

Oracle
Primavera Unifier
General User Guide

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Oracle Primavera Unifier General User Guide

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Getting Started with General Operations

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

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

There are two modes of operation:

▶ **User mode** :

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

▶ **Admin mode** :

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

You can switch between modes using the mode icon

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

Permissions (Access Control)

The ability to utilize a specific function depends on the **Permissions Settings** (accessed in **Admin** mode). In **Admin** mode at the **Company Workspace**, you can use the **Access Control** functional node to access permission settings for:

- ▶ Administration (Admin) mode access
- ▶ User mode access

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

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

The Unifier user guides are:

- ▶ Unifier General User Guide
- ▶ Unifier Business Processes User Guide
- ▶ Unifier Managers User Guide

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

This guide explains how to work with Unifier and covers a range of topics, such as what to know the first time that you use the system, security guidelines, reports, and using the Unifier Mobile Application.

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About Consent Notices (Users)

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

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

Cookies Policy

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

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

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

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

Oracle Cloud Services Agreement

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

Oracle Privacy Policy

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

Oracle Data Processing Agreement

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

Product Accessibility Information

This topic includes guidelines and tips regarding accessible product usage.

Keyboard Shortcuts

The list of keyboard shortcuts for Oracle Primavera Unifier and Oracle Primavera Portal (access point for your Oracle Primavera applications), including page-specific and browser-specific keyboard shortcuts, can be accessed in the ***Navigating the System Using a Keyboard*** (on page 15) topic.

Common Symbols, Icons, and Tabs: What to Expect

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

Asterisks

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

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Navigating the System Using a Keyboard

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

Note: The keyboard shortcuts might change depending on the browser that you use.

Main Content Area

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

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

Grids

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

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

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

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

Editable Grid

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

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

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

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

Individual Web Elements

Hyperlink Fields

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

Pull-Down

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

Picker

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

5) Press Enter to select choice and close picker.

Multi Select Input fields

Option 1:

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

Option 2:

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

Date Picker fields

Option 1:

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

Option 2:

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

Number Fields

1. Tab into the cell.
2. Enter the value.
3. Tab out of the cell.

Text Fields

1. Tab into the cell.
2. Enter the string.
3. Tab out of the cell.

Using Shortcut Keys

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

Function Keys Supported in Unifier

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

Hot keys Supported in the Editable Grid of Unifier

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

Keyboard End User Information

The following table explains the keyboard shortcuts for specific UI elements such as lists and menus:

Target	Key	Action
List Item	Enter or Space	Selects list item.
	Up Arrow	Moves focus to the previous visible list item.
	Down Arrow	Moves focus to the next visible list item.
	Right Arrow (Left Arrow in RTL)	For horizontal navigation list and focus will be moved to next visible item.
	Left Arrow (Right Arrow in RTL)	For horizontal navigation list and focus will be moved to previous visible item.
	Home	Moves focus to the first visible list item.
	End	Moves focus to the last visible list item.
	F2	If focus is on a list item,

Target	Key	Action
		pressing F2 will make its contents accessible using Tab.
	Esc	When F2 mode is enabled, press Esc to exit F2 mode.
	Shift+Tab	Move focus to hierarchical menu option. This is only applicable for sliding navigation list and when hierarchical menu option is enabled.
Group Item	Right Arrow (Left Arrow in RTL)	If focus is on collapsed node, expands the sub list.
	Left Arrow (Right Arrow in RTL)	If focus is on expanded node, collapses the sub list.
List Item in sublist	Esc	Applicable only for sliding navigation list. If focus is in a sublist, it closes the sublist and moves focus to the parent list item.
Hierarchical Menu button	Enter	Open menu. Refer to the menu keyboard documentation. This target is visible only for sliding navigation list.
	Tab	Moves focus to current list item. This target is visible only for sliding navigation list.
	Shift + Tab	Moves focus to Previous Icon. This target is visible only for sliding navigation list.
Overflow Menu button	Enter or Space	Open menu. Refer to the menu touch documentation. This is applicable only for horizontal navigation list when overflow is set to pop-up.
Previous Icon or List Header	Enter	Collapses the sublist and slides to parent list. This

Target	Key	Action
		target is visible only for sliding navigation list.
	Tab	Moves focus to Hierarchical Menu option. This target is visible only for sliding navigation list.

Information for First Time Users

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

If you receive a message regarding the Base Currency for the company the first time that you sign in, click **OK** and contact your Company Administrator. The Base Currency is the default currency used by the company. Although it might be set by Oracle when the system is first provisioned, the Base Currency must be selected the first time that the Company Administrator signs in. No other users are allowed to sign in until the Company Administrator sets the Base Currency.

Configuring Your System for Unifier

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

Supported Browsers and Settings

You can use Unifier with the following supported browsers:

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

Notes:

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

Microsoft Edge

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

Mozilla Firefox

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

For plug-ins, follow these steps:

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

Google Chrome

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

Note: AutoVue viewing is not supported in Google Chrome.

Apple Safari

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

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

For plug-ins, follow these steps:

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

User Interface (UI) Content and Internationalization

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

Example

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

In contrast, the content of the material created by the Users (also known as Custom Strings) can be translated into different languages. For more information, see **Translating Custom Strings (Internationalization)** in the *Unifier General Administration Guide*.

Example

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

Notes:

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

For more information, see **Internationalization**.

User Name and Password

To sign in, you might start by signing in to Primavera Lobby first or you might sign directly in to Unifier. However, before you can sign in to Primavera Lobby or Unifier, you must have a user account, which will provide you with a Login Username and a Password that you can use to sign in to the system. Your Unifier Company Administrator(s) should be able to create your user account and provide you with your Login Username and Password.

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

Sign In for the First Time

To sign in to the system for the first time:

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

Notes:

- The Lobby lets you access your projects that are managed in both Unifier and Oracle Primavera Cloud. For details about the Lobby, refer to the **Construction and Engineering Lobby Help** (see Construction and Engineering Lobby Help - https://docs.oracle.com/cd/F23711_01/help/en/202246.htm) (https://docs.oracle.com/cd/F23711_01/help/en/202246.htm).
 - After you sign into the Lobby, you can view all the projects/shells that you are a member of.
-

The Password Recovery secret questions setup form is displayed.

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

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

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

To determine whether the company policy makes it mandatory for you to set up the password recovery secret questions:

- 1) In the upper-right corner, click the user control panel.
- 2) Click **Preferences**.
- 3) Click **Security**.

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

Note: The answers are masked.

Forgot Password (on-premises only)

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

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

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

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

To reset your password:

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

To add secret questions to use when resetting your password:

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

Sign In, Sign Out, and Session Timeout

To sign in, you might start by signing in to Primavera Lobby first or you might sign directly in to Unifier. The Lobby lets you access your projects that are managed in both Unifier and Oracle Primavera Cloud. After you sign into the Lobby, you can view all the projects/shells that you are a member of. For details about the Lobby, refer to the **Construction and Engineering Lobby Help** (see Construction and Engineering Lobby Help - https://docs.oracle.com/cd/F23711_01/help/en/202246.htm) (https://docs.oracle.com/cd/F23711_01/help/en/202246.htm).

To sign in:

- 1) Open your browser and enter the web address that your site administrator has provided for you.
The Sign In page appears based on the supported browser language. If the browser is not supported, the Sign In page appears in English.
- 2) Enter your user name.
- 3) Enter the password that was set for you during installation.
- 4) Click **Sign In** to open the application.

Notes:

- After signing in, the language will be based on the Language selected in **Preferences**. See **Preferences** (on page 60) for details.
 - If you receive a message regarding the Base Currency for the company the first time that you sign in, click **OK** and contact your Company Administrator. The Base Currency is the default currency used by the company. Although it might be set by Oracle when the system is first provisioned, the Base Currency must be selected the first time that the Company Administrator signs in. No other users are allowed to sign in until the Company Administrator sets the Base Currency.
-

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

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

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

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

Note: Save your work often.

To sign out:

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

Session Timeout

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

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

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

Signing In to Self-Service Portal

Portal Users

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

Self-Service Portal

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

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

Sign in to the Self-Service Portal

To sign into the Self-Service Portal Landing Page:

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

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

Self-Service Portal Navigation

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

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

To open or edit an existing record:

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

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

Self-Service Portal Home Page (Landing Page)

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

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

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

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

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

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

Notes:

- For export to Microsoft Excel, the system currently supports only Euro

(EUR) and United States Dollar (USD) currency symbols.

- If you export data from a business process (BP) record, sheet (such as an Activity Sheet), or log (such as Company Funding Sheet Log) to Excel, be aware that depending on how your negative values are formatted, you might need to configure your columns in Excel to match the correct data type (Number). Otherwise, the columns will not be treated as numeric and will not sum as expected. One supported format includes placing the negative sign between the currency symbol and the amount (for example, \$-1,000).

-
- ▶ **Search** (): To open the Search window and search the log based on pre-defined uDesigner search fields.
 - ▶ **Find Page** (): To conduct a search within the displayed page content.
 - ▶ **Help** (): To view help options.

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

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

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

- ▶ **Record Details**
- ▶ **Attachments**

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

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

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

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

Self-Service Portal: Preferences (User Preference)

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

- ▶ **General:** The Personal Information contains only the First Name and Last Name fields.
- ▶ **Security:** Some of the options are not available for cloud customers.
- ▶ **Email Subscription:** This option is not available in Self-Service Portal.
- ▶ **Region Format**
- ▶ **Proxy:** This option is not available in Self-Service Portal.
- ▶ **More**

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

Security Warnings

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

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

Preventing a Security Warning from Recurring

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

File Viewer Option

The following discusses a basic user preference setting that should be configured before using the system for the first time.

