

Oracle
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Shells and Projects User Guide

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Oracle Primavera Unifier Shells and Projects User Guide

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Working with Shells and Projects

The following explains how to work with Unifier shells and projects.

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.

Note: The instructions and information presented in the system documentation is based on an out-of-the-box (OOTB) setup and before being customized by the user.

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Shells

In the system, shells define your project collaboration workspace. Shells can represent whatever you want them to, for example:

- ▶ Capital Projects
- ▶ Maintenance Projects
- ▶ Business Portfolios
- ▶ Project Delivery Management

With shells, you can show project relationships and hierarchies to more accurately represent a real-world physical or organizational structure. In the following example, indentation is used to represent levels in a hierarchy:

- ▶ Region
 - ▶ Properties
 - Buildings
 - ▶ Buildings
 - Projects

You can create multiple templates from which you can centrally manage large numbers of shells. The shells you create can have their own business processes, cost worksheets, reports, dashboards, document repositories, and users and groups. You can organize shells into project hierarchies that allow you to pull data from a current shell and any of its subordinate shells. Working together, these features give you visibility into, and control of, your projects.

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Shell Relationships and Hierarchy

With shells, you can show project relationships and hierarchies to more accurately represent a real-world physical or organizational structure. Shell hierarchies can have as many levels as needed. For example:

- ▶ Region (shell)
 - ▶ Properties (sub-shell)
 - Buildings (sub-shell)
 - ▶ Buildings (sub-shell)
 - ▶ Projects (sub-shell)

In this simple hierarchy, the shell Region was created and named in uDesigner. The Region shell has the sub-shells Properties, Buildings, and Projects. The sub-shell Properties also has a sub-shell called Buildings. Subshell organization is configured in Admin mode and managed through the shell detail form.

Single Instance and Multiple Instance Shell Types

Shells are characterized by:

- ▶ A unique system ID
- ▶ Single or multiple instance
- ▶ Generic or CBS cost code

Shell instances are copies of shell types, and have these characteristics:

- ▶ An instance of a shell type must exist before the shell type is viewable in User mode
- ▶ Shell type single can be a root node or a tab
- ▶ Shell type multiple populate levels in a hierarchy Shells and the Cost Managers

Shells can be single or multiple instance.

Single instance: This type of shell is an anchor shell and cannot be replicated. Use this shell at the root of a hierarchy. It is seen as a tab, at the same level as the Home page. You cannot make a template of this shell.

Multiple instance: This type of shell can be replicated. Use this shell as a building block for a hierarchy. Multiple-instance shells allow you to create more than one copy of a shell, and they support the use of templates.

Here is an example of how it could work: Your anchor shell is a single-instance shell and might be called Europe. This shell has a tab, and is the root of the hierarchy. Under this shell, you could use multiple-instance shells to create shells that represent countries, such as Holland, France, and Hungary. These building block shells can have templates, so each of these country work spaces can have the same business processes and managers, but they may have different users. The Shell Manager enables you to import and manage shells.

To access the hierarchy, click the anchor shell tab, as seen in the Tab Navigator. The shell landing page displays a mini log in which subordinate shells are listed in the shell log in the lower area of the landing page.

Shell and Cost Managers

The uDesigner configuration controls shell relationships and also determines the type of cost manager that you can use with the shell.

- ▶ **Standard Cost Manager:** Uses CBS codes and works with projects and shells. In uDesigner, the administrator can create a shell that uses CBS costing. This shell then has the same Cost Manager as a project, but provides the configurability and hierarchical aspects of a shell.
- ▶ **Generic Cost Manager:** Works with generic shells only. The Generic Cost Manager supports costing for projects that are not of a fixed duration or cost. This can include facilities management projects like:
 - ▶ Leases
 - ▶ Janitorial support
 - ▶ Building maintenance
 - ▶ Landscape care
 - ▶ Interior updates to a building

The ongoing management of a building does not have a start and end, and you cannot always project the ultimate cost. With the standard Cost Manager, costs have defined start and end dates for projects that have budgets, scope, and schedules. Cost is broken down by work in the various disciplines and is managed using CBS codes.

In the Generic Cost Manager, cost is time-based, not work-based, allowing you to manage costs that do not have a finite timeline, such as facility maintenance and upgrading. You can plan for these expenses during a time period, such as a quarter or year. Each shell has its own cost manager.

Unifier projects are similar to shells that use CBS cost codes. You can combine shells and shells that use the CBS cost codes together. You can also create a hierarchy of shells that consists of shells that use the Generic Cost Manager and those that use the standard Cost Manager (CBS cost codes).

In the Generic Cost Manager, cost is time-based, not work-based. You would use the Generic Cost Manager to work with the costs that do not have a finite timeline, such as those associated with maintaining and upgrading the building or facility. You can plan for these expenses during a time frame (such as a quarter or a year). The Generic Cost Manager enables you to track the time and corresponding budget for your ongoing facilities work. Each shell has its own cost manager. The Generic Cost Manager does not include:

- ▶ Earned value
- ▶ Cash flow
- ▶ Funding
- ▶ General Spends SOV
- ▶ Pay App SOV

Shell Landing Page (Standard View)

After you create a shell, it is available for use. To access your shell landing page:

- 1) Click your shell tab to open it.
- 2) Switch to **User** mode.
- 3) In the left Navigator, click your shell name on top.

You cannot add or remove the individual tiles. See ***Configuring a Shell Dashboard (My Dashboard)*** (on page 20) for details on the shell dashboard and instructions on how to configure the dashboard.

By default, the following two tabs are displayed:

- ▶ **Summary** tab
- ▶ **Workspaces** tab

The following topics provide details for each tab.

The block will get displayed back, post removal, by navigating to Add Block > Standard and selecting Data Type as "Items Requiring Your Attention." When you save the Standard Block, the block will be added automatically to the dashboard.

The bottom section of the shell landing page displays a log of all sub-shells that have been created under the currently selected shell. For example, if you select the sub-shell South Bay, and then the further sub-shell Mathilda Northwest, this landing page displays.

Summary tab

By default, the shell dashboard contains the following blocks:

Tasks

This block lists the total tasks belonging to the shell. When you click Tasks, you go to the Task log directly. You will be able to add this block in all tabs (in all dashboards) by using the data-source "Items Requiring Attention" in the Standard block. Also, you can remove the block from My Dashboard. This block can be added or removed.

Notifications

This block lists the total notifications belonging to the shell. When you click Notifications, you go to the Notifications log directly. You will be able to add this block in all tabs (in all dashboards) by using the data-source "Items Requiring Attention" in the Standard block. Also, you can remove the block from My Dashboard. This block can be added or removed.

Mails

This block lists the total mails belonging to the shell. When you click Mails, you go to the Inbox log directly. You will be able to add this block in all tabs (in all dashboards) by using the data-source "Items Requiring Attention" in the Standard block. Also, you can remove the block from My Dashboard. This block can be added or removed.

Project Image

This block displays an image, if available; otherwise, the block will be blank.

Details

This block is displayed with either custom fields or default fields based on the configuration of the details block that is designed in uDesigner, shell manager. In the latest version of Unifier, the shell home landing page displays the custom fields; otherwise, the shell home landing page only displays the default fields.

You can edit the details block using the pen icon or through Edit dashboard option. This capability applies to block information, or to the fields that must be displayed in the block.

Links

If links have been added to the shell details, then those links are displayed in this block.

Sub-shell log

This block displays the sub-shells of parent shell, based on the view that you have selected.

The user-created dashboards support all of the existing functionalities, except the sub-shell log.

You cannot delete **Workspaces** tab in any Dashboard.

You can hide the **Workspaces** tab in all user-defined Dashboards, and you will be able to deselect the "Show" option for the Workspaces tab.

Workspaces tab

You cannot hide the **Workspaces** tab in My Dashboard. As a result, you cannot deselect the Show check box for Workspaces.

The **Workspaces** tab is only available when geo-code server details are configured in the system.

- ▶ If there are no geo-location present in the sub-shells, the application displays a map without location markers.
- ▶ If there is a geo-location present in the sub-shells, the application displays a map with location markers.

When you hover over the location markers on the map, you can see the details for the location marker based on available information.

When you right-click the location marker, you can open the shell (for that location) in a new tab.

The **Workspaces** tab has the following toolbar options:

View	For example, Buildings, Cities, Shells, Projects, Regions.
Actions	▶ Get Activity Sheet Data ▶ All Shells ▶ Selected Shells ▶ Filtered Shells ▶ History ▶ Send Activity Sheet Data ▶ All Shells ▶ Selected Shells ▶ Filtered Shells ▶ History
Search	To search for the items.
Find on page	To find an item on the page.

Expand All Groups	To expand or collapse the list.
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The **Workspaces** tab has the following columns:

- ▶ **Name**
- ▶ **Shell Number**
- ▶ **Shell Name**
- ▶ **Description**
- ▶ **Status**
- ▶ **Administrator**
- ▶ **Location**
- ▶ **User-Defined Text**

Note: The columns the Workspaces tab sub-shell log are not hard-coded. The fields defined in Shell Detail form (in uDesigner) are added as columns in the **Sub-shell** log.

The right pane of the **Workspaces** tab displays the map that shows the regions.

My Dashboard

The **My Dashboard ...** link enables you to edit your dashboard elements, access the details of the dashboard, print your dashboard, access the history of changes made in the dashboard, and finally access additional dashboards for the shell, if available.

You can access the **My Dashboard ...** link from the upper-right corner of the shell landing page. The **My Dashboard ...** link has a series of sub-menu options, based on your settings, as explained below:

My Dashboard

Enables you to go back to the default dashboard.

Details

To open the **Details** window and:

- ▶ View the shell details such as Shell Name, Shell Number, and the following tabs:
 - ▶ General
 - ▶ Currency
 - ▶ Images
 - ▶ Options
 - ▶ Links
 - ▶ Calendar
 - ▶ Custom Print Template
 - ▶ Gateway Integration
 - ▶ Primavera Cloud Integration
- ▶ Edit the information about the dashboard.

Edit Dashboard

To open the **My Dashboard ...** window and:

- ▶ Select from a list of available dashboard tabs.
- ▶ Select what type of information can be displayed on the dashboard.

The **My Dashboard ...** window has the following toolbar options:

- ▶ **Create Tab** (the plus sign icon)
- ▶ **Edit Tab** (the pencil icon)
- ▶ **Filters**
- ▶ **Delete Tab** (the trash can icon)
- ▶ **Add Block** (the plus sign with arrow down icon)
 - ▶ **Custom**
Opens the **New Custom Block** window to enable you to add a new custom block.
 - ▶ **Standard**
Opens the **New Custom Block** window to enable you to add a new standard block.
 - ▶ **Portlet**
Opens the **New Portlet Block** window to enable you to add a new portlet.
You can change the layout of the tabs in **My Dashboard ...**.

Example

Block Length: 2 units

Block Height: 2 units

When the user includes dashboards in a shell or shell template, the user can format the values that are passed from the shell attribute forms in order for the dashboards to render information. The dashboard portlet enables you to pass values to parameters in URLs by mapping those to fields from shell attribute form and format the values so that the URL can render in the dashboard during runtime correctly.

The **Source Details** block enables you to:

- Set the URL
- Map the URL parameters to the shell attribute form

- ▶ **Drill Down**

Opens the **New Drilldown Block** window to enable you to enter elements details in in the Shell Dashboard blocks to drill into layers of data contained in the Shell.

Note: If a **Drill Down** block has Cost Sheet columns that are based on a formula, then the data will not be displayed:

- ▶ **Analytics**

Opens the **New Analytics Block** window to enable you enter details needed for analytics.

Enables you to pass basic parameters from dashboards setup to OBIEE so that you can use those to create a single dashboard catering to multiple projects instead of having to create a unique dashboard for each project.

The **Source Details** block enables you to:

- Set the URL
- Map the URL parameters to the shell attribute form

The **Get Parameters** option enables you to get workspace-specific information. This information will be available for any filter mapping in URLs used in the Analytics dashboard. When you click **Get Parameters**, Unifier extracts the parameters from the URL and adds the extracted parameters to the **URL Parameter Mapping**. You can then map those to appropriate fields from shell attribute form.

Print

To print the contents of the dashboard.

Audit Log

To open the **Audit Log** and review the history of changes made on the dashboard. Use the **Print** option to print or export the contents of the log.

View Forms

The permissions that have been set in the **View Forms** tab determine the data that you can see when you open the shell details. If you have permission, you can see the form in the **General** tab, when you open the shell details using the **Details** option (shell type > shell instance > Details, or selecting a shell data picker hyperlink, on a business process form, attribute form, or configurable manager form).

Opening the shell properties, from the landing page (Admin mode)

A user or group (company or partner > Company Workspace > Admin mode > company or partner sponsored shell > shell type > shell instance > Details) in the shell who has restriction to access the View forms (the user or group is not included in the viewers list in the View Forms setup of shell) will see the View form in read-only mode, when the form is accessed by way of the shell details from the shell landing page. In addition:

- ▶ This type of user or group will not see any other tabs within the **Details** page.
- ▶ This restriction does not apply to a user or group (including the administrator) who has **Modify** permission to the company-sponsored or partner-sponsored shell.

A user or group (including the administrator) who has Modify permission to the company-sponsored or partner-sponsored shell and has been added as a viewer to any of the View forms can see the Action form and all of the tabs in the edit mode.

Opening the shell properties, from the landing page (User mode)

When a user or group opens a shell instance in user mode, the system opens the landing page of the shell. A shell member who has permission to a View form that has been defined for a shell can see the View form when the member opens the shell properties from the shell landing page.

Note: A user or group (including the administrator) who has Modify permission can access the shell properties in edit mode and see all of the tabs even if the user or group (including the administrator) is added as a restricted user for the View Forms tab.

Shell Navigation

You can navigate between current Shell, sub-shells, and instances through the use of:

- ▶ Tabs to move from one single instance Shell to another
- ▶ The Landing Page mini-log at the bottom of the landing page

Note: You can search for instances within a Shell by using the Landing Page Log Find functionality.

- ▶ The View drop-down menu to filter shells by types, which are displayed in the Shell log, based on the shells defined in the hierarchy
- ▶ Breadcrumbs to navigate up and down the shell hierarchy
- ▶ A geocoded map, which allows you to click map pins to navigate to associated shells
 - ▶ If a Shell does not have sub-shells, then in the **Workspaces** tab you will see the location markers (pins) for the Shell.
 - ▶ If a Shell has sub-shells, then in the **Workspaces** tab you will only see the location markers (pins) for the sub-shells.

Shell Dashboard

A shell dashboard is a graphical user interface which provides at-a-glance view of shell or project data.

From the shell dashboard, you can:

- ▶ Use the Drill-down functionality to access the Shell data
- ▶ Use filters on the Shell Dashboard so that all blocks in a particular dashboard can be filtered based on the same parameter
- ▶ Print the entire dashboard, or individual dashboard blocks
- ▶ Minimize and maximize the entire dashboard, or a block
- ▶ Use a free-form dashboard layout that gives you the ability to drag and drop dashboard blocks as an alternative to using pre-defined layout

The following explains the following topics related to a shell dashboard:

- ▶ Using Custom Shell Dashboard
- ▶ Minimizing Shell Dashboard
- ▶ Expanding Shell Dashboard
- ▶ Printing Shell Dashboard
- ▶ Navigating Through Shell Block Drilldown
- ▶ Setting Filters on Shell Dashboard
- ▶ Using Drilldown
- ▶ Analytics
- ▶ Scrolling Vertical Y-axis in Shell Dashboard Graph

Minimizing Shell Dashboard

Click the minimization icon to minimize the Shell Dashboard. You can minimize the Shell Dashboard blocks individually.

Expanding Shell Dashboard

Click the expansion icon to expand the Shell Dashboard or to fill the width of the Shell Dashboard. You can expand the Shell Dashboard blocks individually.

Printing Shell Dashboard

Click the ellipsis drop-down menu, and select **print** to print a Shell Dashboard. You can print the Shell Dashboard blocks individually. For each block, only the information that is visible in the tab (that is, information that is visible in the block without maximizing it) will be printed out.

The print functionality has been optimized for A4 paper size. When you click the **Print** option, the blocks will be re-sized proportionality to print all the information which is visible on-screen to the user. For Standard blocks, where the display type is table or grid, the columns will be re-sized automatically in print to display more information. Users can also re-size the columns within the block to optimize it for Print.

Background graphics and scroll-bars within the block are controlled by your browser properties.

Navigating Through Shell Block Drilldown

Click the left-arrow icon to navigate up the Drilldown in a Shell Dashboard block.

Setting Filters on Shell Dashboard

Click the **Filters** button in the upper left-corner of the Shell Dashboard.

If there are filters defined, they will be listed, and enable you to filter the Shell Dashboard data by criteria defined in the **Edit > Dashboard Filters** window.

To set filters on a Shell Dashboard block:

- 1) Click the **Filters** button. The Filters window opens.
- 2) Enter the filter criteria.
- 3) Click **OK**.

The data view in the block changes to reflect the filtering.

- 4) You can turn off the filter by clicking the red X associated with the displayed filter criteria. The data view for the block returns to the default, unfiltered view.

Using Drill Down

You can click activated elements in Shell Dashboard blocks to drill into layers of data contained in the Shell.

Notes:

- The drill-down functionality is supported for charts only. Drill Down is not available for grids or tables, and Drill Down stops when a grid or table is encountered.
- If a **Drill Down** block has Cost Sheet columns that are based on a formula, then the data will not be displayed.

To drill-down into Shell Dashboard block data:

- 1) Click a data representation in the data block.
For example, you can drill down into the next configured level of data for a Shell called Terminal Expansion by double-clicking that section of the chart.
- 2) View the next level of data. In this example, after you double-click Terminal Expansion, the next level of data is displayed.
- 3) You can return to the original data view by clicking the left arrow icon.

