AM/PM**

The date and time when you signed in last.

▸ **Sign Out**

Enables you to sign out of Unifier.

See *Sign Out* (on page 78) for details.

You may see the **Upload Status** icon ( ) appear next to the **Announcements** icon. This happens when there are documents pending to be uploaded. In general, when you go to the **Document Manager** grouping node (for example, **Company Workspace** or **Administration** tabs > **Document Manager** where you can upload multiple documents), you can see the **Upload Status** icon on top. The color of this icon changes depending on the upload status. You can click Clear to remove this icon.

Unifier User Interface LocationBar

The location bar at the top of the interface contains the following elements, from left to right:

> **Note**: One page or tab must always be present.

▸ **Analytics** page or tab

▸ **Home** workspace

▸ Company Workspace page or tab

▸ Switch-to tab (arrowhead icon ⌄) allowing you to switch to a different tab

▸ New tab (plus icon ＋) to add a new tab (programs, shells, or projects) to the location area)

Creating new tabs is useful when navigating to frequently used locations, such as the Company Workspace, shells, or projects. You can create an unlimited number of tabs that can be rearranged by clicking and dragging, or removed by clicking the **X** that appears when hovering over a tab. You can remove all tabs except for the **Home** workspace and the **Analytics** tab.

When creating a new tab, the location launcher window displays three sections - Recent Locations (recently accessed locations), Key Locations (Company Workspace and single-instance shells), and Bookmarks (locations you have saved in Bookmarks. The height of the initial drop-down dynamically varies based on the number of items in Key Locations.

Use the search bar to quickly find a location. Alternatively, click the location picker icon ( ) to see the log of all available locations to choose from.

You can also create multiple tabs representing the same location to quickly navigate to, or in, different areas within that location.

Tabs maintain their states if you switch tabs. For example: If you are working in **Schedule Manager** (**User** mode) and decide to switch to another tab and switch back, Unifier preserves your view and settings in the **Schedule Manager** node for when you return. Similarly, when you sign out of Unifier and sign in again, you return to the tab that you were working with, before you signed out, with your settings preserved.

> **Note:** First-time Unifier users see only the Home workspace. Returning users see all the tabs that were displayed in the previous Unifier version.

Unifier User Interface Left Navigation

The left Navigation (or left Sidebar, or Navigation) lists all of the nodes that are available for a company, program, shell, or project.

> **Note**: Your Navigator setup may differ, but the basic functionality will be the same.

Your company administrator can configure the **User** mode Navigator (**Company Workspace** > **Admin** mode > **Configuration** > **User Mode Navigator**) to better suit the company business needs, such as by creating additional nodes to store business process records, renaming nodes, and so on.

Every node, feature, and record in Unifier can be accessed by way of the Navigator, which is always available in the left-hand pane of the Unifier screen. The Navigator is similar to a folder system, much like a network drive. Each feature is stored in its own "functional node," similar to a folder, and some nodes may be stored in "grouping nodes" that organize functional nodes based on their properties. Each functional node is controlled by permissions. If you do not see a feature in the Navigator, contact your project or shell Administrator or Company Administrator to verify that you have been assigned the proper access permissions.

As you access different nodes on the left-hand Navigator, the Navigator remains available on the left of the screen, while the content frame on the right changes.

Unifier User Interface Screen Adjustments

The screen adjustments section of the interface contains the following elements, from left to right:

- Collapse Sidebar
- Expand Navigation
- Collapse Navigation

Use the Expand Navigation or Collapse Navigation icons at the bottom of the Navigator pane to expand or collapse all the nodes (modules) in the Navigator.

Unifier User Interface Log

This right pane displays all of the information pertaining to the nodes (or modules) that are available for a company, program, shell, or project. The right-hand pane houses the logs. Additional functions are available from the options and links at various parts of the logs.

On top, below the company, shell, and project tabs, the locator links (breadcrumbs) are displayed. The locator links:

- Enable you to follow the path to the current location
- Always include home

Click the drop-down arrow of a locator link (breadcrumb) to reveal the direct children or sub-shells of that location.

Even if you do not have permission to access a shell, the shell name appears in the breadcrumb trail.

See the following topics for details on each static element, listed above.

The following topics display the dynamic elements of the Unifier user interface, and the explanation for each dynamic element follows.

> **Note**: The following screen captures are examples of a typical Unifier dynamic user interface and might not be identical to the version that you are using.

In This Section

## Analytics Page

The **Analytics** page that is available to users who have permission to access or view the tab. The **Analytics** page displays analytic information to assist the user to make faster and more informed business decisions by allowing the user to access dashboards that have been set up in Oracle Business Intelligence Suite Enterprise Edition (OBI EE).

Home Workspace

The **Home** workspace ⌂ is a tab that displays the user's (signed-in user's), tasks, E-Signature tasks, notifications, emails from various workspaces, daily reports, and so on. In addition, depending on the user's permission, the **Home** workspace displays the **Master Log - Business Processes** grouping node (for example, **Project Controls Master Log**). The **Master Log - Business Processes** grouping node lists all of the business process types at the shell-level, or project-level, in separate functional nodes for each type. This includes workflow, non-workflow, and multiple record business processes.

> **Note**: The **Home** workspace does not support the **Admin** mode.
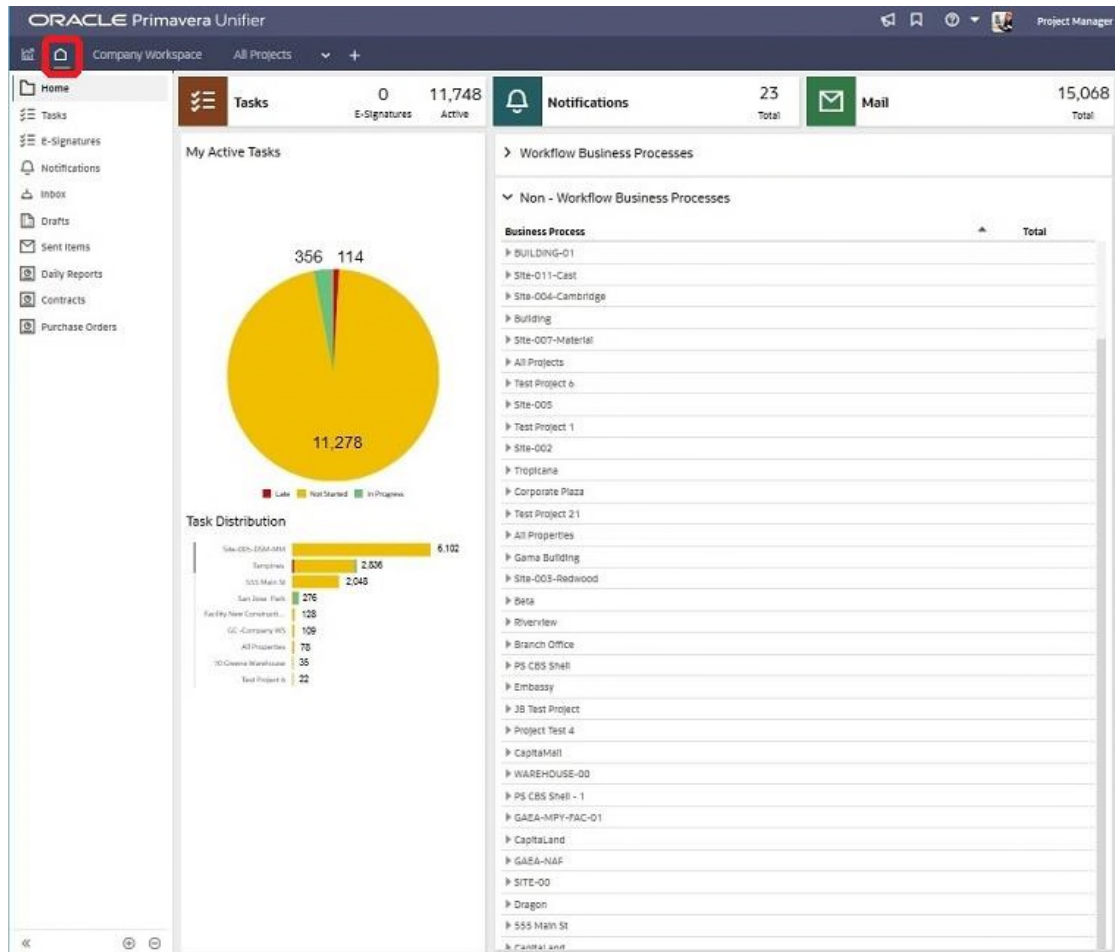
The **Home** workspace contains the following elements:

▸ Left Navigation or Left Sidebar which has several nodes (explained in the table below).
▸ Log which visually represents information about the user's:
   ▸ Number of tasks (**Tasks**)
   ▸ **Notifications**
   ▸ **Mail**
   ▸ Active Tasks (**My Active Tasks**)
   ▸ **Task Distribution**
   ▸ **Workflow Business Processes**
   ▸ **Non-Workflow Business Processes**

Typically, the **Home** workspace contains the following nodes:

Note: Your Navigator setup may differ, but the basic functionality will be the same.

Node or Sub-node	Description
Home	Enables you to access the **Home** log which provides information summaries for your: ▶ **Tasks** ▶ **E-signatures** ▶ **Notifications** ▶ **Mail** ▶ **My Active Tasks** ▶ **Task Distribution** ▶ **Workflow Business Processes** ▶ **Non-Workflow Business Processes** You can click a tile to navigate to the respective log. For example, click the **E-signatures** (in the **Tasks** tile) to go to the **E-Signatures** log. Within the left pane of the **Home** log, you can see pie chart (or a circle chart) statistical graphic, which is divided into slices to represent the number of active tasks by status and workspace distribution. Within the left pane of the **Home** log, you can see a list of tasks in your workspaces, by business process type and status. You can click on a business process name to go to the BP log, within the corresponding workspace (company or project).
Tasks	Enables you to access the **Tasks** log and attend to the tasks that have been assigned to you.
E-signatures	Enables you to access the **E-signature Requests** log and attend to any requests that you have received.
Notifications	Enables you to access the **Notifications** log and attend to the notifications that you have received.
Inbox	Enables you to access the **Inbox** log and attend to all the emails that you have received.
Drafts	Enables you to access the **Drafts** log and continue your work with items in draft mode.
Sent Items	Enables you to access the **Sent Items** log and check for any emails that you had sent.
Daily Reports	Enables you to access the **Daily Reports** log and attend to reports that you have permission to access.
Contracts	Enables you to access the **Contracts** log and review the contracts that you have permission to access.

The following provides more details for the **Home** workspace nodes:

Tasks

The **Tasks** log has the following toolbar options:

Toolbar Options	Description
Create	To create a new record. You need to select a value for the following fields: ▸ **Select Business Process Origin**: Your options are company or shell. Depending on your selection, you can click the **Details** icon (🔬) to open the **Select Business Process Origin** window, select a shell to list the names of available BPs, make your selection, and click **Select**. ▸ **Select Business Process**: You can select a BP from the drop-down field. You can create BPs records that involve a workflow when working within the **Tasks** module if you have permission to create BP records. It is important to note that you can only create Workflow BPs, and the list of available Workflow BPs are according to the shell or project that you are in.
Actions	To perform one of the following on any of your tasks, if applicable: ▸ **Accept** ▸ **Undo Accept** ▸ **Action with Preview...** ▸ **Action without Preview...** ▸ **Hide** ▸ **Unhide All** ▸ **Print** **Note**: You cannot update the Bidders email addresses in bulk (bulk update through Bulk edit) or within multiple records. You can change a Bidder's email address in a single record, only.

View	Your options are: ▸ **My Daily Reports** ▸ **Received in last 7 days** ▸ **Received in last 30 days** ▸ **Group by Business Process** ▸ **Group by Origin** ▸ **Hidden Tasks** ▸ **All Tasks** ------------------ ▸ **Create New View** (See information at the end of this topic) ▸ **Manage Views**
Edit View	Enables you to open the Edit View window and change the View Name. You can also use the following tabs to change the values of the: **Columns** ▸ **Available Columns** ▸ **Selected Columns** ▸ **Lock after selected Column** ▸ **Number of Records per Page** **Filters** Based on: ▸ **Record** ▸ **Advanced** **Group By** To use the **Add Column** option, add columns, and arrange the items. **Sort By** To use the **Add Column** option, add columns, and arrange the items. After you are finished, you can click: ▸ **Cancel** to cancel your changes. ▸ **Apply** to apply your changes. ▸ **Save** to save your changes. ▸ **Save As** to save your changes with a different name.
Refresh	Click this option to update the list of items in your **Tasks** log.
Print	To print your tasks (**Print**) or export your tasks to a CSV or Excel file: ▸ **Export to CSV** ▸ **Export to Excel**
Search	To open the **Search** window (bottom of the log) and search for a particular item.
Find on Page	To open a row under the column headings and find a task based on the column headings.

The **Tasks** log has the following columns:

- ▸ **Project Number**
- ▸ **Origin**
- ▸ **Business Process**
- ▸ **Record Number**
- ▸ **Title**
- ▸ **Record Due**
- ▸ **From**
- ▸ **Sent for**
- ▸ **Task Due**
- ▸ **Received**
- ▸ **Workflow Name**

Create New View

To create a new view for your log, click **View** drop-down and click **Create New View** to open the **New View** window. By default, the **Columns** tab is selected.

1) From the **Available Columns** box, click to select the columns that you need and click the **Move** icon (the single arrow icon pointing to the right) to move your selected column to the **Selected Columns** box. The **Selected Columns** box contains the columns that are seen in the log view. The last column in the **Selected Columns** box is not available for locking.

2) In case you want all of the available columns to be seen in the log view, click on one column to select it (in the **Available Columns** box), click the **Move All** icon (the double-arrow icon pointing to the right) to move all columns to the **Selected Columns** box.

3) To move multiple available columns at a time, click on one column to select it (in the **Available Columns** box), then hold down the **Ctrl** key and proceed to click to select each desired column from the **Available Columns** box. Once finished, click the **Move** icon (the single arrow icon pointing to the right) to move all of the highlighted columns to the **Selected Columns** box.

You can move each column in the **Selected Columns** box by using the:

- ▸ **Move Up** icon (the single up-arrow icon)
- ▸ **Move Down** icon (the single down-arrow icon)

You can move multiple columns in the **Selected Columns** box by using the:

- ▸ **Move to Top** icon (the double up-arrow icon)
- ▸ **Move to Bottom** icon (the double up-arrow icon)

To lock columns in the log view or determine the number of records, or both, use the following drop-down fields in the **New View** window, respectively:

- ▸ **Lock after selected Column**
- ▸ **Number of Records per Page**

E-signatures

When a Send for E-Signature action is taken, and one or more documents are sent to Unifier users (internal user, external user, or proxy user), an entry is made in the **E-Signatures** functional node to enable the user to act on the E-Signatures task. Refer to the Unifier User Help, "Working with E-Signatures" for details. The **E-signatures** log has the following toolbar options which enable you to work with each E-signature item:

Toolbar Options	Description
View	To set the items in the log by selecting one of the following options: ▸ **All < default** ▸ **Group by Status** ▸ **Create New View** ▸ **Manage Views**
Edit View	To select which columns to be displayed or remain hidden, apply filters, group and sort by available fields and to save custom views.
Delete	To delete an item in the log.
Refresh	To update the information displayed on the screen.
Print	To print the information displayed on the screen. Your other options are: ▸ **Export To CSV** ▸ **Export To Excel**
Search	To search for related items.
Find on Page	To filter results displayed on the screen. In any column, begin typing in the field below the header to trigger results.

The E-signatures log has the following columns which provide details about each E-signature item:

▸ **Name**
▸ **Form**
▸ **E-Signature Status**
▸ **Subject**
▸ **Location**
▸ **Received Date**
▸ **Completion Date**

When you click on an item in the **E-signature** log, the right-hand part of the log provides properties information.

Notifications

When you receive a task, your task will appear in the **Notifications** log. The **Notifications** log contains the following toolbar options which enables you to work with each notification:

Toolbar Options	Description
Actions	To select one of the following actions for your notification: **Print** ▸ **HTML** ▸ **PDF** ▸ **Custom** **Delete**
View	To select one of the following options: ▸ **All Notifications** < Default ▸ **Received in last 7 days** ▸ **Received in last 30 days** ▸ **Group by Business Process** ▸ **Group by Origin** ▸ **All Notifications** ▸ **My very own view** ▸ **Create New View** ▸ **Manage Views**
Edit View	Enables you to select which columns to be displayed or remain hidden, apply filters, group and sort by available fields and to save custom views.
Delete	To delete an item in the log.
Refresh	To update the information displayed on the screen.
Print	To print the information displayed on the screen. Your other options are: ▸ **Export To CSV** ▸ **Export To Excel**
Search	To search for related items.
Find on Page	To filter results displayed on the screen. In any column, begin typing in the field below the header to trigger results.

The **Notifications** log contains the following columns which enables you to work with, and learn more about, each notification:

▸ **Attachments**
▸ **Business Process**
▸ **From**
▸ **Title**

- ▶ **Record Number**
- ▶ **Origin**
- ▶ **Received**

When you click on a notification in the **Notifications** log, the right-hand part of the log provides properties information by way of the following tabs:

Record Details tab

This tab provides the details about the selected notification, within the fields in the following blocks:

- ▶ **General** block
- ▶ **Action Item Information** block
- ▶ **Meeting Details** block
- ▶ **Description** block

Workflow Progress tab

This tab provides the following workflow details about the BP that was indicated in the selected notification:

- ▶ Title
- ▶ Record Number
- ▶ Current Step
- ▶ BP Setup Used
- ▶ View Graphic (to view Workflow Progress - Graphic. You can print the graphic)
- ▶ Filter By
- ▶ Visited Steps

Attachments tab

This tab provides the following details about the attachments that were included in the BP that was indicated in the selected notification:

- ▶ File Name
- ▶ Title
- ▶ Pub. no.
- ▶ Tab Name
- ▶ Size

For each item in the **Attachments** tab log, the gear icon menu items enable you to conduct the following actions on the attached file:

- ▶ Open
- ▶ Open in AutoVue
- ▶ Download

Inbox

The Unifier **Inbox** is:

> ▶ An internal email feature that allows Unifier shell team members to communicate with each other and maintain a record of the communications. For shells with View-Only status, Mailbox is available for viewing, but you cannot send, edit or delete messages.

> ▶ The repository that collects external emails related to the shell. These emails can come from shell users or from external users who do not use Unifier. From the Mailbox, users can forward the emails to appropriate members, flag them for review, and reply to them. In addition, these external emails can be linked to business process records.

> ▶ A *cross-shell* listing of your **Inbox** can also be accessed in the **Mailbox** grouping node of your *shell*. Refer to the *Unifier Programs, Shells, and Projects User Guide* for details.

> ▶ A *cross-project* listing of your **Inbox** can also be accessed in the **Mailbox** grouping node of your *project*. The **Mailbox** grouping node displays all of the internal and external emails in a project.

Replies from external users can be tracked and monitored from within your **Project Mailbox**. Refer to the *Unifier Programs, Shells, and Projects User Guide* for details.

When you receive an email, your email will appear in the **Inbox** log.

To view all your email messages (Mailbox) across shells

1) Go to the **Home** workspace.
2) In the left Navigator, click **Inbox**. All messages sent between *shell team members* (messages residing in all shell Mailbox Inbox and Sent folders) are listed.
3) To open a listed message, select it from the list, click the gear menu, and click **Open**.

When an email is selected from the **Inbox** log, the contents of the email are displayed on the right along with the possible actions.

You can use the gear menu (⚙) to perform the following actions: **Open**, **Flag** (All available options are displayed), **Clear Flag**, **Print**, and **Delete** for each record.

The following toolbar options are displayed on the **Inbox** log:

Toolbar Option	Description
Actions	This option enables you to take the following actions: ▶ **Flag**: To flag one or more emails. All of the following available sub-options are displayed. ▶ **Call** ▶ **Do not Forward** ▶ **Follow up** ▶ **For Your Information** ▶ **Forward** ▶ **No Response Necessary** ▶ **Read** ▶ **Reply** ▶ **Reply to All** ▶ **Review**

Toolbar Option	Description
	▶ **Clear Flag**: To clear the flags. This option is context-sensitive. ▶ **Print**: To print the log. ▶ **Delete**: Delete one or more emails.
View	To customize the view according to the following criteria: ▶ Received in last 7 days ▶ Received in last 30 days ▶ Group by Business Process ▶ Group by Origin ▶ All Items ▶ Create New View... ▶ Manage Views... This sub-menu will also contain all views that you have created.
Edit View ✎	To edit the view (columns) of the **Inbox** log.
Search 🔍	To open the Search window and enter search parameters. You can search for items that are not currently displayed in the log.
Find on Page 🔍	The **Find on Page** option enables you to find items on the displayed page. When you click the **Find on Page** option, the system inserts a new row that enables you to enter your filter parameters.
Refresh (↻)	To refresh the log screen.
Expand All Groups OR Collapse All Groups	When you expand a group from the log and select an item: ▶ The gear icon menu enables you to Open, Flag, Clear Flag, Print, or Delete the item. ▶ The **Inbox** log splits and the right-hand of the page becomes the reading pane for the message.

Drafts

Click **Drafts** to see all the business processes that are in a preliminary version. You can navigate to the **Drafts** functional node from the left navigator.

The following columns and icons are displayed in the log:

▶ Attachment icon (displays if the upper form of the drafts has any attachments)
▶ Business Process (Name of the BP)
▶ Record Number (Record number of the Draft)

▸ Title (Title of the draft)
▸ Origin (The source name where the draft was created)
▸ Last Saved (The date that the draft was last saved)

From the **Drafts** log, you can use the *gear menu* (⚙) to perform the following actions: **Open**, **Go to Origin**, and **Delete**.

When a draft record is selected from the log, the **Record Details**, **Workflow Progress**, and **Attachments** tabs are displayed on the right pane.

Toolbar Option	Description
Actions	The following option is displayed: **Delete**: to delete drafts.
View	To customize the view according to the following criteria: ▸ Saved in last 7 days ▸ Saved in last 30 days ▸ Group by Business Process ▸ Group by Origin ▸ All Drafts ▸ Create New View... ▸ Manage Views... This sub-menu will also contain all views that you have created.
Edit View(✎)	To edit the view of the log. You can edit the view of the following elements on your log: ▸ **Columns** ▸ **Filters** ▸ **Group By** ▸ **Sort By** If you modify the view and do not save the changes, the system keeps the existing name and adds the word "Modify" to the existing name. You can click **Clear** to clear your selections.
Refresh (↻)	To refresh the log screen.
Print (🖶)	To print the contents of the log, export to CSV, or export to Excel.
Search 🔍	To open the Search window and enter search parameters. You can search for drafts that are not currently displayed in the log.
Find on Page ≡ᕾ	The **Find on Page** option enables you to find items on the displayed page. When you click the **Find on Page** option, the system inserts a new row that enables you to enter your filter parameters.

Toolbar Option	Description

When you click on a draft in the **Drafts** log, the right-hand part of the log provides properties information by way of the following tabs:

▶ **Record Details** tab

This tab contains the details associated with the BP record, which can be edited when the BP record is opened from the drafts log.

▶ **Workflow Progress** tab

This tab provides the following workflow details about the BP that was indicated in the selected notification:

- ▶ Step Name
- ▶ Assignee
- ▶ Company
- ▶ Status
- ▶ Action
- ▶ Completion Date

▶ **Attachments** tab

This tab provides details about the attachments that were included in the BP that was indicated in the selected draft.

Sent Items

You can use the **Sent Items** functional node to open the **Sent Items** log and check for any emails that you had sent.

The **Sent Items** log has toolbar options that are similar to the **Inbox** log.

The **Sent Items** log has columns that are similar to the **Inbox** log.

Each item in the log, when selected, has a gear icon. The gear icon menu enables you to Open, Flag, Clear Flag, Print, or Delete the item.