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

File Viewer Option (Select Default Viewer)

There are two methods of viewing files:

- ▶ **Native:** The Native viewer lets you view most file formats in the application in which you created or regularly view them. In other words, if you view a .docx file in Native, Microsoft Word will open and display the .docx file. If your Company Administrator enabled Office 365 integration, you can also view and update Microsoft Office documents in the Document Manager and BPs using Microsoft 365 (Office for the web). You can view and modify Excel (XLSX), PowerPoint (PPTX), and Word (DOCX) files; you can only view Comma Separated Values (CSV) files. Microsoft 365 integration for documents is supported with the following types of BPs:
 - ▶ Generic Line Item
 - ▶ Cost type with Line items with CBS code
 - ▶ Document Type
 - ▶ Simple
- ▶ **Unifier Viewer:** Unifier Viewer is the default option. It lets you view and mark up documents. The markups are saved as markups without changing the original file. Unifier Viewer supports the document file types listed in the table below. When you add documents through a business process (BP) or the Document Manager (DM), a brief delay might occur while the system converts the file so that it can be viewed and marked up using Unifier Viewer.

Supported File Types with Unifier Viewer

File Type	File Type	File Type	File Type	File Type	File Type	File Type
BMP	DOTX	JFIF	ODT	PPSX	TXT	XLT
CSV	DWF	JP2	PDF	PPT	VSD	XLTM
DGN	DWG	JPC	PNG	PPTM	VSDX	XLTX
DOC	DXF	JPEG	POT	PPTX	WMF	
DOCM	EMF	JPG	POTM	PUB	XLS	
DOCX	EML	MSG	POTX	RTF	XLSB	
DOT	GIF	ODP	PPS	SVG	XLSM	
DOTM	HTML	ODS	PPSM	TIF	XLSX	

Supported File Formats with Downloaded Unifier Wallet Zip File

The following file formats are supported if you download the Primavera Unifier Wallet zip file:

File Type	File Type	File Type
DOC	JFIF	TIF
DOCM	PDF	XLS
DOCX	PNG	XLSM
DOT	POT	XLSX
DOTM	PPT	XLT
DOTX	PPTM	
JPG	PPTX	
JPEG	PPS	

Supported File Formats with Webviewer Server Installation

The following file formats are supported if you install the WebViewer Server:

File Type	File Type	File Type	
BMP	HTML	PPSM	XLSB
CSV	JP2	PPSX	XLTM
DGN	JPC	PUB	XLTX
DWF	MSG	RTF	
DWG	ODP	SVG	
DXF	ODS	TXT	
EMF	ODT	VSD	
EML	POTM	VSDX	
GIF	POTX	WMF	

Unifier User Interface

The user interface has both static and dynamic elements.

- ▶ Header section
- ▶ Tabs section
- ▶ Left navigation section
- ▶ Right pane section

Header

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

- ▶ Unifier logo (Primavera Unifier): Displays the application name and environment.
- ▶ **Switch Applications** (

When a new announcement record is unread, a red bubble count-indicator icon () appears on top of the Announcements icon and indicates the number of unread announcements.

When you click the Announcements icon, a grid appears that displays the announcements, with unread ones highlighted in red.

- ▶ **Bookmarks** (

Download (opens by default): In the Download tab, you can see the following plug-in and applications. These plug-in and applications are available to download. A link to the installation instructions is available, where applicable.

AutoVue WebStart

Follow the links within each option to proceed.

Customers are requested to use REST services. The Web Service Description Language (WSDL) document can be provided by making a Service Request.

- ▶ **Company Help:** If your organization provides company-specific help, you can access this option. If the URL provided by your Company Administrator is invalid, an error message is displayed.
- ▶ **Contact Support:** To access a Support window that has two tabs, Contact and Download.

Contact (opens by default): In the Contact Information section of the Contact tab, you can see the name, phone, and contact instructions of someone at your company that you can contact when you need help. For assistance, try this person first.

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

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

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

- ▶ **About Unifier:** Click to access the Version number, Copyright information, Software agreement details for Unifier, Cookie Policy, and Privacy Policy.
- ▶ Name of the user: Displays the name of the person who has signed in. If you click the name, you will be able to access the following features:
 - ▶ **Get Unifier Mobile App:** Enables you to open a new window and proceed to download the Unifier Mobile Application. Follow the instructions on this window to get the app for both Android and iOS.
 - ▶ **Preferences:** Displays the Preferences window, which contains multiple tab, including General, Security, Email Subscription, Region Format, Proxy, and More. For details, see **Preferences** (on page 60).
 - ▶ **Change Password:** Enables you to open the **Change Password** window. For details, see **Change Password** (on page 77).

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

- ▶ **Proxy For:** Click to expand the menu and see the list of individuals who selected you as their proxy and sign in as that person's proxy. For details, see **Proxy For** (on page 78).
- ▶ **Last login: MM/DD/YYYY HH:mm AM/PM:** Displays the date and time when you signed in last.
- ▶ **Sign Out:** Enables you to sign out of the system. For details, see **Sign Out** (on page 78).

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

Unifier User Interface Location Bar

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

Notes:

- One page or tab must always be present.
- On touchscreen-enabled devices, the close button (x) is displayed for every page or tab in the location bar at the top of the application, instead of being displayed only for the active page or tab.

- ▶ **Analytics**  page or tab
- ▶ **Home**  workspace
- ▶ **Company Workspace** tab
- ▶ **Switch-to tab**  allowing you to switch to a different tab
- ▶ **New tab**  to add a new tab (projects/shells) to the location area

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

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

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

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

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

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

Left Navigator

The left Navigator (also known as the left Sidebar or left Navigation) lists all the nodes that are available for a company or project/shell.

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

Your company administrator can configure the **User Mode Navigator** to suit the company business needs, such as by creating additional nodes to store business process records, renaming nodes, and so on. To configure the navigator:

- 1) Go to the **Company Workspace** tab and switch to **Admin** mode.
- 2) In the left Navigator, select **Configuration**, and then select **User Mode Navigator**.

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

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

Screen Adjustments

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

- ▶ **Collapse Sidebar**
- ▶ **Expand Navigation**
- ▶ **Collapse Navigation**

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

Right Pane

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

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

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

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

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

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

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

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

In This Section

Analytics Page	45
Home Workspace	45
Company Workspace.....	58
Shell or Project	58
Preferences	60
Change Password	77
Proxy For	78
Sign Out	78
Bookmarks.....	78
Master Log-Business Processes.....	79

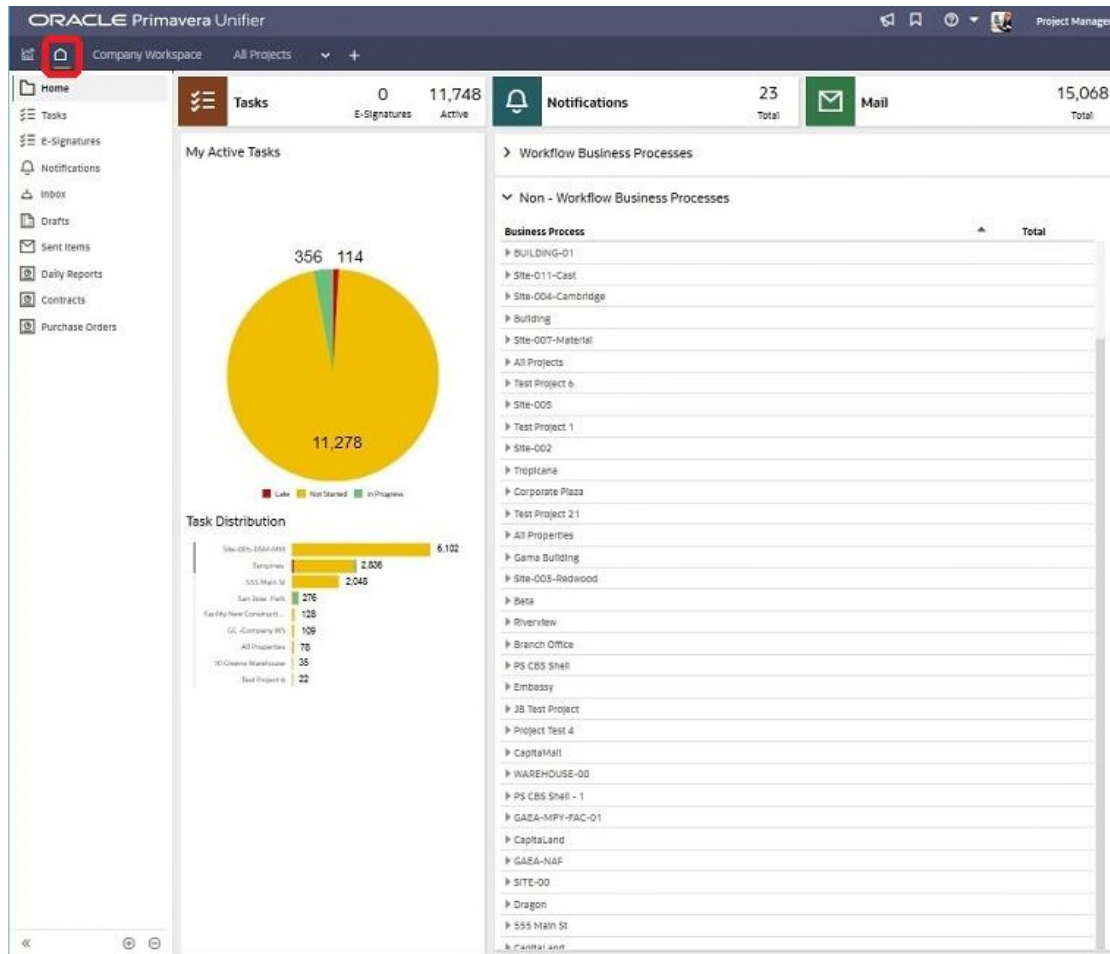
Analytics Page

The **Analytics**  page, which is available to users who have permission to access or view the tab, displays analytic information to assist the user to make faster and more informed business decisions by allowing the user to access dashboards that have been set up in Oracle Analytics Server.