Analytics

Unifier dashboard portlet enables you to pass parameters to Analytics so that the same analysis from OBIEE can render in each project dashboard correctly and without the need to create individual dashboards within OBIEE.

Setting the parameters in the URL fields (**Source Details** block of the **New Analytics Block** window) creates analytics type dashboards that can be rendered within the system.

Scrolling Vertical Y-axis in Shell Dashboard Graph

If there are enough records represented, you can scroll up and down the vertical y-axis of a graph using a scroll bar.

Project Shell Dashboards

Project shell dashboards display project data in an at-a-glance format. You can control the dashboard look and content and make it specific to the shell that you are working with.

Shell dashboards cannot pull data from across shell hierarchies. For example, consider two anchor tabs, one called Capital Projects, and one called Facilities. The Capital Projects dashboard can display data from all levels of the Capital Projects hierarchy; however, it cannot display Facilities data because Facilities is a separate, independent hierarchy.

Two types of dashboards are available in project shells:

Administrative dashboard

These are designed by the shell administrator and pushed via templates. Administrators with dashboard Setup permission can create multiple shell dashboards for each project shell. Users can select administrative dashboards to view from the View Dashboard drop-down list on each shell. These dashboards are maintained at the shell level and are available to any user to view, provided the user has permissions. Users cannot edit an administrative dashboard.

My Dashboard

Designed by an individual user, it is a personalized view that contains only the information the user wants to see.

Note: In most cases, the Company Administrator will configure the shell dashboard for you.

Each shell dashboard has at least one tab and can have up to five tabs. The default tab name is Summary, which you can change. The default shell dashboard layout contains these four blocks:

- ▶ **Image** Displays the image your company administrator uploaded for the shell.
- ▶ **Items Requiring Your Attention:** Contains items that are generally listed on the Unifier Home workspace, such as tasks and messages.
- ▶ **Details:** Lists shell details, including shell number, shell name, administrator, and other details.
- ▶ **Links:** List of links configured for the shell by your company administrator.

On each tab, you can select a different layout to which you can add blocks of these types:

- ▶ **Standard:** Use this selection to view project data from, for example, business process, manager, users, and active tasks
- ▶ **Portlet:** Use this selection to view an external URL, such as a web cam, or a frequently visited web site
- ▶ **Drilldown:** Use this selection to slice and dice project-shell data. See **Add a Drill Down Block to My Dashboard** (on page 23)
- ▶ **Custom:** Use this selection to view data from the current shell, subordinate shells, or both (cannot cross hierarchies)

Configuring a Shell Dashboard (My Dashboard)

All shells have a dashboard that the end-user can configure if they have **Setup** permission.

The dashboard is the user's personal dashboard, with their personally configured view of shell data. In **User** mode, you can use the **My Dashboard > Edit Dashboard** option to configure your dashboard window; however, for each user, the dashboard is often configured by the Administrator. Users can select this type of dashboard to view from the View Dashboard drop-down list on each shell. This dashboard is recommended if the user wants a personalized dashboard to view data that they specifically need to see regarding the shell.

To configure a shell dashboard (My Dashboard)

- 1) From the shell landing page, click **My Dashboard ...**
- 2) Click **Edit Dashboard** to open the **Edit Dashboard** window.
There are two sections to this window: **Tab Setup** and **Source Details**. Under **Tab Setup**, the default first tab already has a name and layout that you can modify.
- 3) To change the tab, click the tab name. Change the tab name, and select a layout for the tab. You can experiment with layouts to see which one works with the information that you want to display.
- 4) Select the **Show** check box to show the tab in the dashboard.

Under **Source Details**, you can add standard or custom blocks. Double-click to select a default standard block and modify it as needed.

To add a standard block:

- 5) Click **Add > Standard**. You can add any number of blocks, but the dashboard displays the blocks based on the tab layout you select. See the first table below.
- 6) Click **OK** to save your changes and exit the Edit Standard Block window.
- 7) To add a custom block, click **Add > Custom**. See the second table below.
- 8) Click **OK** to save your changes and exit the Edit Custom Block window.
- 9) To add a portlet, click **Add > Portlet**. Enter the portlet name and the URL or IP address.
- 10) This allows you to add content to your dashboard from a URL address. For example, you could use this portlet to specify a webcam site to monitor activities via a live camera. You can add as many portlets as needed.
- 11) You can define a block that allows users to drill down into the displayed data.

Note: You must add drilldown blocks if you want to use filtering on your dashboard blocks.

- 12) After you define the drilldown, you can also add filters.
- 13) To remove a block, click **Remove**. To reposition a block, click **Move Up** or **Move Down**.
- 14) Click another tab name to modify the tabs and sources for that tab. Repeat these steps for each tab until you have configured the entire dashboard to meet your needs.
- 15) Click **Apply** to save your configuration, and then click **OK** to close the window.

Use the following table for Standard blocks.

In this field	Do this
Source Name	Enter a source name.
Data Type	▶ Select a data type. The data types are: ▶ Business Process: general business process information ▶ Document Management: total documents ▶ Active Task Information: Active task metrics ▶ Users: Metrics by Company ▶ Image: shell image ▶ Items Requiring Your Attention: items such as tasks and messages ▶ Details: Shell details, such as shell number and name ▶ Links: Links configured for the shell ▶ <specific business processes> : details on selected business processes, such as record status and tasks

In this field	Do this
Report On	Select what to report on.
Block Title	Add a title for this block.
Display Type	Select the chart type.
Show Result	Choose Actual Value or Percent of Total.
Show Total	Select this check box to display the total.
Decimal Places	Select the number of decimal places.
Use 1000 Separator (,)	Select this check box to use the comma as a 1000 separator.
Negative Number Format	Select the format for negative numbers.
Currency Format	Choose None, Shell Currency, or Base Currency.

Use the following table for Custom blocks.

This item	Does this
Data Cube	Select the shell data cube definition to use. Data cubes are queries that can be defined and reused to create charts on your dashboard. Your company administrator defines the data cubes.
Show data from	Enables you to select the shells to use as data sources. You can choose: ▶ Current Shell Only ▶ Subshells Only ▶ Current Shell and Sub-shells
Block Title	Add a title for this block.
Display Type	Select the chart type.
Source Grouped By	Select how the source is grouped.
Output Type	Choose either Record Count or Summary Value.
Report On	Select what to report on.
Show Result	Choose Actual Value or Percent of Total.
Show Total	Select this check box to display the total.
Decimal Places	Select the number of decimal places.
Use 1000 Separator (,)	Select this check box to use the comma as a 1000 separator.

This item	Does this
Negative Number Format	Select the format for negative numbers.
Currency Format	Choose None, Shell Currency, or Base Currency.

Add a Drill Down Block to My Dashboard

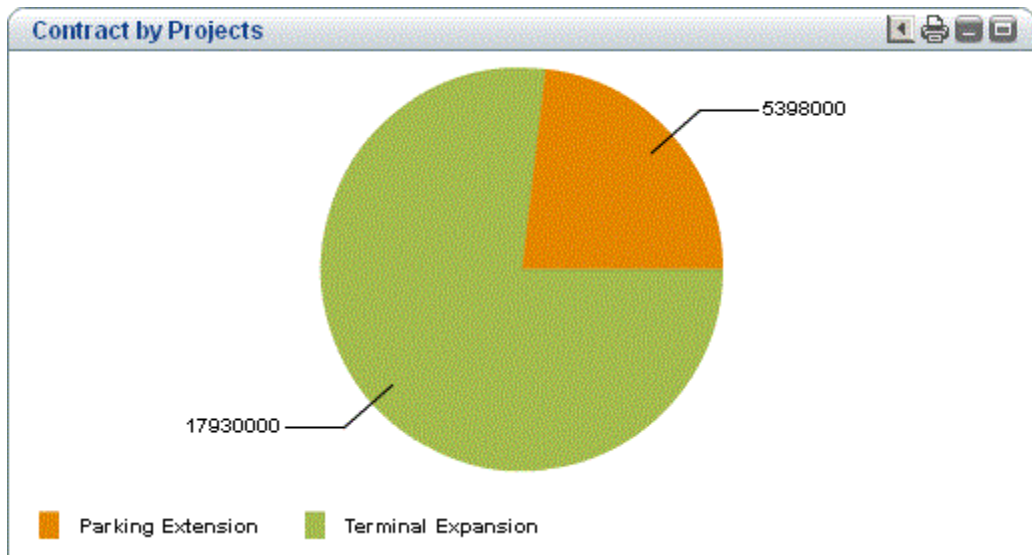
You can add a **Drill Down** block that allows you to access greater levels of data detail.

Note: If a **Drill Down** block has Cost Sheet columns that are based on a formula, then the data will not be displayed.

Example

The pie chart below shows data for the following two projects (Contract by Projects):

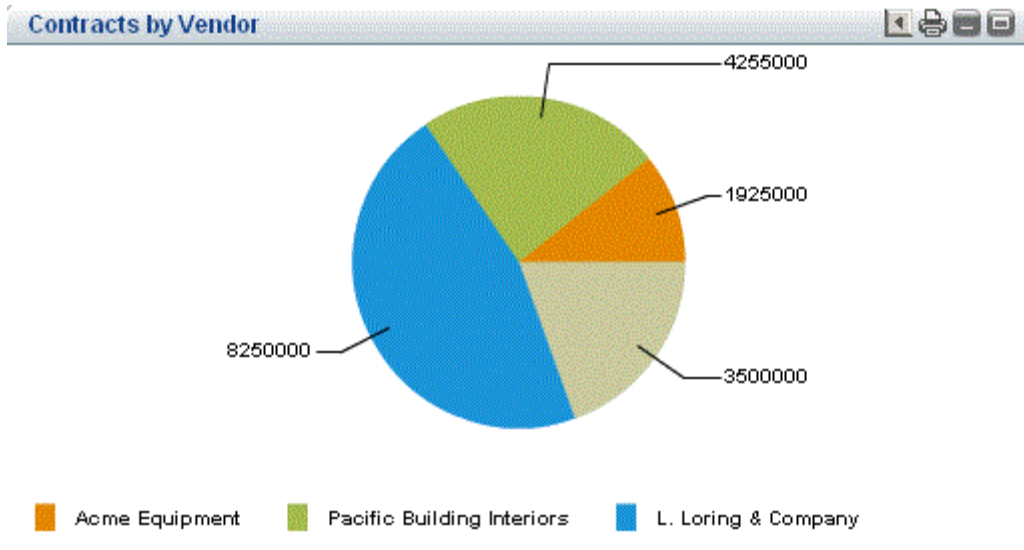
- Parking Extension
- Terminal Expansion



If you double-click the pie chart for the Terminal Expansion project, then the amount associated vendors pie chart will display (greater levels of data detail), as shown (Contract by Vendor):

- Acme Equipment
- Pacific Building Interiors

▪ L. Loring & Company



Note: If you want to use filters on your dashboard blocks, you must first define a **Drill Down** block.

To add a drilldown block to your shell dashboard

- 1) On the Edit Dashboard window, click **Add > Drilldown**. The Edit Drilldown Block window opens. Drilldown functionality is supported for charts only, and is not available for grids or tables. Drilldown will stop when a grid or table is encountered. See the first table below.
- 2) Click **Add** to add Drilldown Details. The Edit Drilldown Details window opens. See the second table below.
- 3) When complete, click **OK**, and click **OK** to exit the Edit Dashboard window.

This item	Does this
Data Cube	Select the data cube definition to use. Data cubes are queries that can be defined and reused to create charts on your dashboard. Your company administrator defines the data cubes.
Block Title	Add a title for this block.
Block Filter Elements	Group By elements from the data cube. This determines which columns from the data cube definition will be used to group data for filtering.

In this field:	Do this:
Title	Enter a title for the drilldown.

In this field:	Do this:
Show Data From	Select the shells to use as data sources.
Display Type	Select the type of display, for example, a bar chart.
Source Grouped By	Select the columns from the data cube definition that will be used to group data.
Output Type	Select Record Count or Summary Value.
Report On	Select the columns from the data cube to be defined as Summary.
Summary Type	Select the summary type.
Show Result	Select the type of result, for example, Actual Value.
Show Total	Select to show the totals for the data.
Decimal Places	Select the number of decimal places.
Use 1000 Separator (,)	Select to use a comma (,) as a separator.
Negative Number Format	Specify the format for negative numbers.
Currency Format	Select the currency format.

Additional Information

If a Drill Down dashboard (Table or Grid) is set to show data from *current shell*, then when you create a report of your records the report will contain all the pertinent records as hyperlinks, which can take you to the details of that record.

If a Drill Down dashboard (Table or Grid) is set to show data from *sub-shells*, then when you create a report of your records the report, will contain all the pertinent records without any hyperlinks, by design.

Add filtering to the drilldown block

You can add filtering on a drilldown block in your shell dashboard. You must first define the filter at the block level, and then specify that it appear on the dashboard for use.

To add filtering on a drilldown block in your shell dashboard

- 1) To define the drilldown at the block level, click **Select** next to Block Filter Elements on the Edit Drilldown Block window.
- 2) Select the data elements from the data cube that you want to use as filters.
- 3) Click **OK** to exit the Edit Drilldown Block window.
- 4) On the Edit Dashboard window, click the **Filters** button to add filters at the dashboard level. The Configure Filters window opens.
- 5) Click **Add**. The Add Filter window opens.
- 6) Enter the filter name.

- 7) Select the filter you want to use on the dashboard block.
- 8) Click **OK**, and then click **OK** to exit the Configure Filters window.

Optimizing Shell Dashboard Performance

You can sometimes improve shell dashboard display performance by following a few guidelines. Shell Dashboard performance can depend on how many dashboard blocks are defined and the volume of data retrieved by the dashboard query.

Here are some tips to improve shell dashboard performance:

- ▶ Reduce the number of dashboard blocks, if possible.
- ▶ Define conditions for SQL filtering to return less data.
- ▶ Do not check **Show Total** when you configure dashboard blocks.
- ▶ Do not select **Percent** for **Show Result**.

View dashboards

Users with Configure User Dashboard permissions can configure and maintain a shell dashboard. This user-configured dashboard is listed as My Dashboard in the View Dashboard drop-down list. This menu can also list shell dashboards that were configured by the Administrator.

For example, the Administrator can create separate shell instance dashboards to serve various business groups that are using shells in a single instance. For example, the Administrator can create these types of shell instance dashboards for a shell instance called Building 100:

This dashboard	To serve this business group
Operations Dashboard	Operations and Management groups
Technical Services Dashboard	Technical Support and Services group
Lease Management Dashboard	Vice President of Leasing Services and his reports

With permissions, you can view the dashboards provided by the Administrator, but you cannot modify them.

To view dashboards

- 1) Navigate to a shell.
- 2) Select a dashboard from the **View Dashboard** drop-down list. Any dashboard that you have configured for yourself is called My Dashboard.
- 3) You can select dashboard in the **View Dashboard** drop-down list to which you have **View** permission. The last dashboard that you view will display the next time you sign in to the system.

Expand the Shell Log on the Landing Page

You can expand the shell log (the bottom area of the shell landing page) by clicking the rectangle next to the View drop-down list.

About Shell Statuses

Your shell can have one of four statuses.

- ▶ **Active:** A live, in-progress shell.
- ▶ **On-Hold:** The initial shell status. On-hold shells appear on the shells log. Shell administration functionality is available to shell administrators for setup and maintenance for users with permissions to perform that function. Users cannot create records in a shell that is On-Hold. If a user attempts to access a shell that is On-Hold, the system displays an alert message stating that the shell is On-Hold.
- ▶ **View-Only:** View-Only shells can be viewed, printed, exported, and included in reports. You cannot modify any data in View-Only shells. This allows you to view past shells without allowing changes to these shells. If a shell in a shell hierarchy changes to View-Only, you can still navigate up and down the shell hierarchy, and can create sub-shells in the hierarchy under the View-Only shell.
- ▶ **Inactive:** Used to suspend shell usage. Inactive shells are visible to Administrators, but not to end users. Only System and Shell Administrators (users with Modify Status rights) can reactivate the project.

Note: If automatic status update is enabled on a shell, the status of the shell can change from Active to an inactive status (On-Hold, View-Only, Inactive). The change of status is set up by the Administrator, and is based on defined triggering conditions. For example, if a shell is close to exceeding its funding, it might make sense to put it On-Hold while funding matters are discussed. Your shell administrator must manually change the status back to Active when you are ready to restart the project.

The Shell Administrator will receive email notification when the status of a shell changes. The change of shell status could occur due to a manual change, bulk update, through Web Services or a CSV file, or through automatic update.

Working with Shells

A shell allows users to collaborate on and coordinate the execution of a project.

Note: User access and permission levels for all functions are controlled by the company administrator. Contact your company administrator if you have questions regarding access.

Open a Shell

Open a shell to access the shell functions.

To access shells

From your user home page, click a shell tab.

When you click a shell tab, the shell landing page displays. From the shell log, you can access the various sub-shells listed.

To open a shell

Select a shell from the shell log and click **Open**. When you open the shell, the Navigator expands, providing access to shell-level features and business processes.

To find a shell

Since shell hierarchies can be extensive, the system provides a Find feature to help you locate a specific shell.

- 1) Click the anchor shell tab that contains the shell you want to locate.

The shell dashboard appears, and a "mini log" of sub-shells appears at the bottom of the window.

- 2) From the **View** drop-down list on the mini log, select the sub-shell you want to search.

- 3) Click the **Find** button.

To accommodate the Find operation, the system collapses the dashboard to show only the mini log, and displays a Find window.

