

Oracle
Primavera Unifier
Day One Impact

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Oracle Primavera Unifier Day One Impact

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Introduction

This document provides details about upgrades that have day-one impact to help you find the information you need more quickly.

23.10 Select Base Currency at First Sign In

As the Company Administrator, you will be prompted to select the base currency when you sign in to Unifier for the first time.

Until the base currency is selected:

- ▶ No other action can be taken in Unifier.
- ▶ No other user can sign in to Unifier or the mobile applications.

Day 1 Impact: Applies only to new company owner users.

23.10 Get BP Record Permissions API REST Service Added for Workflow BPs

Use the Get BP Record Permissions API to change permissions for the current owner and to change users in workflow BPs.

Day 1 Impact: In the BP Log view, the **Records Received by Me** displays a list of records that has been only received by the signed-in user.

23.10 Remove User License Governor

The License Manager has been updated to eliminate tracking of license counts and overage counts for standard users and portal users.

As a Site Administrator (also referred to as the System Administrator):

- ▶ You can no longer set the overage count for Standard Users and Portal Users when you navigate when you navigate to **Company Workspace > Admin mode > General Administration > License Manager > ⚙ Settings drop-down > License Terms > General** tab.
- ▶ You can continue to define notification thresholds up to 100%.

As a Company Administrator:

- ▶ You can create any number of users without receiving warnings or notifications.
- ▶ You can review the number of **Active Named Users** for each user type under the **Current Usage** even if it exceeds the number of available licenses when you navigate to **Company Workspace > Admin mode > General Administration > License Manager**.
- ▶ You can review the **Event Audit Log** to track overages when the number of active users created through the user interface, import, or integration services exceeds the number of available licenses. The audit log is updated when a user's status is updated from *Inactive* to *Active* or *On hold*.

As an integration user or a Company Administrator, you can create any number of users with the Create User and Update User REST API V1 services. The REST services have been updated to exclude the `active_standard_user_overage` and `active_portal_user_overage` in the API input. You will no longer receive any errors or notifications when the number of available licenses is exceeded.

Day 1 Impact: This change affects only new users.

23.7 Standard UI Support Enhanced for Lease Business Process

The Lease business process is available in the standard UI.

In the standard UI, you can:

- ▶ Create a lease snapshot and a snapshot log.
- ▶ Access Regular Payment Schedule and Straight Line Payment Schedule.

23.4 Information Enhanced in the Default Filter View in Cash Flows

You can view the following information in the default view of the Cash Flow:

- ▶ All selected inflow and outflow curves
- ▶ All variance data such as Cost Variance and Schedule Variance
- ▶ The variance data in the graph

23.4 Redesigned Buttons For Workflow and Non-Workflow BPs

For an improved and consistent user experience:

- ▶ The buttons for **Save**, **Submit**, and **Send** business processes have been redesigned for improved clarity.
- ▶ A workflow BP has buttons for **Save Draft**, **Save**, **Submit**, **Send**, and the **More Actions** menu.
- ▶ A non-workflow BP has buttons for **Save**, **Submit**, **Send**, and the **More Actions** menu.
- ▶ A newly created non-workflow BP record has buttons for **Save**, **Submit**, and the **More Actions** menu.
- ▶ A non-workflow BP record that has been submitted has buttons for **Edit** and the **More Actions** menu.
- ▶ A non-workflow BP record that has been *terminated* has only the **More Actions** button.

23.4 Non-Workflow Logs Indicate Records in Edit Mode

The following features have been added for non-workflow BP logs:

- ▶ A new column has been added to indicate whether the record is in Edit mode.
- ▶ When creating or filtering views, you can use a **Show Edit records** filter to include or exclude records in Edit mode.

22.10 QBDE and Integration

Starting with the 22.10 release, Unifier will dismiss direct QBDE value updates, if:

- ▶ The "refresh" condition has not been defined, or
- ▶ The "trigger element" is not updated through input request.

Go to **uDesigner > Business Processes > Asset - Home > Integration** node > **Upper** sub-node > **Upper** design window > **Data Elements** tab > **Element Label** column: "**Status**" > **Data Element** column: "**Status**" > **Direction** column: "**Both**"

Existing users

If the **Direction** column value is set as Both, or Input, for the QBDE, Unifier will dismiss these direction values (and direct updates) and will evaluate the query conditions based on the:

- ▶ The "refresh" condition, or
- ▶ The "trigger element".