Home Workspace

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

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



The **Home** workspace contains the following elements:

- ▶ Left navigation, which contains the left Navigator that has several nodes (explained in the table below).
- ▶ Log which visually represents information about the user's:
 - ▶ Number of tasks (**Tasks**)
 - ▶ **Notifications**
 - ▶ **Mail**
 - ▶ Active Tasks (**My Active Tasks**)
 - ▶ **Task Distribution**
 - ▶ **Workflow Business Processes**
 - ▶ **Non-Workflow Business Processes**

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

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

the same.

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

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

Tasks

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

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

Toolbar Options	Description
View	Your options are: ▶ My Daily Reports ▶ Received in last 7 days ▶ Received in last 30 days ▶ Group by Business Process ▶ Group by Origin ▶ Hidden Tasks ▶ All Tasks ----- ▶ Create New View (See information at the end of this topic) ▶ Manage Views
Edit View 	Enables you to open the Edit View window and change the View Name. You can also use the following tabs to change the values of the: Columns ▶ Available Columns ▶ Selected Columns ▶ Lock after selected Column ▶ Number of Records per Page Filters Based on: ▶ Record ▶ Advanced Group By To use the Add Column option, add columns, and arrange the items. Sort By To use the Add Column option, add columns, and arrange the items. After you are finished, you can click: ▶ Cancel to cancel your changes. ▶ Apply to apply your changes. ▶ Save to save your changes. ▶ Save As to save your changes with a different name.
Refresh 	Click this option to update the list of items in your Tasks log.

Toolbar Options	Description
Print 	To print your tasks (Print) or export your tasks to a CSV or Excel file: ▶ Export to CSV ▶ Export to Excel
Search 	To open the Search window (bottom of the log) and search for a particular item.
Find on Page 	To find a task based on the column headings. When you click this option, the system inserts a row that lets you enter filter parameters.

The **Tasks** log contains multiple columns, such as Project Number, Origin, Business Process, and so on.

Create New View

- 1) To create a new view for your log, click **View** drop-down and click **Create New View** to open the **New View** window. By default, the **Columns** tab is selected.
- 2) From the **Available Columns** box, select the columns that you need and click the **Move** icon (the single arrow icon pointing to the right) to move your selected column to the **Selected Columns** box. The **Selected Columns** box contains the columns that are seen in the log view. The last column in the **Selected Columns** box is not available for locking.
- 3) In case you want all the available columns to be seen in the log view, click one column to select it (in the **Available Columns** box), click the **Move All** icon (the double-arrow icon pointing to the right) to move all columns to the **Selected Columns** box.
- 4) To move multiple available columns at a time, click one column to select it (in the **Available Columns** box), and then hold down the **Ctrl** key and proceed to select each desired column from the **Available Columns** box. Once finished, click the **Move** icon (the single arrow icon pointing to the right) to move all the highlighted columns to the **Selected Columns** box.

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

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

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

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

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

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

E-signatures

When a Send for E-Signature action is taken, and one or more documents are sent to users (internal user, external user, or proxy user), an entry is made in the **E-Signatures** functional node to enable the user to act on the E-Signatures task. For more information, see **Working with E-Signatures (English/User_Guides/user_general/10292877.htm)**. The **E-signatures** log has the following toolbar options which enable you to work with each E-signature item:

Toolbar Options	Description
View	To set the items in the log by selecting one of the following options: ▶ All < default ▶ Group by Status ▶ Group by Envelope Code ▶ Create New View ▶ Manage Views
Edit View 	To select which columns to display or hide, apply filters, group and sort by available fields, and to save custom views.
Delete	To delete an item in the log.
Refresh 	To update the information displayed on the screen.
Print 	To print the information displayed on the screen. Your other options are: ▶ Export To CSV ▶ Export To Excel
Search 	To search for related items.
Find on Page 	To filter results displayed on the screen. When you click this option, the system inserts a row that lets you enter filter parameters.

The E-Signatures log contains multiple columns, such as Name, Form, E-Signature Status, Envelope Code, and so on, which provide details about each E-signature item.

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

Notifications

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

Toolbar Options	Description
Actions	To select one of the following actions for your notification: Print ▶ HTML ▶ PDF ▶ Custom Delete
View	To select one of the following options: ▶ All Notifications < Default ▶ Received in last 7 days ▶ Received in last 30 days ▶ Group by Business Process ▶ Group by Origin ▶ All Notifications ▶ My very own view ▶ Create New View ▶ Manage Views
Edit View 	Enables you to select which columns to be displayed or remain hidden, apply filters, group and sort by available fields, and to save custom views.
Delete	To delete an item in the log.
Refresh 	To update the information displayed on the screen.
Print 	To print the information displayed on the screen. Your other options are: ▶ Export To CSV ▶ Export To Excel
Search 	To search for related items.
Find on Page 	To filter results displayed on the screen. When you click this option, the system inserts a row that lets you enter filter parameters.

The **Notifications** log contains multiple columns, such as Attachments, Business Process, From, and so on, which enable you to work with and learn more about each notification.

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

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

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

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

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

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

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

For each item in the **Attachments** tab log, the *gear menu* () lets you conduct the following actions on the attached file:

- ▶ Open
- ▶ Open in AutoVue
- ▶ Open in Office for the web
- ▶ Download

Inbox

The **Inbox** is:

- ▶ 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.
- ▶ The repository that collects external emails related to the shell. These emails can come from shell users or from external users who do not use Unifier. From the Mailbox, users can forward the emails to appropriate members, flag them for review, and reply to them. In addition, these external emails can be linked to business process records.
- ▶ A *cross-shell* listing of your **Inbox** can also be accessed in the **Mailbox** grouping node of your *shell*. For more information, see **Accessing Mailbox Messages Across Shells (Home Workspace)**.

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

Replies from external users can be tracked and monitored from within your **Project Mailbox**. For more information, see **Working with Mailbox (Projects)**.

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

To view all your email messages (Mailbox) across shells:

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

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

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

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

Toolbar Option	Description
Actions	This option enables you to take the following actions: ▶ Flag: To flag one or more emails. All the following available sub-options are displayed. ▶ Call ▶ Do not Forward ▶ Follow up ▶ For Your Information ▶ Forward ▶ No Response Necessary ▶ Read ▶ Reply ▶ Reply to All ▶ Review ▶ Clear Flag: To clear the flags. This option is context-sensitive. ▶ Print: To print the log. ▶ Delete: Delete one or more emails.
View	To customize the view according to the following criteria: ▶ Received in last 7 days ▶ Received in last 30 days

Toolbar Option	Description
	▶ Group by Business Process ▶ Group by Origin ▶ All Items ▶ Create New View ▶ Manage Views This submenu also contains 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.
Expand All Groups OR Collapse All Groups	When you expand a group from the log and select an item: ▶ The <i>gear menu</i> lets you Open, Flag, Clear Flag, Print, or Delete the item. ▶ The Inbox log splits and the right of the page becomes the reading pane for the message.

Drafts

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

The following columns and icons are displayed in the log:

- ▶ Attachment icon (displays if the upper form of the drafts has any attachments)
- ▶ Business Process (Name of the BP)
- ▶ Record Number (Record number of the Draft)
- ▶ Title (Title of the draft)
- ▶ Origin (The source name where the draft was created)
- ▶ Last Saved (The date that the draft was last saved)

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

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

Toolbar Option	Description
Actions	The following option is displayed: Delete: to delete drafts.
View	To customize the view according to the following criteria: ▶ Saved in last 7 days ▶ Saved in last 30 days ▶ Group by Business Process ▶ Group by Origin ▶ All Drafts ▶ Create New View ▶ Manage Views This submenu will also contain all views that you have created.
Edit View()	To edit the view of the log. You can edit the view of the following elements on your log: ▶ Columns ▶ Filters ▶ Group By ▶ Sort By If you modify the view and do not save the changes, the system keeps the existing name and adds the word "Modify" to the existing name. You can click Clear to clear your selections.
Refresh ()	To refresh the log screen.
Print ()	To print the contents of the log, export to CSV, or export to Microsoft Excel. Notes: ▶ For export to Microsoft Excel, the system currently supports only Euro (EUR) and United States Dollar (USD) currency symbols. ▶ If you export data from a business process (BP) record, sheet (such as an Activity Sheet), or log (such as Company Funding Sheet Log) to Excel, be aware that depending on

Toolbar Option	Description
	how your negative values are formatted, you might need to configure your columns in Excel to match the correct data type (Number). Otherwise, the columns will not be treated as numeric and will not sum as expected. One supported format includes placing the negative sign between the currency symbol and the amount (for example, \$-1,000).
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.

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

▶ **Record Details** tab

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

▶ **Workflow Progress** tab

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

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

▶ **Attachments** tab

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

Sent Items

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

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

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

Each item in the log, when selected, has a *gear menu* (), which lets you Open, Flag, Clear Flag, Print, or Delete the item.

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

Company Workspace

The **Company Workspace** tab has two modes:

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

For more information about the **Company Workspace** tab, see **Company Workspace Landing Page (User)** (on page 81) and see **Company Workspace Landing Page (Admin)** in the *Unifier General Administration Guide*.