When you click on an item in the log, the **Sent Items** log splits and the right-hand of the page becomes the reading pane for the message.

Company Workspace

The **Company Workspace** page is a tab that has two modes:

- ▶ The **Admin** mode
- ▶ The **User** mode

The following image shows the typical **Admin** mode for the **Company Workspace** tab:

The following image shows the typical **User** mode for the **Company Workspace** tab:

Program and Shell or Project

Similar to the **Company Workspace** page, the **Program** page is a tab that has two modes:

▸ The **Admin** mode
▸ The **User** mode

The following image shows the typical **Admin** mode for the **Program** tab:
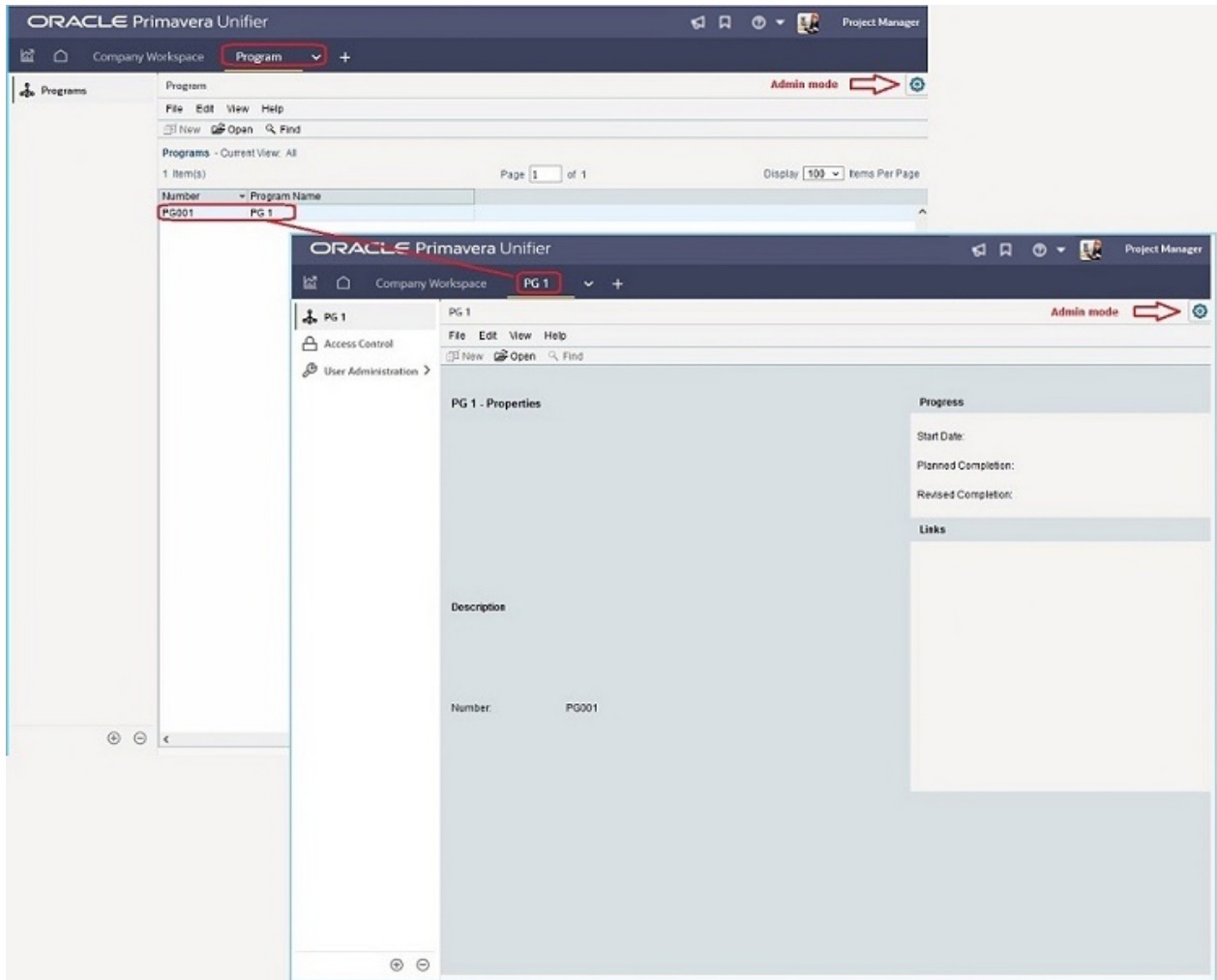
The following image shows the typical **User** mode for the **Program** tab:
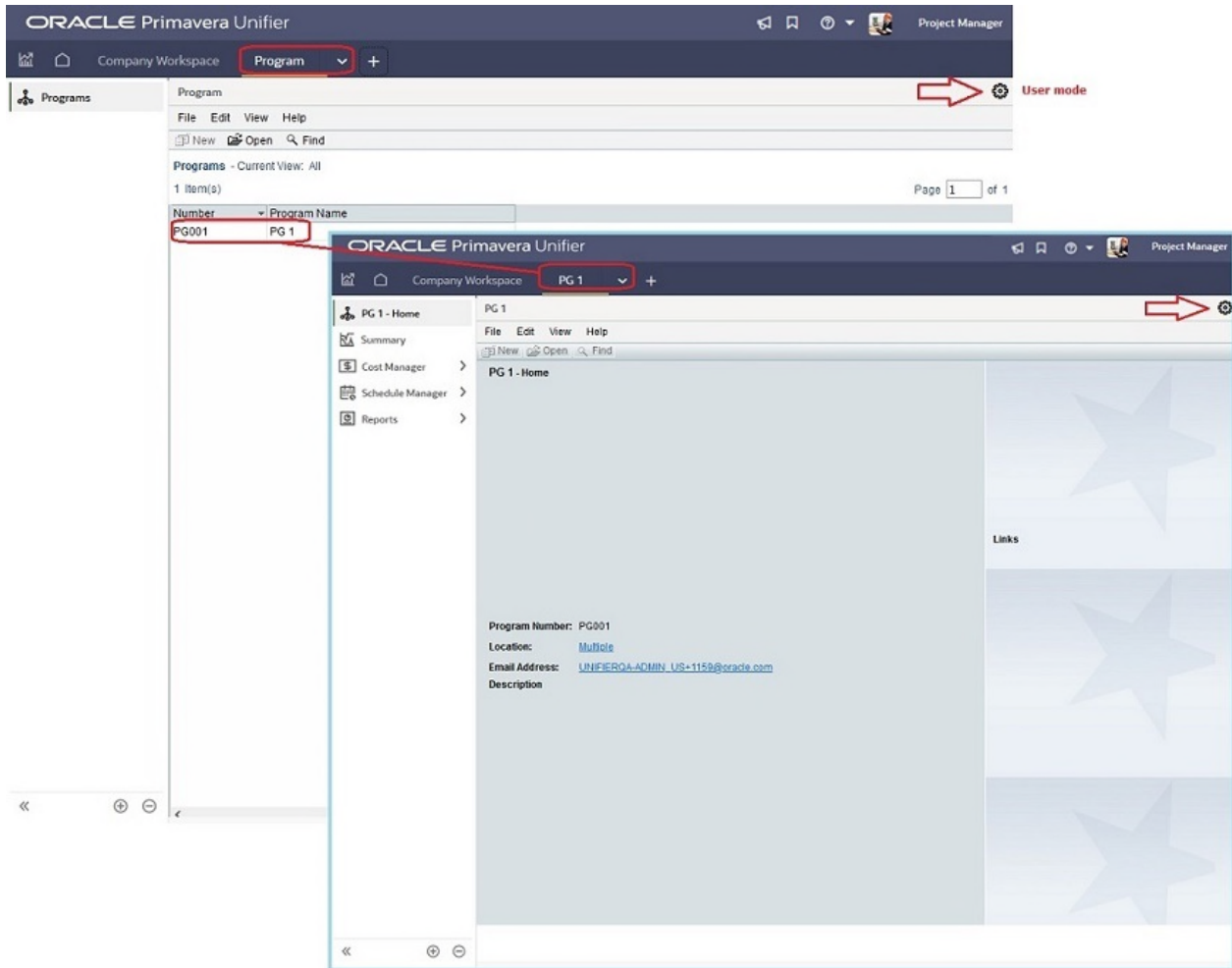
The **Shell** page, or the **Project** page, has two modes:

‣ The **User** mode
‣ The **Admin** mode

A shell is a "container" in which users can organize entities, such as projects or facilities. This shell is where users can organize business information in one place to make managing it easy. A shell can include the functions and features necessary to manage the information in that shell, such as a Schedule Manager, a Document Manager, and a Cost Manager.

Standard "projects" in Unifier work in a similar manner. The difference is that a shell is not required to function like a time-based project. A shell can encompass a static entity, such as a university campus, where maintenance activities are on-going. An example of such a shell could encompass a college campus in order to track building maintenance and new additions. You could include a Space Manager for improvements and remodeling, a Document Manager for all the documents and drawings necessary for new additions, and a Generic Cost Manager for costing functions.

In Unifier, shells can be arranged in hierarchies to represent a company's physical or organizational structure, such as:

▶ State
▶ City
▶ Property
▶ Building

Shell Dashboard

A dashboard that is accessible at the shell level and can be used to view data within a particular shell hierarchy. There are several types of shell dashboard: My Dashboard or Shell Instance Dashboard.

The following image shows the typical **User** mode for the **Shell** tab:
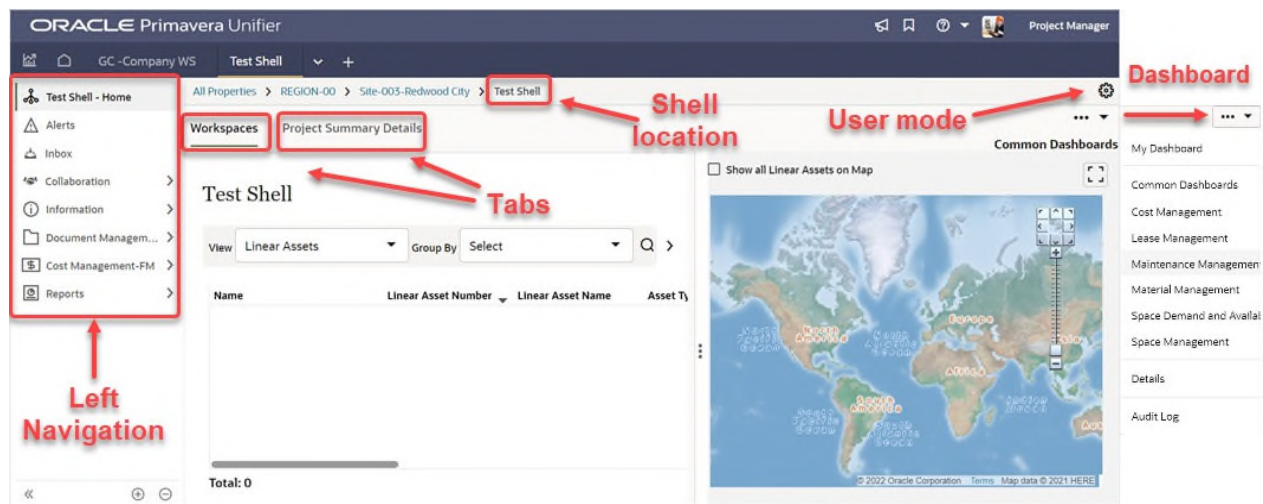
The following image shows the typical **Admin** mode for the **Shell** tab:
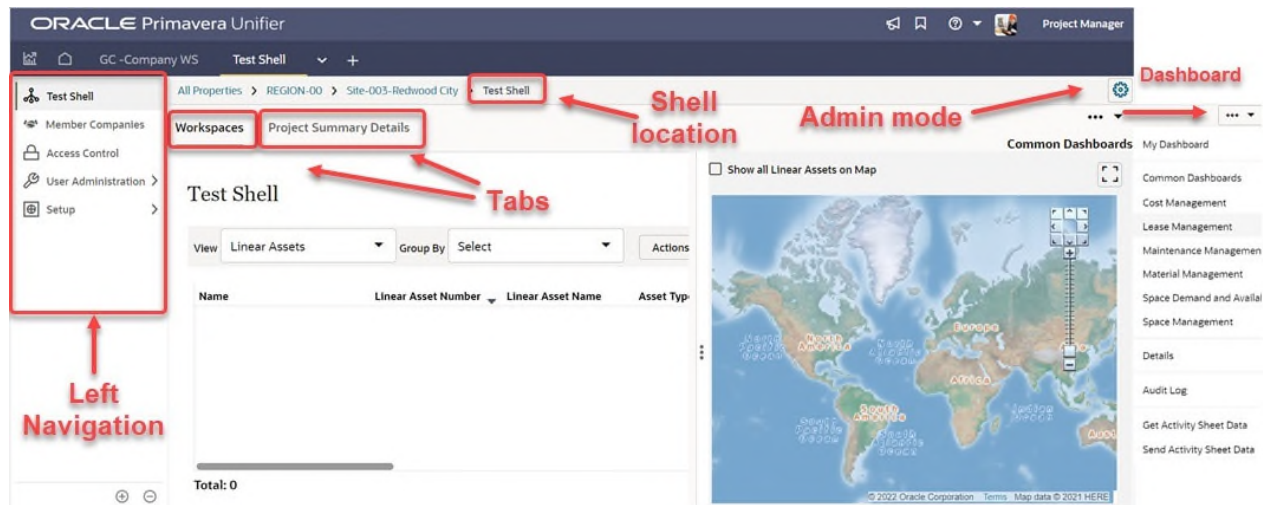
The following are for a shell-project:
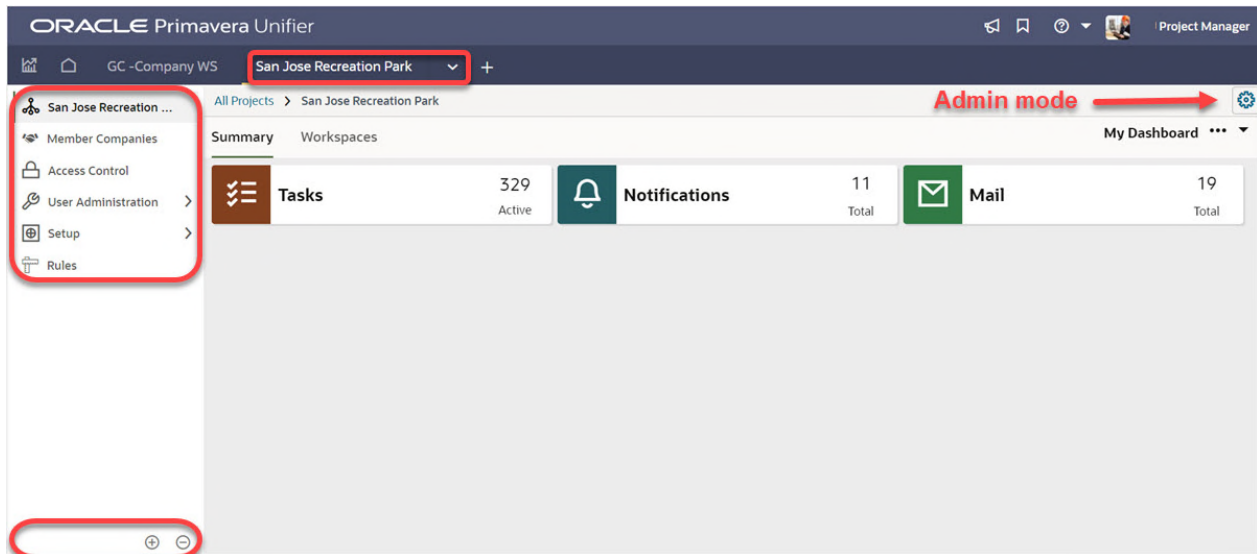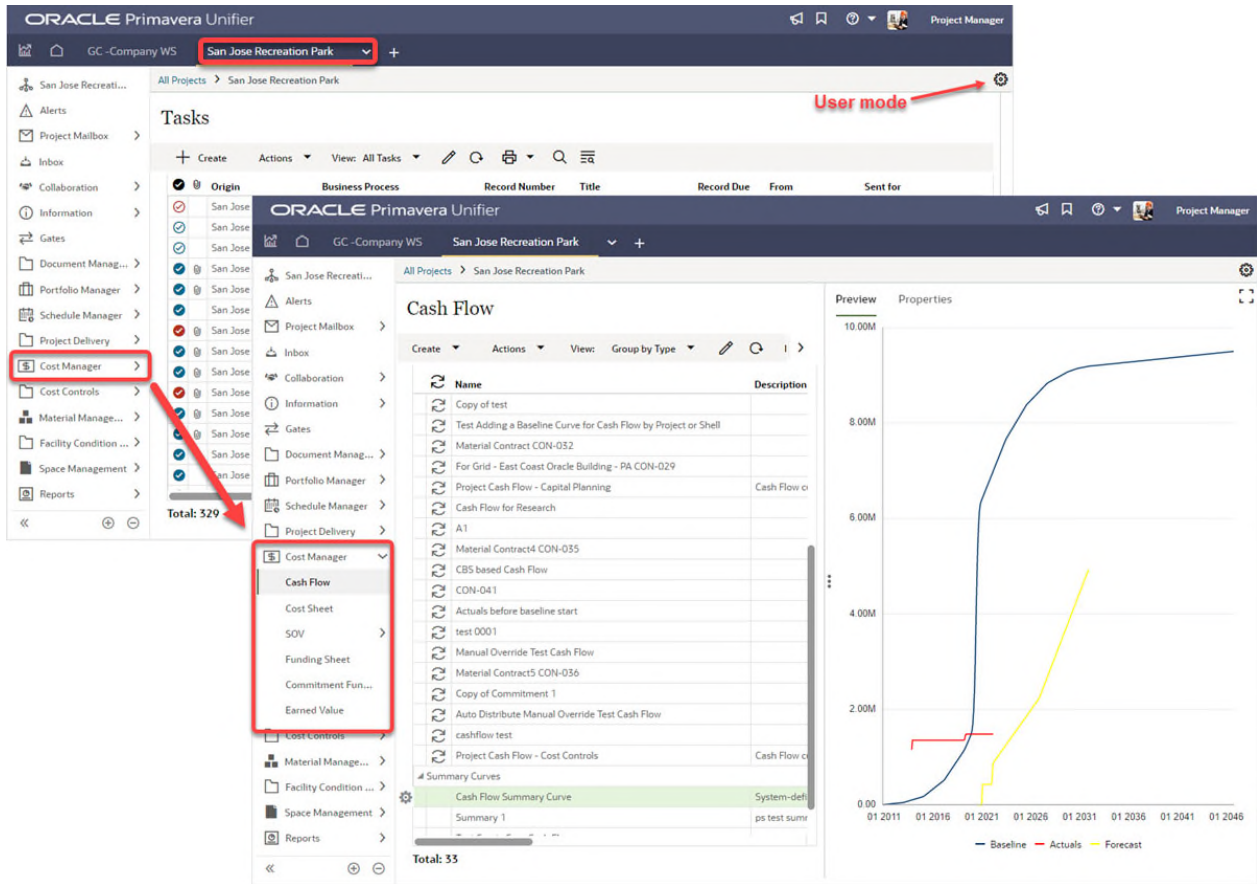
Preferences

To access the **Preferences** (user preferences) window:

1) From the top right-corner of your window, click your user name to open a contextual menu. The menu offers a limited set of choices that are available in the current state. For example:

    ▸ Get Unifier Mobile App
    ▸ Preferences
    ▸ Change Password
    ▸ Proxy For
    ▸ Last login
    ▸ Sign Out

2) Click **Preferences** to open the **Preferences** window. The **Preferences** window contains the following tabs:

▸ **General**
▸ **Security**
▸ **Email Subscription**
▸ **Region Format**
▸ **Proxy**
▸ **More**

The following describes each tab.

General Tab

Use the **General** tab to view contact information for the company directory.

You can include the user's photo by clicking from the left-hand side. The existing Image picker supports images of type jpg, jpeg, png, tiff, only.

You can upload a profile picture by using the **Upload Photo** option.

Viewing your Company Contact Information

Use the **General** tab of the **Preferences** window to view your company contact information such as the contact's Name, Title, Email, Work Phone number, Mobile Phone number, Pager number, Fax number, and Address (City, State/Province, Zip/Postal Code, and Country/Region).

> **Note:** The Company Administrator manages user profiles, including the contact information. Contact your Company Administrator if you want to update your information.

If the "Hide User Profile" option is selected (by the administrator) in the Company Properties (**Security** tab), then you cannot view the basic information which includes field values such as Email address, phone number, etc. This applies to the basic information that is available as a part of user profile.

Example

The Task Details section in a Workflow BP has To, From, CC fields. If checkbox is checked, then the Basic Information block will be hidden.

Administrator name in Shell landing page and Company landing page.

User Picker such as Creator in BP forms, shell forms etc.

Security Tab

Use the **Security** tab (of the **Preferences** window) to:

▶ Change password
▶ Manage password reset and recovery (on-premises only)
▶ Manage secret questions.

Notes:

- You cannot recover/reset your password if you do not set up password recovery secret questions and corresponding answers.
- For better security, change your password at regular intervals. Your Company Administrator may require you to change it at set times.

You can change your password in two ways:

▶ Using the **Security** tab of the **Preferences** window (for first-time users).
▶ Using the **Change Password** option (for returning users). See *Change Password* (on page 78) for more information.

To change your password using the **Security** tab of the **Preferences** window follow these steps:

1. Go to the **Security** tab in the **Preferences** window.
2. Enter your current password and new password in the Current Password and Password fields. To view the password policy, click the **Password Help** tooltip above the New Password field.
3. Confirm your new password by entering the new password in the Confirm Password field.
4. Under Password Recovery Secret Questions section of the Security tab, select a question and enter the answer. You can designate up to three secret questions.
5. Click **Apply** and click **OK** to close the **Preferences** window.

To change your password using the Security tab of the Change Password option follow these steps:

1. From the top right-corner of your window, click your **User Name** to open a contextual menu.
2. Click Change Password to open the Change Password window.
3. Enter your current password and new password in the Current Password and Password fields. To view the password policy set by the administrator, click the **View Password Policy** link.
4. Confirm your new password by entering the new password in the Confirm Password field.
5. Click **Save** to complete changing your password.

You can recover your password from the Sign In Page.

To recover your password:

1. Go to the Sign In page.
2. Click **Forgot Password?** link to open the Reset Password window.
3. Enter your user name and email in the User Name and Email fields.
4. Click **Submit** to show the Secret Question.

> **Note:** If you did not set up the Password Recovery Secret Questions, or if your Unifier account is Inactive or On-Hold, you will receive an error message instructing you to contact Oracle Customer Support.

5. Enter the answer to your secret question field and click **Submit**. A system-generated email containing a temporary password will be sent to you automatically.
6. Click **OK** in the Alert window.
7. Go to your email inbox and open the system-generated email titled "Unifier Password Reset Notification" and follow the instructions.

Password/Login Policy

▸ Minimum overall characters: Minimum number of characters that a password must contain; default is one (1).

▸ Maximum overall characters: Maximum number of characters that a password must contain.

▸ Minimum numeric characters: Password must contain a minimum amount of numbers.

▸ Minimum alphabetic characters: Password must contain a minimum amount of letters.

▸ Minimum special characters: Special characters are [{~!@#$%&*()-_=+;:"',<.>/?}].

▸ Password cannot be same as Username: Users cannot use their user name as a password.

▸ Password cannot be the same as the user's First or Last Name: Users cannot use their first or last name as a password.

▸ Password cannot be same as last password(s): A newly changed password must be different from the previously used passwords.