22.6 Define Number of Decimal Places for Currency Fields

Unifier administrators can specify from zero to four decimal places when defining a currency. All formulas, auto-populate, and reverse auto-populate currency elements will honor the decimal places defined for the currency. Once a currency has been defined, the "Decimal Places" field will no longer be editable.

Day 1 Impact: The existing business process records and sheets with currency amounts will be rounded off to the decimal places specified in the currency details window for the selected project/base and transactional currency. Currencies with two decimal places will not show any changes.

22.6 Decimal-Point Precision

In WBS sheets, Direct Entry or Formula Columns based on Sys Numeric logical data sources now support up to 15 decimal places of precision.

Day 1 Impact: Direct Entry columns based on a Currency Amount or Decimal Amount data definition will honor the decimal precision set in the data element properties. Columns whose data definition is based on Currency Amount will honor the decimal precision defined for the Project Currency / Base Currency.

For CMx sheets, the decimal places are not defined in column properties; instead, a column will honor the decimal precision selected in the data element properties.

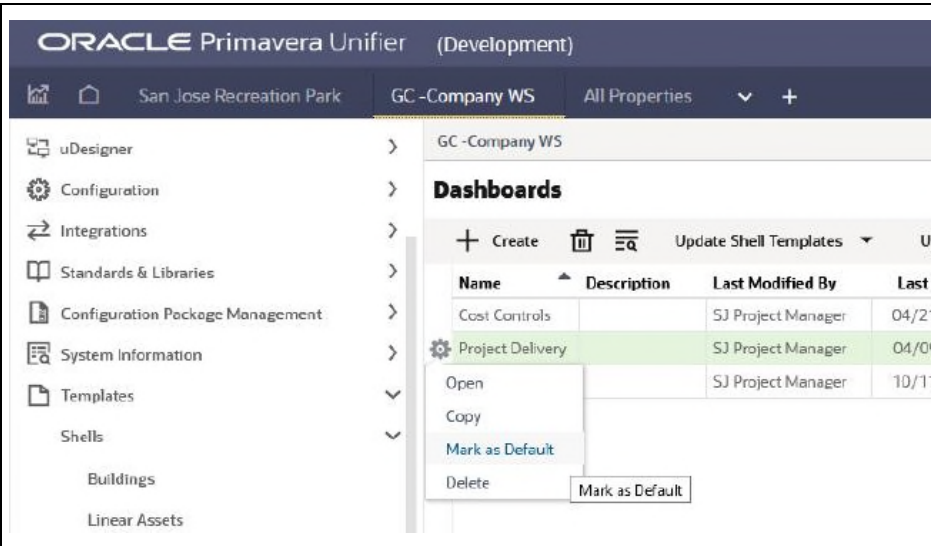
Day 1 Impact: The decimal precision set in the data element properties will be honored; direct cell entry columns based on Currency Amount or Decimal Amount data definitions will not show additional decimal formatting options.

For Planning Sheets, columns based on SYS numerical logical data source and SYS numeric data source will support 15 decimal places instead of the previous limit of 8 decimal places.

Day 1 Impact: Manual entry columns based on the Decimal Amount definition will not show additional formatting options; the decimal precision set in the data element properties will be honored.

22.5 Set and Push Default Dashboards

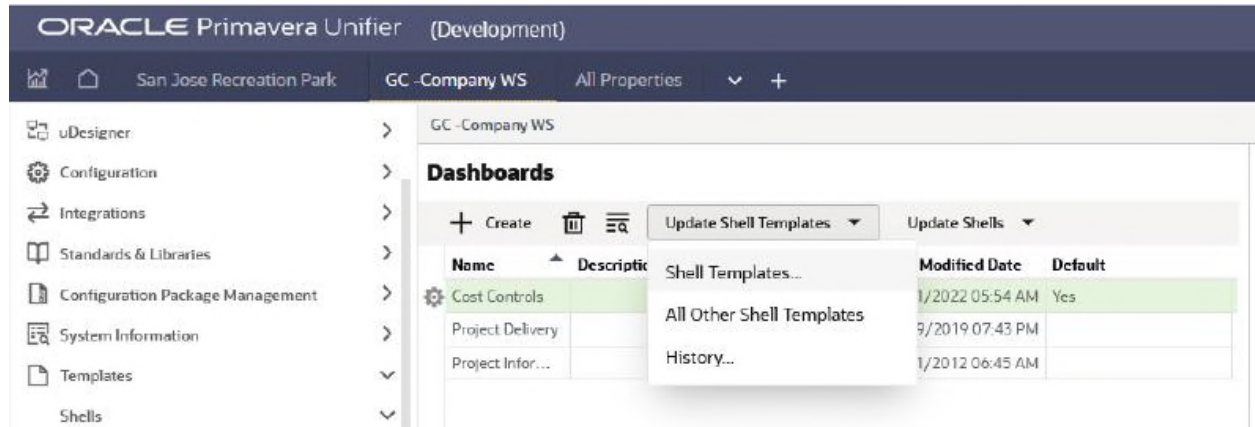
Administrators can now set a default dashboard within shell templates. A shell template can have only one default dashboard.