Shell or Project

The **Shell** page, or the **Project** page, has two modes:

- ▶ **User** mode
- ▶ **Admin** mode

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

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

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

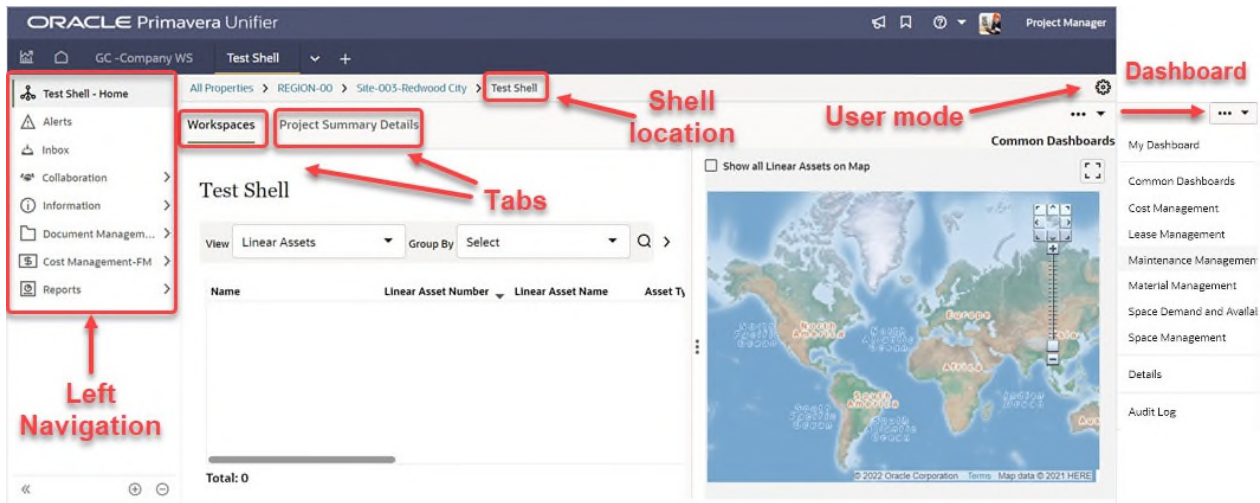
- ▶ State
- ▶ City
- ▶ Property

► Building

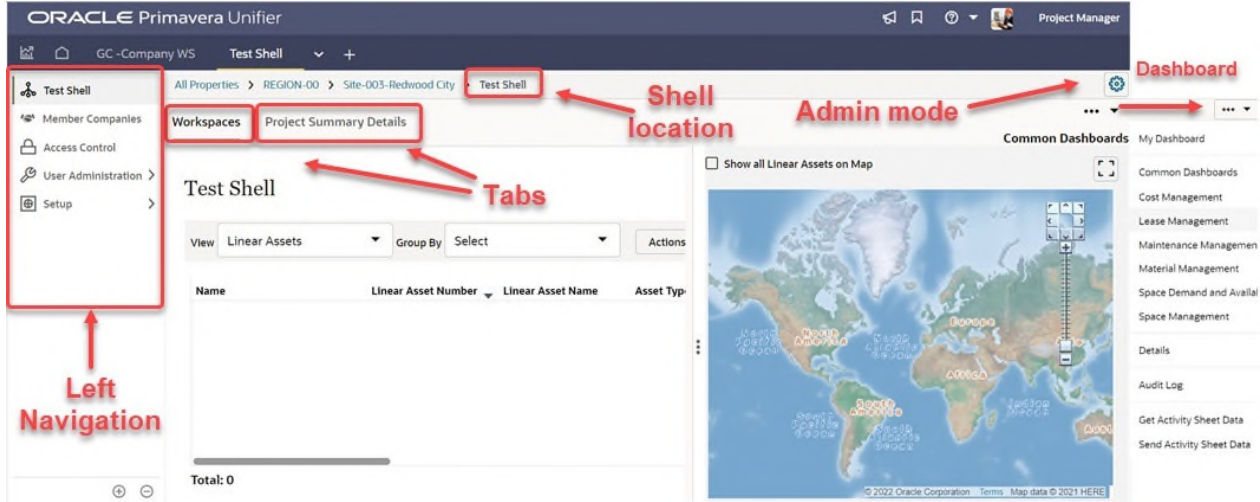
Shell Dashboard

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

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



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



The following are for a shell-project:

The top screenshot displays the Oracle Primavera Unifier interface in 'User mode'. The left sidebar shows the 'Cost Manager' menu item highlighted. The main area shows the 'Cash Flow' section with a list of tasks and a 'Preview' graph. A red arrow points to the 'User mode' label in the top right corner.

The bottom screenshot displays the Oracle Primavera Unifier interface in 'Admin mode'. The left sidebar shows the 'San Jose Recreation Park' project selected. The main area shows the 'Tasks' summary card with 329 active tasks. A red arrow points to the 'Admin mode' label in the top right corner.

Preferences

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

- 1) In the upper-right corner of your window, click your user name to open a contextual menu.
The menu offers a limited set of choices that are available in the current state, such as Get Unifier Mobile App, Preferences, and so on.
- 2) Select **Preferences**.
- 3) Use the tabs described in the following topics as needed.

General Tab

Use the **General** tab of the **Preferences** window to view your company contact information as it is listed in the company directory. This information includes your Name, Title, Email, Work Phone number, Mobile Phone number, Pager number, Fax number, and Address.

Notes:

- The Company Administrator manages user profiles, including the contact information. Contact your Company Administrator if you want to update your information.
- If the **Hide personal information on user profiles** option is selected (by the administrator) in the **Security** tab of the **Company Settings**, you cannot view the basic information, which includes field values such as email address, phone number, and so on. This applies to the basic information that is available as a part of a user profile.

To add a photo to your profile, click **Upload Profile Photo** on the left. The Image picker supports images of type jpg, jpeg, png, and tiff.

Security Tab

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

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

Notes:

- You cannot recover/reset your password if you do not set up password recovery secret questions and corresponding answers.
- For better security, change your password at regular intervals. Your Company Administrator may require you to change it at set times.
- When you change your password, you will automatically be logged out. Log in again with your new password.

You can change your password in two ways:

- ▶ Using the **Security** tab of the **Preferences** window (for first-time users).
- ▶ Using the **Change Password** option (for returning users). See **Change Password** (on page 77) for more information.

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

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

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

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

You can recover your password from the Sign In Page. To do so:

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

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

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

Password/Login Policy

- ▶ Minimum overall characters: Minimum number of characters that a password must contain; default is one (1).
- ▶ Maximum overall characters: Maximum number of characters that a password must contain.
- ▶ Minimum numeric characters: Password must contain a minimum amount of numbers.
- ▶ Minimum alphabetic characters: Password must contain a minimum amount of letters.
- ▶ Minimum special characters: Special characters are [{~!@#\$%&*()-_+=+;:","<.>/?}].
- ▶ Password cannot be same as Username: Users cannot use their user name as a password.
- ▶ Password cannot be the same as the user's First or Last Name: Users cannot use their first or last name as a password.

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

Email Subscription Tab

The **Email Subscription** tab lets you set up email subscription details. The tab contains the following blocks and fields:

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

The following topic provides details.

Selecting Email Subscription Options

The Email Subscription tab lets each user to control the number, type, and frequency of Unifier-related email notifications received. Users can subscribe to, or opt-out of, receiving email notifications for events.

Send notifications in single daily digest

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

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

Before you begin selecting email subscription options

Permission

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

Note: If you do not have view permission, your email notifications settings do not override the original permissions (set by your Company)

Administrator), and you only get email notifications for modules or events that you have permission to view.

Document Manager notifications

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

External email accounts

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

To receive email notification for a module or event:

- 1) Go to the **More** tab in the **Preferences** window.
- 2) Select your choices from the scrolling window. For more information, see the following tables.

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

To subscribe to or opt out of email notifications:

- 1) Go to the **Email Subscription** tab in the **Preferences** window.
- 2) Select the modules and events for which you want to receive email notifications. If you do not select a module or event, you do not receive email notifications related to the unselected module or event. For more information, see the following tables.

The events apply to the following modules:

- ▶ Workflow business processes
 - ▶ Non-workflow business processes
 - ▶ Document Manager - Project/Shell
 - ▶ Portfolio Manager
 - ▶ Document Manager - Company
 - ▶ Mailbox
 - ▶ User Defined Reports
 - ▶ Alerts
 - ▶ Gates
 - ▶ Project/Shell
 - ▶ E-Signatures
- 3) To opt out of receiving email notifications regarding specific events, clear the check box for the notification.
 - 4) To receive email notifications in one email summary per day, select the **Send notification in single daily digest** check box. The summary email will be sent if one or more events trigger an email notification.
 - 5) When finished, click **Apply** and **OK**.

Notes:

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

Modules and Events Options

This section describes the events within each module.

Workflow Business Processes

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

For	When
<i>Personal tasks</i>	You are part of the assignees list when a BP is sent (this becomes a task for you).
<i>Decline tasks</i>	A task is declined by one or more of the assignees that you have added to a BP that you sent.
<i>Overdue personal tasks</i>	An assigned task is past the due date. Note: A notice is only sent once; you will not receive regular reminders of overdue tasks.
<i>Messages</i>	Someone cc's you on a BP.
<i>Record Workflow Complete</i>	The record Workflow is complete and the Workflow end step has been reached; this is applicable on any Workflow BP where user is selected as part of the "Notify users on workflow completion" setup under the Setting tab of BP Setup .
<i>Record Modification</i>	A certain step occurs in a workflow (if your Administrator has enabled workflow actions for the workflow step) that needs action. Actions are shown as hyperlinks in the email.