On the Find window, you can search for shells using a geocode search or you can search for shells using search *operators* on shell information. Operators such as "contains" or "is not empty" can help you narrow the search for the shell.

- ▶ To search using a geocode, enter an address, latitude, longitude, or radius

- ▶ To search on shell information using operators:

- a. Choose the operator you want to use on the field, such as "equals," "does not contain," or "is empty."
 - b. Enter the value the field should contain.
- 4) Click **Search** (or press **Enter**). The application displays all the shells that meet the search criteria you entered.

If you choose to, you can cancel the find operation by clicking **[Cancel Filter]** or the **x** icon in the upper-right corner of the window. The system will restore the mini log to its unfiltered state.
 - 5) When you have finished using the Find feature, click the **Restore** button to return the dashboard to normal view.

Auto-Create Projects or Shells

The system provides a type of business process that will create projects and shells from the upper form of the BP or from BP line items. The data necessary to create projects/shells is provided by this BP. In addition to creating a new shell, this type of business process can also be designed so that you can choose the managers and employees who should be automatically assigned to the shell when it is created.

Note: In order for auto-creation to occur correctly, be sure you understand the hierarchy of the shells in your company. This is important for placing the shell in the correct position in the hierarchy as well as choosing the correct template with which to build it. If the template is not the correct one, the creation will not succeed.

You can use the **Project/Shell Creation** business process to create shells and projects from the project or shell templates set up for this purpose. Templates provide shells or projects with the name, number, location, and status for each new project or shell, as well as any included images and phase definitions. If the template includes links, the new shell landing page will display these links. If designed and configured to do so, the template will automatically assign a manager and employees to the project/shell.

Working with Planning Items

If a Planning Item Picker has been included on this business process, you can link new projects/shells with planning items. Instead of linking a planning item to a project in the Planning Manager, this BP will automatically create the link when the project/shell is created, and data will begin to roll up to the Planning Sheet from the business processes in this project.

To auto-create a single shell or project

Auto-creation of a single shell or a project, only requires that you complete an upper form.

- 1) Navigate to the level (such as Company Workspace or a shell) where the auto-creation business process resides.
- 2) In the Navigator, select the business process then on the right pane, click **New**. The business process opens.
- 3) Enter a name and number for the new shell and select an administrator for the shell.
- 4) Specify where the shell should reside in the hierarchy by choosing a shell location as follows:
 - a. Click the **Select** button. A shell picker opens, showing the tabs of all the current anchor shells.
 - b. On the shell picker, click the anchor shell under which the new shell should reside. If the new shell should reside under a sub-shell, double-click the sub-shell.

The sub-shell may contain other sub-shells. You can navigate to them by clicking the **View** drop-down (located in right corner) and selecting the sub-shell from the list.

- 5) Specify the template that should be used to create the shell as follows:
 - a. Click the **Select** button. The Shell Template picker opens, showing a list of the templates that have been designed for the shell type this BP will create.
 - b. Select the template and click the **Select** button. The name of the template appears in the field on the form.

Note: If the selected source cost sheet has duplicate columns that the system cannot auto-correct, an alert is displayed to the user to take further action.

- 6) Specify the shell status, such as **Active** or **On-Hold**.
When the shell is created, this is the status it will be assigned.

7) Specify the BP status.

When this status reaches this BP's designated "terminal" status, it will automatically create the new shell or project and assign it the status you specified in step 6.

Note: If you do not specify a status, the system will assign a status of **Inactive** to the shell and you will have to manually change the status to make the shell active.

8) Complete any other fields that have been included on the form.

9) Click **Finish Editing**.

When the business process reaches its terminal status, it will create a new project/shell using the template you specified on the BP form, and the new project/shell should appear in the hierarchy in its appropriate place.

To auto-create multiple shells or projects

To auto-create multiple shells or projects, you need to fill out an upper form, and create line items for each project/shell you want to create. The system will use each line item to create a separate project/shell.

- 1) Navigate to the level (such as Company Workspace or a shell) where the auto-creation business process resides.
- 2) In the Navigator, select the business process and on the right pane, click **New**. The business process opens.
- 3) Complete the upper form fields, including the status of the business process.
- 4) Click the **Add** button at the bottom of the window and choose **Detail Line Item**. A Line Item window opens.
- 5) Enter a name, number, and description for the new shell and select an administrator for the shell.
- 6) Specify where the shell should reside in the hierarchy by choosing a shell location as follows:
 - a. Click the **Select** button. A shell picker opens, showing the tabs of all the current anchor shells. For example:
 - b. On the shell picker, click the anchor shell under which the new shell should reside. If the new shell should reside under a sub-shell, double-click the sub-shell.The sub-shell may contain other sub-shells. You can navigate to them by clicking the **View** button and selecting the sub-shell from the list.
- 7) Specify the template that should be used to create the shell as follows:
 - a. Click the **Select** button. The Shell Template picker opens, showing a list of the templates that have been designed for the shell type this BP will create.
 - b. Select the template and click the **Select** button. The name of the template appears in the field on the form.
- 8) Specify the shell status, such as **Active** or **On-Hold**.

When the shell is created, this is the status it will be assigned.

Note: If you give the shell a status of **Inactive**, child shells cannot be created.

9) Specify the line item status.

This is the status at which the line item should be to create a new project/shell. When the line item reaches the status you specify here, the application will automatically create the new shell or project and assign it the status you specified in step 8.

10) Complete any other fields that have been included on the form.

11) Click **Finish Editing**.

When the business process reaches its terminal status, and the line item status reaches the status you specified in step 9, the application will create a new project/shell using the template you specified, and the new project/shell should appear in the hierarchy in its appropriate place.

Working with Shell Features

The Navigator displays the shell-related features that you have permission to access (**Shell > User** mode). Depending on the modules that your company has set up and your access permissions, the following shell functions are typically available.

Note: Company administrators can configure the Navigator to better suit business needs, such as creating nodes to store business process records.

Function	Description
Alerts	You can access the following information regarding the alerts: ▶ Alert Title ▶ Current Value ▶ Trigger Value ▶ Status You can create customized alerts for a condition or event.

Function	Description
Tasks	Not available for View-Only and Inactive shells. Lists: ▶ Current business process tasks that have been assigned to you. ▶ Business process tasks that you have been copied on. You can use the View option to display tasks: ▶ Received in last 7 days ▶ Received in last 30 days ▶ Group by Business Process ▶ Group by Origin ▶ Late Tasks You can use the View option to create new view (Create New View) and manage the existing views (Manage Views).
Drafts	Not available for View-Only and Inactive shells. Lists: ▶ Draft copies that you have saved. You can access the following information regarding the drafts: ▶ Attachments ▶ Business Process ▶ Record Number ▶ Title ▶ Last Saved The right pane of the Drafts log has the following tabs, which provide additional information about a selected draft item: ▶ Record Details ▶ Workflow Progress ▶ Attachments

Function	Description
Mailbox	Has the following sub-nodes: ▶ Drafts ▶ Inbox ▶ Notifications (Notifications are available for View-Only shells, but you cannot add general comments.) ▶ Sent Items ▶ Deleted Items ▶ Project Mailbox ▶ Inbox ▶ Unpublished Attachments ▶ Custom folder Mailbox has two functions: 1) An internal email feature that allows 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. 2) 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.
Information	Lists the shell directory (Directory) and general BP information.
Gates	Displays phase and gates information and enables manual or automatic advancement of phases.
Configurable Modules	Lists the configurable modules that have been created to work with your shells.

Function	Description
Cost Manager	Lists shell-level cost manager functions such as: ▶ Cash Flow ▶ Cost Sheet ▶ Earned Value ▶ Funding ▶ Schedule of Values
Document Manager	Allows for collaboration, revision control, or markups of: ▶ Documents: Shell documents ▶ Unpublished Documents
Resource Manager	Allows access to resources and roles (read-only).
Schedule Manager	Allows access to Schedule Sheets
Logs	Allows access to the shell business processes.
Reports	Allows access to user-defined reports.

Auditing Shell Changes

The shell audit log lists the actions that have been taken on a specific shell. The Audit log captures changes that have been made to the fields on the shell's attribute form.

To view an Audit log

From the **View** menu of the shell record, click **Audit Log**. The Audit Log opens, listing each event that was taken on the shell's attribute form. The date and time stamp of each event reflect users' current time zone as set in their User Preferences.

To view audit details

In the Audit Log, double-click a listed event to view the audit record detail, which details the action taken. The details also include the user's current time zone for reference.

To print a business process Audit log

- 1) On the Audit Log, click the **Print** button. A PDF file is created.
- 2) Do one of the following:
 - ▶ Click **Open** to open the file in Adobe Acrobat Reader. From the Reader window, you can view, save, or print the file.
 - ▶ Click **Save**. In the Save As window, navigate to the location in which you want to save the PDF file. Open the file in Adobe Acrobat Reader and choose **File > Print** to print.

Add an Image

If an Image picker is available to your shell, forms display the image name and a box to hold the uploaded image. An Image picker can be added to all forms, except for those in the Cost Manager, Generic Cost Manager, Schedule Manager, and Document Manager.

You can change the image by replacing it with another uploaded image. Images display as HTML or PDF formats in printed forms as well as in print preview.

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

To add an image

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

Note: The system displays the image online, but it is not available for printing. Also, images do not appear in UDRs or email notifications.

For information about translating Email Notifications, see the *Unifier General User Guide*.

Managing Shell Alerts

You can create customized alerts for a specific condition or event. For example, you could set up an alert that sends you an email letting if a fund amount on the funding sheet has reached a certain level.

Alerts are created by creating an Alert-type user-defined report.

To create an alert

- 1) Create an Alert report in user-defined reports.
- 2) Open a shell and click **Alerts** in the Navigator. The Alerts log opens.
- 3) Click **New**. The Alert window opens.
- 4) Complete the window as described in the table below.
- 5) Click **OK** to close the Alert window.

In this field	Do this
Report Name	Click the Select button. The list of user-defined alert reports for the shell opens. Select a report from the list and click the Open button. You can also click the Find button and enter search criteria to locate a specific report. Note: Reports that are already used to create an alert are shown with a check mark. You can create more than one alert

In this field	Do this
	for each report.
Description	Populated automatically with the report description, if one exists.
Alert Title	Appears as the title of the alert in the log and on the alert sent. By default, the field shows the report name, but you can change the name.
Frequency	How often you want the alert to be sent when the trigger condition is met: Never: Alerts are not sent. Hourly: Sent every hour, at about 20 minutes past the hour. Daily: Daily at about 2:20 a.m. Weekly: Sent on Mondays at about 2:20 a.m. Monthly: Sent on the first day of the month, about 2:20 a.m. Times might vary. The times are based on the Unifier server used, which operate on the Pacific Time Zone. Note: If you choose a frequency other than never, you must specify a method and message.
Method	Select one or both of the methods to be notified of the alert. For email, the address in your user profile is used).
Message	Type a message that you want included in the alert. Remember that this is an alert that only you see, so enter as much or as little detail as you need.

To edit alerts

- 1) Open a shell and click **Alerts** in the Navigator. The Alerts log opens.
- 2) Select an alert and click **Open**. The Alert window opens.
- 3) Make changes to the alert as needed and click **OK**.

To delete an alert

Open a shell and click **Alerts** in the Navigator. The Alerts log opens. Select an alert and click **Delete**.

Working with Mailbox (Shells)

The *shell Mailbox* is an internal email feature that allows *shell team members* to communicate with each other and maintain a record of the communications. The *shell Mailbox* interface is similar to common email programs such as Microsoft Outlook. The *shell Mailbox* supports file attachments and emails can be sent between *shell team members* and to external email addresses.

Note: To use any of the mailbox features, you must have permissions.

A copy of every mailbox communication is saved in a central folder controlled by the *shell administrator*. These communications become part of the *shell* record. The *shell* or company administrators must grant users permission to access the *shell Mailbox* folder.

Note: The external email cannot be sent directly to the *shell Mailbox*. For more information, see **Project Mailbox (External Emails)**.

Depending on permissions, users can view all messages or only those in which they participated (sent or received). Permission can also be granted to deleted items in the *shell Mailbox* folder. Once deleted, the communications are not recoverable.

Note: Users who sent or received the deleted message may still retain copies of these messages in their own **Inbox** or **Sent** folder.

Accessing Mailbox (Shells)

The *shell Mailbox* feature is *shell-specific*, and the full functionality is accessed at the *shell* level.

Note: A *cross-shell* listing of your **Inbox** can also be accessed in the **Mailbox** node on the **Home** workspace. Refer to the "Home workspace (Mailbox)" section in the *Unifier General User Guide* for more details.

To access Mailbox from a shell

- 1) Open a shell (**User** mode)
- 2) In the Navigator, click **Mailbox**. The **Mailbox** node expands and displays the following sub-nodes:
 - ▶ **Drafts** sub-node: Displays Mailbox messages that you have drafted but not yet sent.
 - ▶ **Inbox** sub-node: Displays messages sent to you.
 - ▶ **Notifications** sub-node: Displays your notifications.
 - ▶ **Sent Items** sub-node: Displays messages that you have sent.
 - ▶ **Deleted Items** sub-node: Displays items that you have deleted from one of the other folders.
 - ▶ **Project Mailbox:** Stores copies of all Mailbox messages sent between *shell team members*. Access to this folder must be granted through permission settings.

To forward an email

- 1) Open the email and click the **Forward** button. A forward email window opens.

- 2) Click the **To** (and optionally, the **Cc**) button. The User/Group Picker opens.
- 3) Select the user(s) to whom you want to forward the message and click **Add**. The names appear in the Selected Users area at the bottom of the window.
- 4) (Optional) To forward the email to external users, enter their addresses in the **External Cc** field, separated by semi-colons (;).
- 5) Click **OK**. The system forwards the email to the persons you specified.

To delete an email

On the Mailbox log, select the email and click the **Delete** button. To delete multiple emails, hold down the **Ctrl** key on your keyboard and select the emails.

To print an email

On the Mailbox log, select the email and click the **Print** button. To print multiple emails, hold down the **Ctrl** key on your keyboard and select the emails.

To find a specific email

- 1) On the Mailbox log, click the **Find** button. The system opens a Find window at the top of the log.
- 2) Enter the search criteria.
 - ▶ To search for an email from a specific person, enter the person's email address in the **From** field.
 - ▶ To search for an email with a specific subject line, enter the subject line in the **Subjectcontaining** field.

You can enter partial addresses or words in any of these fields. The system will display all the emails that match the partial information you entered.

To search for an email with some specific content in the message, enter that content in the **Messagecontaining** field.

- 3) Click **Search** (or press **Enter**).

The application will display the emails that match the criteria you entered. It will also identify the criteria by which you have searched the list in the "**Current View: filtered by**" line above the list.

Drafts

The **Drafts** sub-node of the **Mailbox** (shell) enables you to:

- ▶ Access the draft emails.
- ▶ Create new draft emails.
- ▶ View, flag, print, or delete draft emails.

Inbox

The **Inbox** sub-node of the **Mailbox** (shell) enables you to:

- ▶ Access the emails.
- ▶ Create new emails.
- ▶ View, flag, reply, forward, print, or delete emails.

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**, and **Delete** for each record.

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

Toolbar Option	Description
Actions	The following options are displayed: Flag : To flag one or more emails. All available sub-options are displayed. Clear : 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 ▶ Saved 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 	To find items on the displayed page. When you click this option, the system inserts a row that lets you enter filter parameters.
Refresh ()	To refresh the log screen.

Notifications

The **Notifications** sub-node of the **Mailbox** (shell) enables you to see all of your notifications. You can navigate to the **Notifications** sub-node from the left navigator or by clicking the **Notifications** tile on the **Home** sub-node (Refer to the *Unifier General User Guide* for details).

The following toolbar options are displayed on the **Notifications** page.

Toolbar Option	Description
Actions	The following options are displayed: Print: Choose from one of the following options: HTML, PDF, or Custom. Delete: Delete one or more notifications.
View	To customize the view according to the following criteria: ▶ Received in last 7 days ▶ Saved in last 30 days ▶ Group by Business Process ▶ Group by Origin ▶ All Notifications ▶ Create New View... ▶ Manage Views... This sub-menu will also contain all views that you have created.
Refresh (↻)	To refresh the log screen.
Print (🖨 Print)	To print the contents of the log, export to CSV, or export to Excel.
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.
Search 🔍	To open the Search window and enter search parameters. You can search for drafts that are not currently displayed in the log.

Toolbar Option	Description
Find on Page 	To find items on the displayed page. When you click this option, the system inserts a row that lets you enter filter parameters.

The following columns and icons are displayed in the log:

- ▶ Attachment icon (Displays if the upper form of the record has any attachments)
- ▶ Business Process (Name of the BP)
- ▶ Record Number (Record number of the notification)
- ▶ Title (Title of the notification)
- ▶ Origin (The source name where the notification was created)
- ▶ Received (The date the notification was received)

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

From the **Notifications** log, you can use the gear menu () to perform the following actions: **Open**, **Print - HTML**, **Print- PDF**, **Print - Custom**, and **Go to Origin**.

Sent Items

The **Sent Items** sub-node of the **Mailbox** (shell) enables you to see the messages that you have sent.

The following toolbar options are displayed on the **Sent Items** page.

Toolbar Option	Description
New	Enables you to create a new email.
Actions	The following option are displayed: Flag Clear Flag Print: Choose from one of the following options: HTML, PDF, or Custom. Delete: Delete one or more notifications.
View	To customize the view according to the following criteria: ▶ Sent in last 7 days ▶ Sent in last 30 days ▶ Group by Origin ▶ All items ▶ Create New View... ▶ Manage Views...