Email Subscription Tab

The **Email Subscription** tab (**Preferences** window) enables you to set up email subscription details. The **Email Subscription** tab contains the following blocks and fields:

▸ Email Subscription
  ▸ Send notifications in single daily digest
▸ Workflow Business Processes
▸ Non Workflow Business Processes
▸ Portfolio Manager
▸ Document Manager - Project/Shell
▸ Document Manager - Company
▸ Mailbox
▸ User Defined Reports
▸ Alerts

- ▶ Gates
- ▶ Project/Shell

The following provides details.

Selecting Email Subscription Options

Email Subscription

The email subscription option enables each user to control the number, type, and frequency of Unifier-related email notifications received. Users can subscribe to, or opt-out of, receiving email notifications for events within Unifier.

Send notifications in single daily digest

Select this option if you want to receive your email notifications in a consolidated email, once a day (single daily digest), instead of receiving the notification emails individually and per event. Deselect this option to receive email notifications individually and per event.

> **Note**: The maximum number of messages in a single daily digest depends on the length of the messages. Unifier will send up to the latest 100 messages in single daily digest. The older messages will be removed and will not be included in the digest.

Before you begin selecting email subscription options

Permission

To receive an email notification for a module and/or event, you must have view permission for that module and/or event. This view permission is set in Administration mode.

> **Note**: If you do not have view permission, your email notifications settings do not override the original permissions (set by your Company Administrator), and you only get email notifications for modules and/or events that you have permission to view.

Document Manager notifications

In addition to module-level view permission, you must also have at least view permission on the specific documents or folders that would generate the event email. These permissions are set by Company Administrator and from within the Document Manager. In addition, the owner of the folder has the option of not generating email notifications for specific events.

External email accounts

If you are using an email address from a generic email account such as Yahoo, Hotmail, and so forth, your spam filter may filter out these notifications. Refer to your email provider regarding how to allow these notifications to reach your inbox.

To receive email notification for a module or event

1) Go to the **More** tab in the **Preferences** window.
2) Select your choices from the scrolling window. See the following table for details.

To opt-out of receiving email notifications for a module or event, simply deselect the items from the scrolling window.

To subscribe to or opt-out of email notifications

1) Go to the **Email Subscription** tab in the **Preferences** window.
2) From Email Subscription field, select the modules and events for which you want to receive email notifications. If you do not select a module or event, you do not receive email notifications related to the unselected module or event. The following table for details.
3) The events apply to the following modules:
    ‣ Workflow business processes
    ‣ Non-workflow business processes
    ‣ Document Manager - Project/Shell
    ‣ Portfolio Manager
    ‣ Document Manager - Company
    ‣ Mailbox
    ‣ User Defined Reports
    ‣ Alerts
    ‣ Gates
    ‣ Project/Shell
    ‣ E-Signatures
4) To opt out of receiving email notifications regarding specific Unifier events, deselect the checkbox for the notification.
5) To receive Unifier email notifications in one email summery per day, click the **Send notification in single daily digest** checkbox. The summary email will be sent if one or more events trigger an email notification.
6) When finished, click **Apply** and **OK**.

> **Notes**:
>
> ▪ For permission-based emails, email notification is usually sent the first time permission has been granted and not when permissions are modified, unless otherwise noted.
>
> ▪ Document Manager email notifications are only sent if users have at least view permission on the affected item, and if the item owner enables email notification.

Modules and Events Options

This section describes the events within each module.

Workflow Business Processes

These events pertain to business processes. To receive notification, you must have at least view permission for the business process (BP). You can opt to receive email notification. See the following table for details.

For	When
Personal tasks	You are part of the assignees list when a BP is sent (this becomes a task for you).
Decline tasks	A task is declined by one or more of the assignees that you have added to a BP that you sent.
Overdue personal tasks	An assigned task is past the due date.
Messages	Someone cc's you on a BP.
Record Workflow Complete	The record Workflow is complete and the Workflow end step has been reached; this is applicable on any Workflow BP where user is selected as part of the "Notify users on workflow completion" setup under the BP Setup > Setting tab.
Record Modification	A certain step occurs in a workflow (if your Administrator has enabled workflow actions for the workflow step) that needs action. Actions are shown as hyperlinks in the email.

Non-Workflow Business Processes

These events pertain to non-workflow business processes. To receive notification, you must have at least view permission for the business process (BP). You can opt to receive email notification. See the following table for details.

For	When
Record Creation	A new record is created.
Record Modification	A record or line item is modified, a line item is added or deleted, comments or attachments are added, attachments are removed.

Portfolio Manager

For	When
Scenario Shared or Approved	When the user has defined the list of users, or groups, in the Portfolio Manager configuration, then when the scenario sheet is approved or shared, the respective list of users, or groups, will receive the notification.
	If the list of users, or groups, is defined in the Portfolio Manager configuration, but the option in user preferences is not selected, then the user will not receive any notification.
	This option is not selected by default.
	The option will also be seen in the "User Preference Template," in the Preferences tab. When the "update users" action is performed, the value is pushed to the user preferences.
	The subject of email notification that is received by user states if a Project Portfolio scenario sheet is approved, or approved and shared.
	Note : Only an active user receives the notifications.

Document Manager - Project/Shell and **Document Manager - Company**

Note: With this module in particular, a user modifying multiple documents or folders, or folders with many subfolders, can potentially trigger a large amount of email. You can prevent receiving too many notifications by choosing the digest notification (one email) option, or limit the events for which you want to receive notification.

Users with view permission (set in the Document Manager) on the applicable document, folder, or shortcut target receive notification when the following occurs:

For	When
Document upload	A new document is uploaded into the folder.
Transfer ownership	File or folder ownership is transferred. The new owner is notified.
Move	A document, folder, or shortcut is moved from one location or folder to another.
Delete	A document, folder, or shortcut is deleted.
Document revise	A document is revised.
Folder rename	A folder is renamed.

Mailbox

For	When
Personal Mail	Users receive an email notification when new mail is received.

User Defined Reports (UDRs)

For UDRs, the users receive email notification under following conditions:

For	When
New report granted	The user is granted at least run permission to a user-defined report by another user.
Results from scheduled reports	When a scheduled report has been generated and the results are available; requires run permission be granted for the report.

Alerts

For alert, the users receive email notification under following conditions:

For	When
Each alert	Users can receive notification when an alert is generated.

Gates

For	When
Change Phase Notification	User receives notification when a phase is changed.
Auto-email PDF Gates run	User receives a PDF copy of an automated gates run.

Project/Shell

For	When
Successful Creation	The Program Manager, Project Manager, or Project Administrator receives notification of the successful creation of a Project/Shell. This notification occurs if the Project/Shell is created manually, through Web Services, using a CSV file, or through auto-creation.

E-Signatures

For	When
E-Signature Requests	An internal signee receives email notification for the E-Signature request created in the **E-Signatures** functional node. When you select the E-signature Requests option in the User Preferences, then Unifier sends an email to the user when an E-Signature request is created for that user in the **E-Signatures** functional node at company, project, or shell.

When you select **Send notifications in single daily digest**, and there are notifications relating to the **E-Signature Requests**, then the single digest email to the recipient will contain the E-Signature message along with other messages in the email. The header section (where hyperlinks to each message within the digest are mentioned) contains the hyperlink to the E-Signature message with the text: <Document Name> is sent to you for review and sign.

> **Note**: You do not have the option to send the document as an attachment in the email notification.

You can send the documents in the Document Manager, and the documents attached to a business process record for review and signature to one or more Unifier and non-Unifier users.

Region Format Tab

Use the **Region Format** tab to manage settings such as:

▶ Language, date and time format
  ▸ Preferred Region
  ▸ Language
  ▸ Time Zone
  ▸ Date Format
▶ Number and Currency Formats
  ▸ Decimal
  ▸ Digit Grouping Symbol
  ▸ Digit Grouping
  ▸ Show Currency Symbol
  ▸ Positive Currency Format
  ▸ Negative Currency Format
  ▸ Negative Number Format

This tab provides a Currency Example, also.

Changing Time Zone and Date Format

The following settings are maintained in the **Region Format** tab of your **Preferences**.

The **Time Zone** setting affects the date stamp that appears on the actions that you perform in Unifier, such as saving or uploading files, running user-defined reports, and due dates of tasks assigned to you. The date stamp is effective as of 12:00 AM in your time zone.

Example

If your time zone is Eastern Standard Time, and your task is due August 1, then at 12:00 AM August 1 your task is due — even if it is only 9:00 PM July 31 in Pacific Standard Time.

> **Note**: The Time Zone setting is based on the Coordinated Universal Time (UTC).

To set the time zone:

1) Go to the **Region Format** tab in the **Preferences** window.

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

3) When finished, click **Apply** and then **OK**.

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

To set the date format:

1) Go to the **Region Format** tab in the **Preferences** window.

2) Click the **Date Format** drop-down list and select a date format.

3) When finished, click **Apply** and then **OK**.

Unifier supports the following *additional* date formats:

> **Notes**:
>
> - The time format for all dates is: HH:MM. The Date Format options is displayed without AM to support the 24-hour format. For example, in the Date Format drop-down, instead of MM/DD/YYYY HH:MM AM, MM/DD/YYYY HH:MM is displayed to enable you to select the 24-hour time format.
> - Unifier provides you the option to select 24-hour date time format in all modules, once this is set in the user preferences (**Preferences**). This is supported for all Standard, Portal, Partner users, and bidders.

▸ MM/DD/YYYY
▸ DD/MM/YYYY
▸ MM/DD/YY
▸ DD/MM/YY
▸ MM-DD-YYYY
▸ DD-MM-YYYY
▸ MM-DD-YY
▸ DD-MM-YY
▸ DD.MM.YYYY
▸ YYYY-MM-DD
▸ MMM/DD/YYYY
▸ DD/MMM/YYYY
▸ YYYY/MMM/DD
▸ M/D/YYYY
▸ M/D/YY
▸ D/M/YYYY
▸ D/M/YY
▸ YY/M/D
▸ YYYY/M/D
▸ YY/MM/DD
▸ YYYY/MM/DD

Changing Number and Currency Formats

The following settings are maintained in the **Region Format** tab of your **Preferences** window.

The **Number and Currency Formats** section of the **Region Format** tab of your **Preferences** allows you to:

▶ Select Preferred Region from a list. This is the region that you want.
▶ Set the **Decimal Symbol** for your currency from a list.
▶ Set **Digit Grouping** from a list.
▶ Set **Show Currency Symbol** to show or not.

> **Note**: If the administrator does not select the **Show Currency Symbol** option, the system ignores the options that are selected for **Positive Currency Format** and **Negative Currency Format**, and does not display symbols. The following applies to all objects (such as Form, Sheet, Cash Flow, Dashboard, and Log) that use the Currency Data Element.

▶ Set **Digit Grouping Symbol** from a list.
▶ Set **Positive Currency Format** from a list.
▶ Set **Negative Currency Format** from a list.
▶ Set **Negative Number Format** from a list.

When finished, click **Apply** and then **OK**.

The Number and Currency Formats section of the **Region Format** tab also provides examples for the following:

▶ Currency
▶ Decimal Number
▶ Integer Number

The examples show the arrangement of the numbers (the way the numbers are displayed) in the forms when a particular formatting option has been selected.

For decimal numeric data, the precision is governed by the "Decimal Places" set in the Data Element properties.

> **Note**: When the Company Administrator creates a User and selects a language, the values of the number formats are populated accordingly and displayed in the **Region Format** tab of the **Preferences** window. The number formatting options are not displayed in the User Properties window. The number formatting options are displayed in the **Preferences** window. If the Company Administrator changes the language value in the User Properties window, the **Region Format** tab of the **Preferences** window shows the same languages as in User Properties window and the number formatting options remain the same.

Changing Language

The following settings are maintained in the **Region Format** tab of your **Preferences** window.

To set the language:

1) Go to the **Region Format** tab in the **Preferences** window.
2) Click the **Language** drop-down list and select your language.
3) When finished, click **Apply** and then **OK**.

> **Note**: The languages listed are the active languages selected in the **Configuration - Internationalization** log window, by the administrator.

The following languages are supported:

▶ Arabic
▶ Chinese (Simplified)
▶ Chinese (Traditional)
▶ Dutch
▶ English
▶ French
▶ German
▶ Italian
▶ Japanese
▶ Korean
▶ Portuguese (Brazil)
▶ Russian
▶ Spanish

> **Note**: The rendering of Unifier content in Arabic language in third party applications (such as Email Client, Adobe for PDF, and so forth) is outside of the Unifier application purview.

Numeric Format Based on Language Selection

The Numeric formats such as the decimal symbol, grouping, and so forth are based on the language selected for the bidder.

For the Vendors records that are created through CSV or Web Services, the user can specify the values for the Language, Time Zone, and Date Format Data Elements and create Vendors records in Bulk. The existing codes for these fields can be used to specify the values. The list below is derived from the Java API.

Language	Region Format	Decimal Symbol	Digit Grouping Symbol	Digit Grouping	Positive Currency Format	Negative Currency Format	Negative Number Format
Simplified Chines	Chinese (Simplified, PRC)	. (period)	, (comma)	123,456,789	#123	#-123	-123

e							
Traditional Chinese	Chinese (Traditional, Taiwan)	. (period)	, (comma)	123,456,789	#123	-#123	-123
Dutch	Dutch (Netherlands)	, (comma)	. (period)	123,456,789	# 123	# -123	-123
English	English (United States)	. (period)	, (comma)	123,456,789	#123	(#123)	-123
French	French (France)	, (comma)	Space represented by blank in the product	123,456,789	123 #	-123 #	-123
German	German (Germany)	, (comma)	. (period)	123,456,789	123 #	-123 #	-123
Italian	Italian (Italy)	, (comma)	. (period)	123,456,789	# 123	-# 123	-123
Japanese	Japanese (Japan)	. (period)	, (comma)	123,456,789	#123	-#123	-123
Korean	Korean (Korea)	. (period)	, (comma)	123,456,789	#123	-#123	-123
Portuguese	Portuguese (Brazil)	, (comma)	. (period)	123,456,789	# 123	-# 123	-123
Russian	Russian (Russia)	, (comma)	Space represented by blank in the product	123,456,789	123#	-123#	-123
Spanish	Spanish (Spain)	, (comma)	. (period)	123,456,789	123 #	-123 #	-123

Proxy Tab

Use the **Proxy** tab to:

▶ Prevent assigning proxies (**Do not allow Proxies**)

> **Note**: The **Do not allow Proxies** option is available for the **Company Administrator** (and in **Admin** mode), only.

▶ Add multiple proxies (**My Proxy** tab: **Users who can act as my Proxy**)
▶ See the list of users who can act as your proxy (**My Proxy** tab: **Users who can act as my Proxy**)
▶ See the list of users who you act as their proxy (**I am Proxy** tab: **Users I can act as their Proxy**)
▶ See the history of proxy login (**Proxy Login History** tab)

You can select/designate more than one proxy user.

You can be a proxy for multiple people, and you can designate more than one user as your proxy.

Proxy users can be granted permission to access another user's account to complete tasks and perform other functions on that person's behalf. When another person signs in as your proxy user, that person will have access to all of the records and functions that you do.

When you designate another user as your proxy, the user will have access to all of:

▶ The records that you have generated
▶ The functions that you perform

When you designate another user as your proxy, the user will not be able to change your Preference settings and the Audit logs reflect the actions taken by a proxy user as "on behalf of" the original user.

You can limit the period in which the proxy user will have access to your account by specifying a start and end date or leave their access active indefinitely.

Proxy users who are active (Status: **Active**) receive email notification of tasks to perform as proxy. This applies during the time specified time period, using the Start Date/Time and End Date/Time.

> **Note**: If the proxy user must receive task notifications immediately, ask the proxy user to ensure that the Send notifications in a single daily digest checkbox is not selected. See *Selecting Email Subscription Options* (on page 64) on the **Preferences** window, **More** tab.

Do not allow Proxies

Only Site/Company Administrators, Company users, and Partner users are permitted to select the **Do not allow Proxies** option.

> **Note**: This option is read-only in the user's **Preferences** window.

Users are able to add proxy users in their **Preferences** window only if the Site/Company Administrator has not checked the **Do not allow Proxies** option in the **Proxy** tab of Edit User window.

The **Proxy** tab contains the following tabs:

▶ **My Proxy** tab

This tab enables you to determine the users who can act as your proxy (**Users who can act as my Proxy**). This tab of the **Proxy** tab lists the users who can act as your proxy and allows you to add, adjust the settings, remove proxies, and view the proxy login history.

If enabled by the Administrator, Partner Users can add Owner Company Users as proxy users.

If you have access to more than one Company and want to assign a proxy for yourself in those companies, you need to go into each Company and set the proxy user (Company > your user name > Preferences > Proxy).

The topics that follow describe available user preference configuration settings for each tab, in details.

▶ **I am Proxy** tab

This tab enables you to determine who you can be a proxy for (**Users I can act as their Proxy**).

▶ **Proxy Login History** tab

This tab enables you to see a history of all proxy logins.

Choosing a Proxy User

Add (plus "+" icon)

If the **Do not allow Proxies** option is selected by your Company Administrators, then this option is not available for you to use.

If the **Do not allow Proxies** option is not selected by your Company Administrators, then you can use this option to grant proxy access to other users. To add a proxy, click **Add** and follow the prompts.

> **Note**: Your Company Administrator can assign other users to act as proxies to your account if you are unable to do so.

Settings

If the **Do not allow Proxies** option is selected by your Company Administrators, then this option is not available for you to use.

If the **Do not allow Proxies** option is not selected by your Company Administrators, then you can use this option to select an existing proxy and change the user settings of your proxy, such as start and end date/time. To change the user settings of your proxy, click **Settings** and follow the prompts.

The system sets the values in the time-related fields base on the user's preferred data and time formats.

If you do not specify a start or end date, the proxy user can access your account immediately and their access privileges will not expire.

You can select **Active** to activate your proxy's access. To disable your proxy's access, select **Inactive**.

Remove

You can use this option to remove a selected proxy. To remove a user as your proxy, click to select the proxy from the list and click **Remove**.

Proxy Login History

Use this option to view the following information about your proxies:

▶ Name
▶ Company
▶ Login Date
▶ Logout Date

The last login information appears on top.

Users I can act as their Proxy

If the Company Administrator has designated you as a proxy for another user, your user name is listed under Users I can act as their Proxy field.

> **Note**: As a proxy of a user, you have all the permissions that have been granted to that user except that you cannot change the user's original Preference settings even if the user has Administration permissions.

More Tab

Use the **More** tab to manage company settings such as:

▶ Viewer Options
  ▶ Default Viewer
▶ Viewer Exceptions
  ▶ Always use Native
  ▶ Always use Unifier

Choosing a Viewer Option

The following setting is maintained in the **More** tab of the **Preferences** window.

> **Note:** Before you choose a file viewer option, you must have an active AutoVue license and AutoVue installed and configured on your server.

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

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

To select a file viewer option:

1) Go to the **More** tab in the **Preferences** window.
2) Click the **Default Viewer** drop-down list and select one of the following viewer options:
   ▸ Native
   ▸ Unifier Viewer
3) When finished, click **Apply** and then **OK**.

The following describes each of the default file viewer options in details:

Native

To open documents in their native software applications (for example, Microsoft® Word documents are opened in Microsoft Word). In order to be able to use this option to view files, you must have the native software application installed on your computer.

> **Note**: The native software application does not display the document graphical markups, but Unifier displays the document graphical markups automatically, using the Unifier Viewer.

Unifier Viewer

To open documents in system-provided Viewer which will convert most file types to an image format.

> **Note**: If you select **Unifier Viewer**, the document opens in read-only view, but it supports adding graphical markups and text comments (for example, in attachments to business process and other records, or in files in the **Document Manager**).

Setting Viewer Exceptions

The **Viewer Exceptions** section of the **More** tab allows you to specify exceptions to the default viewer of your choice.

Example

If you selected "Unifier Viewer" as your file viewer and want "Native" to show a particular extension and not the "Unifier Viewer," enter the extension in the "Always Use Native:" field.

If you selected "Native" as your file viewer and want "Unifier" to show a particular extension and not your Native software, enter the extension in the "Always Use Unifier:" field.

> **Notes**:
> - Omit the period before the extension.
> - Separate multiple extensions by a semicolon, with no space in between.

Change Password

Changing Your Password as an On-Premises Customer

From the top right-corner of your window, click your user name to open a contextual menu. Click **Change Password** to open the **Change Password** window. In the **Change Password** window you can:

- Change your Unifier password.
- View password policy.

Changing Your Password as a Cloud Customer

To change a password in your identity domain:

1) In the Primavera Portal, click **Identity Cloud Service**.
2) Log into the identity domain with your user name and password.
3) Click **Change My Password**.
4) Provide input for the required fields and click **Submit** when finished. Ensure that the new password complies with the password policy.

> **Note:** Wait five minutes before logging into an account after you have changed your password.

Proxy For

To log in as someone else's proxy user:

1) From the top right-corner of your window, click your **User Name** to open a contextual menu.
2) Click the **Proxy For** link to see a list of the users who designated you as their proxy.
3) Click to select the user name.
4) Select the user account to which you want to log in as a proxy and you will be immediately acting on behalf of the user.

To log out as a proxy user:

Click the **Sign Out** link at the bottom of the **User Name** contextual menu. Your Proxy session will end, but you will still be signed in to Unifier under your own user name.

Sign Out

From the top right-corner of your window, click your user name to open a contextual menu. Click **Sign Out**. For additional details, see *Sign In, Sign Out, and Session Timeout* (on page 27).

Bookmarks

The function of bookmarks in Unifier is similar to the bookmarks that you create in a web browser to help you access a web page more quickly, or navigate to frequently used locations.

> **Note:** Unifier does not validate bookmark names, so ensure that you do not add duplicate or confusing bookmark names.

You can add bookmarks to Unifier **User** Mode functions where you frequently work.

> **Note**: You cannot add bookmarks when you are in the **Admin** mode.

To add bookmarks:

1) Go to the tab/node that you want to bookmark.

2) From the top right-hand corner, click the **Bookmark** icon () to open the **Bookmarks** window.

3) Click **Bookmark this Page**.

In the **Bookmarks** window, use the following options to remove, rename, or mark a particular tab as a default tab:

- **Remove**
- **Rename**
- **Mark as Default** (to designate a bookmark as the default module shown to you at sign in**)**

> **Note:** Accessing a tab/node through a bookmark is based on your user permissions.

To use bookmarks, from the top right-hand corner, click the **Bookmark** icon () to open the **Bookmarks** window.

Master Log-Business Processes

> **Note**: The name of this node can be customized.

Click the **Master Log - Business Processes** grouping node in the Navigator (left-hand pane) to see all of the business processes that you are involved in and you have permission to access. The business processes log displayed (for each of the business processes under the **Master Log - Business Processes** grouping node) is driven by the log design of the respective business process. The log for a non-workflow BP includes an Edit Record column that indicates whether the record is in an editable state by displaying an Edit Record status icon. If the record has a status such as submitted, terminal, or initiated, no icon is displayed.

> **Note**: If you do not have permissions to view any of the business process types listed under the **Master Log - Business Processes** grouping node (master log), then you will not see the **Master Log - Business Processes** grouping node in the **Home** (Home workspace)

page.

Company Landing Page (User)

When you (a user or an administrator) sign in to Unifier, the system is in the user mode, by default. You can switch between modes using the mode icon (⚙ **User** mode and ⚙ **Admin** mode).

> **Note**: The **Home** workspace ⌂ does not support the **Admin** mode.

To access company user functions in Unifier, go to the **Company Workspace** tab and click **User** mode to open the company landing page (or company home workspace).

To access your company landing page (*User*):

1) Click your company tab (**Company Workspace**) to open it.
2) Switch to **User** mode.
3) From the left-hand Navigator, on the very top, click your company name to open the company landing page, the **Company Workspace** window (log).

The **Company Workspace** window has the following tabs:

▶ **General**
▶ **Summary**

You can add multiple tabs to the company landing page. To add a new tab:

1) Click the pencil icon (under the mode icon) to open the **Company Dashboard** window. The **Company Dashboard** window lists the existing tabs and enables you to add, modify (edit), or delete tabs.
2) Click the **Create Tab** option (the plus "+" icon) to open the **New Tab** window.
3) Enter a name in the **Tab Name** field, and click **Save**.