Non-Workflow Business Processes

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

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

Portfolio Manager

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

Document Manager - Project/Shell and Document Manager - Company

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

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

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

Mailbox

For	When
<i>Personal Mail</i>	Users receive an email notification when new mail is received.

User Defined Reports (UDRs)

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

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

Alerts

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

For	When
<i>Each alert</i>	Users can receive notification when an alert is generated.

Gates

For	When
<i>Change Phase Notification</i>	User receives notification when a phase is changed.

For	When
<i>Auto-email PDF Gates run</i>	User receives a PDF copy of an automated gates run.

Project/Shell

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

E-Signatures

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

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

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

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

Region Format Tab

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

- ▶ Language, date, and time format
 - ▶ Preferred Region
 - ▶ Language

- ▶ Time Zone
- ▶ Date Format
- ▶ Number and Currency formats
 - ▶ Decimal
 - ▶ Digit Grouping Symbol
 - ▶ Digit Grouping
 - ▶ Show Currency Symbol
 - ▶ Positive Currency Format
 - ▶ Negative Currency Format
 - ▶ Negative Number Format

This tab also provides a Currency Example.

Changing Time Zone and Date Format

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

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

Example

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

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

To set the time zone:

- 1) Go to the **Region Format** tab in the **Preferences** window.
- 2) From the **Time Zone** drop-down list, select a time zone based on your locale.
- 3) When finished, click **Apply** and then **OK**.

The **Date Format** determines how date fields appear.

To set the date format:

- 1) Go to the **Region Format** tab in the **Preferences** window.
- 2) From the **Date Format** drop-down list, select a date format.
- 3) When finished, click **Apply** and then **OK**.

The system supports the following *additional* date formats:

Notes:

- The time format for all dates is: HH:mm. The Date Format options is displayed without AM to support the 24-hour format. For example, in the Date Format drop-down, instead of MM/DD/YYYY HH:mm AM, MM/DD/YYYY HH:mm is displayed to enable you to select the 24-hour time format. The uppercase MM in the date format denotes

month and lowercase mm denotes minutes.

- The system provides you the option to select 24-hour date time format in all modules, after this is set in the user preferences (**Preferences**). This is supported for all Standard, Portal, Partner users, and bidders.

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

Changing Number and Currency Formats

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

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

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

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

- ▶ Set **Negative Currency Format** from a list.
- ▶ Set **Negative Number Format** from a list.

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

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

- ▶ Currency
- ▶ Decimal Number
- ▶ Integer Number

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

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

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

Changing Language

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

To set the language:

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

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

The following languages are supported:

- ▶ Arabic
- ▶ Chinese (Simplified)
- ▶ Chinese (Traditional)
- ▶ Dutch
- ▶ English
- ▶ French
- ▶ German
- ▶ Italian

- ▶ Japanese
- ▶ Korean
- ▶ Portuguese (Brazil)
- ▶ Russian
- ▶ Spanish

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

Numeric Format Based on Language Selection

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

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

Language	Region Format	Decimal Symbol	Digit Grouping Symbol	Digit Grouping	Positive Currency Format	Negative Currency Format	Negative Number Format
Simplified Chinese	Chinese (Simplified, PRC)	. (period)	, (comma)	123,456,789	#123	#-123	-123
Traditional Chinese	Chinese (Traditional, Taiwan)	. (period)	, (comma)	123,456,789	#123	-#123	-123
Dutch	Dutch (Netherlands)	, (comma)	. (period)	123,456,789	# 123	# -123	-123
English	English (United States)	. (period)	, (comma)	123,456,789	#123	(#123)	-123
French	French (France)	, (comma)	Space represented by blank in the product	123,456,789	123 #	-123 #	-123
German	German (German)	, (comma)	. (period)	123,456,789	123 #	-123 #	-123

Language	Region Format	Decimal Symbol	Digit Grouping Symbol	Digit Grouping	Positive Currency Format	Negative Currency Format	Negative Number Format
	y)						
Italian	Italian (Italy)	' (comma)	. (period)	123,456,789	# 123	-# 123	-123
Japanese	Japanese (Japan)	. (period)	' (comma)	123,456,789	#123	-#123	-123
Korean	Korean (Korea)	. (period)	' (comma)	123,456,789	#123	-#123	-123
Portuguese	Portuguese (Brazil)	' (comma)	. (period)	123,456,789	# 123	-# 123	-123
Russian	Russian (Russia)	' (comma)	Space represented by blank in the product	123,456,789	123#	-123#	-123
Spanish	Spanish (Spain)	' (comma)	. (period)	123,456,789	123 #	-123 #	-123

Proxy Tab

Use the **Proxy** tab to:

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

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

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

You can select/designate more than one proxy user.

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

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

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

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

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

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

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

Note: If the proxy user must receive task notifications immediately, ask the proxy user to ensure that the Send notifications in a single daily digest check box is not selected. See **Selecting Email Subscription Options** (on page 63) on the **Preferences** window, **More** tab.

Do not allow Proxies

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

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

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

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

- ▶ **My Proxy** tab

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

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

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

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

- ▶ **I am Proxy** tab

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

- ▶ **Proxy Login History** tab

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

Choosing a Proxy User

Add (plus "+" icon)

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

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

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

Settings

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

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

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

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

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

Remove

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

Proxy Login History

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

- ▶ Name
- ▶ Company
- ▶ Login Date
- ▶ Logout Date

The last login information appears on top.

Users I can act as their Proxy

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

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

More Tab

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

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

Choosing a Viewer Option

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

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

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

To select a File Viewer option:

- 1) Go to the **More** tab in the **Preferences** window.
- 2) From the **Default Viewer** drop-down list, select one of the following options:
 - ▶ **Native:** Select this option to open documents in their native software applications. To use this option to view files, you must have the applicable native software application installed on your computer or your Company Administrator must have enabled Office 365 integration for use with Microsoft 365 (Office for the web) applications.

Note: The native software application and Microsoft 365 do not display the document graphical markups, but Unifier displays the document graphical markups automatically, using the Unifier Viewer.

- ▶ **Unifier Viewer:** Select this option to open documents in the system-provided Viewer. For more information on working with documents, see **Creating and Managing Documents** in the *Unifier Managers User Guide*.

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

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

Setting Viewer Exceptions

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

Example

If you selected **Unifier Viewer** as the default viewer and want **Native** to show a particular extension and not the **Unifier Viewer**, enter the extension in the **Always use Native** field.

If you selected **Native** as the default viewer and want **Unifier Viewer** to show a particular extension and not your Native software, enter the extension in the **Always use Unifier** field.

Notes:

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

Change Password

Changing Your Password as an On-Premises Customer

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

- ▶ Change your password.
- ▶ View password policy.

Note: When you change your password, you will automatically be logged out. Log in again with your new password.

Changing Your Password as a Cloud Customer

To change a password in your identity domain:

- 1) In the Primavera Portal, click **Identity Cloud Service**.
- 2) Log in to the identity domain with your user name and password.
- 3) Click **Change My Password**.

- 4) Provide input for the required fields and click **Submit** when finished. Ensure that the new password complies with the password policy.

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

Proxy For

To log in as someone else's proxy user:

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

To log out as a proxy user:

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

Sign Out

In the upper-right corner of your window, click your user name to open a contextual menu. Click **Sign Out**. For additional details, see ***Sign In, Sign Out, and Session Timeout*** (on page 31).

Bookmarks

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

Note: The system does not validate bookmark names, so ensure that you do not add duplicate or confusing bookmark names.

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

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

To add bookmarks:

- 1) Go to the tab/node that you want to bookmark.
- 2) In the upper-right corner, click **Bookmark**  to open the **Bookmarks** window.
- 3) Click **Bookmark this Page**.

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

- ▶ **Remove**
- ▶ **Rename**

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

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

To use bookmarks, in the upper-right corner, click **Bookmark**  to open the **Bookmarks** window.

Master Log-Business Processes

Note: The name of this node can be customized.

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

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

Company Workspace Landing Page (User)

When you sign in, the system is in **User** mode, by default. You can switch between modes using the mode icon (**User** mode  and **Admin** mode .

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

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

- 1) Go to the **Company Workspace** tab and switch to **User** mode.
- 2) In the left Navigator, select your company name.
The system displays the company landing page.

The company landing page has the following tabs:

- ▶ **General**
- ▶ **Summary**

If the administrator does not enable the **Hide tabs in Company Dashboard** option, you can add additional tabs to the company landing page.

To add a new tab:

- 1) In the upper-right corner, below the **User** mode icon, click **Edit Dashboard**  to open the **Company Dashboard** window.
This window lists the existing tabs and enables you to add, modify (edit), or delete tabs.
- 2) From the toolbar, click **+ Create Tab**.
- 3) In the New Tab dialog box, enter a name in the **Tab Name** field, and click **Save**.

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

You can add multiple blocks (custom or standard) to each tab of the company landing page.

To add new blocks to a tab:

- 1) Select the tab.
- 2) Click **+ Add Block** on the right side of the screen, and select either **Custom** or **Standard**.
You can add both custom and standard blocks to a tab.
- 3) In the **Source Details** and **Block Details** sections, enter the applicable values.
If you are adding a standard block, the **Data Type** field lets you include workspace type information (such as Active Workspaces, On-Hold Workspaces, and so on) on the company landing page.
- 4) Click **Save**.
The new block is added to the right pane.

You can also update or remove a tab using the **Edit Tab**  and **Delete Tab**  icons.

You can:

- ▶ Update a tab name by using **Edit Tab** .