Toolbar Option	Description
	This sub-menu will also contain all views that you have created.
Refresh (↻)	To refresh the log screen.
Print (🖨 Print)	To print the contents of the log.
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.
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 ≡	To find items on the displayed page. When you click this option, the system inserts a row that lets you enter filter parameters.

Note: For **Project Mailbox** replies, the **From** field of the external email received does not indicate the corresponding project mailbox email address; however, once you reply, the **To** field will contain the project mailbox email address, auto-populated.

The following columns and icons are displayed in the log:

- ▶ Flags
- ▶ Attachment icon (Displays if the upper form of the record has any attachments)
- ▶ Origin (The source name)
- ▶ To (The recipient)
- ▶ Subject (The subject of the message)
- ▶ Sent (the date of that the message was sent)
- ▶ Received (The date the item was received)

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

From the **Sent Items** log, you can use the gear menu () to perform the following actions: **Open**, **Print - HTML**, **Print- PDF**, **Print - Custom**, and **Go to Origin**.

Project Mailbox (External Emails)

The **Project Mailbox** supports additional email addresses such that emails can be directly sent to those email addresses. The **Project Mailbox** sub-node contains the external emails. The external emails are important communications that need to be included in shells. Such emails can come from *shell members* or from external users who do not use Unifier.

These email communications (and any attachments) are collected in a central repository for the *shell*, called the **Inbox (Mailbox > Project Mailbox > Inbox)** so that *shell* users can use them in managing and documenting the *shell*. After such emails reside in the **Inbox**, the *shell* users can view them, forward them to appropriate members, flag them for review, and reply to them. In addition, the *shell* users can link these emails to business process records.

Note: The external emails that have been blind carbon-copied (Bcc'd) are not collected by the **Inbox**.

The additional emails can also be included in folders along with the default project **Inbox**. You can move emails between the **Inbox** and the additional folders.

Note: For **Project Mailbox** replies, the **From** field of the external email received does not indicate the corresponding project mailbox email address; however, once you reply, the **To** field will contain the project mailbox email address, auto-populated.

On the **Inbox** log, double-click the email. The system opens the email. If there are attachments, the email will display an **Attachments (n)** link. To open an attachment, click the link and double-click the attachment on the list that appears.

To flag an email for follow-up

- 1) Open the email.
- 2) Click the **Flag for Follow-Up** button. The system opens the Flag for Follow-Up window.
- 3) In the **Flag to** field, choose the action you want for this email, such as "call," or "for your information."
- 4) Click the **Reply** button to reply to the email, or click the **Forward** button to forward the email on to someone.

When the recipient opens the message, the specific flag remark is shown across the top of the message.

Note: To remove the flag, click the **Flag for Follow up** button, and then click **Clear Flag**.

To move an email from one folder to another folder

- 1) Go to **Inbox** and click the email that you want to move.
- 2) Click the **Actions** drop-down list and select **Move**. This opens the Move window.
Alternatively, you can click the gear menu and select **Move**.

3) In the Move window, select the folder that you want to move the email into and click **OK**.

The **Move** option is available only if more than one folder (including the **Inbox**) exists below the **Project Mailbox** parent sub-node, and you have the permission to view the **Inbox**.

To create additional folder (Project Mailbox)

See the ***Creating Additional Folders in the Project Mailbox*** topic.

To delete a folder

- 1) Go to **Inbox** and click the folder icon.
- 2) In the Folders window, select the row of the folder that you want to delete.
- 3) Click the trash-can icon and click **OK**.

To reply to an email

- 1) Open the email and click the **Reply** button.
The system displays the addressee's email address in the **External To** field. You can add additional external addresses in this field, separated by semi-colons (;).
- 2) (Optional) To add email addresses to the Cc line, click the **Cc** button. The User/Group Picker opens.
 - a. Select the user(s) you want to add to the message and click **Add**. The names appear in the Selected Users area at the bottom of the window.
 - b. Click **OK**.
- 3) (Optional) To attach a file to the reply, click the **Attach** button and choose **My Computer** or **Unifier Folder**.
 - a. In the window that opens, select the file you want to attach, or browse your computer's directories to locate the file to attach.
 - b. Click **OK**. The application attaches the file to your reply.
- 4) Enter your reply and click **Send**.

The system sends the email to the persons you specified.

Note: After you reply to an external email, the communication will become part of Unifier mailbox system. To see your reply, or any other communication regarding this email after this point, look for it in the **Inbox** sub-node of the Navigator. Any reply you made to the email will appear in the **Sent Items** sub-node of the **Mailbox** node. Any email you forwarded will also appear in the **Sent Items** sub-node of the **Mailbox** node.

Any reply you made to the email will appear in the **Sent Items** sub-node of the **Mailbox** node.

Any email you forwarded will also appear in the **Sent Items** sub-node of the **Mailbox** node.

You can filter the available email items based on the folders that are present in **Project Mailbox**.

To link emails

- 1) From the **Project Mailbox**, in the **Linked Mail** tab, click **Add**.
- 2) In the **Add from Project Mailbox** window, click the **Mailbox Folder** drop-down list.

- 3) Select from the list of the folders present for the **Project Mailbox**. The default value is **Inbox**. The list under **Available Items** block displays the emails in the folder that you had selected from the **Mailbox Folder** drop-down list.

Deleted Items

The **DeletedItems** sub-node of the **Mailbox** node (shell) enables you to see the items that you have deleted from one of the other folders. Once deleted, the communications are not recoverable.

Note: Users who sent or received the deleted message may still retain copies of these messages in their own Inbox or Sent folder.

The following columns and icons are displayed in the log:

- ▶ Flags
- ▶ Attachment icon (Displays if the upper form of the record has any attachments)
- ▶ From (The sender's information)
- ▶ Subject (The subject of the message)
- ▶ Received (The date the item was received)

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

From the **Deleted Items** log, you can use the gear menu () to perform the following actions: **Open**, **Print - HTML**, **Print- PDF**, **Print - Custom**, and **Go to Origin**.

The following toolbar options are displayed on the **Deleted Items** page.

Toolbar Option	Description
New	To create a new email.
Actions	The following option are displayed: Flag Clear Flag Print: Choose from one of the following options: HTML, PDF, or Custom. Delete: Delete one or more notifications.
View	To customize the view according to the following criteria: ▶ All items ▶ Create New View... ▶ Manage Views... This sub-menu will also contain all views that you have created.
Refresh ()	To refresh the log screen.

Toolbar Option	Description
Print ( Print)	To print the contents of the log.
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.
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 	To find items on the displayed page. When you click this option, the system inserts a row that lets you enter filter parameters.

Accessing Mailbox Messages Across Shells (Home Workspace)

To view all your Mailbox messages 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 and click **Open**.

To search for a specific Mailbox message across shells

- 1) Click the **Home** workspace. Refer to the "Home workspace (Mailbox)" section in the *Unifier General User Guide* for more details.
- 2) In the left Navigator, click **Inbox**. All messages residing in all shell **Mailbox** node > **Inbox** and the **Sent** sub-nodes are listed.
- 3) Click the **Find** button.
- 4) Enter search criteria in the **Subject Containing** or **Message Containing** fields in the upper portion of the log.
- 5) Click **Search**. The log lists the messages meeting the search criteria entered.

Send and Receive Mailbox Messages

The mailbox functionality is similar to common email programs. You can attach files, format text, flag the message, compose and save a draft of your response without sending it, and preview your message in a browser. You can correspond with your shell team members and send messages to external email addresses through Mailbox.

To send a Mailbox message

- 1) Access Mailbox and select any of the sub-nodes.
- 2) Click **New**. A message window opens.
- 3) Choose the recipients of the Mailbox message by doing any of the following:
 - ▶ Click **To**. The User/Group picker opens displaying shell users. Select the recipients from the Select Users list and click **Add**. Click **OK** to close the picker.
 - ▶ To send a copy to another recipient, click **Cc**, and then choose the recipients from the User/Group picker.
 - ▶ To send a copy to an external email address, enter the address in the **External Cc** field. Separate multiple addresses with a semicolon (;). The recipient sees Unifier Notification in the From field and cannot reply directly.
 - ▶ To send a blind copy (bcc), click the **View** menu and select **Bcc Fields**. The Bcc button and External Bcc field become available on the Mailbox message window.
- 4) Type the subject of the message in the **Subject** field.
- 5) Type the body of the message in the text field.

Note: To attach files, format the text, flag a message for follow up, compose and save a draft of your message without sending it, or preview your message in a browser, see the following procedures.

- 6) Click **Send** to send the message.

To view or respond to a Mailbox message

- 1) Double-click a message to view it. The message opens.
- 2) To respond to the message, do one of the following:
 - ▶ To send a reply to the sender, click **Reply**.
 - ▶ To send a reply to the sender and other recipients of the original message, click **Reply to All**.
 - ▶ To forward the message to another recipient, click **Forward**. File attachments remain with forwarded messages.
- 3) Type your response and click **Send**.

To attach files to a Mailbox message

- 1) Open the Mailbox message.
- 2) Click **Attach** and choose one of the following:
 - ▶ To attach the file from your local system, select **My Computer**. The procedure is the same as uploading files to the Document Manager.

- ▶ To attach documents from the Document Manager, select **Unifier Folder**. The window opens, displaying the shell documents files and folders. Select the files and folders to attach and click **OK**.

Note: When attaching a folder, the contents of the folder are attached in a flat list. You cannot attach documents with duplicate file names.

- 3) Click **OK** to add the file, and then click **OK** to close the General Comments window.

You can also send a copy of a completed BP form directly while working in the BP form. The system automatically creates a PDF copy to send via Mailbox.

To flag a Mailbox message for follow-up

- 1) Open an existing message, or create a new message.
If you want to flag a message that you are replying to or forwarding, then open the message, and click **Reply**, **Reply All** or **Forward**.
- 2) Click the **Flag for Follow-Up** button. The Flag for Follow-Up window opens.
- 3) In the **Flag to** field, choose an action, such as "call," or "for your information."
- 4) Click **OK**. The flag text appears at the top of the message. A red flag symbol will also display next to the message in the log. (You may need to refresh the log to see the flag.)
- 5) If this is an existing message that you are flagging for yourself, you can simply close the message. If you are sending the message to someone else, add the recipients and send the message.

To remove a Mailbox flag

Click the **Flag for Follow up** button, and then click **Clear Flag**.

To format Mailbox text

- 1) Open the Mailbox message.
- 2) Select the text that you want to format in the body of the message.
- 3) On the Formatting toolbar, choose the formatting to apply to the text.

To spell check Mailbox message text

- 1) When you are finished composing a Mailbox message, click the **Spelling** button on the toolbar of the message. The body text of the message is checked.
- 2) Make spelling corrections as necessary and click **OK**.

To print a Mailbox message

- 1) Open the Mailbox message.
- 2) Click the **Print** button.

To print several Mailbox messages from the Mailbox log

- 1) Navigate to a Mailbox log.
- 2) Select several Mailbox records that you want to print.
- 3) Click the **Print** button.

To search for a Mailbox message

- 1) In the Navigator, click a Mailbox folder.
- 2) From the toolbar, click the **Find** button. The Find box expands above the log.
- 3) Do any of the following:
 - ▶ To search by the recipient (To field), click the **Select** button and choose the user from the User/Group picker.
 - ▶ To search by subject, enter a word or phrase in the **Subject Containing** field. You can use partial entries.
 - ▶ To search by message content, enter a word or phrase in **Message Containing**.
 - ▶ Further refine the search by choosing **Read** or **Unread**.
- 4) Click **Search**. The messages meeting your search criteria are listed in the log.

To delete Mailbox messages

- 1) Do one of the following:
 - ▶ From a Mailbox log, select the message and click **Delete**.
 - ▶ From within a Mailbox message, click **Delete** on the toolbar.The message is moved to the shell Deleted Items folder.
- 2) To permanently delete a message, select it from the Deleted Items folder and click **Delete**. Click **Yes** to confirm.

Link Mailbox Messages to Business Process Records

You can link *shell* mailbox messages directly to BP records using the Linked Mailbox link at the bottom of the BP form.

Note: This option is available only in BPs that have been set up to accommodate linked Mailbox messages. Attaching messages or viewing attachments depends on your Mailbox permissions.

To view a list of BP records to which a message is linked

- 1) Open the message.
- 2) If the message is linked to a BP record, the upper portion of the message displays the following:

This message and any future replies are linked to records. Show list
- 3) Click the **Show list** link to view the list of BP records to which the message is linked.

To view the linked business process records associated with an email

You can view the linked business process (BP) records associated with an email, and when you reply to the email directly from the linked business process record, or from the Inbox, your reply will be part of the business process record.

- 1) From your shell (user mode), click the **Mailbox** node to expand it.
- 2) Click **Inbox** sub-node to open the **Inbox** log.
- 3) Click an item from the list to see the preview, on the right pane of the page **Inbox** log.

When available, on the right pane, under the "To" field, a message appears which states, "This mail and any future replies are linked to business process records." Click the link in the message to open the business process records log (**Linked Business Process Records** log). Similar to a business process record log, the **Linked Business Process Records** log lists the records (Business Processes) and displays details (**Record Details** tab) for each record, on the right pane.

You can click **Reply**, enter your message, and click **Send**. When you take this action, you can go to the BP log of your shell (**Logs** node), click the BP record to open it, and from the right pane click the **Linked Mail** tab to see your reply, or other replies, related to the BP record, listed.

Example

You have an Action Item BP record with a linked email. When you open the email, the email contains a link to the Action Item BP record.

Creating Additional Folders in the Project Mailbox

To create additional folder (Project Mailbox)

- 1) Go to **Inbox** and click the folder icon. If you have the **View** permission for **Inbox** sub-node, then you can view all folders under the **Inbox** sub-node.
- 2) In the **Folders** window, click the plus option to open a row on the grid.
- 3) Double-click each cell of this new row, under **Name** and **Email Address Code** columns, and enter the values.
- 4) When finished, click **OK**.
- 5) Ensure that you see the new folder under the **Project Mailbox** parent sub-node, below the **Inbox** sub-node.

You can create new folders only if you have the permission to "Create/Manage" folders for the **Project Mailbox**.

You can change the order of the folders by moving the rows in the **Folders** window.

The order of folders arrangement below the **Inbox**, in the left Navigator, is according to the order of rows in the **Folders** window. The **Inbox** is always the top folder and directly below the **Project Mailbox** parent sub-node.

Your newly created folder appears in the existing list of folders below the **Inbox** node. The positioning of the folders below the **Inbox** node is according to the ordering of rows in **Folders** window. You can drag and drop rows in the **Folders** window in order to reorder the folder position in the navigator, on the left.

Note: You can reorder more than one folder at the same time.

In addition, you can double-click into any cell of the grid of an existing folder, in the **Folders** window, and edit the folder properties (**Name**, **Email Address Code**).

The email address is calculated by the system according to the **Project Email Pattern** that is defined in **Unifier Configurator**. As a result:

- ▶ When the **Project Email Pattern**, in the **Unifier Configurator**, is configured to be the *prefix*, the email address of the folder will be: <Email Address Code for the folder>-<project email id>. For example, if the **Email Address Code** of a folder is "construction," and the project email id is "bostonGenHospital-slc05kuz@internal-mail.oracle.com," then the folder email address will be "construction-bostonGenHospital-slc05kuz@internal-mail.oracle.com."
- ▶ When the **Project Email Pattern** is configured to be the *suffix*, the email address of the folder will be such that the **Email Address Code** gets appended to the very end of the project email id. For example, if the **Email Address Code** of a folder is "construction," and the project email id is "slc05kuz+bostonGenHospital@internal-mail.oracle.com," the folder email address will be "slc05kuz+bostonGenHospital+construction@internal-mail.oracle.com."

When a user sends an email to the email address of a folder, that email automatically lands inside the correct folder. Additionally, if the user specifies an incorrect value of the **Email Address Code**, and the rest of the project/shell email address is correct, then that email automatically shows up in the **Inbox** sub-node under the **Project Mailbox** parent sub-node.

The toolbar options for the new folder (below the Email Address) is the same as the toolbar options for the **Inbox** sub-node. The actions **Move** and **Folder** are visible based on permissions.

The options **View**, **Edit View**, **Refresh**, **Search and Find on Page** are the same as in **Inbox** sub-node.

The log layout listing the emails for a new folder is the same as for **Inbox** sub-node. Similar to **Inbox** sub-node, the user has the ability to move one or more emails from one folder to another using the right-click option > **Move** or using the **Move** option.

By default, **Inbox** is available under **Project Mailbox** (Project/Shell > **User** mode > **Mailbox** > **Project Mailbox** > **Inbox**). You have ability to select **Inbox**, move it to the "Available Modules and Business Processes" section and then move it back below any other parent node in the "Selected Modules and Business Processes" section.

When you move **Inbox** to the right section, the parent node **Project Mailbox** will disappear.

When you move **Inbox** from the right to the left section below a new parent node, then the system inserts the **Project Mailbox** node as the direct parent node of **Inbox**. For example, if the original hierarchy was Folder A > Project Mailbox > Inbox, and the user moves the Inbox to the right section, and then moves it back to the left section below Folder B, then the application displays the hierarchy as Folder B > Project Mailbox > Inbox. In other words, the Inbox always resides below the Project Mailbox.

You can send an email to Project/Shell users giving them information about the additional email address of a Project/Shell. The email is a system-generated message with the following elements:

Header: Email Address(es) for <project/shell number> - <project/shell name>

Subject: Email Address(es) for <project/shell number> - <project/shell name>

Body (text): This email is to inform you that a Unifier Mailbox has been setup for <project/shell number in bold chars> - <project/shell name in bold chars>

You must use the following general format for the email address: <project/shell email id>

If the Project/Shell contains additional folders, the following text between two forward slashes //:

//To send messages, including file attachments to specific folders, use the following email address(es):

1. <Folder 1 name>: <Folder 1 email address>
 2. <Folder 2 name>: <Folder 2 email address>
 3. <Folder 3 name>: <Folder 3 email address>
 - ... <and so on>
- //

Note: If there are no additional folders, this text must not be contained in the email body.