The newly created tab will be listed under the existing tabs on the **Company Dashboard** window.

You can add multiple blocks (custom or standard) to each tab of the company landing page: To add new blocks to a tab:

1) Click to select the tab.
2) Click the plus "**+**" icon (on the right-hand side of the screen) drop-down arrow and select one of the following types of blocks:
   a. **Custom**
   b. **Standard**

To add custom blocks on a tab:

I. Click to select a tab.
2. Click **Custom** to open the **New Custom Block** window.
3. Enter the values (Source Details, Block Title, Block Length, etc.) in the fields and click **Save**. The new block is added to the right-hand pane.

To add standard blocks on a tab:

1. Click to select a tab. You can add both custom and standard blocks to a tab.
2. Click **Standard** to open the **New Standard Block** window.
3. Enter the values (Source Details, Report On, Block Title, Block Length, etc.) in the fields and click **Save**.

   The **Data Type** drop-down field (under the **Source Details** block) enables you to include workspace type information (such as Active Workspaces, On-Hold Workspaces, etc.) on the company landing page. Click the **Data Type** drop-down field, click to select **Workspace Information**, and click **Save**.

To delete or edit a block use the trash-can or pencil icons.

You can:

▸ Edit a tab name by selecting the tab and using the **Edit Tab** icon (the pencil icon) on the **Company Dashboard** window.

▸ Delete a tab by selecting the tab and using the **Delete** icon (the trash-can icon) on the **Company Dashboard** window. You cannot delete the **General** tab or **Summary** tab because they are system-generated tabs.

▸ Reorder the tabs that are displayed on the **Company Dashboard** window by way of drag-and-drop.

▸ Select which tabs to be displayed on the **Company Dashboard** window by selecting the tab (the select box). You cannot deselect the **General** tab.

▸ Print a tab or maximize a tab by using the print icon or the maximize icon, respectively.

The **General** tab is divided into two sections:

▸ The left-hand section displays the following information:

   ▸ Company name and image (if it exists in the Company Properties page).
   ▸ **Description**
   ▸ **Administrator**
   ▸ **Homepage url**
   ▸ **Locations**

      Other locations, if available, appear as grouping nodes in expanded mode below the first address, and the map picker displays the pin markers for all other locations.

▸ The right-hand section displays the following information in multiple blocks:

   ▸ **Tasks**
   ▸ **Notifications**
   ▸ Company Workspace records: **Workflow Business Processes**

      The Workflow BPs are all the workflow records for the user who has signed in. If the user who has signed in does not have access to any of the Workflow BPs, at the Company Workspace level, then the panes display a pertinent message. You can click on the BP name to navigate to the respective BP log.

   ▸ Company Workspace records: **Non-Workflow Business Processes**

The Non-Workflow BPs are all the non-workflow records for the user who has signed in. If the user who has signed in does not have access to any of the Non-Workflow BPs, at the Company Workspace level, then the panes display a pertinent message. You can click on the BP name to navigate to the respective BP log.

The **Summary** tab contains summary information displayed within custom or summary blocks. Similar to the **General** tab, you can add, edit, or delete custom and standard blocks.

Shell Landing Page (User) - Details

To access your shell landing page (User):

1) Click your shell tab to open it.
2) Switch to **User** mode.
3) Click **My Dashboard** and click **Details** to open the shell **Details** form.

For more information about the shell landing page, refer to the *Unifier Programs, Shells, and Projects User Guide*.

The shell **Details** form enables you to access the following tabs:

Tab	Description
General	This tab has the following blocks: ▶ General ▶ Description ▶ Location This tab enables you to see and set the following general information about the shell: ▶ Number ▶ Administrator ▶ Location ▶ Description ▶ Status ▶ Latitude ▶ Longitude The fields in the **General** tab can be customized. You can format the columns when your Display Type is set as Table or Grid. This enables you to re-size, for example the Dashboard View Mode for the Drill-downs, and Standard, or Custom, blocks that the selected Display Type is set as Table or Grid. This is similar to the same feature available for the Business Processes log. Unifier saves your customized display automatically until it is changed by another user. You can also reorder the fields under the Detail Form Tab Name. Use the Edit Details Block option (New Standard Block window) to select fields columns (Selected Fields) by dragging and dropping the fields from the Available Fields. You can also use the deflector and collector options. This action makes the order in which the fields are displayed in the Details block of Dashboard match the order defined in the Selected Fields column in the New Standard Block window.
Currency	In this tab, you can: ▶ See the currency that the shell uses. ▶ Add new currency. ▶ Modify an existing currency.

Tab	Description
Images	This tab contains the following toolbars: Image (the plus "+" symbol) drop-down menu: ▶ **Browse**: To upload images from the local computer, directly. You can select and add multiple images. If you select multiple images, the images will be displayed in the shell dashboard, on the image block, as rolling images. ▶ **Document Manager**: To see the image files and folders that are available in a shell Document Manager. You must have the "View" permission to see the images and folders. Use this option to upload images from the local Document Manager (DM) of the particular project. If an image is revised in DM, the revised image is displayed in the shell dashboard, on the image block. You will be able to view images, from DM, in the Dashboard in Admin as well as User modes. In the dashboards, if there are multiple images, then Unifier displays all of the images as rolling images. When a shell has multiple images, Unifier uses the first image from the list to print the shell image through custom prints and reports. Help (⑦): To display information about this tab. The tab also contains a log that lists the names of the images that you have downloaded. You can use drag-and-drop to reorder the images on the log. Use the trash-can icon to delete an image.
Options	Enables you to see, add, and set options about the shell such as: ▶ Phase ▶ Time Zone for Background Jobs: This time zone will be used to calculate the time for running the recurring jobs, specific to this workspace. If left blank, the time zone that was set in the Background Jobs (at Company-level) will be used to run the jobs. ▶ Financial Period ▶ Email Address ▶ Send Notification To ▶ Document Manager Attribute Form ▶ Document Manager Attribute Form Used ▶ E-Signature Type
Links	Enables you to add new links and see the existing links in the shell under the following blocks on the window: ▶ New Links ▶ All Links

Tab	Description
Calendar	Enables you to select one of the following calendar types: ▸ Standard Calendar ▸ Custom Calendar (you can copy an existing custom calendar) Select Working and Non Working days by choosing a day and selecting "Working" or "Non Working" below. If you would like to select a specific day of the week to adjust the working status, click the day of the week and select "Working" or "Non Working" below.
Custom Print Template	Enables you to Add Selective Custom Print Templates for shell specific business processes. Once you check the Add Selective Custom Print Templates checkbox, you can click **Add Templates** to choose which business process to apply templates to by moving them from the Available Items list to the Selected Items list.
Gateway Integration	This tab enables you to link Multiple P6 Projects with the following information: ▸ Project ID ▸ Project Name ▸ Schedule Type

Opening records from drill-down Tables and Grid

When in a drill-down, the selected Display Type is Table, or Grid, and the Record Number is selected in the Source Group By, the Record No. turns to a hyperlink. You can click on the Record No. to open the record in a pop-up window.

> **Note**: The linked record will only be displayed if you have View or Modify access for the BP record.

The Record Number will not be a hyperlink for the following:

▸ When source of the selected Data Cube (in Drill-down block) is Data View.
▸ In the Drill-down block, when the data is selected from the Current Shell and sub-shells or from sub-shells, only.
▸ If the selected Data cube has multiple BPs added as the Data Source.

Common Procedures

This section summarizes some procedures that are the same or very similar in different sections and modules within Unifier.

In This Section

Queries

You will be using queries to extract data from the database for reports and data pickers, and to set up auto-creation with creator elements.

A query is a data mining tool—a method for retrieving information from a database. A query filters the information returned from the database according to restrictions or conditions you specify. The Unifier queries can:

▶ Filter or narrow the data being retrieved for use in reports and manager sheets
▶ Set up conditions or triggers to make something happen automatically in Unifier
▶ Filter or narrow the data being retrieved for use in a data picker element

In This Section

Using Formulas or Conditions in Queries

For queries, you can evaluate the data before retrieving it from the database to determine whether or not to include the value in the report, manager sheet, or data picker, or to spawn an auto-creation. To evaluate the data, you can use a formula or a condition.

In formulas, multiple fields can be calculated to arrive at a certain value that the data must meet before it will be used. The value can be one that you enter, or a value from another field.

You can include formulas in conditions.

In the **Condition** field, select the condition the value in the field must meet.

The following explains the formulas you can use in a query.

Field Value Comparison

The formula for field value comparison produces data that meets a field value (string or numeric) from the form of a business process or a shell in a hierarchy, or a constant. This is then used to populate a data picker.

Date Plus or Minus

The formula for date adds or subtracts a value to or from a date.

Date Difference

The formula for date difference subtracts one date from another to give you the number of days between the dates.

Compare Date Fields

You can also compare date fields as part of a query.

Dynamic Date Value

You can compare a date field value with a date field from the form of a business process or a shell in a hierarchy, a specific date, or today's date, and also add or subtract days to the result. This is then used to populate a data picker.

Between Dates

You can compare a date field value to see if it falls between two dates. This is then used to populate a data picker.
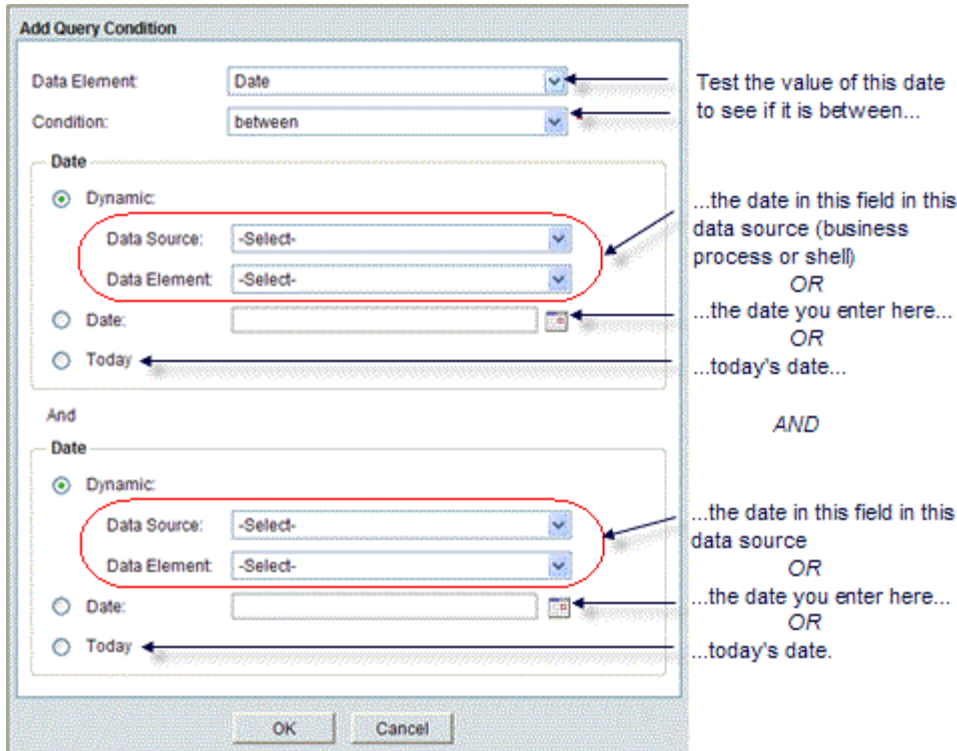
How Queries Work

The way queries work in Unifier is as follows:

▶ You mine down to the information you want by choosing an element (field) in the database on which to base the query.

▶ You test the data against conditions and values you specify.

A condition is a state or restriction the value in the data element (field) must meet. A condition of the value might be that it must be equal to a certain number (maybe 10) or that it must contain a certain string of letters (such as "due date of").

▸ When (or if) the data meets the condition you specify, Unifier retrieves it from the database for use in a report, manager sheet, auto-creation, data picker, etc.
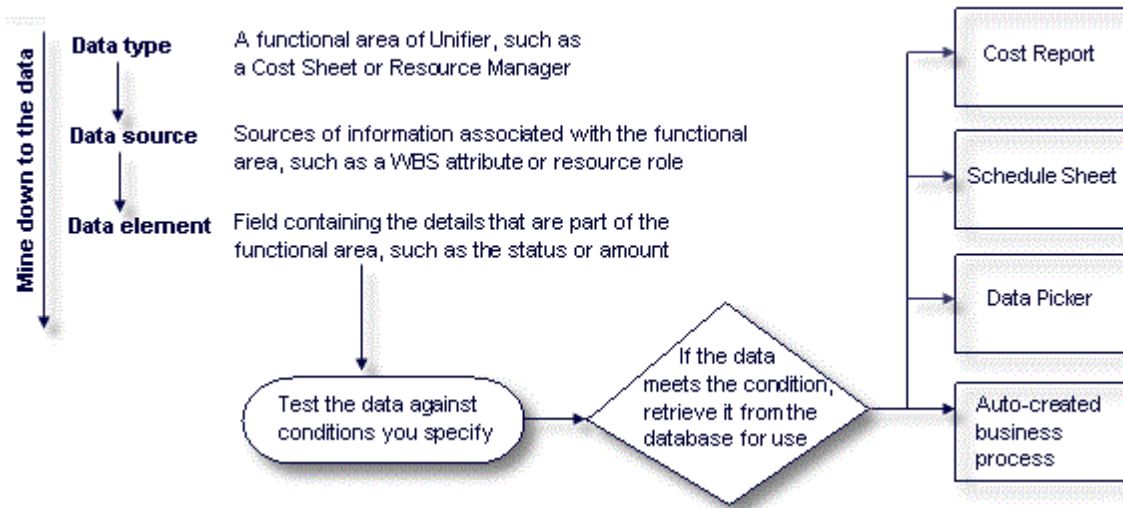
Assignee Filter Query Condition

When you are setting up a business process, you can filter the condition for the *assignee* according to:

▸ Contains
▸ Does not contain
▸ Exists in
▸ Does not exist in
▸ Equals
▸ Does not equal
▸ is empty
▸ is not empty

The following is an example of query evaluation. The workflow setup follows these policies for selecting users.

Assignee	Query Field (Role as defined in the User Attribute Form)
A	Approver
B	Reviewer
C	Controller-Approver
D	Controller
E	Reviewer-Submitter
F	Submitter
G	Approver

The following shows examples with condition/operator:

Condition/Operator	Business Process Form (Field value) Example of the data source used.	Filtered List of Assignees
exists in	Controller-Approver	A, C, D, G
	Reviewer	B
does not exist in	Controller	A, B, C, E, F, G

> **Note**: If the workflow setup has any of the new operators, the list of *assignees* that the user sees at runtime retains the stated query parameters.

The following shows examples with value, condition/operator, and result:

Value 1	Condition/Operator	Value 2	Result
ABC	exists in	ABC, BCD, CDE	True
XYZ	exists in	ABC, BCD, CDE	False
ABC	does not exist in	ABC, BCD, CDE	False
XYZ	does not exist in	ABC, BCD, CDE	True
ABC, BCD, CDE	contains	ABC	True
ABC, BCD, CDE	contains	XYZ	False
ABC, BCD, CDE	does not contain	ABC	False
ABC, BCD, CDE	does not contain	XYZ	True

Query Based Data Element (QBDE)

In Unifier, a Query Based Data Element (QBDE) enables you to view data from the Upper Form or Detail form of a Business Process. QBDE also enables you to view data from:

▸ Other Business Processes
▸ Sheets
▸ Cash Flow

The QBDEs are based on the "SYS Numeric Query Based" Data Definition (DD), and the query for these QBDEs is set in the Business Process Configuration setup. See the "Configure a Query for a Query Based Data Element on a BP" for additional details.

In addition to the Web interface (Unifier Application in the browser), the system evaluates QBDE in the following areas:

▸ CSV import for record creation
▸ CSV import for Line Item creation

- ▶ Web Service methods for record creation along with Line items
- ▶ Web Service methods for Line Item creation
- ▶ Web Service methods for record updates
- ▶ Bulk Edit
- ▶ Bulk Update
- ▶ Creating BP records using BP Template

Evaluating Query Setups of Data Picker Data Elements

Unifier supports many types of Data Picker DEs. The Administrator can set up Query conditions on these Data Picker DEs to filter the results. When a Data Picker DE is launched in the Web interface (Unifier Application in the browser), the system runs the query and displays the records based on the queries defined in uDesigner. The system evaluates the data picker query conditions in the following areas, as well:

- ▶ CSV import for record creation
- ▶ CSV import for Line Item creation
- ▶ Web Service methods for record creation along with Line items
- ▶ Web Service methods for Line Item creation
- ▶ Web Service methods for record updates

The following is a list of the supported Data Pickers:

- ▶ BP Data Picker
- ▶ Shell Data Picker
- ▶ User Data Picker
- ▶ CM Data Picker
- ▶ Role Data Picker

For more information about importing data, see Importing Configuration Packages in the *Unifier Modules Setup Administration Guide*.

Creating a Record from the Query Based Tab

When creating a record from the Query Based tab of another BP (that auto-populates data to the record being created), the Data Element (DE) of type "SYS Numeric Query Based" Data Definition (any DE of this type) *is not updated*, unless the user manually changes the trigger element.

Attaching Files

This section outlines the rules for attaching files in Unifier.

Assuming that you have the proper permissions, you may attach files (such as Word documents, spreadsheets, drawings, etc.) to business process forms, cells (such as a cost sheet or funding sheet), and Mailbox messages. These files can be uploaded and attached from your local system, or they can be attached from documents already uploaded and stored in the Document Manager.

The file attachment procedures are similar across Unifier. When an Attach button is available in a Unifier window, it is associated with the ability to attach a file. When attaching files to other Unifier modules, such as a Mailbox message or Cost Sheet cell, you will be presented with two options:

▸ **My Computer**: To attach a file from your local system.

▸ **Primavera Unifier Folder:** To attach documents from the Document Manager. The window opens, displaying the Documents files and folders. Select the files and folders to attach and click **OK**. (Folders are not attached; the contents of selected folders are attached in a flat list. Documents with duplicate files names will not attach.) You must have at least view permission to the folders and files within the Document Manager in order to view and attach them.

▸ **Document Manager:** Stores documents in Unifier's powerful document management system. Files are uploaded to the DM and stored in a folder system. Access permissions can be applied to individual folders and documents. Files and folders are uploaded by clicking the **Upload** button.

▸ **Business Process Forms:** If you are creating or participating in a business process workflow, you can add attachments to the form or to a general comment associated with the form. Document type BP forms have special file attachment functionality. You can access the attachments in Workflow task emails under General comments section in the Document type BP.

   Note: The Enable response via email option must be selected.

▸ **Cost Sheet, Funding Sheet, Schedule Sheet Cells:** You can add a file attachment to a cost sheet, funding sheet, or schedule sheet (or most any Primavera Unifier sheet) cells that have not been auto-populated from a business process. Open the cost, funding, or schedule sheet and click a cell. The Cell Detail window opens. In the Cell Detail window, click **Attach**.

▸ **Mailbox Messages:** You can attach a file to a Mailbox message. Open a Mailbox message window and click **Attach**.

Attaching Files From your Local System ("My Computer")

To attach documents from your local system (general procedure), click the **Attach** button, choose **My Computer** and follow the prompts.

Attaching Files From the Document Manager ("Primavera Unifier Folder")

You can attach documents from Unifier Document Manager as long as you have at least view permission on the documents.

Attaching Documents From the Document Manager (General Procedure)

1) Click the **Attach** button.
2) Choose **Primavera Unifier Folder**. The Select Files window opens.

   This window displays the folder structure in the project or shell Documents functional node in the Document Manager. Here you can:

   ▸ Open folders to view contents.

   ▸ Select multiple documents or folders to attach.

   All documents within folders and subfolders will be attached in a flat file.

   Documents with duplicate files names will not attach.

Attaching Files (Standard View)

This topic outlines the rules for attaching files in Unifier.

Assuming that you have the proper permissions, you may attach files (such as Word documents, spreadsheets, PDFs, etc.) to business process forms, cells (such as a Cost Sheet), and **Mailbox** messages. These files can be uploaded and attached from your local system, or they can be attached from documents that were already uploaded and stored in the **Document Manager**.

The file attachment procedures are similar across the system. When an **Attach Files** option or **Attachments** tab is available in a Unifier window, it is associated with the ability to attach a file. When attaching files to other modules, such as a Mailbox message or a Cost Sheet shell, you are presented with two options:

▶ Browse
▶ Document Manager

Browse Option for File Attachments

If you select the **Browse** option, a new **Upload** window is displayed. You can drag and drop files from your computer to the **Drag and Drop** box, or click anywhere in the **Drag and Drop** box and browse your local system for attachments. In the middle portion of the window, there is a **File** log that contains the following columns:

▶ File Name
▶ File Size
▶ Document Title
▶ Revision No
▶ Issue Date

In the lower portion of the window, you are provided with options that pertain to the uploading process. You can select two checkboxes, which are **Include reference files** and **Revise automatically if file with same name exists**. However, unless you have more than one file with the same name, the **Revise automatically if file with same name exists** checkbox cannot be selected. If you select the **Include reference files** checkbox, then a drop-down list is available. You can choose whether to upload the files from your computer, auto-resolve the files from **Documents** as **Dynamic Links**, or auto-resolve the files from **Documents** as **Static Links**.

After you select files to upload, click on the **Upload** option in the bottom right corner of the window. To close the window, click on the **Cancel** option.

Document Manager Option for File Attachments

If you select the **Document Manager** option, a new **Select Files** window is displayed. You can browse a variety of existing folders from the **Document Manager** by clicking on any of the folders in the **Project Documents** log. This log contains the following columns:

▶ Name
▶ Comments
▶ Location
▶ Owner

- ▶ Title
- ▶ Rev. No.
- ▶ Issue Date
- ▶ Size

In the top left corner of the window under the locator links, you can select the **Search** and **Find on Page** options. With the **Search** option, a new window is displayed where you can search for a file based on a variety of pre-determined conditions. You can also add conditions as well as match your search with any or all conditions. Once you have entered information into the **Search** bar, you can select the **Search** option to begin the search process. To go back to the previous window, select **Reset**.

With the **Find on Page** option, you can search for a file or folder within the **Project Documents** log. A new row is created at the top of the log, and this row contains search fields for each column. Upon entering information into the search fields, any matching results are highlighted and displayed in the log. To restore the log to its original state, clear the search fields by deleting the entered information.

> **Notes**:
>
> - Folders cannot be selected and documents with duplicate file names cannot be attached.
> - You must have at least view permission to the folders and files within the Document Manager in order to view and attach them.

After you select the files, click on the **Select** option in the bottom right corner of the window. To close the window, click on the **Cancel** option.

If you are creating or participating in a business process workflow, you can add attachments to a business process form or to a general comment associated with the form. Document-type business process forms have special file attachment functionality. You can add attachments to a general comment by selecting the **Attach Files** option in the **Comments** tab of a document-type business process form. The previous **Browse** and **Document Manager** options are available.

When attaching files to a business process form, you may be presented with the previous two options as well as an additional option:

- ▶ Browse
- ▶ Document Manager
- ▶ Custom Print

Custom Print Option for File Attachments

If you select the **Custom Print** option, then a new **Print** window is displayed. The window contains two sections, **Custom Print Template** and **Template and Format**. In the **Custom Print Template** section, there is a **Title** heading followed by a text box that displays the specific **Custom Print Template** data. In the **Template and Format** section, there is a **Name** textbox along with **Template** and **Format** drop-down lists.

- **Notes**:
- A value must be entered into the **Name** textbox before proceeding.
- If there are no **Custom Print Templates** available for the business process, then most of the elements of the window cannot be selected. The exception to this behavior is the **Name** textbox.