- ▶ Remove a tab by using **Delete Tab** . You cannot delete the **General** tab or **Summary** tab because they are system-generated tabs.
- ▶ Reorder the tabs that are displayed on the **Company Workspace** by using drag-and-drop .
- ▶ Select which tabs to display on the **Company Dashboard** window by selecting or clearing the corresponding check box. You cannot deselect the **General** tab.
- ▶ Print a tab  or maximize a tab .

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

- ▶ The left section displays the following information:
 - ▶ Company name and image (if it exists in the **Company Information** page).
 - ▶ **Description**
 - ▶ **Administrator**
 - ▶ **Homepage url**
 - ▶ **Help url**
 - ▶ **Locations**
Other locations, if available, appear as grouping nodes in expanded mode below the first address, and the map picker displays the pin markers for all other locations.
- ▶ The right section displays the following information in multiple blocks:
 - ▶ **Tasks**
 - ▶ **Notifications**
 - ▶ Company Workspace records: **Workflow Business Processes**
The Workflow BPs are all the workflow records for the user who has signed in. If the user who has signed in does not have access to any of the Workflow BPs at the Company Workspace level, the panes display a pertinent message. You can click the BP name to navigate to the respective BP log.
 - ▶ Company Workspace records: **Non-Workflow Business Processes**
The Non-Workflow BPs are all the non-workflow records for the user who has signed in. If the user who has signed in does not have access to any of the Non-Workflow BPs at the Company Workspace level, the panes display a pertinent message. You can click the BP name to navigate to the respective BP log.

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

Shell Landing Page (User) - Details

To access your shell landing page (User):

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select the project/shell name (**Home** icon).
- 3) In the upper-right corner, click **My Dashboard** and select **Details** to open the **Details** form.

Depending on your permissions, you can modify any of the shell properties any time during the shell duration, except for the shell currency. (After a shell is set up, the shell currency is locked.) For example, if you want to assign newly defined global views to the project/shell so that they are available to all users, go to the **System Information** section on the **General** tab, click **Select**  next to the **Shell Templates** field, select the applicable template, and click **Select**.

For more information about projects/shells, see ***Working with Shells and Projects***.

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

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

Tab	Description
Images	This tab contains the following toolbars: Image (the plus "+" symbol) drop-down menu: ▶ Browse: To upload images directly from the local computer. You can select and add multiple images. If you select multiple images, the images will be displayed in the shell dashboard, on the image block, as rolling images. ▶ Document Manager: To see the image files and folders that are available in a shell Document Manager. You must have the "View" permission to see the images and folders. Use this option to upload images from the local Document Manager (DM) of the particular project. If an image is revised in DM, the revised image is displayed in the shell dashboard, on the image block. You will be able to view images, from DM, in the Dashboard in Admin as well as User modes. In the dashboards, if there are multiple images, the system displays all the images as rolling images. When a shell has multiple images, the system uses the first image from the list to print the shell image through custom prints and reports. Help (?): To display information about this tab. The tab also contains a log that lists the names of the images that you have downloaded. You can use drag-and-drop to reorder the images on the log. Use the trash-can icon to delete an image.

Tab	Description
Options	Enables you to see, add, and set options about the shell such as: ▶ Phase ▶ Time Zone for Background Jobs: This time zone will be used to calculate the time for running the recurring jobs, specific to this workspace. If left blank, the time zone that was set in the Background Jobs (at Company-level) will be used to run the jobs. ▶ Financial Period ▶ Email Address ▶ Send Notification To ▶ Document Manager Attribute Form ▶ Document Manager Attribute Form Used ▶ E-Signature Type
Links	Enables you to add new links and see the existing links in the shell under the following blocks on the window: ▶ New Links ▶ All Links
Calendar	Enables you to select one of the following calendar types: ▶ Standard Calendar ▶ Custom Calendar (you can copy an existing custom calendar) Select Working and Non Working days by choosing a day and selecting "Working" or "Non Working" below. If you would like to select a specific day of the week to adjust the working status, click the day of the week and select "Working" or "Non Working" below.

Tab	Description
Custom Print Template	Enables you to Add Selective Custom Print Templates for shell-specific business processes. After you select the Add Selective Custom Print Templates check box, you can click Add Templates to choose which business process to apply templates to by moving them from the Available Items list to the Selected Items list.
View Forms	If the project administrator set up View Forms in the shell, this tab lists the View and the users and groups with associated permissions.
Gateway Integration	This tab enables you to link multiple P6 Projects with the following information: ▶ Project ID ▶ Project Name ▶ Schedule Type
Primavera Cloud Integration	This tab lets you add a single project to a single Oracle Primavera Cloud project or a single project (in multiple shells) to multiple Oracle Primavera Cloud projects with the following information (for more information, refer to the <i>Unifier General Administration Guide</i>): ▶ Project ID ▶ Project Name (optional) ▶ Primavera Cloud Workspace ID ▶ Integration Type (completed by the system based on the option selected, Primavera Cloud Cash Flow or Primavera Cloud Schedule) You can also remove a project if it has not been synchronized between Unifier and Oracle Primavera Cloud.

Opening records from drill-down Tables and Grid

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

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

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

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

Working with Shells and Projects

Shells represent your project collaboration workspace, for example:

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

With shells, you can show project relationships and hierarchies to represent a real-world physical or organizational structure more accurately. In the following example, indentation is used to represent levels in a hierarchy. In this example, a Building shell can be a sub-shell within a Property or a Region.

- ▶ 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 hierarchies that let you 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.

A Unifier project is a collaboration space that lets project users 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.

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.

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

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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Using Shells

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 another status such as On-Hold, View-Only, or 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.

You can navigate between the current shell and sub-shells through the use of:

- ▶ Visible tabs in the Location bar.
- ▶ The list displayed when you click **Switch to tab** (the down arrow icon) or **New tab** (the plug sign) in the Location bar.

Note: You can search for a shell by using the **Search by Name or**

Number option at the top of the **New tab** page.

- ▶ Breadcrumbs shown for the current shell at the top of its tab.
- ▶ Using the list on the Workspaces tab and the location markers (pins) on the map.

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

Depending on the shell type, the shell is either a single-instance shell or a multiple-instance shell. Single- and multiple-instance shells all appear as tabs, similar to the Home tab.

- ▶ **Single instance:** This type of shell is an anchor shell and *cannot* be replicated. Use this shell at the root of a hierarchy. 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 workspaces can have the same business processes and managers, but they may have different users. The Shell Manager lets you import and manage shells.

To access the hierarchy, in the **Location** bar, click **+** (New tab) and select a shell, which appears as a tab. On the **Workspaces** tab, you can view the list of available sub-shells.

Shell and Cost Managers

The uDesigner determines the shell type. After the shell type is deployed from uDesigner, the administrator defines the hierarchical relationships during shell configuration.

- ▶ **Standard Cost Manager:** Uses CBS codes and works with projects/shells. In uDesigner, the administrator can create a shell that uses CBS costing.
- ▶ **Generic Cost Manager:** Works with generic shells only. The Generic Cost Manager supports costing for processes or objects that are not of a fixed duration or cost. For example, the following items related to buildings might be managed as separate items within a Building shell:
 - ▶ 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.

You can combine generic 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

Using the Shell Landing Page

To access your shell landing page:

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select the project/shell name (the Home icon in the left Navigator).

You cannot add or remove the individual tiles. See ***Configuring a Shell Dashboard (My Dashboard)*** (on page 99) 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, selecting Standard, and then 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 directly to the Task log. You can add this block in all tabs (in all dashboards) by using the data-source **Items Requiring Attention** in the Standard block. You can also remove the block from My Dashboard.

Notifications

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

Mail

This block lists the total mail belonging to the shell. When you click Mail, you go directly to the Inbox log. You can add this block in all tabs (in all dashboards) by using the data-source **Items Requiring Attention** in the Standard block. You can also remove the block from My Dashboard.

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.

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, those links are displayed in this block.

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 if a geographic location (geolocation) is *not* defined. If the tab is visible, it:

- ▶ Provides a log that lists the sub-shells.
- ▶ Displays a world map on the right pane with no pins if none of the shells have a defined geolocation.

To view pins for defined geolocations, you can select the **Show all <Sites, Buildings, Projects> on Map** check box. (The shell type determines what feature replaces the brackets <>.)

- ▶ When you hover over a pin (location marker) on the map, you can see the details for the location marker based on available information.
- ▶ When you click the pin, you can open the corresponding shell in a new tab.

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

Option	Description
View	For example, Buildings, Cities, Shells, Projects, Regions.
Group By	To view shells in a hierarchical arrangement, select Hierarchy .
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	If you select Hierarchy for Group By, use this option to expand or collapse the list.

The **Workspaces** tab displays different columns, such as Name, Project Number, Building Number, Status, and so on, based on the shell type.

Note: The columns displayed are not hard-coded. The fields defined in the Shell Manager Standard Log for the shell type (in uDesigner) are added as columns in the **Workspaces** log.

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 submenu 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** (the plus sign icon)
- ▶ **Edit Tab** (the pencil icon)
- ▶ **Filters**
- ▶ **Delete Tab** (the trash can icon)
- ▶ **Add Block** (the plus sign with down arrow 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 use this option to display an external URL, such as a web cam, a frequently visited website, or Analytics application.
 - ▶ **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, the data is not displayed.

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

For more information on the preceding options, see **About Shell Dashboards** in the *Unifier Modules Setup Administration Guide*.

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 the 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 form that users see when they open the shell. In the View Forms tab, permissions can be granted to groups to view additional forms designed in uDesigner rather than the standard Shell Attribute Form.

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

A user or group 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 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 the tabs even if the user or group (including the administrator) is added as a restricted user for the View Forms tab.

Shell Dashboard

The shell dashboards provide an at-a-glance view of project/shell data.