The email is a system-generated message.

All emails received, or existing emails in the **Project Mailbox**, are in the **Inbox** node below the **Project Mailbox** parent sub-node.

Unpublished Attachments (Mailbox)

Whenever an email gets logged in any of the Project Mailbox folders, the system adds all of the attachments of the mail to the **Unpublished Attachments** log. The log lists the attachments for each email. At the bottom of the **Unpublished Attachments** log, the total number of files are displayed, similar to the **Unpublished Documents** in Document Manager (DM).

Note: In case you delete an email from the Project Mailbox, the email attachments, in the Unpublished Attachments, will be deleted automatically.

To access the Unpublished Attachments log

- 1) Go to the project/shell tab and switch to **User** mode.
- 2) Click **Mailbox** to expand it.
- 3) Click **Project Mailbox** to expand it.
- 4) Click **Unpublished Attachments** to open the **Unpublished Attachments** log.

The **Unpublished Attachments** log contains the following toolbar options:

Publish	When you select an attachment (or multiple attachments) and click Publish , the Publish - Select destination folder window opens which enables you to
Download (the icon of a circle that has an arrow pointing down)	Enables you to download and save the file. If you select more than one file, the system zips the files so you can you download all of them.

Tile view (the icon of a grid)	Enables you to switch the view to a tile view. When you switch to tile file the toolbar icon changes to menu icon (three horizontal lines) which enables you to switch back to the list view.
View	You have the following options: ▶ All Attachments Enables you to see all attachments in all email folders. ▶ Group By Folder Enables you to select a particular email folder and see only the files of the selected folder.
Search (the icon of a magnifying glass)	Enables you to search for an unpublished attachment from the list based on subject of the email, the email name, or the attachment name.
Find	Enables you to find a particular unpublished attachment.

The gear menu that appears for every item enables you to conduct the following for each attachment:

- ▶ **Open**
- ▶ **Open in AutoVue**
- ▶ **Publish**
- ▶ **Download**

The **Unpublished Attachments** log contains the following columns:

- ▶ **File Name** (the name of the attachment and extension)
- ▶ **Folder** (the folder that contains the email)
- ▶ **Subject** (the email subject)
- ▶ **Received** (the date that the email was received)

When you select an item from the list, the system opens a pane on the right that displays the content of the email.

Depending on your permissions:

If you click the **Inbox** sub-node (**Project Mailbox > Inbox**), you can access the attachments to emails. The attachments can also be accessed in the **Unpublished Attachments** sub-node log (**Project Mailbox > Inbox > Unpublished Attachments**). Use the **View** option to sort out the emails and their attachments. In the **Unpublished Attachments** sub-node log shows the folder (**Folder** column) in which the email is placed in. Use the **View** option > **Group By Folder** sub-option to arrange the emails in the **Folder** (column label) per folder (inbox folders). You can use the **Download** or **Open** options to download or open the attachment of an email.

In the **Unpublished Attachments** sub-node log, you can select an attachment and click **Publish** to publish the attachment in the Document Manager, in a folder.

Collaborating with Team Members

The system helps you to collaborate with your fellow team members through business processes.

View Shell Information

Shell information consists of the directory and the general information node. The Information node in the Navigator has two sub-nodes:

- ▶ General is a log of general information BP records.
- ▶ Directory is a list of shell team members

General records originate as single-record BPs—only one record exists per shell. The General log is useful for shell-specific information that only needs to be documented on a single form. You can use it to easily categorize and find big-picture shell information. An example is general shell data or descriptions.

To access shell information

- 1) Open a shell
- 2) In the Navigator, choose **Information > General**. The log displays the available records.
- 3) To open a record, double-click it or click **Open** from the *Gear menu*.

To view the shell directory

- 1) Open a shell.
- 2) In the Navigator, choose **Information > Directory**. The Directory log opens, listing the shell team members and their contact information.

Contact shell team members

You can view the contact information of team members, and send them email or Mailbox from within the system. If there are many team members, you can use the search function to find a particular member.

To find a shell team member

- 1) Open the shell Directory and click **Find**.
- 2) Choose which information to search by in the **Search By** selection list (for example, first name).

- 3) Enter search criteria in the **Search for** field (for example, enter all or part of the first name), and click the **Search** button.

To view a team member's user profile

- 1) In the Directory, select the user from the list and click **Open**. The View User Profile window opens.
- 2) In the **Contact Information** selection list at the top of the window, choose one of the following:
 - ▶ **Current shell name:** Displays contact information specific to the current shell, such as the onsite address or cell phone.
 - ▶ **Company Contact Information:** This is the member's company contact information.

To send an email using an external email program

Do one of the following:

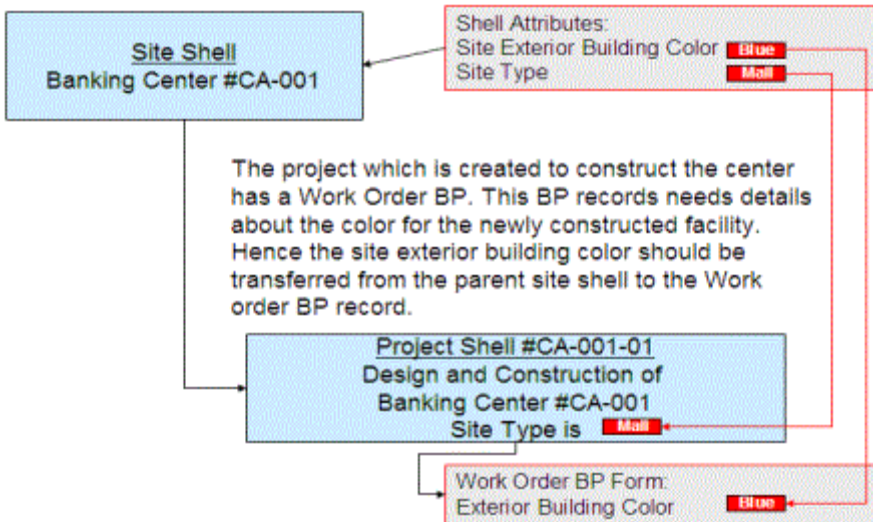
- ▶ In the Directory, select a team member's name and click **Send email**.
- ▶ In the team member's User Profile window, click the email address.

An email dialog box using your default email program (for example, Microsoft Outlook) opens. The To: field is populated automatically with the member's email address. Email sent through your external email program is not saved as part of the Primavera Unifier shell record.

Auto-Population and Reverse Auto-Population in Shells

Fields on a business process in a child shell can be setup in uDesigner to auto-populate from the attribute form of the current shell or any parent shell, or to auto-populate from the upper form of a single-record non-workflow business process under any parent shell. Also, a field on a shell attribute form can be setup to auto-populate from the attribute form of any parent shell, or from the upper form of a single-record business process under any parent shell.

For example, a bank can have multiple banking centers. When a new banking center is commissioned, then a project shell can be used to manage the construction details of the banking center. A Work Order business process, which is created under the project shell contains details including physical characteristics from the Site shell. In this example, that includes the building color, which is auto-populated to the Work Order business process so that the building is painted the correct color.



Note: If a shell is moved to a new place in the shell hierarchy, fields that are auto-populated for that shell retain the values that were populated when the shell was initially created. Auto-population does not reoccur when a shell is moved in the shell hierarchy.

Reverse auto-population in shells

Certain data elements support reverse auto-population. These are specified in uDesigner. Reverse auto-population means that some values can be automatically updated when other values are modified in a BP form or shell attribute form.

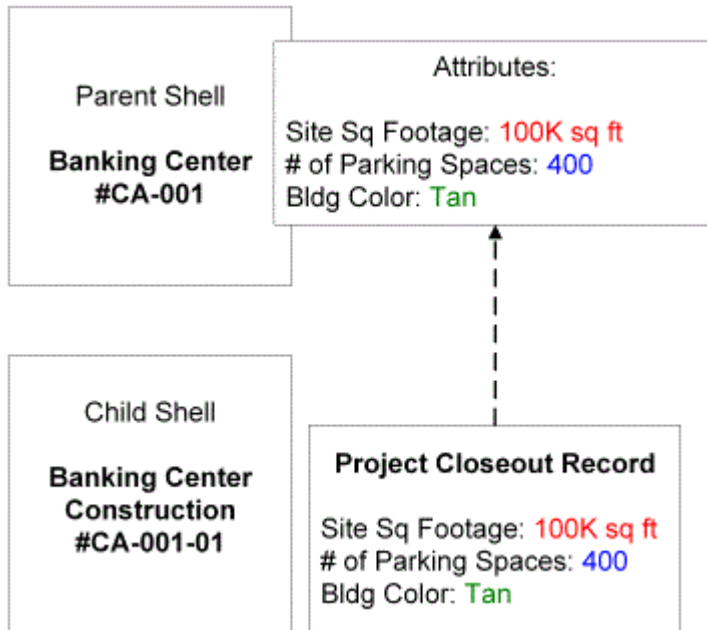
Note: Reverse auto-population does not occur for shells with View-Only status.

Depending on the set up in uDesigner, reverse auto-population can occur in these instances:

- ▶ Changes to the data elements in a child shell's attribute form can result in changes to the attribute form of any parent shell in the shell hierarchy
- ▶ Changes to data elements in a BP detail form under a child shell can result in changes to the current shell attribute form or any parent shell attribute form in the shell hierarchy

For example, When a new banking center is commissioned then a shell instance is used to construct the banking center. The parent shell needs to be updated with data from the Attribute forms of the child shell and from BPs within the child shell.

Also, data stored in a Code and Records-based Manager (such as a Parts Manager) may change based on company-level or project/shell-level BPs, and those changes need to reverse auto-populate back to the attribute form.



Financial Period in Shell

Depending on the financial period selected at the Shell level, when the user tries to create a scenario under Portfolio Manager, the user will only see the list of projects with the same financial period present in the respective Shell options.

If the user has selected a financial period at the Shell level, then the selected option overrides the financial period coming from Portfolio Manager by way of configuration.

The same selected financial period will also be used under Cash Flow curves, for the time scale of the financial period type.

The user is able to change the financial periods when there are no cashflows associated with that financial period.

Accordingly, when the Cash Flow is refreshed, it uses the new period structure.

If the user selects a period from the period picker in the Shell details window, the selected period will be used across Cash Flow curves (if time scale type is financial period) and Portfolio Manager.

Working with Gates and Phases

Gates allow you to assess the quality and integrity of a shell throughout its life cycle. A series of gate conditions are defined and tracked for each phase of the shell. Each gate condition is evaluated against the shell data and is marked complete if the conditions are met. When all the conditions are met, the shell moves to the next phase either automatically or manually, based on the configuration.

Phases and gate conditions are configured in the Gates Setup in Admin mode.

You can use the Gates dashboard when working with shells to do the following:

- ▶ Monitor the progress of phases
- ▶ View phase conditions and their definitions
- ▶ Run a gates process
- ▶ Manually override a gate condition
- ▶ Manually advance a phase

View gate condition details

To access the Gates dashboard

- 1) In User Mode, open a shell.
- 2) In the Navigator, click **Gates**. The Gates dashboard opens.
- 3) Do one of the following:
 - ▶ Select a phase and click the **Edit** button on the toolbar. Click the **View** button below the Gate Condition pane. The Edit button is available if the gates setup is active.
 - ▶ Double-click a gate condition in the Gate Condition pane.

The Edit Gate Condition window opens. This is a view-only window. The General tab displays the data type associated with the gate condition. The Query tab displays the data element and trigger condition for this gate condition.

Validate gate conditions manually

You can manually validate conditions, which is the same validation that is performed during scheduled runs. The dashboard is updated to show any changes to the gates conditions.

Note: Your Administrator can configure that Gates conditions are validated on each Gates run.

To manually run gates

In the Gates dashboard, click the **Refresh** button.

If a gate condition is met, it is marked as complete. If all gates conditions are have been met for a shell phase, and Automatic Advancement is set, the shell phase advances to the next phase.

Edit phase details

To edit phase details

- 1) In the Gates consoles, select a phase and click the **Edit** button. The Edit Phase Detail window opens.
- 2) Do any of the following:
 - ▶ Mark a gate condition as complete by selecting the **Complete** check box next to it.
 - ▶ Mark a completed gate condition as not complete by deselecting the **Complete** check box.

- ▶ Select and view gate condition details.
- ▶ Add or view general comments.

This item	Does this
Gates Condition list	Displays the gates conditions that must be met for the selected phase.
Complete checkbox	Select the check box to flag the gate condition as complete.
Ignore Condition checkbox	Select the check box to override the gate condition requirement for this phase.
View button	Click View to open the view-only Edit Report window. The General tab displays the data type associated with the gate condition. The Query tab displays the data element and trigger condition for this gate condition.
General Comments Add/View	Click the button to add or view general comments associated with this phase.

Advance a shell to the next phase

After the gate conditions have been met for a phase, you can manually advance a shell to the next phase.

To advance to the next phase

- 1) In the **Gates** console, click the **Advance to Next Phase** button.
- 2) In the confirmation window, click **Yes**.
- 3) The system validates whether all gates conditions have been met for that phase. If all gates conditions are complete, the shell advances to the next phase. If any gate conditions have not been met, you can do the following:
 - ▶ Manually mark a gate condition as complete.
 - ▶ Select the **Ignore Condition** check box to override the gate condition requirements. See **Edit phase details** (on page 58).
 - ▶ Select the phase and click the **Edit** button to view details about the phase and gate conditions to determine what needs to be done to meet the condition.

Return to a previous phase

You can return to a previously completed phase and make it the current phase.

To return to a previously completed phase

- 1) Select the phase to reset as the current phase.
- 2) Do one of the following:
 - ▶ Select a gate condition and edit it so that it is no longer complete.

- ▶ Add a new condition so that the completed phase is no longer complete.

Add or view phase comments

To add comments in a phase

- 1) In the **Gates** console, select the phase and click the **Edit** button. The Edit Phase Detail window opens.
- 2) Click the General Comments **Add/View** button. The General Comments window opens.
- 3) Enter comments in the Text Comments window and click **OK**.

Note: After you have saved a comment, it cannot be edited or deleted.

To view comments for a phase

- ▶ In the **Gates** console, click the General Comments **View** button at the bottom of the window. The General Comments window opens displaying existing comments.
- ▶ In the **Gates** console, select the shell phase and click the **Edit** button. Click the General Comments **Add/View** button. The General comments window opens.

Monitoring Gates

You can view results from prior scheduled gates runs.

To view gate runs

- 1) In the Gates console, click the **Saved Gates Runs** button. The Saved Gates Runs window opens.
- 2) Select a gate run from the list and click **Open**. The results are available in a PDF file. PDF file names include the date and time of the gate run.
- 3) Choose to view or save the PDF file and click **OK**.

The audit log captures Ignore Condition flags and general comments.

To view the gate audit log

In the Gates console, select **View > Audit Log**.

Integrating Activity Sheet for Multiple Shells

Notes:

- Permission for "Get / Set Activity Sheet Data" from Shell log are configured in Admin mode while permissions to take these action from within a Shell (User mode) are given at User mode level.
 - The options listed here are not available from the User mode of the Shell log (CBS type Shell) window menu toolbar.
-

To integrate multiple Shell instances with P6, switch to the Admin mode, go to a CBS type Shell and from the Shell log perform any of the following operations:

To get an activity sheet data

- 1) Click **File** from the menu.
- 2) Select **Get Activity Sheet Data**.
- 3) Select one of the following choices:
 - ▶ All Shells
 - ▶ Selected Shells
 - ▶ Filtered Shells
 - ▶ History

To send an activity sheet data

- 1) Click **File** from the menu.
- 2) Select **Send Activity Sheet Data**.
- 3) Select one of the following choices:
 - ▶ All Shells
 - ▶ Selected Shells
 - ▶ Filtered Shells
 - ▶ History

When in Admin mode, the following options are available in the CBS type Shell (in the Shell log) toolbar:

- ▶ Get Activity Sheet Data
- ▶ Send Activity Sheet Data

The following explains the options above in details:

▶ Get Activity Sheet Data > All Shells

You can select this option without having to select a Shell from the log.

▶ Get Activity Sheet Data > Selected Shells

You can select this option only when you select at least one Shell instance from the log.

▶ Get Activity Sheet Data > Filtered Shells

You can select this option after filtering Shells by using the Find option in the Shell log.

▶ Get Activity Sheet Data > History

Similar to the History option in other modules, you can select this option to view the history of a "Pull" action to see whether a request has been submitted successfully.

▶ Send Activity Sheet Data > All Shells

You can select this option without having to select a Shell from the log.

▶ Send Activity Sheet Data > Selected Shells

You can select this option only when you select at least one Shell instance from the log.

▶ Send Activity Sheet Data > Filtered Shells

You can select this option after filtering Shells by using the Find option in the Shell log.

▶ Send Activity Sheet Data > History

Similar to the History option in other modules, you can select this option to view the history of a "Pull" action to see whether a request has been submitted successfully.

Note: Each time you initiate a "Get" data or a "Send" data action, the systems displays a confirmation message. Click OK on the message window to exit.

Working with Multiple Document Manager Attribute Forms

Within the Shell Details, you can select which attributes forms to use for the Document Manager, for both folders and documents.

From the **Options** tab, you can define which attribute form (**Document Manager Attribute Form**) to use for the document/folder. After you define the form, the corresponding Document form value is displayed in the Document properties (**Document Manager Attribute Form Used**).