Once you select **Custom Print Templates** to attach, click on the **Attach** option in the bottom right corner of the window. To close the window, click on the **Cancel** option.

Adding Images

In many forms, you can add an image to a business process, project, shell, etc. For example, you can add an image that shows progress on the project information record, pictures of assets related to a specific asset record, or a photo of an employee in the Resource Manager. You can add images to attribute forms in shells, projects, companies, and BPs.

If the Image picker functionality has been added to your project in uDesigner, forms with the functionality display the image name and a virtual box that will hold the uploaded image.

> **Note**: The image name is based on the data element name provided in uDesigner.

To add an image to a form:

1) Click **Upload Images** in the toolbar at the top of the form.
2) Browse for the image to upload and click **OK**.

    Valid image file types are:

    ‣ .jpg
    ‣ .jpeg
    ‣ .gif
    ‣ .png
    ‣ .tif

You can change the image by replacing it with another uploaded image. Images display on the HTML or PDF formats of printed forms. They display in print preview as well. The Image picker can be added to all forms except for those in the Cost Manager, Generic Cost Manager, Schedule Manager, and the Document Manager.

Adding or Updating Hyperlinks

In many forms, you can add a hyperlink to a business process form, project, shell, etc. For example, you can add a hyperlink to equipment documentation, details on a resource, or external websites that contain information pertinent to a business process record. You can add hyperlinks to attribute forms in shells, projects, companies, and business processes.

If the Hyperlink picker functionality has been added to your project in uDesigner, forms with the functionality display a hyperlink name, such as vendor website or internal web page.

To add a hyperlink:

1) Click the hyperlink area on the form.
2) In the Hyperlink window, enter the hyperlink name and the Uniform Resource Locator (URL).

   Only the URL is mandatory. If you enter the name and the URL, the hyperlink displays as the name you entered. If you only enter the URL, the hyperlink displays as the URL. The protocols HTTP and HTTPS are the only protocols allowed. FTP is not supported for hyperlink creation on forms.

3) Make sure that the URL adheres to accepted formats, such as starting with an approved protocol, followed by ://, and then followed by a host name or domain name.

   The system validates the specified URL based on the Uniform Resource Identifier (URI) provided by the administrator for your organization, if applicable, and on current standards for URLs.

   Examples of HTTP and HTTPS URLs:

   http://MyCompany.com

   https://YourCompany.net

   Examples of URLs that might include URIs authorized for use by your administrator:

   ftp://UserName:Password@MyCompany.edu

   ftp://private.ftp-servers.sample.com/MyDirectory/MyFile.txt

   > **Note**: The URL should not reference the same domain that Unifier is using for operation (ask your site administrator if you do not know your domain name). If you attempt to use the same domain, a warning message will result.

4) Click **OK**.

To reset a hyperlink:

1) Click the hyperlink area on the form.
2) In the Hyperlink window, click **Clear** to remove the existing hyperlink.
3) Enter a new hyperlink name and URL.
4) Click **OK**.

   > **Note**: If you attempt to open a hyperlink to a website that is not controlled by Unifier, a confirmation window will appear, and you will need to click **Yes** to access the external website. If the URL of the hyperlink is invalid, you will receive an error message and you will not be able to save the record until a valid hyperlink is added.

CSV File

A Comma-Separated Values (CSV) data file, or a CSV template file, enables you to import or export data to and from Unifier. Each row in a CSV file corresponds to a new record and each column is a field to be populated on the form. For more information about importing and exporting a CSV template, see the "Importing Data from an Outside Data Source into Unifier" section.

> **Note**: CSV support all data definitions.

As an example for how the data is updated by way of a CSV file, the following explains how the data definition type of "Company Picker" (for example, a contractor's name) is updated in the CSV template. The update is applicable to both upper form and detail form data elements of the Company Picker type.

Project-level business process

When Company Picker exists in a project-level business process, Unifier checks to ensure that the value you had entered in the Company Picker field of the CSV template is an active and valid company, or not. The valid values for the Company Picker are:

▸ Owner company
▸ Member companies in the shell

Company-level business process

When Company Picker exists in a project-level business process, Unifier checks to ensure that the value you had entered in the Company Picker field of the CSV template is an active and valid company, or not. The valid values for the Company Picker are:

▸ Owner company
▸ All active partner companies

> **Note**: In both cases (project and company), if the CSV template contains an invalid value, then Unifier displays a message indicating that the company name is not a valid value for the selected data element.

Exporting a CSV File

When exporting a CSV template, the column headers display according to your **Preferences** settings.

▸ If you enter data for any text type DE, the data is not translated. Example: "Vendor Specialty" is a text type DE. If the User enters "Electrical Appliances" as the data, then the entry is not translated according to the **Preferences** settings.
▸ You must not include currency and digit grouping symbols when you enter data because the information is captured as a part of header information and according to your User Preferences settings. If you enter currency and digit grouping symbols when you enter data, you receive an error message.
▸ Ensure that you enter the negative number format with a minus sign at the beginning of the number: Example: -10000,99 (minus 10000 comma 99). The decimal symbol is a comma)

▶ If you enter a value in the date field, or in line items, through CSV, the values display according to your User Preferences settings.

Additional Information about Exporting a CSV File

All error messages, system, custom, or form validation, display according to your **Preferences** settings.

The file name of an exported file will not be translated automatically.

When using CSV to import (CSV Import), ensure that you do not remove any of the comments (including the instructional text) from the CSV file. Removing comments will result in import failure.

To prevent receiving error messages, do not change the contents or structure of an exported CSV file.

When comparing strings, the leading or trailing space ("white space" at the end of a line) will be ignored by the system. The following is an example. Note the presence or absence of space in the example:

▶ The Line Item tab name in uDesigner - " Budget Details "

▶ The CSV import template may have "Budget Details ", "Budget Details", or " Budget Details ".

▶ The system will trim the spaces if needed ("Budget Details.   " the space between the period and close quotation will be trimmed and interpreted as "Budget Details") and this value will be compared with the uDesigner tab name "Budget Details".

The following lists the impacted modules:

▶ CSV Import for all Business Processes for record creation
▶ CSV Import for Asset Manager Objects for record creation
▶ CSV Import under CM - Code and Records-based manager for record creation
▶ CSV Import under Planning Manager for record creation
▶ CSV Import under Portfolio Manager for record creation
▶ CSV Import under Shell Manager for record creation
▶ CSV Import under Space Manager for record creation
▶ CSV Import under User Administration for record creation
▶ Line Item import for Line Item creation

Exporting a CSV File with or without an Import

When you export a CSV data file from the sheet, the numeric fields display according to your **Preferences** settings (the number format options settings). The following provides additional information:

▶ In Unifier functionalities that allow export and import of data through a CSV file, the currency symbol and digit grouping symbol are not displayed.

▶ In Unifier functionalities that allow only exporting of data but not importing data through a CSV file, the currency symbol and the digit grouping symbol are displayed.

▶ In Unifier functionalities that allow only exporting of data but not importing data through a CSV file, the negative numbers display according to your **Preferences** settings.

▶ Decimal symbol display according to your **Preferences** settings.

▶ In Unifier functionalities, which allow exporting and importing of data through a CSV, the negative numbers, if any, displays as: -<Number, Decimal Symbol, Number> (Example: -100000,99 - The decimal symbol is comma)

▶ If there are any date fields, then the dates are formatted based on your **Preferences** settings.

Importing a CSV Template Data File

If importing a CSV data file (Example: Importing Column details), the column data appears according to your **Preferences** settings.

▶ You do not need to enter the Currency symbol manually because the symbol is included in the header. Entering the Currency symbol manually generates an error message.

▶ When importing a CSV file is complete, the number formatting displays according to your **Preferences** settings.

▶ When importing a CSV file is complete, the date formatting displays according to your **Preferences** settings.

▶ Oracle recommends that you use custom data elements for defining queries for a data picker filter condition. You can use the auto-populate in order to get the shell name or other shell properties populated on the record for the required custom data element.

> **Note**: Oracle recommends that you use custom data elements for defining queries for a data picker filter condition. You can use the auto-populate in order to get the shell name, or other shell properties, to get populated on the record for the required custom data element.

List of Impacted Sheets and Modules

The following is a list of impacted sheets and modules:

▶ Cost Sheet
▶ Funding Sheet
▶ CM sheet
▶ Generic Cost Sheet
▶ Planning Sheet
▶ Summary Fund Sheet
▶ Summary Budget
▶ CBS Details
▶ Column Details
▶ Data Definitions (DDs) export

List of Modules Only Impacted by Exporting

In Unifier functionalities that allow only exporting of data but not importing data through a CSV file, the column headers and the Data Element (DE) labels display according to your **Preferences** settings. The following shows a list of modules impacted by exporting, only:

▶ Basic data definitions under Data Structure Setup
▶ Cost Codes under Data Structure Setup
▶ Data Elements under Data Structure Setup
▶ Data Picker under Data Structure Setup

Importing Data from an Outside Data Source into Unifier

The Unifier integration feature imports data into Unifier from an outside data source. Using this feature, you can import data from an outside application, such as an accounting system, into Unifier, and thereby, create records and line items. Importing is most effective in cases where you want to populate Unifier with a large amount of information that already exists in the other system.

This section discusses importing data into Unifier using CSV files. You can use CSV files to create records and line items for business processes and most of the Unifier managers. It is largely useful for transferring a company's legacy data to Unifier.

Once you have edited and saved the CSV file, you can import it back into Unifier to create the new records or line items. During the import process, Unifier validates the data. If the data passes validation, the new records or line items will be created. If the data fails the validation, you can view or download a text file summarizing the errors.

To use this feature, the business process or manager must include an integration interface that was designed in uDesigner. Separate integration interfaces are designed for each BP or manager, each specifying what fields will be populated when the new records or line items are created.

> **Note**: New records can also be created by XML integration via Web Services. For more information about Web Services integration, refer to the *Unifier Integration Interface Guide*. XML integration via Web Services must be coordinated with Primavera Unifier Consulting Services.

The integration interface feature supports:

▶ Cost BPs
▶ Line Item BPs
▶ Simple BPs
▶ Text BPs
▶ Document BPs
▶ Asset Manager classes
▶ Code and Records-based configurable manager classes
▶ Planning Manager planning items
▶ Shell Manager shells
▶ Shell creation BPs

Overall Steps for Importing Data

Here is an overview of the steps involved in importing data from CSV files to create new records and line items.

1) **Export the CSV template file to your machine.**

   The CSV file contains the correct integration structure, with each row corresponding to a new record, and each column a field to be populated on the form.

2) **Modify the CSV file**.

   Add new record data into the template CSV file, one record per row.

3) **Import the modified CSV file.**

   After completing the CSV file, you can then import it back into Unifier to create the new records or line items. During the import process, Unifier validates the data. If the data passes validation, the new records or line items will be created. If the data fails the validation, you can view or download the CSV file with the error summary.

   > **Note:** The import process runs in background, allowing you to continue your work during the import and validation process. The amount of records being imported will affect the processing time. You will be notified by email once the process is complete and the records have been imported or errors have occurred.

Exporting the CSV Template to Your Machine (Integration)

To export an integration template:

> **Note**: To prevent receiving error messages, do not change the contents or structure of an exported CSV file.

1) Display the toolbar with the **Export** button using the table below.
2) Click the **Export Template** button and choose **CSV**.
3) Save the CSV file to your local drive.

To display the toolbar for this:	Do this:
A business process at the company level	Select the name of the BP wherever it resides in the Navigator: in the Company Logs node, the General log node, or Data Manager log node.
A business process at the project/shell level	Select the name of the BP wherever it resides in the Navigator: in the Project Logs node, the Information > General log node, or the Data Manager log node.
An asset class	In the Asset Manager node of the Navigator, select the asset class.
A planning item	In the Planning Manager node of the Navigator, select the planning item.
A class for a Code and Records-based configurable manager	In the [Manager] node of the Navigator, select the class.

When comparing strings, the leading or trailing space ("white space" at the end of a line) will be ignored by the system. The following is an example. Note the presence or absence of space in the example:

‣ The Line Item tab name in uDesigner - " Budget Details "

‣ The CSV import template may have "Budget Details ", "Budget Details", or " Budget Details ".

‣ The system will trim the spaces if needed ("Budget Details.   " the space between the period and close quotation will be trimmed and interpreted as "Budget Details") and this value will be compared with the uDesigner tab name "Budget Details".

Editing the CSV File

Each row in a CSV file corresponds to a new record, and each column is a field to be populated on the form.

> **Note**: Do not add, move, or delete the columns in the CSV file.

To edit the CSV file:

1) Open the CSV file in Microsoft Excel or a compatible application, such as a text editor or Notepad.
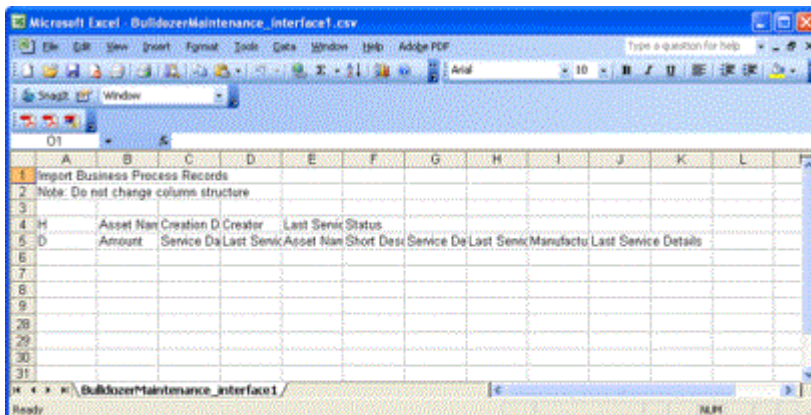
The letter **H** in column A indicates that this row is for upper form data. The row shows the names of the fields from the **upper form** that were specified when the integration interface was designed in uDesigner.

The letter **D** indicates that this row is detail form data. The row shows the names of the fields from the **detail form** that were specified when the integration interface was designed in uDesigner.

2) To add header (upper form) data to the file:

a. Move your cursor to an empty line and type an **H** in column A.

b. Press the **Tab** key to move to the next column and enter the value that you want to import for that field.

c. Repeat step **b** for all the fields in the row.

3) To add detail form data to the file:

a. Move your cursor to an empty line and type a **D** in column A.

    b. Press the **Tab** key to move to the next column and enter the value that you want to import for that field.

    c. Repeat step **b** for all the fields in the row.

4) If you have additional line item data that needs to be imported, repeat step **3** and its sub-steps until you have entered all the line items you want to import.

5) Save the file.

Importing CSV File into Unifier

Once you have edited and saved the CSV file, you can import it back into Unifier to create the new records or line items. During the import process, Unifier validates the data. If the data passes validation, the new records or line items will be created. If the data fails the validation, you can view or download a text file summarizing the errors.

To import the file into Unifier:

1) Display the toolbar with the Import button as shown in the table below.

2) Click the **Import** button. The File Upload window opens.

3) Fill in the fields on the File Upload window and click **OK**.

    Unifier checks the import process to verify that valid records were created. Specifically, it validates that:

- ▸ The import file format matches the integration interface design that was created in uDesigner.
- ▸ The imported data is for the correct BP (that is, that the data was imported into the same log as that from which you exported the CSV template file).
- ▸ The imported data is correct; that required fields contain data in the correct format, the data type is correct, the correct values were added for drop-down lists, etc.

To display the toolbar for this:	Do this:
A business process at the company level	Select the name of the BP wherever it resides in the Navigator:in the Company Logs node, the General log node, or Data Manager log node.
A business process at the project/shell level	Select the name of the BP wherever it resides in the Navigator:in the Project Logs node, the Information > General log node, or the Data Manager log node.
An asset class	In the Asset Manager node of the Navigator, select the asset class.
A planning item	In the Planning Manager node of the Navigator, select the planning item.
A class for a Code and Records-based configurable manager	In the [Manager] node of the Navigator, select the class.

Using CSV File to Import Attachments

You can use a CSV template file to import attachments into Unifier, when you are creating a BP Record, or Line Item.

> **Note**: To prevent receiving error messages, do not change the contents or structure of an exported CSV file.

Example

There are 20 line items in a single record (Line Item type BP) and each line has an attachment. You can use a CSV template to include the names of all the attachments (for that single record) and import, or upload, all the attachments into Unifier.

For details on how to import a CSV file back into Unifier, see the previous topic.

The last column of the CSV template is a placeholder for the file names of the attachment (the file that you want to attach to the BP Record, or Line Item). If you have more than one file to attach, you can enter the names of each attachment separated by a colon (:), for example, Attachment1.pdf:Attachment2.pdf:Attachment3.pdf.

If you enter the same name in the Attachment cell twice, then Unifier ignores the duplicate and uploads a single file, only.

If there is no data in the placeholder column of the CSV template file that is getting uploaded, then Unifier processes the CSV template upload as a file without any attachment.

If you keep two attachments with the same name in the CSV file, then Unifier attaches the same two attachments to all the Item Lines referencing that name.

If you upload a file twice, then Unifier overwrites the attachment that is present in the review section.

The Attachment section of the CSV upload wizard lists attachments that are ready for upload (Ready to be uploaded). As you keep uploading the attachments on the Attachment section, the status of the files keep changing to Ready to be uploaded.

> **Note**: For security, the Company Administrators can specify the list and size of files that can be uploaded to the Company Properties page, by users and per company policy. Contact your Company Administrator for more information.

When comparing strings, the leading or trailing space ("white space" at the end of a line) will be ignored by the system. The following is an example. Note the presence or absence of space in the example:

- The Line Item tab name in uDesigner - " Budget Details "
- The CSV import template may have "Budget Details ", "Budget Details", or " Budget Details ".
- The system will trim the spaces if needed ("Budget Details.   " the space between the period and close quotation will be trimmed and interpreted as "Budget Details") and this value will be compared with the uDesigner tab name "Budget Details".

Upload CSV and Add Attachments

When the Upload CSV wizard opens, you can select the file manually (Add) or choose to drag the file onto the page. After uploading the CSV file, click **Next** to go to the **Add Attachments** page.

> **Note**: After you upload the required files, the status of each file changes to **Ready to be Uploaded**.

For BP Record import

▶ Unifier does not check whether the file attachment is allowed (set on the integration form) for the BP Record, or not.
▶ If there are files referenced in the Attachments column of the CSV file, but the files are not uploaded in the **Add Attachments** section, then Unifier provides two options:
  ▸ Select OK if you want Unifier to ignore the files referenced in the Attachments column of the CSV file. Unifier creates the BP Record without the attachments.
  ▸ Select Cancel to navigate back to the CSV file and upload the attachments.

> **Note**: Oracle recommends that the total number of line items included in the CSV file not to exceed five thousand (5000), for better performance.

For Line Item import

▶ Unifier does not check whether the file attachment is allowed (set on the integration form) for the Line Item, or not.
▶ If the CSV file upload is restricted for the Line Items tab, then Unifier disables the Upload Attachments and you are able to upload the CSV file.
▶ If there are files referenced in the Attachments column of the CSV file, but the files are not present in the Attachment upload, then Unifier provides two options:
  ▸ Select OK if you want Unifier to ignore the files referenced in the Attachments column of the CSV file. Unifier creates the Line Item without the attachments.
  ▸ Select Cancel to navigate back to the CSV file and upload the attachments.

The CSV file attachment process starts when you click Upload, in the Add Attachments window. If there are any validation errors, Unifier displays a pop-up window after you click Next on the Upload CSV page window.

For Document-type BP

▶ Unifier processes the attachments referred to at the Line Item level (D level in the CSV file), only.
▶ If you reference an attachment at the BP Record level (H level in the CSV file), Unifier ignores the attachment that is available on the Attachments window of the CSV upload wizard.

For Text-type BP

▶ Unifier ignores all attachments included in the CSV file and the attachments do not appear on the Attachments window of the CSV upload wizard.

Blocked file extension

Unifier prevents uploading of file attachments with blocked extensions, as configured by your Site Administrator (System Administrator).

Audit log

▶ If a CSV import of a BP record occurs, if an attachment is uploaded during creation, then the system does not audit the attachment.

▶ If a CSV import of a Line Item occurs, the system does not audit the attachment.

Internationalization and CSV Files

Importing and exporting data can be done by using a Comma-Separated Values (CSV) data file or a CSV template file. This section explains how the availability of different languages (Internationalization) impact the various CSV files created, used, imported, or exported.

> **Note**: Number formatting is not supported for Symbols that are based on a right-to-left language such as official languages of Afghanistan or Hebrew.

Generic CSV files

Language preferences are detected from the **Preferences** settings (**Region Format**), for both CSV data files and CSV template in:

▶ All column headers

▶ All informational text

If importing a CSV file fails, the import error file displays the system generated error messages in the preferred language.

If importing a CSV file fails because of form validation errors, then the custom error message displays the message in the preferred language.

> **Notes**:
>
> ▪ If translation is not available for a custom error message, then the source string is displayed.
>
> ▪ Before importing a CSV file, always check the **Preferences** settings to see the allowed format and number formatting.
>
> ▪ When importing, or exporting, a CSV file, the date format follows the **Preferences** window (**Region Format**) Date Format settings.

Additional information about exporting and importing CSV files

When importing and exporting of a CSV file is conducted by users with two different language settings (for example, French and German), the data entered into an exported file must match the original language set.

Example

The CSV template Export has been done in French and the template is being used by a German User. If the German User enters data without changing the column structure and Imports the file, the Import action will fail and an error message will appear in German, indicating the error.

Internationalization and Web Services

About Web Services

New records can be created and line items can be added using Integration through web services. Also, the Schedule Manager integrates with Primavera scheduling software by way of web services.

> **Note**: Integration through web services must be coordinated with an Oracle Primavera representative.

As Project Administrator, you can receive email notification of the successful creation of a shell instance, for shells that are created manually, through web services or a CSV file upload, or through auto-creation. This notification can be set up in email notifications in uDesigner. Also, you can set your **Preferences** to control whether you receive these notifications.

Web Services and Internationalization

The output data generated by web services is always in the source language.

> **Note**: If a record (Example: Business Process) is created by using web services and the Data Definition (DD) label includes a non-ASCII string, then the record creation will fail.

Number formatting of data

When you enter numeric data in XML, you can use the decimal point (period) and negative sign (dash), only.

Examples

XML Tag: <Committed_Amount>100.99</Committed_Amount>

XML Tag: <Credited_Amount>-1423.99</Credited_Amount>

Sample JSON request

```
"data": [
        {
            "uuu_quantity": 6000.258,
            "amount": -27600.0,
    }
```

When you run a Get call, the input content in the response XML or JSON will be in the language of the source strings.

Get Web Services

You can use the Get Web Services call methods to get various attributes of Shell, CBS, and the list of Business Process records, Shells, and User defined data.

When you run a Get call, the input content in the response XML will be in the language of the source strings.

Number formatting does not apply to the numeric data and the decimal point is a period. The negative numbers are displayed with the minus sign before the numeric data, for example, -12345.99.

> **Note**: Number formatting is not supported for Symbols that are based on a right-to-left language such as official languages of Afghanistan or Hebrew.

Searching and Finding in Unifier

You can use the **Search** and the **Find on Page** options to search for specific items in:

▸ Business Processes
▸ Manager sheets
▸ Pickers

You can also use the **Search** and the **Find on Page** options to search for a design in uDesigner.

When you use the **Search** and the **Find on Page** options, Unifier narrows the list of items shown on a sheet, or picker, to match the search criteria you specified.

The **Search** and the **Find on Page** options show fields from the sheets, or pickers, that you can use to narrow the list of items you see. For example, for pickers with extensive lists, this can make completing the business process form much quicker.

The fields that appear in the **Search** and the **Find on Page** options are usually specified in uDesigner when the forms are designed for the business processes, managers, and pickers.

> **Note**: Some logs, such as the Mail logs, use "canned" **Search** and **Find on Page** windows because these logs are not designed in uDesigner.