From any shell dashboard, you can:

- ▶ Use the drill-down functionality to access the data.

- ▶ Use filters so that all blocks in a specific dashboard are filtered based on the same parameter.
- ▶ Print the entire dashboard or print 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 predefined layout.

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, shell dashboards are configured 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 102)
- ▶ **Custom:** Use this selection to view data from the current shell, subordinate shells, or both (cannot cross hierarchies)

Minimizing the Shell Dashboard

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

Expanding the 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 the 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 a 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 **Dashboard Filters** window accessible through the **Edit** option.

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, the data will not be displayed.
 - Any dashboard based on active task information or data view based on active tasks cannot be drilled down to the actual record.
-

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) To the original data view, click the left arrow icon.

Analytics

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

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.

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 **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**, and then select **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, from the toolbar, click **Add**, and then select **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, from the toolbar, click **Add**, and then select **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

In this field	Do this
	▶ 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
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. If the Data Cube is based on the Date Picker, which indicates the date and time that the relevant data was updated, the dashboard adjusts this information based on your date/time format preference and time zone. If the Data Cube is based on the Date Only picker, the dashboard displays only the date and adjusts it based on your date format preference.
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

This item	Does this
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.
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.

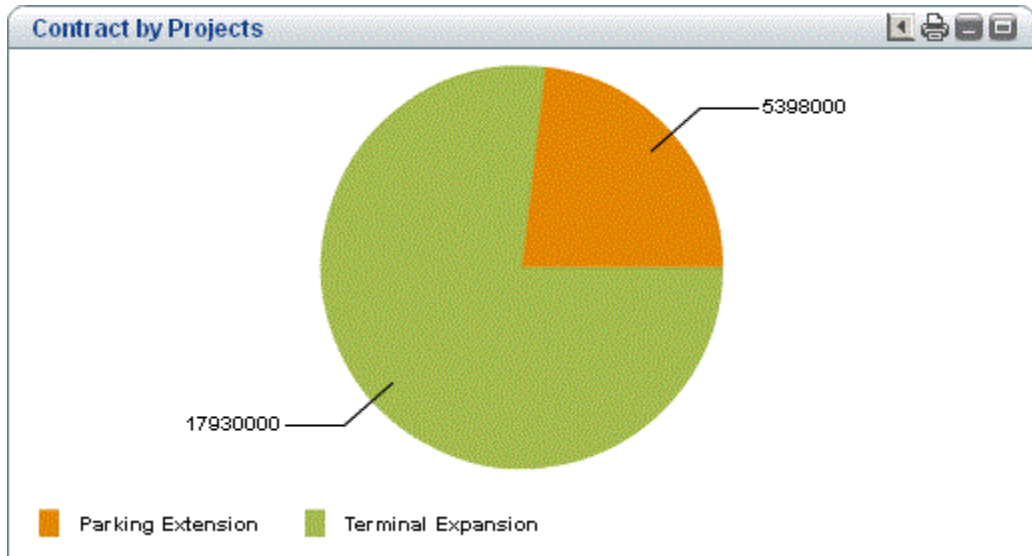
Note: If a **Drill Down** block has Cost Sheet columns that are based on a formula, the data will not be displayed.

Example

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

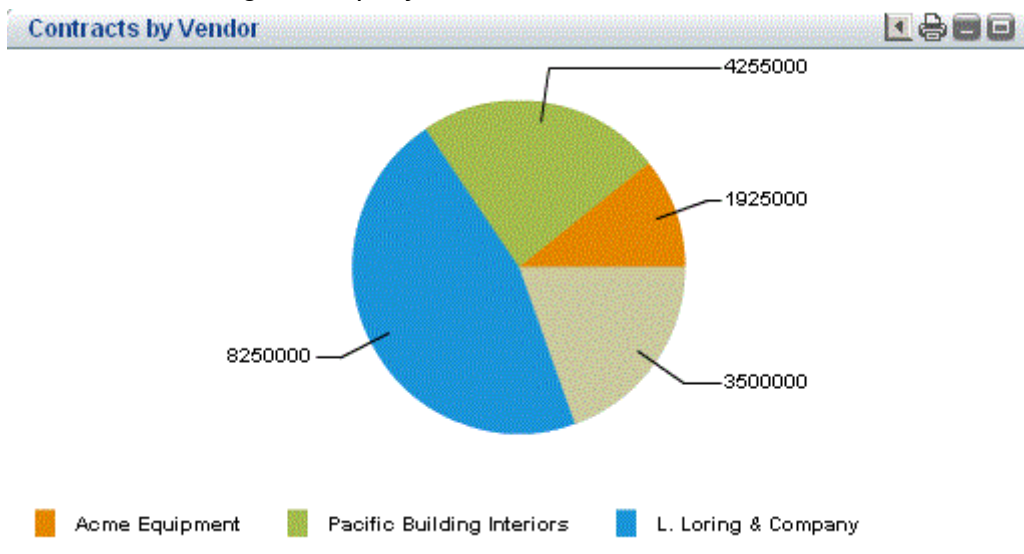
- Parking Extension

- Terminal Expansion



If you double-click the pie chart for the Terminal Expansion project, 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**, and then select **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. If the Data Cube is based on the Date Picker, which indicates the date and time that the relevant data was updated, the dashboard adjusts this information based on your date/time format preference and time zone. If the Data Cube is based on the Date Only picker, the dashboard displays only the date and adjusts it based on your date format preference.
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.
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.

In this field:	Do this:
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* and 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* and 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. The Administrator might create the following 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 that person's 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.

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.

Auto-Create Projects or Shells

The system provides a type of business process that will create projects/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: 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 projects/shells from the project/shell templates set up for this purpose. Templates provide projects/shells with the name, number, location, and status for each new project/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 project/shell:

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 project/shell 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 projects/shells:

To auto-create multiple projects/shells, 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 project/shell 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 in **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 views (Create New View) and manage 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	If you have access to the feature, allows access to resources and roles (read-only).
Schedule Manager	If you have access to the feature, 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 Attribute Form.

Note: When a user does not have the option to view the Audit Log because **Hide Audit Log** is enabled, it prevents the user from viewing the Audit Log for a project/shell, which ensures that the user is not aware of what changes are made to the shell, when they are made, and by whom. For more information, see **Edit User or Group Permissions Using Access Control** and **Editing User Permissions at Company, Shell, and Project Levels** in the *Unifier General Administration Guide* and see **Setting Permissions to Create or Modify Shell Instances** in the *Modules Setup Administration Guide*.

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 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, select **File**, and then select **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. For more information, see ***Adding Images***.

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 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.

In this field	Do this
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. For more information, see **Home Workspace** (on page 45).

To access Mailbox from a shell:

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

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 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 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
 New	To create a message.

Toolbar Option	Description
Actions	The following options are displayed: ▶ Flag: To flag one or more emails. All available sub-options are displayed. ▶ Clear Flag: To clear the flags. This option is context-sensitive. ▶ Print: To print the log. ▶ Delete: Delete one or more emails.
View	To customize the view according to the following criteria: ▶ Received in last 7 days ▶ Saved in last 30 days ▶ Group by From ▶ All Items ▶ Create New View ▶ Manage Views This submenu will also contain all views that you have created.
Edit View 	To edit the view (columns) of the Inbox log.
Refresh 	To refresh the log screen.
Print 	To print the selected record.
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.

Notifications

The **Notifications** sub-node of the **Mailbox** (shell) enables you to see all 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.

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

Toolbar Option	Description
	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 submenu will also contain all views that you have created.
Refresh ()	To refresh the log screen.
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.
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**.

For information about translating Email Notifications, see **User Interface (UI) Content and Internationalization**.

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 options 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 This submenu will also contain all views that you have created.
Refresh ()	To refresh the log screen.
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

Toolbar Option	Description
	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, after 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** 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.

To access the inbox:

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Mailbox**, select **Project Mailbox**, and then select **Inbox**.

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, after 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 options 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 submenu will also contain all views that you have created.
Refresh ()	To refresh the log screen.
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

Toolbar Option	Description
	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, select **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.
- 2) In the left Navigator, select **Inbox**.
All messages residing in the **Inbox** and **Sent** sub-nodes of all shell **Mailbox** 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 **Spelling** 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 left Navigator, select 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) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Mailbox**, and then select **Inbox** 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 folders (Project Mailbox):

- 1) Go to **Inbox** and click the folder icon. If you have the **View** permission for **Inbox** sub-node, 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 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 to reorder the folder position in the left Navigator.

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, 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) are 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 and selecting **Move** or using the **Move** option.

By default, **Inbox** is available under **Project Mailbox**. 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 which includes Project Mailbox which includes Inbox, and the user moves the Inbox to the right section, and then moves it back to the left section below Folder B, the system displays the hierarchy as Folder B which includes Project Mailbox which includes 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 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: If 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 shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Mailbox**, select **Project Mailbox**, and then select **Unpublished Attachments** to open the **Unpublished Attachments** log.

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

Option	Description
Publish	When you select an attachment (or multiple attachments) and click Publish , the Publish - Select destination folder window opens which enables you to
Download 	Enables you to download and save the file. If you select more than one file, the system zips the files so you can 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  or 	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 	Enables you to search for an unpublished attachment from the list based on subject of the email, the email name, or the attachment name.