- ▶ By default, the attribute form (marked as system-defined in **Document Manager**) can be selected, and the corresponding document attribute form is used to determine the DMS structure.
- ▶ Only the active DM configuration forms are available for selection.
- ▶ If you decide to change the attribute form for an existing shell, the system displays a message.

If you change the attribute forms that are being used (which results in user views within the **Document Manager** containing fields that are no longer in the attribute form), then the system:

- ▶ Removes the fields from the view
- ▶ The related field columns will no longer be seen.

For Columns that are added in the user view due to change in attribute form, the information is retrieved, if it exists.

In case a previous active **Document Manager** configuration (in a shell) is marked as *inactive*, the DMS structure keeps that attribute form structure. When you open the shell details, the **Document Manager Attribute** is defaulted to system-defined attribute form because the previous configuration has been marked as inactive. The **Document Manager Attribute Form User** will show the previous DM attribute form that is kept by the shell. If you click **OK**, the system displays a message, informing you of this change.

In case if a previous active **Document Manager** configuration (in a shell) is *deleted* because the associate folder attribute form was deleted, the DMS structure is defaulted to the system-defined attribute form of a supported DMS structure for the shells. When you open the shell details, the **Document Manager Attribute** is defaulted to system-defined attribute form because the previous configuration has been deleted. The **Document Manager Attribute Form Used** will show the system defined DM attribute form that is kept by the shell. If you click **OK**, the system displays a message, informing you of this change.

Projects

A Unifier project is a "collaboration space" that allows project users to collaborate on and coordinate the execution of a project.

As a Unifier user, you may be part of a sponsor company or a partner company (or possibly both). Sponsor companies can commission and administer projects. Partner, or member, companies (for example, subcontractors and vendors) work with sponsor companies to complete projects.

Note: User access and permission levels for all functions are controlled by the Company Administrator. If you have access-related questions, contact your Company Administrator.

Within the system, a shell is a construct that contains sub-shells. Shells are like projects, but offer more functionality and flexibility in terms of how you work with them.

Note: Your Administrator can migrate standard projects of any status (Active, On-Hold, View-Only, or Inactive) to CBS shells.

Shells allow users to manage different modules. Projects are also shells that are predefined in the system. The Shell Manager allows shell types to be defined in uDesigner. Administrators can later create one or more instances under each shell type. Each instance can have its own business process, cost manager, reporting module, or other modules as needed.

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Open a Project

Open a project to access the project functions and its tabs (see below). Projects are listed on the Projects tab. For details on navigation, refer to the *Unifier General User Guide*.

Note: Your company may have configured the navigation so that the labels on the navigation tabs across the top or nodes on the left Navigator may differ from the default labels discussed here.

To access your projects

Go to the **Projects** tab and switch to **User** mode. The Project log opens, listing all of the projects to which you have access. The log shows:

- ▶ **Number:** The number assigned to the project.
- ▶ **Project Name:** The name of the project.
- ▶ **Company Name:** The sponsoring company for the project. This may be your own company or another company for which your company is a partner company in the project.
- ▶ **Status:** The status of the project.
- ▶ **Asset Name:** If the project has been associated with a company asset, the asset will be listed in this column.

To open a project

Select a project from the Projects log and click **Open**. The project home page opens, providing an overview of the project.

When you open the project home page, the Navigator expands, providing access to project-level features and business processes.

About Project Statuses

Your project can have one of four statuses:

- ▶ **Active:** A live, in-progress project.
- ▶ **On-Hold:** The initial project status. On-Hold projects are listed on the projects log, but you cannot work with them.
- ▶ **View-Only:** View-Only projects can be viewed, printed, exported, and included in reports. You cannot modify any data in View-Only projects. This allows you to view past projects without allowing changes to these projects.
- ▶ **Inactive:** Used to suspend project usage. Inactive projects are visible to Administrators, but not to end users. Only System and Project Administrators (users with Modify Status rights) can reactivate the project.

Note: If automatic status update is enabled on a project, the status of the project can change from Active to an inactive status (On-Hold, View-Only, Inactive). The change of status is set up by the Administrator, and is based on defined triggering conditions. For example, if a project is close to exceeding its funding, it might make sense to put it On-Hold while funding matters are discussed. Your project administrator must manually change the status back to Active when you are ready to restart the project.

The Project Administrator will receive email notification when the status of a project changes. The change of project status could occur due to a manual change, bulk update, through Web Services or a CSV file, or through automatic update.

Working with the Project Summary

The project summary provides a snapshot of the overall project. You can configure what information is displayed in your project summary. There are two available views of the project summary:

Summary - Standard View: The standard view of the project summary displays an overview of the project:

- ▶ Project name and number, project administrator, and the number of people on the project.
- ▶ Project schedule data, including schedule tracking information.
- ▶ Cost data relative to expenses incurred on the project to date from the project cost sheet. Total amounts are displayed and rounded to the nearest integer. "Invalid" displays for any entry that contains an invalid entry in a Cost Manager formula.
- ▶ Current tasks and their progress.
- ▶ Project-level business process records. Click a business process on the list to display the number of records that exist for that business process.
- ▶ From the **View By** selection list, choose **Status** (displays the total number of project records for each business process and the current status) or **Originating Company** (displays the total number of project records originated per company, listed by company short name; applicable if your partner companies can create business processes for the project).

Summary - User View: You can customize the project summary to display virtually any reportable project-related information in table or graphical format. The summary information is pulled from summary-type, user-defined reports or from preconfigured standard data-type reports.

You can drill down to the respective log by clicking a hyperlink from a summary report block.

To access the project summary

- 1) Open a project and click **Summary** in the Navigator.
- 2) Click the **View** menu, and choose **Standard** to view the standard view or **User** to view the user-defined view.

- 3) Click a link to jump directly to the respective log.

To print a project summary

- 1) Open a project and click **Summary** in the Navigator. You can print both the user view and the standard view.
- 2) From the File menu, click **Print Preview**. The preview window of the summary opens.
- 3) Click the **Print** icon in the upper-right corner of the window.

Configure your Project Summary

To help you keep track of the information that is most useful to you, you can customize the information that is displayed in the Project Summary window. Each part of the summary page is called a block. The data shown in a block can be in table form, a bar graph, or a pie chart. The summary page displays blocks on the right or the left.

You can add, edit, view, or delete summary reports as described below. You can customize how the summary report data is arranged in the Project Summary window, including displaying it on the left or right column, arranging the order of the display, and displaying the information as a table, bar chart, or pie chart.

The data that is displayed in this view is generated from summary-type, user-defined reports. Each block represents one report.

Note: The system displays the **Tasks**, **Notifications**, and **Drafts** nodes, in the respective Company Workspace and Project/Shell, based on the deployment of your user mode navigators.

Available project-level standard reports

Name	Drill down to	Default
<BP Name> Count by Status	BP Log	
<BP Name>% by Status	BP Log	
<BP Name> Count by Company	BP Log	
<BP Name>% by Company	BP Log	
<BP Name> Count by User	BP Log	
<BP Name>% by Creator User	BP Log	
<BP Name> - Tasks by User	Project > Tasks	
<BP Name> - Tasks All Users	Project > Tasks	

Name	Drill down to	Default
Record Count per BP (for current user)	BP Log based on which BP link was clicked	Yes
Record% per BP	BP Log based on which BP link was clicked	
All Users (by company)	Project > Project Information > Project Directory	
Logged in Users (by company)	Project > Project Information > Project Directory	Yes
Current User Task Count	Project > Tasks	Yes
All User Task Count	No drill down	
Total Documents	Drill down to Document Manager	Yes

To add reports to the user view

- 1) Create summary-type reports that include the information that you want to display in the summary. For details about user-defined data types, see the *Unifier General User Guide*.
- 2) Open a project and click **Summary** in the Navigator. The Summary window opens.
- 3) Click the **View** menu and choose **User**.
The initial reports included in the summary are displayed in table format. You have the option to modify how these reports display, remove them from the summary view, or add other summary reports.
- 4) From the **Edit** menu, choose one of the following:
 - ▶ **Left Column**: To add information to the left side of the window
 - ▶ **Right Column**: To add information to the right side of the window
 The Left Column Blocks or Right Column Blocks window opens.
- 5) Do one of the following:
 - ▶ To add a user-defined summary report, click **Add Custom**. The Custom Summary Block window opens. Complete the window and click **OK**.
 - ▶ To add a preconfigured, standard data-type report, click **Add Standard**. The Standard Summary Block window opens. Complete the window and click **OK**.
- 6) Use the information in the first table below to complete the fields in the Add Custom window.
- 7) Use the information in the second table below to complete the fields in the Add Standard window.
- 8) Click **Close**. The Project Summary - User View window will update to include the new report.

In this field	Do this
Report Name	Click the Select button. The User-Defined Reports window opens, listing the available summary reports. Select a report from the list, and click the Open button. (If the list is long, you

	may click the Find button and enter search criteria to help locate a specific report.) Note: Note: Reports that are already used in the summary page are shown with a check mark. You can use a report more than once. For example, you might want to include the same report in both table and pie chart formats.
Description	This is populated automatically with the report description, if one exists.
Block Title	This will appear over the data on the summary page. By default, the field will show the report name, but is editable.
Display Type	Choose to show the data as a bar chart, pie chart, or table format.
Show Result	Choose one of the following: ▶ Actual Value: Shows the actual value of what is being reported (number of records for a particular BP type, and so on). ▶ Percent distribution of total: Calculates the value as a percentage of the total (the percentage of total records to which a BP type corresponds, and so on).
Show Total	Select this check box if you want to display the total value of the data. This will vary, depending on what data is used in the report. For example, it may include the total number of records, total currency amount, and so on.

In this field	Do this	
Report Name	This field will auto-populate with the selection from the Report On field.	
Data Type	Choose a standard data type to add to the summary. Choices include:	
	Business Process Document Management	Active Task Information Users List of project business processes
Report On	The selection list is dependent on what is chosen from Data Type. Choose from the selection list. The Report Name field will auto-populate with the standard report.	
Block Title	This will appear over the data on the summary page. By default, the field will show the report name, but is editable.	
Display Type	Choose to show the data as a bar chart, pie chart, or table format.	

Show Result	Choose one of the following: ▶ Actual Value: Shows the actual value of what is being reported (number of records for a particular BP type, and so on). ▶ Percent distribution of total: Calculates the value as a percentage of the total (the percentage of total records to which a BP type corresponds, and so on).
Show Total	Select this check box if you want to display the total value of the data. This will vary, depending on what data is used in the report. For example, it may include the total number of records, total currency amount, and so on.

To move or delete blocks on the Project Summary - User View

- 1) Open the Project Summary - User View.
- 2) From the Edit menu, choose one of the following:
 - ▶ **Left Column:** To add information to the left side of the window
 - ▶ **Right Column:** To add information to the right side of the window
 The Blocks window opens. Blocks are listed in the order in which they appear on the page.
- 3) To move a block, select it and click **Move Up** or **Move Down**.
- 4) To delete a block, select it and click **Delete**.

To change the display type, title, or other block property

Select the block and click **Open**. Make changes as necessary and click **OK**.

Managing Project Alerts

You can create customized alerts to alert you to a condition or event in the system that you specify. For example, you might set up an alert that will send you an email or Mailbox message letting you know that a fund amount on the funding sheet has reached a certain level.

Alerts are created by creating an alert-type user-defined report.

To create an alert

- 1) Create an alert report in user-defined reports. For more information about user-defined report data types, refer to the *Unifier General User Guide*.
- 2) Open a project and click **Alerts** on the Navigator. The Alerts log opens.
- 3) Click **New**. The Alert window opens. Complete the window as described in the table below.
- 4) Click **OK** to close the Alert window.

In this field:	Do this:
Report Name	Click the Select button. The list of user-defined alert reports for the project opens. Select a report from the list, and click the Open button. (If the list is long,

In this field:	Do this:
	you may click the Find button and enter search criteria to help locate a specific report.) Note: Reports that are already used to create an alert are shown with a check mark. You can create more than one alert for each report.
Description	This is populated automatically with the report description, if one exists.
Alert Title	This will appear as the title of the alert in the log and on the alert sent. By default, the field will show the report name, but this is editable.
Frequency	Choose the frequency that you want the alert to be sent when the trigger condition is met: Never: Alerts will not be sent. Hourly: Alerts will be sent every hour, at about 20 minutes past the hour. Daily: Alerts will be sent daily at about 2:20 a.m. Weekly: Alerts will be sent on Mondays at about 2:20 a.m. Monthly: Alerts will be sent on the first day of the month, about 2:20 a.m. Times may vary somewhat. The times noted above refer to server time, that is, the time according to the Unifier server being used. (Servers operate on Pacific Time Zone.) Note: If you choose any frequency other than Never, you must specify a method and message.
Method	You may select one or both of the following methods to be notified of the alert: Email (the email on your user profile will be used) or Mailbox.
Message	Type a message that you want to be included in the alert. Remember that this is an alert that only you will see, so enter as much or as little detail as you need.

To edit alerts

- 1) Open a project and click **Alerts** on the Navigator. The Alerts log opens.
- 2) Select an alert and click **Open**. The Alert window opens.
- 3) Make changes to the alert as needed and click **OK**.

To delete an alert

Open a project and click **Alerts** on the Navigator. The Alerts log opens. Select an alert and click **Delete**.

Working with Mailbox (Projects)

The *project Mailbox* is an internal email feature that allows *project team members* to communicate with each other and maintain a record of the communications. The *project Mailbox* interface is similar in functionality to common email programs such as Microsoft Outlook. The *project Mailbox* supports file attachments and emails can be sent between *project team members* and to external email addresses.

Note: The external email cannot be sent directly to the *project Mailbox*.

A copy of every mailbox communication is saved in a central folder controlled by the *project administrator*. These communications become part of the *project* record. The *project* or company administrators must grant users permission to access the *project Mailbox* folder.

Depending on permissions, users can view all messages or only those in which they participated (sent or received). Permission can also be granted to delete items in the *project Mailbox* folder. Once deleted, the communications are not recoverable.

Note: Users who sent or received the deleted message may still retain copies of these messages in their own **Inbox** or **Sent** folder.

Refer to the "Home Page (Mailbox)" section in the *Unifier General User Guide* for more details. You can link the messages in the *project Mailbox* to specific business process records.

View and find Mailbox Messages

The Mailbox feature is project-specific, and the full functionality is accessed at the project level. A cross-project listing of your Inbox and Sent items can also be accessed in the Mailbox node directly under Home.

To access project Mailbox

- 1) Open a project and switch to **User** mode.
- 2) Click **Mailbox** in the left Navigator. The Mailbox folders expand:
 - ▶ **Drafts:** Displays Mailbox messages that you have drafted but not yet sent.
 - ▶ **Inbox:** Displays messages sent to you.
 - ▶ **Sent Items:** Displays messages that you have sent.
 - ▶ **Deleted Items:** Displays items that you have deleted from one of the other folders.

- ▶ **Project Mailbox** : Stores copies of all Mailbox messages sent between project team members. Access to this folder must be granted through permission settings.

To view all of your Mailbox messages across projects

- 1) Go to the Home workspace.
- 2) Click **Mailbox** in the left Navigator. All messages residing in all project Mailbox Inbox and Sent folders are listed.
- 3) To open a listed message, select it from the list and click **Open**. You will be directed to the Project Mailbox Inbox or Sent folder containing the message, and the message will open.

To search for a specific Mailbox message across projects

- 1) Go to the Home workspace.
- 2) Click **Mailbox** in the left Navigator. All messages residing in all project Mailbox Inbox and Sent folders are listed.
- 3) Click the **Find** button.
- 4) Enter search criteria in the Subject Containing or Message Containing fields in the upper portion of the log.
- 5) Click **Search**. The log will list the messages meeting the search criteria entered.

Send and Receive Mailbox Messages

Mailbox functionality is similar to common email programs. In Mailbox, you can attach files, format text, flag the message, compose and save a draft of your response without sending it, and preview your message in a browser.

You can correspond with your project team members through Mailbox, and send Mailbox to external email addresses. External email users cannot send email directly to Mailbox.

Note: Mailbox messages can be linked directly to related business process records. For information about linking mailbox messages to a record refer to the *Unifier Business Processes User Guide*.

To send a Mailbox message

- 1) Open a project and switch to **User** mode.
- 2) Select any Mailbox folder.
- 3) Click **New**. A message window opens.
- 4) Choose the recipients of the Mailbox message by doing any of the following:
 - ▶ Click **To** to select the primary recipients. The User/Group picker opens displaying project users. Select recipients from the **Select Users** list, and click **Add**. Click **OK** to close the picker.
 - ▶ To send a copy to another recipient, click **Cc**, and choose the recipients from the User/Group picker.
 - ▶ To send a copy to an external email address, enter the address in the External Cc field. Separate multiple external addresses with a semicolon (;). The recipient will see Unifier Notification in the From field, and will not be able to reply directly.

- ▶ To send a blind copy (Bcc), click the **View** menu and select **Bcc Fields**. The Bcc button and External Bcc field become available on the Mailbox message window.
- 5) Type the subject of the message in the Subject field.
 - 6) Type the body of the message in the text field.
 - 7) Click **Send** to send the message.

To view or respond to a Mailbox message

- 1) Access Mailbox by doing one of the following:
 - ▶ Open a project and switch to **User** mode. In the left Navigator, select the **Mailbox Inbox** folder. The Inbox lists all messages that have been sent to you. Unread messages are shown in bold text.
 - ▶ Go to the Home workspace. In the left Navigator, click **Mailbox**. All sent and received Mailbox messages across projects are listed. Unread messages are in bold text.
- 2) Double-click a message to view it. The message opens.
- 3) To respond to the message, do one of the following:
 - ▶ To send a reply to the sender, click **Reply**.
 - ▶ To send a reply to the sender and other recipients of the original message, click **Reply to All**.
 - ▶ To forward the message to another recipient, click **Forward**.