In This Section:

Searching and Finding: Search Option

Searching and Finding: Find on Page Option

Searching and Finding: Search Option

The **Search** option enables you to search specific elements of a BP, sheet, picker, etc. Upon clicking the **Search** icon in the toolbar menu of a BP, sheet, or a picker, the **Search** window is displayed. You can move the window around the right pane in a horizontal or a vertical motion depending on if the window is docked at the bottom or to the right. The **Dock Right/Dock Bottom** option allows you to adjust the positioning of the window.

This **Search** window contains advanced search features that change depending on the function that you are working in. Unlike the **Find** window in Classic View, the **Search** window does not have a **Save** option that allows you to save your search. When you modify the previous search fields, you can click the **Apply** option to save those modifications. The **Clear** option resets the search fields back to their default values.

Similar to the previous **Find** window, the search fields often contain changeable operators, like "contains" or "equals," which you can use to further specify the items you want to see.

Like Classic View, some of the search fields contain **Select** dropdown lists where you can choose from a list of values. Some of these lists allow you to select multiple values as you click the items. If you select multiple values, then the search will contain results that match any or all of the values that you selected.

Searching and Finding: Find on Page Option

The **Find on Page** option enables you to find specific elements of a BP, sheet, picker, etc. Upon clicking the **Find on Page** icon in the toolbar menu of a BP, sheet, or a picker, a new row is created within the log. Unlike the **Search** option, the **Find on Page** row appears at the top of the log and therefore cannot be moved.

This **Find on Page** row contains search fields that change depending on the function that you are working in. Unlike the previous **Find** window in Classic View, The **Find on Page** row does not have a **Search** option that initiates the searching process. Instead, the searching process begins immediately upon entering information into the search fields in the row.

Unlike the previous **Find** window, the search fields do not have changeable operators, like "contains" or "equals." Similar to the **Search** option, **Find on Page** also does not have a **Save** option that allows you to save your search.

When you enter information into the search fields, any matching results are highlighted and displayed in the log. To restore the log to its original state, clear the search fields by deleting the entered information.

Searching and Finding a Shell

Since shell hierarchies can be extensive, you can use the **Search** (🔍) feature to locate specific shells.

You can search for a shell by using either the **Geocode Search** parameters or the **Shell** parameters.

To search for a shell by using the **Geocode Search** parameters:

1) Go to the home dashboard of the shell (anchor shell) that contains the shell you want to find (the top node in the left navigator.)

2) Click the **Workspaces** tab.

3) From the toolbar in the left pane, click **Search** (🔍) to open the **Search** window. The Search window has the following options:
    ▸ **Clear**
    ▸ **Apply**
    ▸ **Dock Right / Dock Bottom**
    ▸ **Close**

4) Scroll down and enter values in the fields under the **Geocode Search** section.
    Select an address or a latitude and longitude.
    ▸ In the **Address** field, enter a full or partial address for the shell.
    ▸ In the **Latitude** and **Longitude** fields, enter the values, if you know them.

If you do not know the latitude and longitude, then you can select the **View Map** option (Co-ordinates) to open the **Geocode (Latitude/Longitude) Picker** window.

▸ Select the **Address, City, State, Country, Postal Code** field and enter a full or partial address.

▸ To see the location on the map displayed in the window, you can select the **Map It** option. Unifier fills in the **Decimal Degrees** for the latitude and longitude as well as the **Degrees, Minutes, and Seconds**. The **Map It** option is also available for **Decimal Degrees** and **Degrees, Minutes, and Seconds**. To clear the fields, select the **Clear** option.

▸ Click on the **Done** option to go back to the previous **Search** window. Unifier fills in the **Latitude** and **Longitude** fields in the **Search** window.

▸ In the **Search** window, you can enter a value in the **Radius** field to specify a search radius surrounding the address or latitude and longitude coordinates.

5) When finished, click **Apply**.

6) When you finished finding the shell, click the **Cancel Search** button at the bottom of the log to return the dashboard to normal view.

To search for a shell by using the **Shell** parameters:

1) Go to the home dashboard of the shell (anchor shell) that contains the shell you want to find (the top node in the left navigator.)

2) Click the **Workspaces** tab.

3) From the toolbar in the left pane, click **Search** (🔍) to open the **Search** window. The Search window has the following options:

    ▸ **Clear**

    ▸ **Apply**

    ▸ **Dock Right / Dock Bottom**

    ▸ **Close**

4) Enter values in the fields under the **Shell** section.

For all the fields in the **Shell** section, you can change the "contains" and "equals" values to: does not contain, equals, does not equal, is empty, and is not empty, respectively.

5) When finished entering values, click **Apply**.

6) When you finished finding the shell, click the **Cancel Search** button at the bottom of the log to return the dashboard to normal view.

Searching in Managers Logs

Most manager logs, including **Configurable Modules** logs, display a static **Search** window in order to enable you to find information. See *Searching and Finding: Search Option* (on page 113) for more details.

The **Document Manager** and **Shell** work differently and are explained separately. See the following sections for details:

▸ *Searching and Finding a Shell* (on page 114).

▶ *Searching in Document Manager Node (Standard View)* (on page 117).

In most manager logs, you will be searching for **Sheets**.

The following managers use the Classic **Find** button:

▶ **Resource Manager**
▶ **Schedule Manager**

To search in most manager logs:

1) Go to the **Company Workspace** tab, or open the Project/Shell where the manager resides.
2) In the left Navigator, click the manager grouping node you want to search. The manager expands to list functional sub-nodes.
3) If there are functional sub-nodes in the Navigator, click the functional sub-node you want to search.
4) Click the **Search** button in the toolbar.

   Unifier displays a **Search** window. The window will display different fields, depending on how the manager has been designed.
5) Enter your search criteria and click **Apply** (or press **Enter** on your keyboard). Unifier displays all the items that meet the search criteria you entered.

Searching in Document Manager Node (Standard View)

This section consists of the following topics:

▶ Searching in Document Manager Sub-Nodes
▶ Supported Documents
▶ Indexing and Content Search
▶ Document Index Migration

Searching in Document Manager Sub-Nodes

You can access the **Document Manager** grouping node from:

▶ Project (User mode)
▶ Company Workspace (User mode)

In both the Company Workspace and the project (User mode), the **Document Manager** grouping node contains the following functional sub-nodes:

▶ Documents
▶ Recycle Bin
▶ Unpublished Documents

The following applies to the search and find features in both project and Company Workspace **Document Manager** functional sub-nodes.

Search

The **Search** window enables you to search for document properties or contents.

1) Click to expand the **Document Manager** grouping node in the project (User mode).

2) Click **Documents** functional sub-node to display the **Documents** log.

3) From the toolbar menu, click **Search** ($\mathcal{Q}$) to open the search window. The **Search** window enables you to search for document properties or contents. Some of the options are:

▶ Content
▶ Linked Records
▶ Name
▶ Title
▶ Description

Find on Page

Use **Find on Page** to narrow your search in the records displayed within the log.

1) Click to expand the **Document Manager** grouping node in the project (User mode).

2) Click **Documents** functional sub-node to display the **Documents** log.

3) From the toolbar menu, click **Find on Page** to open a new row in the table (log columns) within the **Documents** log.

4) Enter values in the fields to narrow your search in the records displayed within the log.

Supported Documents

The following is a list of supported documents for content search:

▸ Microsoft® Word Document (.doc/.docx)

▸ Microsoft® Excel Document (.xls/.xlsx)

▸ Microsoft® PowerPoint Document (.ppt/.pptx)

▸ Microsoft® Project (.mpp)

▸ Rich Text Format (.rtf)

▸ Adobe Portable Document Format (.pdf)

▸ Hypertext Markup Language (.html)

▸ Extensible HyperText Markup Language (.xhtml)

▸ Plain Text files (.txt, .java, .bat, etc.)

▸ Document formats supported by Apache Tika 1.3

Indexing and Content Search

The following contains general information about indexing and content search in Unifier:

Unifier uses Lucene StandardAnalyzer 2.9.3 to index and search the documents.

The following contains examples, and a brief explanation, of how a document or phrase is indexed and searched in Unifier:

▸ If a document contains the sentence "The quick brown fox jumped over the lazy dog," it will be stored in index using the tokens: [quick] [brown] [fox] [jumped] [over] [lazy] [dog]. When you search for the string, "fox," the document will be found.

▸ If a document contains the sentence "server.local.port=7001," it will be stored in index using the tokens: [server.local.port] [7001], so if you search for the string, "server," the document will not be found. In this case, you must search for the string, "server.local.port" to get this document in the search results.

The phrase "XY&Z Corporation - xyz@example.com" will be indexed as [xy&z] [corporation] [xyz@example.com].

In case of xml files, only the *element content* will be indexed. The tag and attribute value will not be indexed and cannot be searched. See the following example:

```
<?xml version="1.0" encoding="UTF-8"?>
<!-- in the project's Project Properties dialog box.-->
<project name="Unifier913" default="default" basedir=".">
    <description>Builds, tests, and runs the project Unifier913.</description>
</project>
```

In the example above, the xml file will be indexed as [builds] [tests] [runs] [project] [unifier913]. If you search for the string, "description," then the document will not be returned, but if you search for the string, "project," you will get the document since the string "project" is a part of the *element content*.

The indexing background job is scheduled to run every 15 minutes. The documents added to Document Manager are available for search every 15 minutes after being added.

> **Note:** In the case of Unpublished documents, the attachments will be searched, only. The record information PDF will not be searched.

Document Index Migration

Once the server is restarted, the indexer job starts re-indexing for all of the documents to migrate the index from Lucene 2.9.3 to Lucene 4.0 format.

> **Note:** The re-indexing job takes 2 to 3 days to complete, depending on the number of files that need to be re-indexed. If you conduct a document search during the re-indexing job, you may receive an error message asking you to wait until the job is completed.

Searching Date Fields

The floating Find window provides comprehensive search criteria for date fields. If the date field on the Find window includes an operator, you may have the option of making the search relevant to today's date.

For example, for a date field, such as a Payment Due Date, you could specify that the value in the field should be greater than or equal to the date you pick from the calendar, today's date, or today's date, plus or minus the number of days entered in the **Days** field.

Another example might be that the value in the field should be between today's date and today's date, plus or minus the number of days entered in the **Days** field.

Floating Find windows display search results that include a banner across the top of the window. This banner indicates that the list has been searched, or filtered. To restore the list of records to its unfiltered state, click Cancel Filter in the banner.

Searching Mailbox Log, Notifications Log, and Sent Items Log (Home Workspace)

In the **Home** workspace, you can access the following functional nodes:

- **Inbox**
- **Notifications**
- **Sent Items**

Inbox

To search the **Inbox**, click the **Inbox** functional node and in the Inbox log click the **View** drop-down list. The **View** drop-down list enables you to search in the Inbox by adjusting the log view and using the following options:

- Received in last 7 days
- Received in last 30 days
- Group by Origin
- Group by From
- All Items

You can use the search icon (Q) to open the Search screen and determine the values for the columns in the Inbox log by:

- Field
- Operator
- Value

The Search screen also enables you to determine the number of records that you want to be displayed on the Inbox log.

The right hand side, next to the Inbox log, shows the contents of the email that is highlighted on the log.

See the *Home Workspace* (on page 42) topic for more details.

Notifications

To search the **Notifications**, click the **Notifications** functional node and in the Notifications log click the **View** drop-down list. The **View** drop-down list enables you to search in the Notifications by adjusting the log view and using the following options:

- Received in last 7 days
- Received in last 30 days
- Group by Business Process
- Group by Origin
- All Notifications

You can use the search icon (Q) to open the Search screen and determine the values for the columns in the Inbox log by:

- Field
- Operator
- Value

The Search screen also enables you to determine the number of records that you want to be displayed on the Notifications log.

The right hand side, next to the Inbox log, shows the contents of the email that is highlighted on the log, if you have permission to view.

See the *Home Workspace* (on page 42) topic for more details.

Sent Items

To search the **Sent Items**, click the **Sent Items** functional node and in the Sent Items log click the **View** drop-down list. The **View** drop-down list enables you to search in the Sent Items by adjusting the log view and using the following options:

▶ Sent in last 7 days
▶ Sent in last 30 days
▶ Group by Origin
▶ Group by To
▶ All Items

You can use the search icon (Q) to open the Search screen and determine the values for the columns in the Inbox log by:

▶ Field
▶ Operator
▶ Value

The Search screen also enables you to determine the number of records that you want to be displayed on the Sent Items log.

The right hand side, next to the Inbox log, shows the contents of the email that is highlighted on the log.

See the *Home Workspace* (on page 42) topic for more details.

Searching Sheets

Most manager sheets will have a **Find on Page** button ( ) to search for data within the individual columns of a sheet.

To search a sheet:

1) Open the sheet.
2) Click the **Find on Page** button. Find fields appear above each column.
3) For each column you would like to search, enter the value you are looking for in each Find field. If Primavera Unifier finds the value, it will highlight the value on the sheet and hide all rows that do not contain that value.

Searching Pickers

Most pickers include a Find feature with which you can locate specific objects (codes, assets, business processes, users, shells, etc.) while you are working on a form or a sheet . When you use this Find feature, Unifier narrows the list of items shown on the picker to match the search criteria you specified. For pickers with extensive lists, this can make completing the business process form much quicker.

Some pickers display static Find windows; others display floating windows like the Task and business process logs (however, without the "save search" feature).

For most pickers, the Find feature works as generally described under *Searching and Finding: Search Option* (on page 113) and *Searching and Finding: Find on Page Option* (on page 114); however, the User/Group Picker works differently.

> **Notes**:
>
> - Fund Pickers are most often searchable by the fields that were created for the fund attribute form in uDesigner. However, if no attribute form was created for the fund, you can search for the fund by its name or code.
> - Pickers that include CBS codes display information generated from a sheet (the cost sheet or an SOV). Consequently, the Find feature on the CBS Picker, Commit Line Item Picker, and SOV Picker works the same way as it does on manager sheets. For instructions on using these pickers, see *Searching Sheets* (on page 123).

To find a user in the User/Group Picker

1) Open the User/Group Picker.
2) The **List Names from** field shows the project/shell or company from which the users' names will come. (This field is editable only by your company Administrator.)
3) Use the **Show By** field to restrict the search to users only, to groups only, or to both.
4) In the **Search for** field, enter a name, or partial name.
5) Click **Search** or press **Enter**.

   Unifier uses the filters at the top of the Find window and searches the picker list according to the project/shell, or company specified in the List Names from field, as well as the **Show By** option you specify (users, groups, or both).

   Unifier displays on the picker the names that met the search criteria you entered, and also displays above the list this line: **Current View: <filtered by ...> [Cancel Filter]**.

   > **Note**: If you choose to, you can cancel the search action by clicking [Cancel Filter]. Unifier will restore the picker list.

User/Group Picker and type-ahead

In the "To" or "Cc" fields (mail recipients) or in the Edit Permissions (log level) and other fields (where user and groups are both supported), when you enter a value Unifier includes both users and groups:

▶ If a user is displayed in the type-ahead, then the name is prefixed with the user's profile.

▶ If a group is displayed in the type-ahead, then the name is prefixed with the group icon.

Example

"Enter a <Display Element's column name> ..."

In the unlikely case of display element not being present in the log, the placeholder text will be "Enter a <Display Element label>..."

Internationalization

The process of adapting Unifier services to specific local languages and cultures:

The following topics explain the process of planning and implementing Unifier services so that they can be adapted to specific local languages. These services include:

▶ Email notifications
▶ Tools
▶ BI Publisher Custom Reports
▶ Dashboards
▶ Help files
▶ Spell check
▶ Date and time zone formats
▶ Audit log

Internationalization (Email Notifications)

When the system generates an email notification, the language used for that email is based on the recipient's **Preferences**.

Email notifications for scheduled User-Defined Reports (UDRs), Gates, and so forth, have two components:

▶ Text
▶ Attachments

If a Business Process (BP) email notification contains an attachment with the record information, then the Custom Strings and number formatting in the attachment is according to the **Preferences**.

If a scheduled UDR is sent as a part of an email attachment, the language in the PDF attachment is according to the **Preferences** of the UDR owner; however, the email text content is according to the recipient's User Preferences.

When a UDR is generated manually and saved by a User, the language in the PDF attachment is according to the **Preferences** of the User who generated, or ran, the UDR.

If a scheduled job such as Project Gates, where the "Auto-email as PDF attachment to users and groups" option is selected, the language in the PDF attachment is according to the User Preferences of the creator of the job (Project Gates creator).

When a manual refresh of the Gates is requested, the language in the PDF attachment is according to the **Preferences** of the User who requested the refresh.

Internationalization (Support for Tools)

When used within the system, the following tools support internationalization:

▶ Oracle Map
▶ AutoVue Server
▶ Flex replacement (O charts)

> **Note**: The Unifier Plug-ins do not support internationalization.

Oracle Map viewer supports internationalization for Tier 1 languages. Refer to the *Oracle Map Viewer User Guide* for more details.

The language displayed in the map, and the following subsequent areas, is according to the language selected in the **Preferences** of the user:

▶ View map for BP records from log
▶ Shell Landing Page
▶ Map Picker in Log Find
▶ Map Picker in Bulk Edit
▶ View Map when invoked from the BP record

> **Note**: eLocation services, which is used for geocoding, does not support internationalization. As a result, the map labels are displayed in English. If a User enters a label in a different language, the Find feature does not provide the desired results.

Internationalization (BI Publisher Custom Reports)

The Oracle Business Intelligence Publisher (BI Publisher or BIP) Reports support internationalization as follows:

Custom Report (Report File tab) window

If there are no templates available for the report,the Custom Report window (Report File tab) displays according to the default settings.

To upload the translated XLIFF files and report layout, click **Add** to open the Add Template and Files window, enter data in the required fields, and click **OK**.

Notes:

- The non-RTF templates do not support internationalization.
- You can change the template type when the template is in Creation stage, only. After you create a template, you cannot change the template type. Use the report designer to create a new template with the desired template type and remove the template that is no longer needed.

In the Custom Report window (Report File tab), the only editable column is the Default column, which allows you to set the default template by selecting (check-box) the corresponding template.

Note: The system sets the first template, or XLIFF file, that you upload as the default template.

Use **Modify** in the Custom Report window (Report File tab) to modify an existing template. After you click Modify, the Modify Template and Files window opens, which lets you modify the template and the translated XLIFF file for that template. When finished, click **OK**.

Use **Download** in the Custom Report window (Report File tab) to download a template and the corresponding translated XLIFF file, in a zip file.

External Data Model BI Publisher Reports

If you want to download the data model of a template, select the template and click **Download** in the Custom Report window (Report File tab). When the download is complete for an External BIP report, the data model is included.

Non-RTF type template

BIP supports RTF templates and XLIFF files. If the report designer selects a non-RTF type template, the Browse option in the Modify Template and Files window (Translated XLIFF files for the Template section) will be disabled.

Custom Report (Query tab) window

Queries based on Data Definition (DD) support internationalization and number formatting associated with internationalization according to the **Preferences** settings.

Queries based on Data Views do not support internationalization and formatting because raw data is being used.

Queries based on Ad-Hoc support internationalization and number formatting associated with internationalization according to the **Preferences** settings.

Internationalization (Dashboards)

Shell Dashboards

The Shell Dashboards support Internationalization and number formatting for System Strings as well as Custom Strings according to the **Preferences** settings.

Internationalization (Help Files)

Unifier Help files do not support Internationalization and are not translated.

> **Note**: You can translate the Help files, using a third party translator, and display the files based on the your **Preferences** settings. This includes uploading a single PDF with multiple language help information.

Internationalization (Spell Check)

The Spell Check feature does not support Internationalization.

> **Note**: If the language selected in your **Preferences** is not English, the Spell Check option will not be available.

Internationalization (Date and Time Zone Formats)

Date formats

The following additional date formats support Internationalization:

▸ MM/DD/YYYY
▸ DD/MM/YYYY
▸ MM/DD/YY
▸ DD/MM/YY
▸ MM-DD-YYYY
▸ DD-MM-YYYY
▸ MM-DD-YY
▸ DD-MM-YY
▸ DD.MM.YYYY
▸ YYYY-MM-DD
▸ MMM/DD/YYYY
▸ DD/MMM/YYYY
▸ YYYY/MMM/DD
▸ M/D/YYYY
▸ M/D/YY
▸ D/M/YYYY
▸ D/M/YY
▸ YY/M/D
▸ YYYY/M/D
▸ YY/MM/DD
▸ YYYY/MM/DD

Time Zone formats

The Time Zone setting is based on the Coordinated Universal Time (UTC) and supports Internationalization.

> **Note**: The time format for all dates is: HH:MM AM.

Internationalization (Audit Log)

Within the Audit log, the following columns support Internationalization according to the **Preferences**:

- ▶ Event
- ▶ Description
- ▶ Field

System and custom strings can be translated for Event, Description, and Field columns.

P6, Unifier, and Gateway

Unifier uses the **Rate Sheet** object in Gateway, with canned fields, for connecting Rate Sheet with P6.

A new OOTB Unifier Object, "Rate Sheet" (in Gateway) contains all of the canned fields present under the **Master Rate Sheet** in Unifier. See Unifier Master Rate Sheet.

In This Section

Gateway Data Dictionary

The following objects, in Gateway data dictionary, support the integration:

- **P6Resource**
- **P6ResourceRate**
- **P6Role**
- **P6RoleRate**

Each of these objects are explained in the following tables:

P6Resource

> **Note**: P6Resource exists in Gateway only, and it is not deployed through Unifier.

Field	Type	Description
uuu_resc_parent_id	String	Resource Parent ID
uuu_resc_short_name	String	Resource short name
uuu_resc_name	String	Resource Name
uuu_resc_status	String	Resource Status
uuu_resc_curr	String	Currency

P6ResourceRate

Note: P6ResourceRate exists in Gateway only, and it is not deployed through Unifier.

Field	Type	Description
ResourceObjectId	Foreign Key	Resource object ID to map the rate
effective_date	String	effective date for the rate
standard_rate	String	price per unit

P6Role

Note: P6Role exists in Gateway only, and it is not deployed through Unifier.

Field	Type	Description
uuu_role_parent_id	String	Role Parent ID
uuu_role_short_name	String	Role Code
uuu_role_name	String	Role Name
uuu_role_status	String	Role Status

P6RoleRate

Note: P6RoleRate exists in Gateway only, and it is not deployed through Unifier.

Field	Type	Description
RoleObjectId	Foreign Key	Role object ID to map the rate
standard_rate	String	price per unit

Gateway Field Mappings

The following out of the box (OOB) field mapping templates are in Gateway to support the integration:

Mapping	Type	Flow Type	Unifier Object	Gateway Object	P6 Object
Sync Resource data from P6 for EVM	Both	Master Data	P6Resource (New)	Resource	Resource
Create Resource Rate from P6 for EVM	Create	Master Data	P6ResourceRate (New)	Resource Rate	Resource Rate
Sync Role data from P6 for EVM	Both	Master Data	P6Role (New)	Role	Role
Create Role Rate from P6 for EVM	Create	Master Data	P6RoleRate (New)	Role Rate	Role Rate

Resource Data from P6

A mapping template is created to map the fields of **Resource** object in P6 to **P6Resource** object in Unifier. The following is used for creating/updating a new Rate Sheet in Unifier:

Unifier Field Name	Gateway Field Name	P6 Field Name
uuu_resc_parent_id	ParentObjectId	ParentObjectId
uuu_resc_short_name	Id	Id
uuu_resc_name	Name	Name
uuu_resc_status	IsActive	IsActive
uuu_resc_curr	CurrencyName	CurrencyName

Resource Rate from P6

A mapping template is created to map the fields of **Resource Rate** object in P6 to **P6ResourceRate** object in Unifier. The following is used for creating/updating a new Rate Sheet in Unifier:

Unifier Field Name	Gateway Field Name	P6 Field Name
ResourceObjectId	ResourceObjectId	ResourceObjectId
effective_date	EffectiveDate	EffectiveDate

Unifier Field Name	Gateway Field Name	P6 Field Name
standard_rate	PricePerUnit	PricePerUnit

Role Data from P6

A mapping template is created to map the fields of **Roles** object in P6 to **P6Role** object in Unifier. The following is used for creating/updating a new Rate Sheet in Unifier:

Unifier Field Name	Gateway Field Name	P6 Field Name
uuu_role_parent_id	ParentObjectId	ParentObjectId
uuu_role_short_name	Id	Id
uuu_role_name	Name	Name
uuu_role_status	IsActive	IsActive

Create Role Rate from P6

A mapping template is created to map the fields of **Role Rate** object in P6 to **P6RoleRate** object in Unifier. The following is used for creating a new Role in the Rate Sheet in Unifier:

P6 Field Name	Gateway Field Name	P6 Field Name
RoleObjectId	RoleObjectId	RoleObjectId
standard_rate	PricePerUnit	PricePerUnit

This mapping template contains the pre-defined elements of Unifier mapped to corresponding fields in P6, but you can deploy additional custom attributes to Gateway (for Activity Sheet), and they will be available for the data mapping templates.