Name	Description	Last Modified By	Last Modified Date
Cost Controls		SJ Project Manager	04/27/2022
Project Delivery		SJ Project Manager	04/09/2022
Open		SJ Project Manager	10/11/2021

There will be a new column titled "Default" set to "Yes" for the dashboard that was the default prior to this upgrade.

A default dashboard can be pushed to some or all shells using Update Shell Templates.



Name	Description	Modified Date	Default
Cost Controls		1/2022 05:54 AM	Yes
Project Delivery		9/2019 07:43 PM	
Project Infor...		1/2012 06:45 AM	

When creating a new shell – whether by copying from a Template, copying from a Shell, through a Project/Shell Creation BP, or through REST services using a Shell Template – checking the "Dashboard Setup" option will cause the default setting for the custom dashboard setup to be copied into the newly-created shell.

22.4 Links to Email Attachments

Email notifications with attachments will now include a "View in Unifier" option which will log the user into Unifier and open the associated record automatically.

22.3 Hyperlink Enhancement

Existing standard hyperlink pickers should work as expected. For non-standard URIs in the hyperlink picker, Unifier will validate the URL in a hyperlink picker every time a BP record is saved/sent to the next step in the workflow. This validation is done regardless of how the hyperlink picker is created.

- ▶ The URL is validated for acceptable format and against the allowed URIs. This closes a security loophole and ensures Unifier does not allow saving of any security-sensitive URL.
- ▶ Unifier also validates the URL every time a user clicks on the hyperlink, ensuring a secure handling of hyperlinks.

For security reasons, the URLs in a hyperlink picker should include http(s) or the allowed URIs set by the company administrator. Company administrators must ensure they include required URIs in the “Allow URIs” field of the Security tab of the Company Properties.

21.11 Bidder Impact

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

What has changed?

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

The image shows two side-by-side screenshots of the 'General' tab in the 'Company Properties' page, with a green arrow pointing from the left to the right to indicate a change.

Left Screenshot (Before Upgrade):

- Fields: Name, Short Name, Description, Contact Name, DUNS, Home Page URL, Help URL, Status (Active/Inactive), Image, Bid Access URL, Bid Management Account, Owner, Enable Custom Dashboards, Maximum Limit for UDR records, Display element for Project / Shift, Hide Tabs in Company Dashboard, Source for Activity Sheet Data.
- Buttons: OK, Cancel.

Right Screenshot (After Upgrade):

- Fields: Name, Short Name, Description, Contact Name, DUNS, Home Page URL, Help URL, Status (Active/Inactive), Image, Bid Management Account, Owner, Enable Custom Dashboards, Maximum Limit for UDR records, Display element for Project / Shift, Hide Tabs in Company Dashboard, Source for Activity Sheet Data.
- Buttons: OK, Cancel.

The 'Bid Access URL' field is removed in the right screenshot.

Why was this change made?

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

Who is affected?

- ▶ Unifier 21.11 requires unique "login usernames" across bidder users and standard users for authentication purposes

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

SCENARIO	IMPACT	RESOLUTION										
<p>Applicable to both Cloud and On-Premise customers</p> <p>If the same email address is used in the uuu_user_id field of multiple Vendor records of the Master Vendor List.</p> <p>Existing behavior for Cloud customers</p> <p>– The vendor gets created as a bidder in Primavera Administration only when the vendor is invited for the very first time through an RFB process in the Proposal Management tab.</p> <p>There is no change to this behavior.</p>	<p>The vendor that was created first as a bidder, will be able to login to the bidder portal.</p> <p>Example:</p> <table><tr><td>Company Name</td><td>uuu_user_id</td></tr><tr><td>C1_US</td><td>abc@company</td></tr><tr><td>C1_CN</td><td>abc@company</td></tr><tr><td>C1_UK</td><td>abc@company</td></tr><tr><td>C1_IN</td><td>abc@company</td></tr></table> <p>When abc@company.com logs in to Unifier, the user is a member of C1_IN and not C1_US</p>	Company Name	uuu_user_id	C1_US	abc@company	C1_CN	abc@company	C1_UK	abc@company	C1_IN	abc@company	<p>Ensure that the vendor emails (data element: uuu_user_id) for all vendor records are unique.</p>
Company Name	uuu_user_id											
C1_US	abc@company											
C1_CN	abc@company											
C1_UK	abc@company											
C1_IN	abc@company											