Note: Any file attachments will remain on forwarded messages.

- 4) Type your response and click **Send**.

Note: For Project Mailbox Replies, the **From** field of the external email received does not indicate the corresponding project mailbox email address; however, once you reply, the **To** field will contain the project mailbox email address, auto-populated.

To attach files to a Mailbox message

- 1) Open the Mailbox message.
- 2) Click **Attach** and choose one of the following:
 - ▶ **My Computer:** Attaches the file from your local system. The procedure is the same as for uploading files to the Document Manager.
 - ▶ **Unifier Folder:** Attaches documents from the Document Manager. The window opens, displaying the Project Documents files and folders. Select the files and folders to attach and click **OK**.

Note: Folders are not attached. The contents of selected folders are attached in a flat list. Documents with duplicate file names will not attach.

- 3) Click **OK** to add the file, and click **OK** to close the General Comments window.

Note: The system allows you to embed only one image (file size must be equal or less than 1MB) in a single email. Use the attachment feature to

send an image with a file size greater than 1MB, or to send multiple images.

To flag a Mailbox message for follow-up

- 1) Open an existing message, or create a new message.
If you want to flag a message that you are replying to or forwarding, then open the message, and click **Reply**, **Reply All** or **Forward**.
- 1) Click the **Flag for Follow-Up** button. The Flag for Follow-Up window opens.
- 2) In the **Flag to** field, choose an action, such as "call," or "for your information."
- 3) Click **OK**. The flag text appears at the top of the message. A red flag symbol will also display next to the message in the log. (You may need to refresh the log to see the flag.)
- 4) If this is an existing message that you are flagging for yourself, you can simply close the message. If you are sending the message to someone else, add the recipients and send the message.

To remove a Mailbox flag

Click the **Flag for Follow up** button, and then click **Clear Flag**.

To format Mailbox text

- 1) Open the Mailbox message.
- 2) Select the text you want to format within the body of the message.
- 3) On the Formatting toolbar, choose the formatting to apply to the text.

To spell check Mailbox text

- 1) When you are finished composing a Mailbox message, click the **Spelling** button on the toolbar of the message. The body text of the message is checked.
- 2) Make spelling corrections as necessary and click **OK**.

To print a Mailbox message

- 1) Open the Mailbox message.
- 2) Click the **Print** button.

To print several Mailbox messages from the Mailbox log

- 1) Navigate to a Mailbox log.
- 2) Select the Mailbox records that you want to print.
- 3) Click the **Print** button.

To search for a Mailbox message

- 1) In the Navigator, click one of the Mailbox folders.
- 2) From the toolbar, click the **Find** button. The Find box expands above the log.
- 3) Do any of the following:
 - ▶ To search by the recipient (To field), click the **Select** button and choose the user from the User/Group picker.

- ▶ To search by subject, enter a word or phrase in the **Subject Containing** field (partial entries are acceptable).
 - ▶ To search by message content, enter a word or phrase in **Message Containing**.
 - ▶ You can further refine the search by clicking the Items that are: drop-down list and choosing Read or Unread.
- 4) Click **Search**. The messages meeting your search criteria will be listed in the log.

To delete Mailbox messages

- 1) Do one of the following:
 - ▶ From a Mailbox log, select the message and click **Delete**.
 - ▶ From within a Mailbox message, click **Delete** on the toolbar.The message is moved to the project's Deleted Items folder.
- 2) To permanently delete a message, select it from the Deleted Items folder and click **Delete**. Click **Yes** to confirm that you are permanently deleting the message.

Note: When you delete a message from your account, a copy of the message remains in the central project record: the Project Mailbox folder. Messages deleted from the Project Mailbox folder are permanently deleted.

Link Mailbox Messages to Business Process Records

Mailbox messages can be linked directly to BP records through the Linked Mailbox link at the bottom of the BP form. For information about linking mailbox messages to a record refer to the *Unifier Business Processes User Guide*.

Note: This option is available only in BPs that have been set up to accommodate linked Mailbox messages. The ability to attach messages or view attached messages depends on the user's Mailbox View permissions. Reply, reply all, and forward messages sent from a linked Mailbox will also be automatically linked to the BP.

To view the list of BP records to which a Mailbox message is linked

- 1) Open the Mailbox message.

If the message is linked to a BP record, the upper portion of the message will display the following:

"This Mailbox and any future replies are linked to records. Show list" (where Show list is a hyperlink).
- 2) Click the **Show list** hyperlink to view the list of BP records to which the Mailbox is linked.

Additional Information about Using the Project Mailbox

External emails are important communications that need to be included in projects. Such emails can come from *project members* or from external users who do not use Unifier.

Note: To use any of the mailbox features, you must have permissions.

These email communications (and any attachments) are collected in a central repository for the *project*, called the **Inbox (Mailbox > Project Mailbox > Inbox)** so that *project* members can use them in managing and documenting the *project*. After such emails reside in the **Inbox**, the *project* users can view them, forward them to appropriate members, flag them for review, and reply to them. In addition, the *project* users can link these emails to business process records.

Note: The external emails that have been blind carbon-copied (Bcc'd) are not collected by the **Inbox**.

Creating additional folders

- 1) Go to the project/shell tab and switch to **User** mode.
- 2) Expand the **Mailbox** node.
- 3) Expand the **Project Mailbox** node.
- 4) Click **Inbox** to open the Inbox log.

If you have the **View** permission for **Inbox** sub-node, then you can view all folders under the **Inbox** sub-node.

- 5) On the toolbar, click the folder icon to open the **Folders** window.
You can see the folder icon only if you have the **Create/Manager Folders** permission.
- 6) Click the plus icon to open a new row.
- 7) Under the **Name** column, double-click the empty cell and enter a name for the new folder.
 - ▶ This field cannot be empty.
 - ▶ The maximum character length is 250.
 - ▶ You cannot use an existing name.
- 8) Under the **Email Address Code** column, double-click the empty cell and enter a code.
 - ▶ This field cannot be empty.
 - ▶ The maximum character length is 120.
 - ▶ You cannot use an existing code.
- 9) Click **OK**.

Your newly created folder appears in the existing list of folders below the **Inbox** node. The positioning of the folders below the **Inbox** node is according to the ordering of rows in **Folders** window. You can drag and drop rows in the **Folders** window in order to reorder the folder position in the navigator, on the left.

Note: You can reorder more than one folder at the same time.

In addition, you can double-click into any cell of the grid of an existing folder, in the **Folders** window, and edit the folder properties (**Name**, **Email Address Code**).

The email address is calculated by the system according to the **Project Email Pattern** that is defined in **Unifier Configurator**. As a result:

- ▶ When the **Project Email Pattern**, in the **Unifier Configurator**, is configured to be the *prefix*, the email address of the folder will be: <Email Address Code for the folder>-<project email id>. For example, if the **Email Address Code** of a folder is "construction," and the project email id is "bostonGenHospital-slc05kuz@internal-mail.oracle.com," then the folder email address will be "construction-bostonGenHospital-slc05kuz@internal-mail.oracle.com."
- ▶ When the **Project Email Pattern** is configured to be the *suffix*, the email address of the folder will be such that the **Email Address Code** gets appended to the very end of the project email id. For example, if the **Email Address Code** of a folder is "construction," and the project email id is "slc05kuz+bostonGenHospital@internal-mail.oracle.com," the folder email address will be "slc05kuz+bostonGenHospital+construction@internal-mail.oracle.com."

When a user sends an email to the email address of a folder, that email automatically lands inside the correct folder. Additionally, if the user specifies an incorrect value of the **Email Address Code**, and the rest of the project/shell email address is correct, then that email automatically shows up in the **Inbox** sub-node under the **Project Mailbox** parent sub-node.

The toolbar options for the new folder (below the Email Address) is the same as the toolbar options for the **Inbox** sub-node. The actions **Move** and **Folder** are visible based on permissions.

The options **View**, **Edit View**, **Refresh**, **Search and Find on Page** are the same as in **Inbox** sub-node.

The log layout listing the emails for a new folder is the same as for **Inbox** sub-node. Similar to **Inbox** sub-node, the user has the ability to move one or more emails from one folder to another using the right-click option > **Move** or using the **Move** option.

By default, **Inbox** is available under **Project Mailbox** (Project/Shell > **User** mode > **Mailbox** > **Project Mailbox** > **Inbox**). You have ability to select **Inbox**, move it to the "Available Modules and Business Processes" section and then move it back below any other parent node in the "Selected Modules and Business Processes" section.

When you move **Inbox** to the right section, the parent node **Project Mailbox** will disappear.

When you move **Inbox** from the right to the left section below a new parent node, the system inserts the **Project Mailbox** node as the direct parent node of **Inbox**. For example, if the original hierarchy was Folder A > Project Mailbox > Inbox, and the user moves the Inbox to the right section, and then moves it back to the left section below Folder B, then the system displays the hierarchy as Folder B > Project Mailbox > Inbox. In other words, the Inbox always resides below the Project Mailbox.

You can send an email to Project/Shell users giving them information about the additional email address of a Project/Shell. The email is a system-generated message with the following elements:

Header: Email Address(es) for <project/shell number> - <project/shell name>

Subject: Email Address(es) for <project/shell number> - <project/shell name>

Body (text): This email is to inform you that a Unifier Mailbox has been setup for <project/shell number in bold chars> - <project/shell name in bold chars>

You must use the following general format for the email address: <project/shell email id>

If the Project/Shell contains additional folders, the following text between two forward slashes //:

//To send messages, including file attachments to specific folders, use the following email address(es):

1. <Folder 1 name>: <Folder 1 email address>
 2. <Folder 2 name>: <Folder 2 email address>
 3. <Folder 3 name>: <Folder 3 email address>
 - ... <and so on>
- //

Note: If there are no additional folders, this text must not be contained in the email body.

The email is a system-generated message.

All emails received, or existing emails in the **Project Mailbox**, are in the **Inbox** node below the **Project Mailbox** parent sub-node.

To open the *Project Mailbox*

- 1) Open your *project*.
- 2) In the left Navigator, expand the **Mailbox** node (**Project Mailbox > Inbox**). The right pane displays a log of the contents of the **Inbox**.

To open an email

On the **Inbox** log, double-click the email. The system opens the email. If there are attachments, the email will display an **Attachments (n)** link. To open an attachment, click the link and double-click the attachment on the list that appears.

To flag an email for follow-up

- 1) Open the email.
- 2) Click the **Flag for Follow-Up** button. The system opens the Flag for Follow-Up window.
- 3) In the **Flag to** field, choose the action you want for this email, such as "call," or "for your information."
- 4) Click the **Reply** button to reply to the email, or click the **Forward** button to forward the email on to someone.

When the recipient opens the message, the specific flag remark is shown across the top of the message.

Note: To remove the flag, click the **Flag for Follow-Up** button, and then click **Clear Flag**.

To move an email from one folder to another folder

- 1) Go to **Inbox** and click the email that you want to move.
- 2) Click the **Actions** drop-down list and select **Move**. This opens the Move window. Alternatively, you can click the gear menu and select **Move**.
- 3) In the Move window, select the folder that you want to move the email into and click **OK**.

The **Move** option is available only if more than one folder (including the **Inbox**) exists below the **Project Mailbox** parent sub-node, and you have the permission to view the **Inbox**.

To create a folder

- 1) Go to **Inbox** and click the folder icon.
- 2) In the Folders window click the plus option to open a row on the grid.
- 3) Double-click each cell of this new row, under **Name** and **Email Address Code** columns, and enter the values.
- 4) When finished, click **OK**.
- 5) Ensure that you see the new folder under the **Project Mailbox** parent sub-node, below the **Inbox** sub-node.

You can create new folders only if you have the permission to "Create/Manage" folders for the **Project Mailbox**.

You can change the order of the folders by moving the rows in the Folders window.

The folders below the Inbox node in the left Navigator are arranged according to the order of rows in the Folders window. The Inbox sub-node is always the top folder and directly below the Project Mailbox parent sub-node.

To delete a folder

- 1) Go to **Inbox** and click the folder icon.
- 2) In the Folders window, select the row of the folder that you want to delete.
- 3) Click the trash-can icon and click **OK**.

To reply to an email

- 1) Open the email and click the **Reply** button.
The system displays the addressee's email address in the **External To** field. You can add additional external addresses in this field, separated by semi-colons (;).
- 2) (Optional) To add email addresses to the Cc line, click the **Cc** button. The User/Group Picker opens.
 - a. Select the user(s) you want to add to the message and click Add. The names appear in the Selected Users area at the bottom of the window.
 - b. Click **OK**.
- 3) (Optional) To attach a file to the reply, click the **Attach** button and choose **My Computer** or **Primavera Unifier Folder**.
 - a. In the window that opens, select the file you want to attach, or browse your computer directories to locate the files to attach.
 - b. Click **OK**. The system attaches the file to your reply.
- 4) Enter your reply and click **Send**.
The system sends the email to the persons you specified.

Note: After you reply to an external email, the communication will become part of Unifier mailbox system. To see your reply, or any other communication regarding this email after this point, look for it in the

Inbox sub-node of the Navigator. Any reply you made to the email will appear in the **Sent Items** sub-node of the **Mailbox** node. Any email you forwarded will also appear in the **Sent Items** sub-node of the **Mailbox** node.

To forward an email

- 1) Open the email.
- 2) To forward the email, click the **Forward** button. A forward email window opens.
- 3) Click the **To** (and optionally, the **Cc**) button. The User/Group Picker opens.
- 4) Select the user(s) to whom you want to forward the message and click **Add**. The names appear in the Selected Users area at the bottom of the window.
- 5) (Optional) To forward the email to external users, enter their addresses in the **External Cc** field, separated by semi-colons (;).
- 6) Click **OK**. The system forwards the email to the persons you specified.

To delete an email

On the Mailbox log, select the email and click the **Delete** button. To delete multiple emails, hold down the **Ctrl** key on your keyboard and select the emails.

To print an email

On the Mailbox log, select the email and click the **Print** button. To print multiple emails, hold down the **Ctrl** key on your keyboard and select the emails.

To find a specific email

- 1) On the Mailbox log, click the **Find** button. The system opens a Find window at the top of the log.
- 2) Enter the search criteria.
 - ▶ To search for an email from a specific person, enter the person's email address in the **From** field.
 - ▶ To search for an email with a specific subject line, enter the subject line in the **Subjectcontaining** field.

You can enter partial addresses or words in any of these fields. The system will display all the emails that match the partial information you entered.

To search for an email with some specific content in the message, enter that content in the **Messagecontaining** field.

- 3) Click **Search** (or press **Enter**).

The system will display the emails that match the criteria you entered. It will also identify the criteria by which you have searched the list in the "**Current View: filtered by**" line above the list.

Distributing the Project Mailbox Email Address to Users

Usually, your Administrator distributes the email address of the Project Mailbox to all project participants, both within and outside of Unifier. You can also distribute this email address to other users you consider appropriate for the project.

Ensure that you notify your Administrator of these new users. The Administrator must add the new email addresses to the approved email list for the project; otherwise, the Project Mailbox will not accept emails from these users.

The Administrator can define the project email address in order to create a more meaningful name that is related to the project.

To distribute the Project Mailbox email address

Open the project home workspace and click the link shown for Email Address.

When an external user replies to a notification email:

- ▶ The address field of the form is automatically set to display the email address of the project.
- ▶ The reply email is captured in the project mailbox.

Working with Tasks, Notifications, and Drafts Nodes

When you are part of a business process workflow, you may be assigned a task.

- ▶ **Tasks** are business processes that you are involved with and are in process.
- ▶ **Notifications** are business processes that you have been sent a copy but do not need to take action.
- ▶ **Drafts** are business processes that you have worked on and saved but have not yet sent.

You can access your tasks, notifications, and drafts in the following locations:

- ▶ Home workspace
Go to the Home workspace > click the nodes (**Tasks, Notifications, Drafts**) to open > from the log, click to open one of the items that required your attention, or you want to work with.
- ▶ Company Workspace
Go to **Company Workspace** > **User** mode > click the nodes (**Tasks, Notifications, Drafts**) to open > from the log, click to open one of the items that required your attention, or you want to work with.
- ▶ Project/Shell
Go to your Project/Shell > **User** mode > click the nodes (**Tasks, Notifications, Drafts**) to open > from the log, click to open one of the items that required your attention, or you want to work with.

Working with your Project Information

You can access your project information from the **Information** node of that project: Your project > **User** mode > **Information**.

The **Information** node as two sub-nodes — **Directory** and **General** — that each provide more details about the project as explained below:

Directory

Contains a collection/log of the project-team members and their contact information. You may view the contact information of fellow team members and even send email from within the system.

Note: A printed version of the Project Directory can be generated using user-defined reports.

The Directory toolbar includes the following options:

▶ **View**

- ▶ Users/Groups
Name and Company columns are visible on the grid
- ▶ Groups
Name column will be visible on the grid
- ▶ Users
Name column will be visible on the grid as defined in uDesigner

▶ **Send Email**

To send an email, select a team member's name and click **Send email**

Note: This button will be visible when the **Hide User Profile** option is unchecked. It will be hidden when the option is checked.

▶ **Search**

To **Search** for users based on the selected **View** (Users/Groups, Groups, Users)

▶ **Find on Page**

To do a quick search for users based on the visible columns

To view a team member's user profile:

In the Project Directory, select the user from the log. The user details become visible in the right pane. The **General** tab will include the user's **Name** and **Company**. Additionally, a **Contact Information as in**, you can choose one of the following:

- ▶ **Company:** Displays the user's company contact information
- ▶ **<Project Number: Project Name>:** Displays contact information specific to the current project, such as an on-site address or cell phone.