For mandatory fields, the integration will fail if you change the data mapping template (or create your own data mapping template) such that a mandatory element is no longer in the template (i.e., you remove a mandatory element from the mapping template).

> **Note**: The schedule type is a mandatory field while sending the data across multiple P6 projects to Unifier.

Business Flows in Gateway

The following out of the box (OOB) Business Flows are available in Gateway:

Business Flow	Field Mapping Template (Applied for)	Description
Get Resource and Role Rates from P6 for EVM	Sync Resource data from P6 for EVM (Both) Sync Resource Rate from P6 for EVM (Create) Sync Role data from P6 for EVM (Both) Sync Role Rate from P6 for EVM (Create)	Create/Update Rate Sheets from P6 to Unifier

Get Resource and Role Rates from P6

This business flow is used to push Rates data from P6 to Unifier **Company Workspace**. The business flow can be initiated from Unifier or Gateway. After it is initiated from either of these applications, Gateway will have all the data from P6 and will send the data to Unifier Provider. Unifier Provider then creates/updates the **Master Rate Sheet** in Unifier **Company Workspace**.

The following P6 parameters are enabled for this flow:

▶ Include resource hierarchy
▶ Include role hierarchy

The following Unifier parameter is enabled for this flow:

Delete data that no longer exists in the source application? (Default value = Yes)

Synchronization: Resource and Role Rates from P6

This synchronization is set:

▶ To be out-of-the-box (OOB) to be initiated from Unifier.
▶ To fetch the *Resource* and *Role* list from P6, along with the respective standard rate.

Only one Master Rate Sheet is allowed at the Company level in Unifier. If the Master Rate Sheet does not exist, create one manually or use the Get Data option in the Master Rate Sheet log.

When the Master Rate Sheet exists, the fields values will be updated regularly with the latest data from Gateway.

Notes:

- If a transaction fails because of connection issues with Gateway, or incorrect Gateway parameters in Admin Mode, it is recorded in the job history with an error message.

- While only one Master Rate Sheet exists at the Company level, users can create multiple Rate Sheets at the project/shell level.

- Resource and Role rates will be imported from P6 the first time a Master Rate Sheet is synchronized. Subsequent imports will not update the rates.

User-Defined Reports

The following sections provide details about the User Defined Report (UDRs) in Unifier.

Also see the ***Internationalization and CSV Files*** section for language (Internationalization) details.

Designing Accessible Reports

Primavera Unifier provides the ability to build accessible report layouts. Reports layouts in Primavera Unifier are created by users. As such, it is up to the users creating the reports to ensure that they are built meeting accessibility criteria, if necessary.

In This Section

About User-Defined Reports (UDRs)

A User-defined report (UDR) is a customizable report that can be run at the project, shell, program, and company level (user mode).

The information that can be included in a UDR can include:

▸ Any business process data element (that is, fields found on the business process form)
▸ Business process workflow information
▸ System data elements (including company, project, shell, and user information)
▸ Column headings from cost, funding, and schedule sheets
▸ Cost sheet and work package data elements
▸ Shell P6 Summary

  The data source for creating a report using the Shell P6 Summary data type are: P6 Summary and Spread.

  You can open the tables within the P6 Summary Sheets in Unifier for data views.

▶ Data views in published status

You can define as many different reports as you need and save them for other users to access and run.

User-defined reports are defined the same way for the project, shell, program, and company level. Only the query fields will vary from report to report.

You can run reports on cash flow curve values in either transaction or project currencies. The UDR will show the values in the chosen currency, and it will display the exchange rate used for the conversion between the transaction and project currency. You can also run Snapshot reports in both currencies. All changes done in the UDR will be supported for Snapshot reports.

Accessing User-Defined Reports (UDRs)

User-defined reports (UDRs) are set up and run in **User** mode.

You can run UDRs at the:

▶ Project level
▶ Shell level
▶ Program level
▶ Company level

To access **project-level**, **shell-level**, **program-level**, or **company-level** user-defined reports:

In **User** mode, Navigate to **Reports** > **User-Defined**. The **User-Defined Reports** log opens.

When you are running a report based on a permission-aware Document Manager data source, the system lets you see the report only if you have permission to see the data source, in case of:

▶ Document Manager - Company
▶ Document Manager - Project/Shell

User-Defined Reports Log

The following table details the **User-Defined Reports** log window:

> **Note**: You will need specific permissions to use the following functions.

The **User-Defined Reports** log has the following toolbar options:

Create

> **Note**: You need to have permission to create UDRs.

Enables you to select a source for your newly defined reports by providing the following options:

▶ **From System Data Sources**
▶ **From Permission Based Data Sources**
▶ **From Templates**

The options above will be explained in subsequent sections.

Actions

Enables you to perform the following functions on the selected report:

▸ **Transfer Ownership**

Enables you to transfer the report ownership. Click the **Select** checkbox icon to open the User Picker screen and select the user name.

▸ **Delete**

▸ **Permissions**

Enables you to open the **Permissions** window and do any of the following:

- View a list of users, groups, or both users and groups and their permissions.
- Add, modify, or remove permissions.
- Add, modify, or remove users or groups.

When you are in the Permissions window, you can use the Next or Previous arrows icons to move to the next or previous report and view the report permissions settings, users, and groups.

Click **Save** to save your changes. Click Cancel to return to the log window.

View

Similar to the **View** function of a BP, it enables you to set the view of the **User-Defined Reports** log by using the following options:

▸ **All Reports**
▸ **Owned by Me**
▸ **Create new view**
▸ **Manage Views**

Edit View

Enables you to modify the user-defined view. You can use this option to modify the list of available columns, apply filters, change grouping, or change sorting.

Refresh

Enables you to refresh the information displayed on the log.

Print

Enables you to print the contents of the log.

Find on Page

Enables you to find specific information on the log.

The **User-Defined Reports** log has the following columns:

Name

The name of the report.

Description

The description of the report, if available.

Data Type

The report data type.

Access Type

The report access type.

Report Type

The report format type. By default, the **Tabular** option is selected. You can create and run user-defined reports of the following types:

▸ **Tabular:** This is the basic report format, arranging information vertically in columns. Tabular reports are a way to present related information for multiple records on the same page.

▸ **Cross tab:** Cross tab reports allow the display of data on two axes and enable users to run time-series reports defined by two data sources, for example, payments made per quarter per vendor.

▸ **Summary:** Summary reports can be run to display summary data. Project-level summary reports can also be used to customize the project summary page and include the information that is most useful for you.

▸ **Alert:** Project- or shell-level alert reports are used to set up and customize system alerts based on project- or shell-level triggers that you specify. For example, you have an alert let you know when your remaining budget is getting low. Alerts are set up and customized by users for their own use using alert reports.

Enable for Integration

Enables you the condition of the report, related to integration.

Owner

The owner of the report.

Last Run Date

The date the report was run the last time.

Creation Date

The creation date for the report.

Last Modified By

The person who modified the report the last time.

Last Modified Date

The date the report was modified the last time.

Schedule

The schedule that is set for the report to run.

The **User-Defined Reports** log reports have the following options for the gear menu (⚙):

▸ **Run**
▸ **Copy**
▸ **Edit**

- ▶ **Transfer Ownership**
- ▶ **Permissions**
- ▶ **Delete**

Tabs

When you select a report, the **User-Defined Reports** log splits and displays the following report properties tabs:

Saved Results tab

> This tab provides the following information about the report, if available:
> - ▶ **Run Date**
> - ▶ **Scheduled/Ad-Hoc**
> - ▶ **Run By**
> - ▶ **Output Format**

Permissions tab

> This tab provides permissions related information such as groups, users, and permissions types.

Schedule tab

This tab provides information about:

- ▶ Scheduled report runs.
- ▶ Whether the report has been enabled to have scheduled Report runs, or not.
- ▶ Output formats and scheduling frequencies

This tab also provides additional information about the report schedule, if any.

Use the **Expand** icon to expand the properties tab pane. Use the **Collapse** icon to collapse the properties tab pane.

User-Defined Report Types

You can create and run user-defined reports of the following types:

Tabular: This is the basic report format, arranging information vertically in columns. Tabular reports are a way to present related information for multiple records on the same page.

Cross tab: Cross tab reports allow the display of data on two axes. Cross tab reports enable users to run time-series reports defined by two data sources, for example, payments made per quarter per vendor.

Summary: Summary reports can be run to display summary data that can be used on project/shell, program and company Summary views.

Alert: Project/Shell-level alert reports are used to set up and customize the generation of system alerts, based on a project/shell trigger that you specify. For example, you can have alerts let you know when your remaining budget is getting low. Alerts are set up and customized by users for their own use using alert reports.

When creating a new user-defined report, the process is similar for all report types. The **Columns** tab is the only tab that is different for each report type. Additionally, only Tabular reports have a **Group By** and **Sort By** tab.

User-Defined Report Data Types

After choosing the report type (Tabular, Cross tab, Summary or Alert), you choose a data type. This determines the type of data that will be displayed on the report.

Data Type	Project UDR	Shell UDR	Program UDR	Company UDR	UDR Template	Use for Maintenance Management Only
Accounts Sheet				x		
Active Task Information	x	x		x	x	
Asset Summary Sheet				x		
Audit				x		x
Commitment Summary	x	x			x	
Company Cash Flow				x		
Company Cost				x		
Company User Information				x		
Cost Sheet - CBS	x	x	x		x	
Cost Transactions -CBS	x	x	x		x	
Cost Transactions MC - CBS	x	x				
Data Views	x	x	x	x	x	
Document Manager	x	x	x	x	x	
Document Manager—Company				x		
Equipment				x		x
Funding	x		x	x	x	
Gates	x	x	x		x	

Inventory				x	x
Inventory On-hand Detail				x	x
Item Master				x	x
Job Plan				x	x
Master PM Book				x	x
Master PM Meter Schedule				x	x
Master PM Time Schedule				x	x
Material Transaction				x	x
Partner User Information				x	
PM Book				x	x
PM Meter Schedule				x	x
PM Time Schedule				x	x
Program Cash flow			x			
Program Cost			x			
Program Schedule			x			
Resource Booking	x				x	
Resource Manager—All Actuals				x		
Resource Manager—Allocated Roles	x		x		x	
Resource Manager—Booked Resources	x		x		x	
Resource Manager—Project Actuals	x		x		x	
Resource Manager -					x	

Resources (Company)						
Resource Manager—Roles				x		
Resource Manager—Sheets	x		x		x	
Service Center				x		x
Service Request				x		x
Schedule of Values	x	x	x	x	x	
Shell or Project Cash Flow	x	x	x	x	x	
Shell or Project Cost	x	x	x		x	
Shell or Project Groups	x	x	x		x	
Shell or Project Information	x	x			x	
Shell or Project Users	x	x			x	
Workflow Information	x	x	x	x	x	
Work Order				x		x
Work Order Items				x		x
Work Order Role				x		x
(Asset class name)				x		
(Business process name)	x	x		x		
(Planning type name)				x		

Creating a User-Defined Report

To create a new user defined report:

1) Navigate to the **Reports** grouping node and click the **User-Defined** functional node. The **User-Defined Reports** log opens.

2) From the top toolbar, click **Create** and select one of the following:

 ▸ **From System Data Sources**
 ▸ **From Permission Based Data Sources**
 ▸ **From Templates**

3) Fill out all tabs in the New User Defined Report window, then select either **Save Report**, or **Save Report & Run**.

See the following topics for more information about how to fill out each tab.

General Tab

The General tab allows you to input general information about the report, as well as select the type of information that will be used as the basis of the report. It contains the following fields:

 ▸ **Data Type**: Select the type of data on which the report is being run. Data Type selected will be locked for the report and cannot be reverted. This is a required field.
 ▸ **Report Name**: This is a required field.
 ▸ **Report Type**: This is a required field. It has the following options:
   ▸ **Tabular**
   ▸ **Cross Tab**
   ▸ **Summary**
   ▸ **Alert**

   See *User-Defined Report Types* (on page 141) for more information about each type.
 ▸ **Report Title**
 ▸ **Element Type**: The values in this dropdown menu are based on the data type selected. This is a required field.
 ▸ **Description**
 ▸ **Access Type**
 ▸ **Report Owner**
 ▸ **Enable for Integration.**
 ▸ **Default Time Zone**: Select the time zone that will be applied when the report is run.
 ▸ **Accessible:** This option enables the manual report run results to meet accessibility standards. When enabled, the output format is HTML, and the page layout will be portrait. This option does not apply to scheduled report runs.

> **Note**: You can only access the other tabs once the required fields of the General tab are completed. Once you move to another tab, **the Data Type**, **Report Type**, and **Element Type** fields will become read only and cannot be edited.

Columns Tab

The Columns tab allows you to define the structure of the report based on the different report types.

The image below displays the Columns tab for a **Tabular** report. Add columns to the report by dragging and dropping data elements from the **Available Columns** list to the left pane. You can drag multiple items at once by selecting the checkboxes next to each item, then dragging one selected item to the left pane.
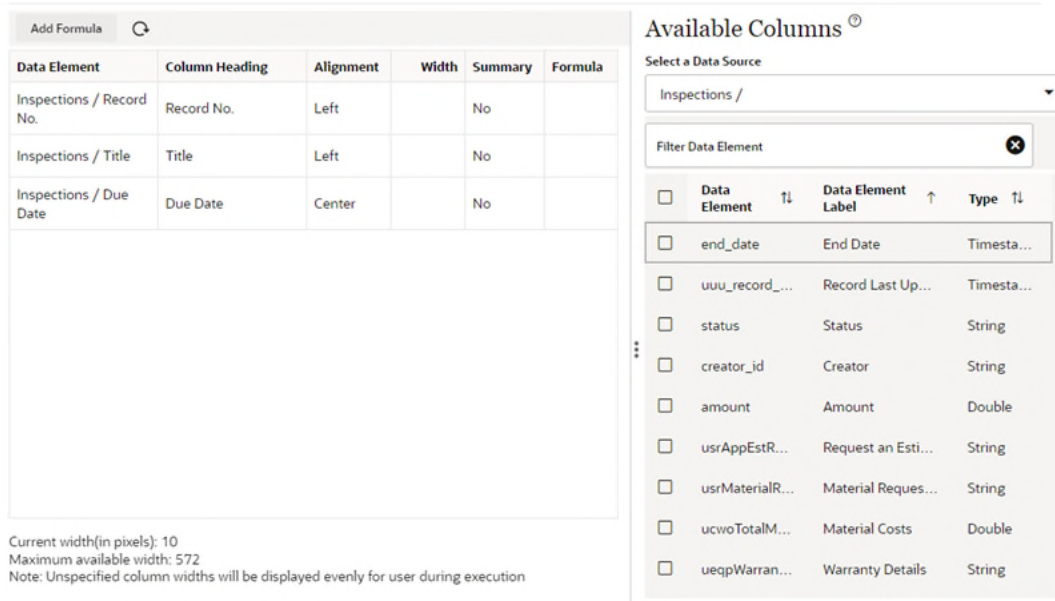
The left pane header contains the following elements and columns:

▶ **Add Formula**

   To add a custom column that is not listed in the Available Columns section. This is done by creating a formula with other existing data elements.

   For example: You can create a formula that subtracts a due date data element from a current date data element to display how many days are left before the due date is reached, once the report is generated.

▶ **Refresh**

   To refresh the selected columns.

▶ **Data Element**

▶ **Column Heading**

▶ **Alignment**

▶ **Width**

▶ **Summary**

▶ **Formula**

▶ **Hide**

▶ **Delete**

   To delete a column from the selected columns list.

▶ **Reorder**

   To change the order of selected columns.

The image below displays the Columns tab for a **Cross tab** report. The color of each block corresponds to the picture in the top left block, to display how data is arranged. Select at least one Data Element for the **Body Columns**, **First Column**, and **Body Data** blocks.

This is the Columns tab for a **Summary** report. The following fields are required:

▶ First Column
  ▸ **Select Data Element for First Column**
  ▸ **Column Heading**
▶ Second Column
  ▸ **Column Type**
  ▸ **Column Heading**
  ▸ **Type**
  ▸ **Formula**

This is the Columns tab for a **Alert** report. Enter a formula for the report column.

Query Tab

The Query tab allows the entry of query parameters as defined during creation and setup. If the report has been set up to enter query parameters, you may enter query information, which will give report results based on records that match the parameters you entered, or you can run a report on all records by leaving the field blank.

User-Defined Report (UDR) and Query-Based Tab

Users will be able to use the Summary Elements, from any of the QBTs, in any of the UDRs that the user wants to use if the UDR is based on the same business process record.

The toolbar of the Query tab has the following elements:

▶ **Add**
▶ **Refresh**
▶ **Filter**
▶ **Show results matching any of the following conditions**

To add a query condition in the Query tab:

Click **Add** and select **Query Condition based on Data Element** or **Query Condition based on Formula**.

▶ When selecting **Query Condition Based on Data Element**, the Add Data Element Query Condition window opens and displays the following fields and elements:
  ▶ **Data Element**: The source of the data that will be used to create the query condition. This is a required field.
  ▶ **Label**

▸ **Condition**: Defines how the data element will be checked, such as if the value of the data element is equal to, less than, or greater than the specified value. This is a required field.

▸ **Values**: The values that are used by the Condition when checking the data element.

▸ **Allow users to modify value(s) during execution**

▸ **Cancel**

▸ **Save**

▸ **Save & Add New**

▶ When selecting **Query Condition Based on Formula**, the Add Formula Query Condition window opens and the following fields and elements:

▸ **Formula Label**: This is a required field.

▸ **Formula**: To create a formula with multiple data elements when an existing data element does not capture the desired value.

For example: You can create a formula that subtracts a due date data element from a current date data element to represent how many days are left before the due date is reached, and you can create a condition based on that value.

▸ **Condition**: Defines how the formula will be checked, such as if the value of the formula is equal to, less than, or greater than the specified value. This is a required field.

▸ **Values:** The values that are used by the Condition when checking the data element.

▸ **Allow users to modify value(s) during execution**

▸ **Cancel**

▸ **Save**

▸ **Save & Add New**

> **Note:** If you select the **Allow users to modify value(s) during execution** option, then the Allow Modify at Run column will contain a check mark. You have the option to deselect the **Allow users to modify value(s) during execution** option. However, the Allow Modify at Run column will display a checkbox regardless of whether the box is checked in the query condition (Add Data Element Query Condition), or not.

The log of the Query tab displays the settings of each query condition, along with the actions you can perform on each query condition. It contains the following columns:

▶ **Data Element**

▶ **Label**

▶ **Condition**

▶ **Value(s)**

▶ **Allow Modify at Run**

▶ **and/or**

▶ **Delete**

▶ **Reorder**

▶ **Action**

▸ **Open**

▸ **Delete**

To edit a previously added query condition, click the three dots in the **Action** column of the log and click **Open**.

> **Note**: You cannot open a previously added query condition by double-clicking it in the log.

Group By and Sort By Tabs (Tabular Report Only)

Group By tab

The Group By tab allows you to create groups based on the selected columns. You can create a max of three groups using the **Add** button.

The Group By log has the following columns:

▸ **Group By**
▸ **Group Heading**
▸ **Order**
▸ **Delete**
▸ **Reorder**

Once a group is added, you can edit the **Group By** and **Order** fields for that group by double clicking.

The right tab has the following additional options:

▸ **Show Group Header**
▸ **Show Detail Rows**
▸ **Show Summary Row in Footer**
▸ **Show Group Name**
▸ **Show Count in Footer**

Sort By tab

The Sort By tab allows you to arrange the results in ascending or descending order, based on the added columns.

Layout Tab

The Layout tab allows you to configure where the content of the report is displayed. It contains the following elements:

▸ **Paper Size**
▸ **Page Orientation**
▸ **Add**
▸ **Show Border**

Below the header options is a visual representation of how information will be organized when the report is run. It contains the following columns:

- **Left Column**
- **Center Column**
- **Right Column**
- **Row Height**
- **Delete**
- **Reorder**

Each column contains cells that represent blocks of information. To add content to a cell, click the **Add** button. The Page Layout window opens.

Select which section to add content to with the **Select Layout for** field, using one of the following options:

- **Title**
- **Header**
- **Footer**
- **Summary**

Input a row height in the **Select row height** field.

You can select the content for the Left, Center, and Right columns, then select the Vertical Alignment for each. Once finished, click **Save**.

Workspaces Tab

The Workspaces tab allows you to choose which shells to pull data from when the report is generated. It contains the following options:

- **Current Shell and Sub Shells**
- **Current Shell Only**
- **Sub Shells Only**
- **User-Defined**
- **Exclude Inactive Workspaces**

If you select **User-Defined**, you can specify which shells will be used in the report generation. Click **Add** and use the arrow buttons to move shells from the Available Workspaces list to the Selected Workspaces list.

User-Defined Report Formats

You can choose the format of user-defined report results. The report format options are available in the **Query and Format** section of the report at runtime.

The report format options are:

- **HTML**: Displays the report in the standard format in a browser window. You may print a copy of the report from the browser window. (Right click and select your browser's Print option)

▶ **CSV**: Formats the report in an exportable CSV format, usually in Microsoft Excel or another software application you have set up for this format. You will be prompted to save the file or open it.

▶ **Excel**: Downloads the report in Microsoft Excel format. Depending on your browser, it will be downloaded automatically, or you may be prompted to download or save it manually.

▶ **PDF**: Displays the report as a PDF in a browser window. Depending on your browser, it will be downloaded automatically, or you may be prompted to download or save it manually.

▶ **XML**: Generates the output in XML format. Depending on your browser, it will be downloaded automatically, or you may be prompted to download or save it manually.

If you would like to save the report results in Unifier, check the **Save results in Unifier** checkbox in the Report Location section of the report. Selecting this checkbox will save a copy of the PDF, XML, or CSV report within Unifier and make it available for retrieval.

> **Notes**:
>
> Scheduled report runs can only be saved and retrieved in PDF, XML, or CSV formats and sent to the report owner or to the owner and other users and groups. These are chosen in the Schedule tab of the Edit Report window.
>
> If you select a report format other than PDF, XML, or CSV, the **Save results in Unifier** checkbox will be disabled.
>
> The DE of type Rich Text DE is not available to be added to the User-Defined Reports (Reports > User Defined).

Running a User-Defined Report (Standard View)

Running a user-defined report consists of the following elements:

▶ Define query parameters if applicable
▶ Review/choose projects or shells to include if applicable
▶ Add runtime notes if applicable
▶ Choose the report format (HTML, CSV, Excel, PDF, XML)
▶ Run the report

The following describes how to run project, shell, program and company-level user-defined reports.

> **Note**: User-defined reports created with data view data types require the data view to be in "published" status. If the data view was changed to "draft" status, the report will not run, and you will see an alert.