<p>If a Standard, Collaborator or Portal user is created first and then a vendor with the same username is invited to bid for the first time.</p> <p>Pre-21.11 behavior for Cloud customers – Primavera Administration will not create a bidder. Pre-21.11, such a user could login to the bidder portal using the same login credentials through the dedicated Bidder portal URL.</p> <p>Existing On-premise customers – Unifier sends a different password that can be used to login to the bidder portal.</p>	<p>For Cloud and on-premise customers – Since the bidder portal has been removed, the user will always be taken to the standard Unifier landing page.</p>	<p>If a user needs to be able to login as a Standard, Collaborator or Portal user as well as be able to respond to bids as a bidder, then the email addresses used for login must be different. The email address used in login username field of User Properties must be different from the one used in 'uuu_user_id' field of the Vendor record.</p>
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Is there an easy way to find login usernames that are same between regular Unifier users and Vendors?

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

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

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

the email address is used.

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

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

What about issues post upgrade?

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

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

What are the other changes?

Bidder credentials

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

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

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

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

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

2w2 Standard **Proposal Management**

Requestor Name *

SJ Project Manager

Email *

l@i[REDACTED].com

Add

Send Invitation

Actions ▼

↺

≡


Send Mail

Send Password

Remove


Request for Bid Line Items Winning Cor


Due Date *

11/25/2021 05:00 PM 

Requ

SJ

Add Send Invitation Actions ▼ 

	Status	Invite	
	● Not Responded	11/0.	s
	● Not Responded	11/0.	et

Send Mail

Remove

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

Compare - ul16-0038: 21.8 final

Record Details Line Items

Requestor Estimates
0.00
0.00
0.00%

line
0.0
0.00
0.00

Total Amount
0.00

Total Amount
0.00

[Send Email](#)
[Send Password](#)
[Open Vendor Details](#)
[Open Proposal](#)

Compare - RFB-067: East Wing Office33

Record Details Line Items

Requestor Estimates
691,117.00
0.00
0.00%

Win
0.0
-691,
-100.00%

Bid Package Instructions

Bid Package Instructions

[Send Email](#)
[Open Vendor Details](#)
[Open Proposal](#)

21.7 Redwood Theme

Redwood Theme for Unifier: User Interaction & Interface Changes

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

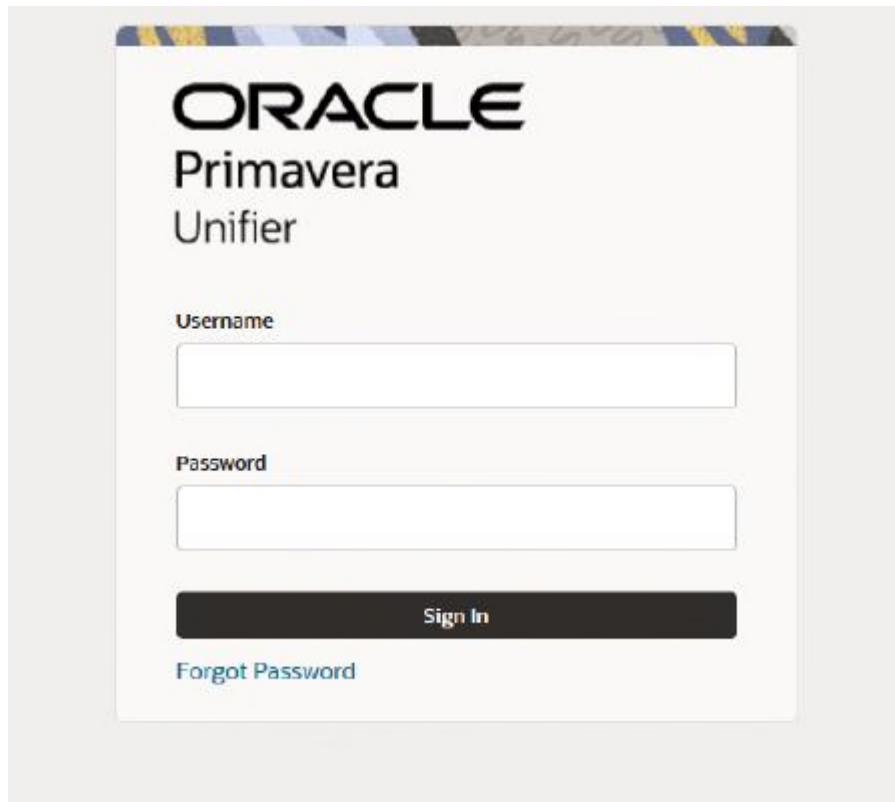
From version 21.7 onward, Unifier will be using the Oracle JavaScript Extension Toolkit (Oracle JET or "OJET"). As a result of using OJET 10.1.1,