A **Basic Information** section will also be visible when the **Hide User Profile** option is unchecked.

To send an email:

In the Project Directory, select a user or group or both and click **Send email**. Or, from the user profile, click the user's email address. The **New Mail** page will open with the selected items from the log.

You can click the picker icon to select additional users or groups from the picker window. The ability to pick applies to the “To,” “CC,” and “Bcc” fields.

You may also contact a team member using Mailbox. Mail from all places in the product support Users and Groups as recipients.

Note: Email sent through your external email program will not be saved as part of the Unifier project record.

General

Contains a collection/log of the general information business process records that may have been added to the project. Refer to the *Unifier General User Guide* for details.

The listed BP records originate as single-record business processes. In other words, only one BP record exists for each BP, per project. The **General** log is useful for project-specific information that only needs to be documented on a single form. It is a way to easily categorize, and find, big-picture project information, for example, the overall project data or descriptions.

To open a record, double-click it or click **Open** from the *Gear menu*.

Working with Gates

Gates provides a structure to assess the quality and integrity of a project throughout its life cycle.

Gates are, in essence, acceptance reviews following which a project can advance to the next phase in the project life cycle. For each phase of the project, a series of gate conditions are defined and tracked. Each gate condition is evaluated against actual project data and is marked complete if conditions are met. After all conditions are complete, the project moves to the next phase either automatically or manually, based on the configuration.

Phases and gate conditions are configured in the Gates Setup in Admin mode.

View the Gates dashboard

The Gates dashboard allows you to:

- ▶ Monitor the progress of project phases
- ▶ View phase conditions and their definitions
- ▶ Run a gates process
- ▶ Manually override gate conditions
- ▶ Manually advance a project phase

To access Gates

- 1) Open the project and switch to **User** mode.
- 2) Click **Gates** in the left Navigator. The Gates dashboard opens.

View gate condition details

To view gate condition details

- 1) Open the Gates dashboard.
- 2) Do one of the following:
 - ▶ Select a project phase and click the **Edit** button on the toolbar. Click the **View** button directly below the **Gate Conditions** pane. (The Edit button is available if the gates setup is active.)
 - ▶ Double-click a listed gate condition in the **Gate Conditions** pane of the dashboard (or select the gate condition and click the **View** button).

The Edit Gate Condition window opens. This is a view-only window. The **General** tab displays the data type associated with the gate condition. The **Query** tab displays the data element and trigger condition for this gate condition.

Validate gate conditions manually (refresh)

You can manually validate conditions, which is the same validation that is performed during scheduled runs. The dashboard is updated to show any changes to the gates conditions.

Note: Your Administrator can configure that Gates conditions are validated on each Gates run.

To manually run gates

- 1) Open the Gates dashboard.
- 2) Click the **Refresh** button.

If a gate condition is met, the gate condition is marked as Complete. If all gate conditions are found to have been met for a project phase (and if Automatic Advancement is **Yes**), then the project phase will advance to the next phase.

Edit phase details

To edit phase details

- 1) Open the Gates console.
- 2) Select a project phase and click the **Edit** button. The Edit Phase Detail window opens.
- 3) Use the information in the following table to complete the window.

This item	Does this
Gates Condition list	Displays the gate conditions that must be met for the selected phase.
Complete checkbox	Select the check box to manually flag the gate condition as complete.
Ignore Condition checkbox	Select the check box to override the gate condition requirement for this phase.

View button	Click the View button under the Gate Conditions list. The Edit Report window opens. This is a view-only window. The General tab displays the data type associated with the gate condition. The Query tab displays the data element and trigger condition for this gate condition.
General Comments Add/View	Click the button to add or view general comments associated with this project phase.

Advance to the next phase

After the gate conditions have been met for the current phase, you can manually advance a project to the next phase.

To advance the phase to the next phase

- 1) Open the **Gates** console.
- 2) Click the **Advance to Next Phase** button.
- 3) A confirmation window opens asking you to confirm the phase advancement. Click **Yes** to confirm.

The system will validate whether all gate conditions have been met for that phase. If all gate conditions for that phase are complete, the phase can advance to the next phase. If all of the gate conditions have not been met, you can:

- ▶ Manually mark a gate condition as complete.
- ▶ Select the **Ignore Condition** check box to override the gate condition requirements.
- ▶ Select the phase and click the **Edit** button to view details about the phase and gate conditions, and therefore determine what needs to be done to meet the gate condition.

Return to a previous phase

To return to a previously completed phase and set it as the current phase:

- 1) Select the phase to reset as the current phase.
- 2) Do one of the following:
 - ▶ Select a gate condition and edit it so that it is no longer complete.
 - ▶ Add a new condition so that the completed phase is no longer complete.

Add or view general comments

To add general comments in a project phase

- 1) In the **Gates** console, select the project phase and click the **Edit** button. The Edit Phase Detail window opens.
- 2) Click the **Add/View** button. The General Comments window opens.
- 3) Enter any comments in the **Text Comment** pane and click **OK**. After you save a comment, it cannot be edited or deleted.

To view existing general comments on a project phase

Do one of the following:

- ▶ In the **Gates** console, click the **View** button at the bottom of the screen. The General Comments window opens displaying existing comments.
- ▶ In the **Gates** console, select the project phase and click the **Edit** button. Click the **Add/View** button. The General Comments window opens. You can view existing comments or add a new one.

View saved Gates runs

You can view results from prior scheduled gates runs.

To view saved gates runs

- 1) Open the Gates console.
- 2) Click the **Saved Gates Runs** button. The Saved Gates Runs window opens.
- 3) Select a saved gates run from the list and click **Open**. Results are available in a PDF file. PDF file names include the date and time of the gates run.
- 4) Choose to view or save the PDF file and click **OK**.

View the Gates audit log

To view the Gates audit log

- 1) Open the Gates console.
- 2) Click the **View** menu and choose **Audit Log**.
The audit log captures Ignore Condition flags and general comments.

Working with E-Signatures

Internal user

When a **Send for E-Signature** action is taken, and one or more documents are sent to Unifier users (**Internal users**), then an entry is made in the **E-Signatures** node to enable the user to act on the **E-Signatures** task.

The internal users are able to act on the E-Sign task from the:

- ▶ E-Signatures node.

- ▶ Email sent out to them from Unifier (if this is configured in the User Preferences > Email Subscription' settings).

When sending out an E-Signature request, for internal users, the To field in 'Send for E-Signature' window enables you to type-ahead user or group. You can select one or more users or groups and send E-signature request.

External user

When a **Send for E-Signature** action is taken, and one or more documents are sent to non-Unifier users (**External users**), the entity that provides electronic signature technology (DocuSign or Adobe Sign) sends an email to each assignee (one email per document). The non-Unifier users can go to the Document Manager log, select a document, and click the **Sign** option from the gear menu to sign the document. This action launches the entity that provides electronic signature technology (DocuSign or Adobe Sign) and enables you to conduct a self-sign.

The external users are *unable* to act on the E-Sign task from the email sent out from Adobe Sign or DocuSign.

When sending out an E-Signature request, for external users, the question-mark icon in the External field of the Send for E-Signature window informs the external user to enter multiple email addresses separated by commas or semi-colons and click Send for E-Signature.

If the external user enters an invalid email address, then:

Unifier logs the signee's E-Signature status as Failed, in the E-Signature log. Unifier enables the user to hover over the status (Failed) and see the reason for failure, for example: Mailbox unavailable. Alternatively, the user can also click the gear menu Reason for Failure and see the reason, for example: Mailbox unavailable.

- ▶ If there are only external signees in an E-Sign request, and all of the email addresses of the external signees are invalid, then the status of the E-Sign request will be set as Failed in:
 - ▶ Document Manager log
 - ▶ Attachments tab for BP Upper form, or detail form
 - ▶ Attachments Review tab

If any of the recipients (external or internal) in the E-Sign request is a valid one, then the status of the E-Sign request is based on the status of the valid signees. The system ignores the failed signee.

Proxy user

A proxy user can see all of the E-Signature features (E-Signatures Node, E-Signature Status column in DM, Send for E-Signature/Self-sign actions, and so on) as they can be seen by the original user. If the proxy takes any of the E-Signature actions (Self-sign or Sign an E-Signature request from the E-Signatures node), then:

The grid in the E-Sign Log displays one more column at the very end (Proxy User). The name of the proxy user is captured in this column (similar to the 'Proxy User' column within the Audit log of a business process log). Note that this column shows up in the grid only if there has been a proxy action by at least one signee within an E-signature request.

The Signee column shows the original signee's name; however, the exclamation-mark icon (at the end of this column) will indicate whether the signature action has been taken by a proxy. Hovering at this icon displays: Signed by Proxy User: <Proxy User Name>

The Proxy User action options are available where E-Sign log can be seen (E-Signatures node, DM, BP attachments tab).

Note: The Proxy users can see the E-Signature count on the Company, Shell, and Project home landing pages.

Project landing page

Similar to the Company and Shell home landing pages, the project landing page shows the count of pending E-Signatures in the Items Requiring Your Attention section. The count can be seen below the Tasks count as: E-Signatures: <xx> Pending.

Note: The count is shown only if the E-Signatures are enabled for the project.

Internationalization

The user's language preferences is used when the E-Signature requests are sent out to external users by way of Adobe Sign or DocuSign. For example, if a user's preferred language is Chinese, then the E-Signature email request that is sent out to an external signee by way of Adobe Sign or DocuSign will be in Chinese. The value of the "E-Signature Status" field is translated, and when you export the structure and properties of a DM file, the "E-Signature Status" column displays the translated values for the status.

DocuSign

When an internal or external user opens a document for signing, the document displays the option to reassign the document, for signing, to someone else (Assign to Someone Else) by using the "Other Actions" drop-down menu. Follow the prompts and note that:

- ▶ The document E-Signature Status in the DM log, BP attachments, or review attachments window (depending on whether the document was sent for E-signature from DM or BP) continue to reflect as "In-Progress."
- ▶ The E-Signature Log tab, in the right pane of the DM log, or in the right pane of the BP "Attachments" tab, is updated with:
- ▶ The original signer's "E-Signature Status" as "Reassigned"
- ▶ The "Completion Date" for the original signee with the date when the task was reassigned.

In addition, one more row will be inserted in the E-Signature Log with the:

- ▶ New signer's Name
- ▶ E-Signature Status (as "Delivered").
- ▶ Initiated Date (as the date when the E-Signature task was reassigned to the new signer).
- ▶ Completion Date (as the Date when the new signer brings the E-Signature task to a terminal state: Completed, Declined, Reassigned, or Recalled).

When an E-Signature task is reassigned, DocuSign sends two emails to the new signer:

- ▶ The first email goes from the first assignee of the E-Signature task (who did the reassigning). After the new signer clicks "Review Document," DocuSign opens the document with features to electronically sign the document.
 - ▶ After the document signing by new signer is complete, the DM log (or the BP attachments tab) from where the document was sent for signature will be updated with the existing row for the new signer in the E-Signature log with appropriate "E-Signature Status" and "Completion Date."
- ▶ The second email is sent to the new signer from the original sender of the E-Signature task.
 - ▶ After the new signer clicks "Review Document," DocuSign opens the document with features to allow for the document to be signed electronically.
 - ▶ After the document signing by new signer is complete, the DM log (or the BP attachments tab) will be updated with row for the new signer in the E-Signature log with appropriate "E-Signature Status" and "Completion Date."

Adobe Sign

When an internal or external user opens a document for signing, Unifier displays the option to reassign the document (Delegate this document), for signing, to someone else by using the "Delegate" option. Follow the prompts and note that Adobe Sign will send an email to the new signer.

When a signer delegates an E-Signature task to another assignee:

- ▶ The "E-Signature Status" in the right pane of the DM log, or in the right pane of the BP "Attachments" tab for the original signer will be updated as "Reassigned."
- ▶ The "Completion Date" will be updated as the date when the signer did the delegation or reassignment.
- ▶ A new row will be included in the "E-Signature Log" with the name of the new signer.

When a new signer responds to the E-Signature request email, the signer can select to review and sign, or to delegate.

Reports or Custom Prints

When you create a User-define Report (UDR), a Custom Print, or a Custom Report at any location in Unifier, You can add the E-Signature Status, or the fields, from the E-Signature Log in the report.

E-Signature Log

To access the **E-Signatures** log, go to your project and click **E-Signatures** node in the left Navigator.

The **E-Signatures** log has the following tools, options and columns:

E-Signatures log toolbar

Field	Description
View	The function is similar to the View option available in several other logs. The options

	are: ▶ All ▶ Group By Status ▶ Create New View ▶ Manage Views
Edit View	The function is similar to the Edit View option available in several other logs. You can use this option to edit the current view (Active View).
Delete	Select one or more tasks and delete. You cannot delete incomplete tasks (tasks with Status set as In-Progress). If you delete an completed task, then E-signatures log (in Document Manager and within a BP record) displays the Status.
Print	The function is similar to the Print option available in several other logs. The options are: ▶ Print ▶ Export to CSV ▶ Export to Excel
Search	Click to open the Search window at the bottom of the page. You can search inside all of the columns available in the E-Signatures log.
Find on Page	The function is similar to the Find on Page option available in several other logs.

E-Signatures log columns

Column	Description
Name	The name of the document that has been sent for E-Signature. The column displays the file-type (extension) along with the name. Note: Since DocuSign converts all files to .pdf, the extension will always be .pdf in this column.
From	The name of the user who initiated the Send for E-Signature action (from the Document Manager or from within a BP

	record).
Status	The status of the E-Signature task: In-Progress: When assignee has not yet taken any action on the signature task. The default Status of any E-Signature task. Completed: When assignee opens the E-Signature task through DocuSign, and clicks Continue in the resulting window. The system populates the DocuSign fields, available on the left, (Signature, Initial, Date Signed, Name, First Name, Last Name, and so on). Assignee clicks Finish at the top to complete the signing. Declined: When assignee opens the E-Signature task and selects the option Decline to Sign. Recalled: The E-Signature task for all signers who have not yet completed the E-Signing process are recalled. If an E-Signature task has been created by way of Send for E-Signature action (from the Document Manager), sent to multiple signers, and at least one signer declined the task, or If an E-Signature task has been created by way of Send for E-Signature action (from within a BP record) and that BP record reaches a Terminal status. In such cases, when a user opens a task, the system displays an alert indicating that the Status is set to Recalled, and the Completion Date is set to the date when the task was recalled.
Subject	The subject of the Send for E-Signature message.
Document Location	If the document was sent for signature from the Document Manager, then this column displays the Document location in the Document Manager, for example: ... /Field Reports/Action Items. If the document was sent for signature from a BP record, then this column displays the BP record number.
Received Date	The date when the Send for E-Signature

	task was received by the assignee. The default sort for this column is Received Date with latest received task at the top.
Completion Date	The date when the E-Signature task reaches a Terminal state (Status = Completed, Declined, Recalled).

E-Signatures log right pane

When you open the **E-Signatures** log, the top row item is selected by default, and the right pane of the **E-Signatures** log displays the following tabs:

Tab	Description
Preview	Displays a preview of the document that has been sent for signature. If the E-Signature task is in either of following statuses, this pane displays a preview of the original document that was sent for E-signature: ▶ In-Progress ▶ Declined ▶ Recalled If the E-Signature task is in a Completed status, then this pane displays a preview of the signed document.

E-Sign log	Displays a list of all internal and external users to whom a given document (from the Document Manager or from within a BP record) was sent for signature through the Send for E-Signature. The toolbar options enable you to: Print: Print documents Download: To download the latest signed signed copy of the document. The columns are: Signer: The name of the user who must sign, or has signed, the document. If an internal user, then the cell contains the user's first and last names. If an external user, then the cell contains the user's email address. Sign Status: The e-signature status of the document for the signer. It can be: Delivered, Completed, Declined, or Recalled. Initiated Date: The date when the document was sent for e-signature. This can be the date that an action was initiated by an internal user using the Sign option from the gear menu. Completion Date: The date when the e-signature task has reached a Terminal state (Status = Completed, Declined, Reassigned, Recalled). If a signer (internal or external) declines an e-signature task, you can see the reason by clicking the signer's entry and opening the Reason for Decline block at the bottom of the tab.
Message	Displays the message sent by the sender, when sending the document for signature through the Send for E-Signature.

E-Signature Log (declining an E-Signature)

If a signee declines an E-signature request, then the E-Signature log captures the E-Signature status as Declined. When the E-Signature Status = Declined, then the tooltip (triggered by placing the pointer on the status), or the gear menu, displays the reason for decline.

When you select an E-Signature request from the **E-Signatures** node, you can see the **E-Signatures** log in the right pane (E-Sign Log). The log contains the:

- ▶ Message which was sent out at the time of sending the E-Signature request
- ▶ A log of all e-signature requests statuses.

When you hover over a row in the **E-Signatures** log, the gear menu appears and enables you to perform the following on a task:

- ▶ **Sign:** Enables you to open the document and sign or do other reviews.
- ▶ **Delete:** Enables you to delete a task. You cannot delete an incomplete task (In-Progress, Deferred, or FaxPending).

When you double-click a row in the **E-Signatures** log, the sent document opens in the entity that provides electronic signature technology (DocuSign or Adobe Sign). Follow the prompts and when done click **Finish** to close the application (DocuSign or Adobe Sign).

After you finish signing a document, the **E-Signatures** log gets updated and the status changes to: **Completed**. At this stage, Unifier updates the **E-Signatures** log of the module (Document Manager or BP record) where the document was sent from and changes the status to: **Completed**. This update process also applies to the **Completion Date**.