To run a user-defined report

1) Open the shell, project, program, or company workspace.
2) Navigate to the **Reports** module, click to expand, and click **User-Defined** to open the **User-Defined Reports** log.

3) Select a report in the log. Double-click the report or click **Gear menu** > **Run** to open the report window.

4) Select and enter values in the following blocks:

   ▸ **Query and Format**

   Depending on the report, this block enables you to select:

   Report Format

   Record count for UDR

   Time Zone

   Report Query Parameters

   ▸ **Report Location**

   Enables you to select where to save the report:

   Save results in Unifier

   Document Manager

   ▸ **Workspaces**

   ▸ **Notes**

   The following table contains details about the fields mentioned above.

5) Click **Run Report** to generate the user-defined report.

Depending on your browser and your report format, the file will be downloaded automatically, or you will be prompted to download the file manually.

Query and Format

Report Format	Choose the format in which the report should appear: HTML, PDF, CSV, Excel, or XML.
	▸ **HTML**: Displays the report in the standard format in a browser window. You may print a copy of the report from the browser window. (Right click and select your browser's Print option)
	▸ **CSV**: Formats the report in an exportable CSV format, usually in Microsoft Excel or another software application you have set up for this format. You will be prompted to save the file or open it.
	▸ **Excel**: Downloads the report in Microsoft Excel format. Depending on your browser, it will be downloaded automatically, or you may be prompted to download or save it manually.
	▸ **PDF**: Displays the report as a PDF in a browser window. Depending on your browser, it will be downloaded automatically, or you may be prompted to download or save it manually.
	▸ **XML**: Generates the output in XML format. Depending on your browser, it will be downloaded automatically, or you may be prompted to download or save it manually.

Record count or UDR	This option is available for Tabular, Summary, and Cross Tab type reports.
	You have ability to set the number of records to be retrieved for the report. This number will be set equal to the maximum number set at the company level by default, by the company administrator.
	The maximum number will be divided into intervals so that you can select the appropriate number. Also, the numeric format for the count must match your preferences.
	See the following table, "Options Available for Record Count," table, for more information about Record count for UDR.
Time Zone	For information purposes, the Query tab displays the time zone that is used for date fields in the report. The default time zone for a report is set up when the report is designed. It can reflect your user time zone, as defined in your user preferences, or it can be fixed to a particular time zone, such as the project location or company headquarters.

Report Query Parameters	If the report has been set up to enter query parameters, you may enter query information, which will give report results based on records that match the parameters you entered, or you can run a report on all records by leaving the field blank.
	The query parameters are defined during creation and set up. For example, you can set up a report to list all leases that expire within 10 days of today. You can also choose to accept the default query parameters, if any.
	For program-level and company-level UDRs you can see all projects and shells with a status of Active, On-Hold, or View-Only. You can specify which project or shell the report should be saved in. For shell-level reports only, you can choose to exclude Inactive shells in the report run.
	Depending on how the report was set up (specifically, if "Allow users to modify value(s) during execution" was enabled in the creation step), you may add or remove projects or shells as needed.
	For shell-level (cross-shell) UDRs, you can retrieve data across shells and sub-shells. You can select to exclude inactive shells in the report run, and the selection of shells is determined when the UDR is created. You cannot modify: ▶ Current Shell and sub-shells ▶ Current Shell only ▶ Sub-shells only
	You cannot modify fields unless the fields are set as user-defined. If the "Allow user to modify User-defined list during execution" checkbox was selected when the UDR was created, then you can modify the list of User Defined shells at run time of the report by using the Add and Remove buttons. You can only add the shells in which you are a member user.

Report Location

Save Report Location	If you want to save the report, choose the location it should be saved in: ▶ **Save results in Unifier** This checkbox becomes active if you select PDF, XML, or CSV. Selecting this checkbox will save a copy of the PDF, XML, or CSV report within Unifier and make it available for retrieval. ▶ **Document Manager** Saves the report in the Document Manager of Unifier. If you choose this option, you need to specify a name for the report (Save As) and which folder of the Document Manager it should be saved in (Location). Scheduled report runs can be saved and retrieved in PDF, XML, or CSV formats and sent to the report owner or to the owner and other users and groups. These are chosen in the Schedule tab of the Edit Report window.

Workspaces

Workspaces	The Workspaces block is for shell-level, program-level, and company-level reports. In the Workspaces block you can add additional shells that the report can be generated from.
	When you run report, the Workspaces block displays "User Defined" if you have selected "User Defined" under the shells tab in the report definition.
	You can exclude Inactive Workspaces by checking the check box, "Exclude Inactive Workspaces," in the report definition.
	The projects or shells tabs appear for program-level and company-level UDRs and shows all projects and shells with a status of Active, On-Hold, or View-Only.
	You cannot modify the list unless the Workspaces block displays "User Defined." All of the shells selected in
	Edit report > Shells tab will be displayed in Workspaces overlay (Available Workspaces).
	If the checkbox "Allow user to modify User-defined list during execution" is checked, then you can modify the list of workspaces by using the Add or Delete options.
	When you click Add, a new Workspaces Picker is displayed with both available and selected workspaces (Selected Workspaces section of the Workspaces page). All of the shells that are already added in the report definition are displayed in the Selected Workspaces.
	You can add additional Shells or remove the existing ones in the Workspaces Picker.
	The **Type** field has the default value of "All." The other options are all for active shell types. You can filter shells by type.
	The **Find on Page** option is available to quickly filter the available workspaces.
	The **Select** option will add all the newly added workspaces, as a part of filtered list, while reporting.
	The **Cancel** option will cancel the changes and closes the window.
	When in the report definition, under shells tab, any of the following options are selected, then the Workspaces block displays an empty list, and the report will be run for all workspaces(shells and sub workspaces (sub-shells)), based on the selection:
	▶ Current Shell and Sub-Shells ▶ Current Shell only ▶ Sub-Shells only

Notes

Notes	Enables you to enter report notes that will be included only on the current report results (to be generated) and will not be saved or generated in any subsequent report results.

Options Available for Record Count

Max Limit at Company	Options available at Report level
100,000	1,000 10,000 25,000 50,000 75,000 100,000
250,000	1,000 50,000 100,000 150,000 200,000 250,000
500,000	1,000 100,000 150,000 200,000 250,000 500,000
750,000	1,000 100,000 150,000 250,000 500,000 750,000

1,000,000	1,000
	100,000
	250,000
	500,000
	750,000
	1,000,000

Retrieve scheduled report results

1) Navigate to the project-level, shell-level, program-level, or company-level User-Defined Reports log.

Select a report from the log. The **Saved Results** tab opens in the right-hand pane.

1) Double click the saved result or click **Gear menu** > **Download** to view.

You will be prompted to open or save the results file.

Depending on your browser, the file will be downloaded automatically, or you will be prompted to download the file manually.

To delete saved report results

1) Navigate to the project-level, shell-level, program-level, or company-level User-Defined Reports log.

2) Select a report from the log. The **Saved Results** tab opens in the right pane.

3) Click **Gear menu** > **Delete**. Click **Yes** to confirm.

Save and Retrieve Scheduled Report Results

Report owners can schedule user-defined reports to run automatically and save the results within Unifier as PDF, XML, or CSV files. If you have run permission for a report, you can view or print any saved results. Report owners can delete saved results from a scheduled report run.

You can save report results and query parameters on reports that you run manually (ad hoc). This option is available only when the report is being generated in PDF, XML, or CSV format. This is available at runtime for project-level, shell-level, program-level and company-level user defined reports.

> **Note**: The default time zone for a report is set up when the report is designed. It can reflect the time zone of the person running the report, as defined in user preferences, or it can be fixed to a particular time zone, such as the project location or company headquarters. If the "user's time zone" option was selected in the set up of this report, the time zone reflected on the scheduled report results will be that of the report owner.

To save report results

1) Navigate to the project-level, shell-level, program-level, or company-level User-Defined Reports log.

2) Select a report from the log. The right pane displays results that have been saved from manual (ad hoc) report runs as well as scheduled report runs.

3) Click the gear menu and click **Run** to open the User-defined Report window.

4) In the Query and Format section, choose **PDF, XML,** or **CSV**.

5) In the Report Location section, select the **Save results in Unifier** checkbox. This saves a copy of the report results within Unifier.

6) Click **Run Report** to run the report. This may take a few moments.

7) When the report is generated, you will be prompted with a download window for the report, or it will be automatically downloaded to your system. The report will also be saved in the **Saved Results** tab in the right pane.

To save report results from scheduled report runs

1) Navigate to the project-level, shell-level, program-level, or company-level User-Defined Reports log.

2) Select a report from the log. The right pane displays results that have been saved from manual (ad hoc) report runs as well as scheduled report runs.

3) Click the **Schedule** tab in the right pane.

4) Select the **Enable Scheduled Reports Run** checkbox and select values for the **Output Format**, **Frequency**, and **Range of Recurrence** fields.

5) In the Saved Report Location info section, select the location in which you would like to save the reports that are generated according to the schedule.

   If you select **Saved Results** log, the report results will appear in the **Saved Results** tab of the report record.

   If you select **Document Manager**, the report results will appear in the Document Manager.

6) Click **Save** when finished.

To retrieve saved report results

1) Navigate to the project-level, shell-level, program-level, or company-level User-Defined Reports log.

2) Select a report from the log and select the **Saved Results** tab in the right pane.

3) Double click on a saved result to download the report results to your system.

To delete saved report results

1) Navigate to the project-level, shell-level, program-level, or company-level User-Defined Reports log.

2) Select a report from the log and select the **Saved Results** tab in the right pane.

3) Click the gear menu next to the result and click **Delete**.

Print Report Results

After running a report, you can print a copy. Depending on the report format you chose, the report results will be displayed in a browser window (HTML, XML), Adobe Acrobat Reader (PDF), Excel (Excel, CSV), or other software application displaying CSV format. The printing functionality will depend on the format of the report.

To print report results

1) Run a user-defined reports (user defined reports).

2) For most formats, the file will be downloaded automatically, or you will be prompted to download the file by your browser. For HTML and XML, you may need to right-click in the browser pop-up window and choose **Print**. Additional printing functionality may be available depending upon the report format.

Transferring Reports Between Environments

Multiple user-defined reports (UDRs) can be transferred between Unifier environments.

1) Go to **Company Workspace** > **Admin** mode > **Configuration Package Management** > **Component List**.

2) Click **Create**.

3) Go to **Company Workspace** > **User Defined Reports**.

4) Select your reports.

5) Enter a value in the **Name** field (top left).

6) (Optional) Click **Error Check** to see if there are any dependencies.

7) Click **Save**.

> **Note**: You can use the **Save As** option if you want to copy the component list.

8) Go to **Company Workspace** > **Admin** mode > **Configuration Package Management** > **Configuration Packages** (to create a configuration package).

9) Click **Create**.

10) Enter values in the **Package Name**, **File name** (zip file name), and **Components Lists**.

11) Select the component list related to your selected report.

12) In the **New Configuration Package** window click **Next**. The window displays a preview of your reports.

13) Click **Next**. In case of errors, you will see messages, if no errors are detected, then respond to the following:

   ▸ Do you want to publish this package for production?

   ▸ Download package after creation.

14) Click **Create** to create the configuration package.

15) Import the configuration package into the destination environment to transfer the reports.

Working with Custom Reports (Standard View)

If your company has custom report in a Program, Project, or Shell developed through Oracle Business Intelligence Publisher (BI Publisher), the custom reports will be available under the **Custom** grouping node (**User** mode > **Reports** > **Custom** > [**Report Name**]).

> **Note**: You must have permission to access custom reports in User mode.

To run a custom report in a Program, Project, or Shell:

1) Open the Program, Project, or Shell.
2) Switch to **User** mode.
3) In the Navigator, click **Reports** > **Custom** > [**Report Name**]. The Reports log shows the list of available custom reports, if you have permission to access.
4) The **Report Settings Page** will open in the right-hand pane.
5) In the Template and Format section, select an output format.
6) In the lower-right corner of the Report Page, click **Run Report** to generate the report in the selected format.

> **Note**: The print output is based on your permissions to certain data in Unifier.

Report Settings Page

When you select the **Report Name** functional node, under the **Custom** grouping node in the left-hand navigator, the Report Settings Page will open in the right-hand pane.

The following explains the main elements of the Report Settings Page:

▶ **Name**

The Report name appears in the upper-left corner of the page.

▶ **Template and Format**

The Template field is a drop-down list that displays the default template that was used at the time of designing the report in the BI Publisher server. If multiple templates are available for the External Report, then they will be listed in this drop-down list.

The Format field is a drop-down list that displays the default format (set based on the default template) that was used at the time of designing the report in the BI Publisher server. If multiple formats are available for the selected template, then they will be listed in this drop-down list.

Example

Available Template: Contracts

Available Formats: PDF, RTF

▶ **Search Parameters**

This section contains all the parameters that are designed for the External Report in the BI Publisher server. The BI Publisher supports the following parameter data types:

  ▶ String
  ▶ Integer
  ▶ Boolean
  ▶ Date
  ▶ Float

Acceptable values (which include wildcard characters) for these parameters depend on the data model used for the report definition.

Except for the Date parameter, the Reports Settings window displays a text field for the other parameters.

▸ **Additional Parameters**

Displays additional parameters as defined by the report.

▸ **Run Report**

When you click **Run Report**, the system generates the report. When you run an External Report in the User mode, Unifier accesses the BI Publisher server and the External Report output will be based on the latest design of the report in the BI Publisher server. Unifier does not store any data related to the External Report content such as model, format, layout, and so forth.

▸ **Reset**

When you modify the Template, Format, or Parameters fields, a **Reset** button will appear in the lower-right corner of the Report Page. Clicking **Reset** will clear out all the entries made by the user and will reset the fields back to the template default.

Custom grouping node

The **Custom** grouping node, under the **Reports** grouping node in the left-hand navigator, includes both the Internal Reports and the External Reports.

When you select and open an Internal Report, the Internal Report log window opens and contains the following columns:

▸ **Name**

Displays the name of the Internal Report that has been created in Unifier.

▸ **ID**

Displays the system-generated ID, for example, uuu_ext_54 for external report and uuu_54 for internal report.

When you select and open an External Report, the External Report log window opens and contains the following columns:

▸ **Report Name**

Displays the name of the External Report that has been created in the BI Publisher server.

▸ **Default Template**

Displays the default template name (for the Default Format) of the External Report that has been set in the BI Publisher server.

▸ **Default Format**

Displays the default format of the External Report that has been created in the BI Publisher server.

Running an External Report

When you run an External Report in the User mode, Unifier accesses the BI Publisher server and the External Report output will be based on the latest design of the report in the BI Publisher server. Unifier does not store any data related to the External Report content such as model, format, layout, and so forth.

When you open an External Report, the **Report Settings** window opens, which contains fields related to the External Report parameters (listed in the Parameters section of the window), and fields related to the template and format for the External Report (Available Templates and Available Formats). The User can set the External Report attributes in the Reports Settings window.

Permission-Based User-Defined Reports (UDRs)

When you are creating User-Defined Reports (at Project/Shell, Program, and Company levels), you have the option to create UDR with **System Data Sources** or with **Permission Based Data Sources**.

> **Note**: To be able to create the UDRs, you must have the **Permissions Create All**, **Create Permission Based**, and **Full Access** permissions.

1) Go to Project/Shell, Program, or Company (**User** mode).
2) Click the **Reports** grouping node to expand.
3) Click **User-Defined** functional sub-node.
4) Click **Create** and select one of the following:
a) **System Data Sources**
b) **Permission Based Data Sources**

If you select the **System Data Sources** option, you can use the **Create a new report** window to create a UDR based on the following fields:

▸ Data Type
▸ Report Type
▸ Access Type (read-only)

If you select the **Permission Based Data Sources** option, the following data sources are available to create permission-aware UDRs:

▸ Business Process (BP)
▸ Document Manager

In the User-Defined Reports log, the **Copy from Templates** option (based on the report that is selected) will create a copy of the report based on the existing functionality.

The above applies to when you have the **Permissions Create Permission Based** permission.

When only have the **Create for Permission Based Data Sources** permission, you have the ability to create UDRs based on the permission aware data.

When creating a new UDR by way of copying an existing one, if you select a System Access Type report, the system does not allow you to create a UDR that is based on System Data Sources and displays an alert.

The permission for permission-aware data sources for a report that is packaged will be transferred from one environment to another.

Review the following for more information

When you are running report based on system-defined data sources, if your report is based on system-defined data sources, then the report will contain the system-defined data irrespective of your permissions. The same result will be applicable to the Schedule Reports.

When you are running report based on permission aware BP data sources, and the permission aware reports are created based on BP data sources, then:

▸ The data presented in the report will be based on the permissions of the user who is running the report, and the user   will only be able to access the data that they have permissions to see through the user interface.

▸ If you are running a permission based report, and you do not have access to the data for the BP data source, then the report output will be blank.

▸ In case of Scheduled Reports, the data returned will be based on the permissions of the user who is creating the report.

▸ The permission restriction is applicable to the first level of data source, only.

   Example

   User One and User Two are Unifier users.

   User One has permission to access the Meeting Minutes BP, but User Two does not have permission to access the Meeting Minutes BP.

   The Meeting Minutes BP log has a column that refers to an Action Items BP.

   User One does not have permission to access the Action Items BP.

   When User One creates and runs a report on the Meeting Minutes BP, User One will be able to see the data related to Meeting Minutes BP as well as the column data which references the Action Items BP.

   When User Two creates and runs a report on the Meeting Minutes BP, User Two will see a blank report.

▸ For a Company-level UDR, if the access permission to data goes across the projects, then you will be able to view the data for BPs based on permission levels present for those BPs across the projects.

When a user is running a report based on a permission aware Document Manager data source

▸ When running such a report, the data presented in the report will be based on the permissions of the user who is running the report. When present, the folder and document level permissions will also be taken into consideration.

Transfer Ownership for UDRs

The administrator can define who has access to the UDR.

At the Company Level as well as Project level, you can use the **Transfer Ownership** option (at the log level) to change the owner of the UDR. This option will be available to change owner for multiple reports at a given time.

1) Go to **Company Workspace**.
2) Click **Reports** to expand.
3) Click **User-Defined** to open the **User-Defined Reports** log.
4) Select the reports the you want the owners changed.
5) Click **Actions > Transfer Ownership** to open the **User/Group Picker** window.
6) Select the new owner for the reports.

You can only select one user in the **User/Group Picker** window.

The list of users that you see contains the users who have access to the Project/Shell.

The user must have Full access permissions.

When editing, you can change the owner of a report by way of the **Report Owner** field in **General** tab.

Once the owner for the report is changed, the **Permission** tab in the UDR displays the new changed owner with all permissions for that report. For example, if the ownership for report R1 was changed from A-user to B-user, then the **Permission** tab displays B-user, only (with full owner permission), and the A-user will not be seen in the **Permission** tab.

Working with Audit Reports (Standard View)

If your company has custom report in a Program, Project, or Shell, it will be available under the **System** grouping node (**User** mode > **Reports** > **System** > **Audit**).

> **Note**: You must have permission to access custom reports in User mode.

To run a custom report in a Program, Project, or Shell:

1) Open the Program, Project, or Shell.
2) Switch to **User** mode.
3) In the Navigator, click **Reports** > **System** > **Audit**.
4) The **Audit Report Page** will open in the right-hand pane.
5) Define query parameters if applicable.
6) In the lower-right corner of the Report Page, click **Run Report** to generate the report in PDF format.

Audit Report Page

When you select the **Audit** functional node, under the **System** grouping node in the left-hand navigator, the Audit Report Page will open in the right-hand pane.

The following explains the main elements of the Audit Report Page:

▶ **Audit Summary Report Query**

This section contains all the query parameters that are designed for the Audit Report. You may enter query information, which will give report results based on records that match the parameters you entered, or you can run a report on all records by leaving the fields blank. The following query parameters will be visible:

- ‣ Description contains
- ‣ Event Name containsr
- ‣ From (Company)
- ‣ From (User)
- ‣ From
- ‣ To
- ‣ Sort by
- ‣ Order

‣ **Run Report**

When you click **Run Report**, the system generates the report in PDF format.

‣ **Reset**

When you modify the query parameters, a **Reset** button will appear in the lower-right corner of the Report Page. Clicking **Reset** will clear out all the entries made by the user and will reset the fields back to the template default.

Unifier Mobile Application for iOS or Android

If your company employees are often out of the office, Unifier can keep the workflow moving by using the Oracle Primavera Unifier Mobile Application. The Unifier Mobile App is built specifically for installation and use on mobile devices that use iOS or Android operating system.

By using the Unifier Mobile App you can:

▸ Act on the assigned tasks
▸ View the various tasks
▸ Create new business process records
▸ Work offline

To get the Unifier Mobile App, you have the following options:

▸ Download it from App Store or Play Store, or
▸ Launch Unifier, click your user name in the top right corner, click **Get Unifier Mobile App**, and follow the prompts.

After download, you can scan the QR code to set up Unifier Server URL and user name on your Oracle Primavera Unifier Mobile Application.

> **Note**: If your organization is using a Content Security Service or Mobile Device Management solution and requires that users do not download from the Apple Store or Play Store directly, submit a Service Request in My Oracle Support to request unsigned versions of the Oracle Primavera Unifier Mobile Application for Android or iOS.

In This Section

Business Processes

The following Business Processes (BPs) can be accessed through the mobile app:

▸ BPs used by field employees to record, or gather, data.
▸ Cost Type BPs used by executives, or approvers.
▸ BPs that require action.

In order for a Business Process (BP) to be accessed through the Unifier Mobile app for iOS, the following conditions must be present:

▸ The BP must be enabled for mobile application (**Enable for Mobile Application**) in the configuration window (**General** tab), in the business process configuration

▸ The forms, seen in the mobile app, are the forms designed in uDesigner.

▸ The Payment Application and Summary Payment Application Cost BPs can be enabled for mobile app, but you cannot create Line Items in those BPs.

▸ The Request for Bid (RFB), Resource, and Project/Shell Creation BPs are not supported in, and cannot be configured for, the mobile app.

Important!

The mobile app does not rely on the **Enable design for Mobile Form Factor** checkbox option that was set in uDesigner. The **Enable for Mobile Application** must be checked in the Business Process configuration window. The uDesigner option will only control the forms seen in the mobile app (standard form as opposed to mobile form factor forms).

The setting of this option will be exported to the created *Configuration Package* (Company Workspace, Shell template, and so forth).

You cannot view data related to Business Processes, and assigned tasks, without proper Unifier Mobile App configuration. Before you download the Unifier Mobile App for iOS, contact your Company Administrator and check if the required setup has been done, or not.

Data Type and Input Type

The following data and input types are supported in the mobile app

Data Type	Input Type
Checkbox	Integer
Currency	Float
Multi Select Input	String
Multi Test Lines	String
Picker	String, Date, Integer
Pull Down Menu	String, Integer
Radio buttons	String, Integer
Text Box	String
Date picker	String

Pickers

The following pickers are supported in both the iOS and Android Unifier mobile apps:

Picker	Single/Multi select
BP Picker	Single select
User Data Picker	Single select

Picker	Single/Multi select
CBS Picker	Single select
Data Picker	Single select
BP Line Item Picker	Single select
Configurable Manager Picker (CMx Picker)	Single select
Generic Cost Picker (CM0 Picker)	Single select
User Picker	Single select
Image Picker	Single select

User Identity

If Unifier has been configured to sign in users using single sign-on (SSO), then the Sign In window will not appear on your device screen. In addition:

‣ Unifier does not capture the user's username and password.
‣ The user's first name, last name, and email address are all stored in Unifier database, but they are not shared with any other applications, including third-party applications.

If Unifier has been configured to sign in users using basic authentication, then the Sign In window will appear on your device screen. In addition:

‣ Unifier captures the user's username, password, first name, last name, and email address.
‣ The user's username, password, first name, last name, and email address are stored in a shared object that uses encrypted format, and they are not shared with any other applications, including third-party applications.