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

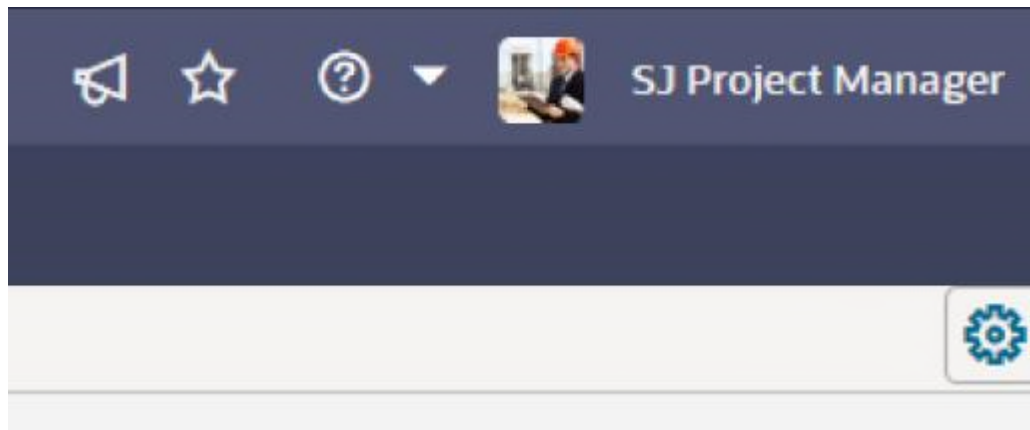
User interface screens in Unifier User mode that use OJET have undergone changes, primarily in colors, icons, and the font.

Here are highlights of the changes between the current version of Unifier and previous versions.

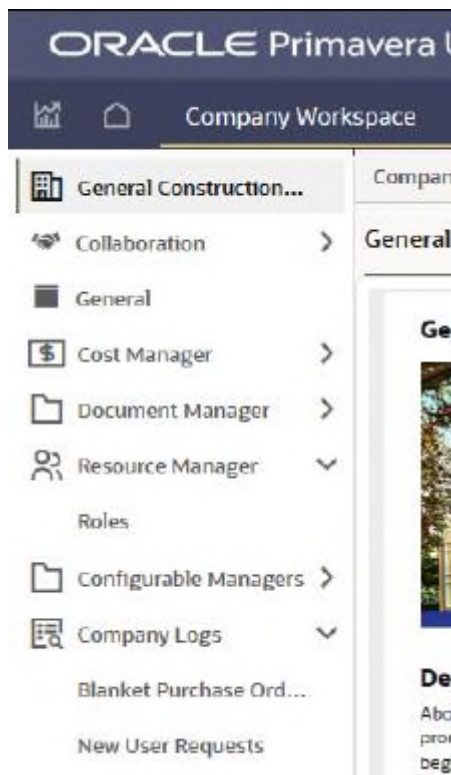
- ▶ The login screen has been updated.



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



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



- ▶ Icons in the Navigator have been updated.

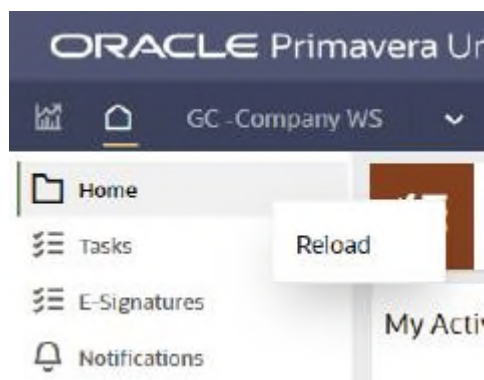
- ▶ In a new tab, a scroll bar is displayed when you hover over a long list.



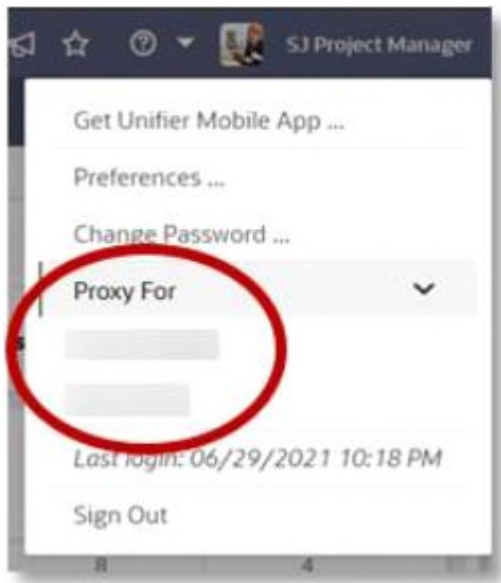
- ▶ Within toolbars, a multi-row arrangement is replaced by a single-angle bracket indicating there are more tools to use.



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



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



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



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



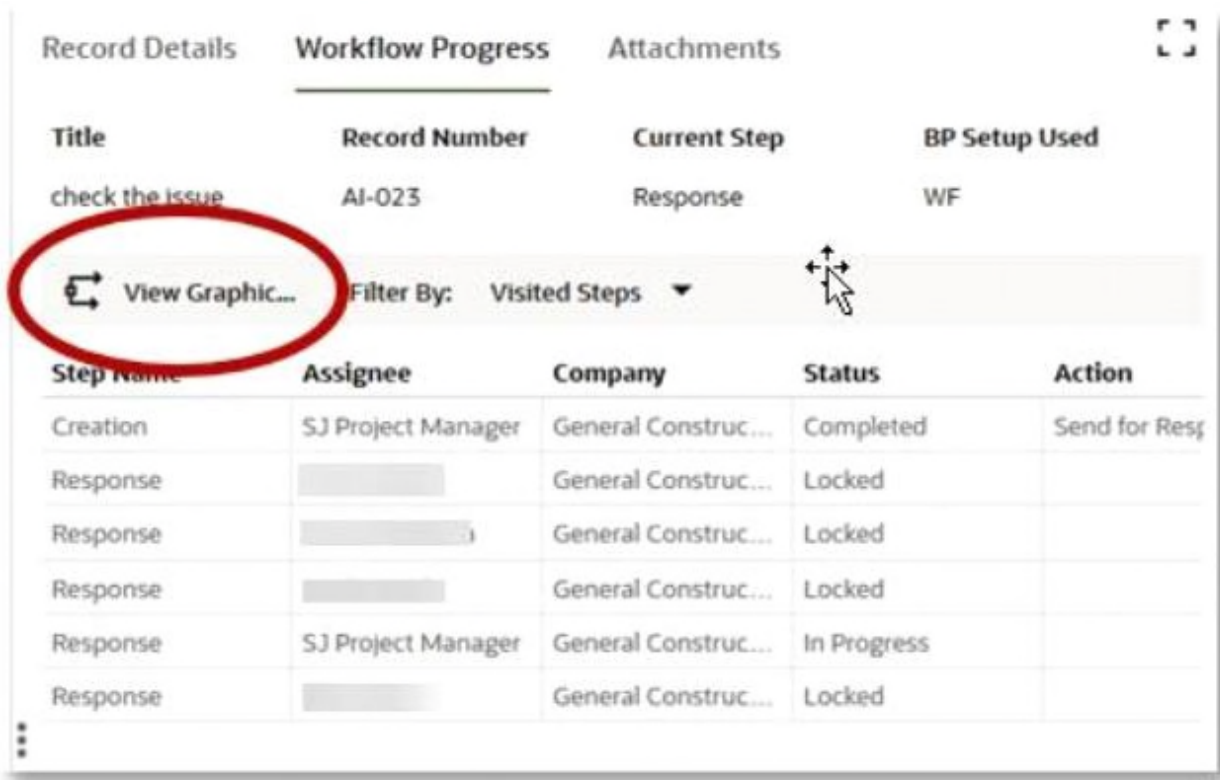
- ▶ The Comments area associated with a BP record is differently styled.
- ▶ The "Search" and "Find on Page" text actions are now represented by icon buttons in the same location.



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



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







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

New View

View Name

Columns Filters **Group By** Sort By

Group By	Order	Delete	Reorder
Due Date	Descending		
Priority	Descending		

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