Option	Description
Find on Page 	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 (located under **Project Mailbox**), you can access the attachments to emails. The attachments can also be accessed in the **Unpublished Attachments** sub-node log. 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 and **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 project/shell and switch to **User** mode.
- 2) In the left Navigator, select **Information**, and then select **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 project/shell and switch to **User** mode.
- 2) In the left Navigator, select **Information**, and then select **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:

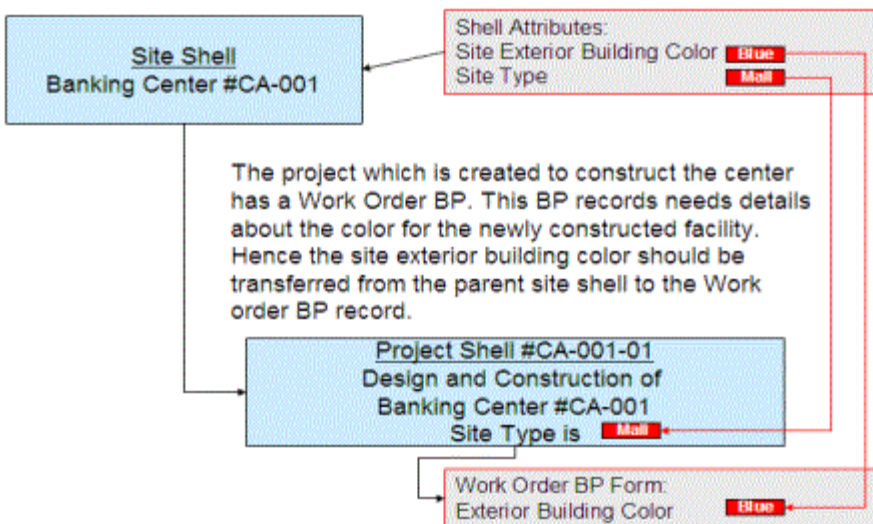
- ▶ In the Directory, select a team member's name and click **Send email**.
- ▶ In the team member's User Profile window, click the email address.

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 Unifier shell record.

Auto-Population in Shells

Fields on a business process in a child shell can be set up 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 set up 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, 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, the physical characteristics 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.

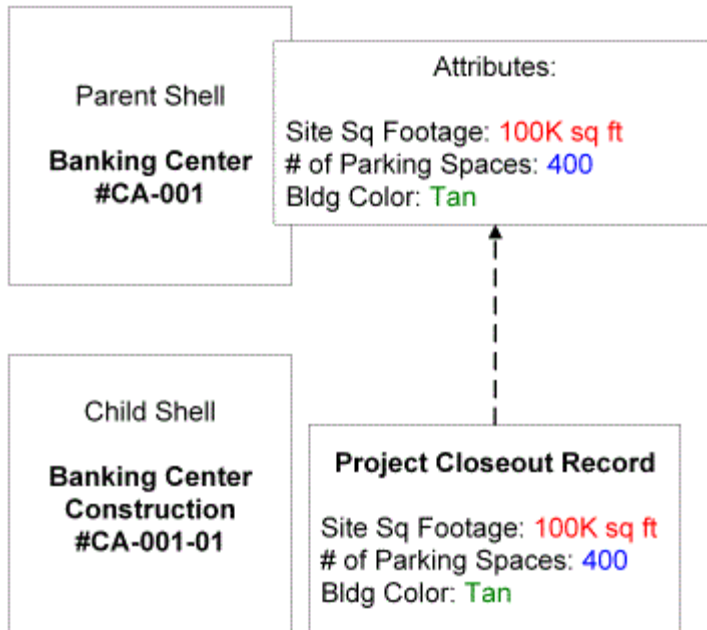
Depending on the set up in uDesigner, reverse auto-population can occur in these instances:

- Changes to the data elements in a child Shell 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 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), the system:

- ▶ Removes the fields from the view and
- ▶ Does not display the related field columns.

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 associated 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.

Using Projects

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, and then select Tasks	
<BP Name> - Tasks All Users	Project, and then select 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, select Project Information, and then select Project Directory	
Logged in Users (by company)	Project, select Project Information, and then select Project Directory	Yes
Current User Task Count	Project, and then select 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.
- 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 windowThe 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

In this field	Do this
	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.
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

In this field	Do this
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 windowThe 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. For more information about user-defined report data types, see **User-Defined Reports**.

To create an alert:

- 1) Create an alert report in user-defined reports.
- 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, 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

In this field:	Do this:
	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.

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) Go to the project tab 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 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) Go to the project tab 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, select **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, after 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, 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 **Spelling** 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, select 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** (select **Mailbox**, select **Project Mailbox**, and then select **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**.

To create additional folders:

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Mailbox**, select **Project Mailbox**, and then select **Inbox** to open the Inbox log.

If you have the **View** permission for **Inbox** sub-node, you can view all folders under the **Inbox** sub-node.
- 3) From 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.
- 4) Click the plus icon to open a new row.
- 5) 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.

6) 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.

7) 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 to reorder the folder position in the left Navigator.

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, 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) are 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 and then selecting **Move** or using the **Move** option.

By default, **Inbox** is available under **Project Mailbox**. 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, 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, select **Mailbox**, select **Project Mailbox**, and then select **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 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 left 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 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 steps for which you are currently the assignee.
- ▶ **Notifications** are records that you have been sent a copy but do not need to act.
- ▶ **Drafts** are items 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, which shows your assigned tasks from all project/shell- and company-level BPs.
Go to the Home workspace; in the left Navigator, select **Tasks**, **Notifications**, or **Drafts**; from the applicable log, open one of the items that required your attention or you want to work with.
- ▶ Company Workspace, which shows your assigned tasks for company-level BPs.

Go to the **Company Workspace** tab and switch to **User** mode; in the left Navigator, select **Tasks**, **Notifications**, or **Drafts**; from the applicable log, open one of the items that required your attention or you want to work with.

- ▶ **Project/Shell**, which shows your tasks from the selected project/shell.

Go to the shell tab and switch **User** mode; in the left Navigator, select **Tasks**, **Notifications**, or **Drafts**; from the applicable log, 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. To do so:

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Information**.

The **Information** node provides two sub-nodes — **Directory** and **General** — that 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 send email from within the system.

Note:

- Project members are listed if they are Active and the **Show user on the Projects Directory** option is selected for the user's account.
 - 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.

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 E-Signatures

You can use the system to send one file or a set of files for an electronic signature (e-signature), and you can send the package to other Unifier users and to external users. If you are using envelopes in DocuSign or Acrobat Sign, you can group documents into a single envelope. When the documents included in an envelope are returned to Unifier, they are consolidated into a single PDF instead of returning as individual attachments.

Internal user

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

The internal users can 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's **Email Subscription** tab, which is located in **Preferences**).

When sending out an E-Signature request, for internal users, the **To** field in the **Send for E-Signature** dialog box lets you type-ahead to find a user or group. You can select one or more users or groups and send an 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 Acrobat 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 Acrobat Sign) and enables you conduct a self-sign.

The external users are *unable* to act on the E-Sign task from the email sent out from Acrobat 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, 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 the email addresses of the external signees are invalid, 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, 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 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 the 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 Acrobat Sign or DocuSign. For example, if a user's preferred language is Chinese, the E-Signature email request that is sent out to an external signee by way of Acrobat 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."

Acrobat 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 Acrobat 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.

Completed Signature Requests

After all recipients have signed the request, they receive an e-mail notification. If they are using DocuSign, individual attachments are included in the email. If they are using Acrobat Sign, a single file that contains the combined documents is included with the email. For Unifier users, the signed file can also be viewed on the **E-Signatures** node. The signatures of the recipients appear on the actual page that they signed; they are not grouped on a specific page.

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 ▶ Group by Envelope Code ▶ 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 a completed task, the 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 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: Because DocuSign converts all files to .pdf, the extension will always be .pdf in

Column	Description
	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.
Envelope Code	If you are using envelopes in DocuSign or Acrobat Sign and a document or group of documents was submitted for an e-signature request, this column displays the code assigned to the envelope that contains the applicable documents. If an

Column	Description
	envelope is resubmitted for signatures, the code is overwritten with a new code.
Subject	The subject of the Send for E-Signature message.
Location	If the document was sent for signature from the Document Manager, this column displays the location in the Document Manager, for example: ... /Field Reports/Action Items. If the document was sent for signature from a BP record, 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 any 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, this pane displays a preview of the signed document.

Tab	Description
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 let you: ▶ Print: Print documents ▶ Download: Download the latest signed copy of the document. The columns are: ▶ Signee: The name of the user who must sign, or has signed, the document. If an internal user, the cell contains the user's first and last names. If an external user, the cell contains the user's email address. ▶ 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 <i>gear menu</i> (). ▶ 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

If a signee declines an E-signature request, the E-Signature log captures the E-Signature status as Declined. When the status is Declined, the tooltip and the *gear menu* () display 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 Acrobat Sign). Follow the prompts and when done click **Finish** to close the external application.

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**.

After a document is signed (E-Signature status = Completed), the signed file gets added as a revision of the original file (as a pdf file and name appended by "_signed" and indicating the number of times the file was sent for e-signature).

Working with Gates and Phases

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

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

Phases and gate conditions are configured in Admin mode. For more information, see **How to Set Up Gates** in the *Unifier Modules Setup Administration Guide*.

View the Gates Dashboard

When working with projects/shells, you can use the Gates dashboard to:

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

To access the Gates dashboard:

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Gates**.

The Gates dashboard opens. The upper section indicates the status of the gate, such as Active or Inactive, and provides access to additional steps that you can take, such as viewing the Audit Log or manually moving the project/shell to the next phase. The Phases column on the left lists the phases assigned to the project/shell and indicates the current status. The Phase Information on the right provides more information and provides the option to search for specific conditions.

- 3) To view information about a specific phase, in the left column of the dashboard, select the phase.

View Gate Condition Details

To view gate condition details:

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Gates**.
- 3) In the left column of the **Gates** dashboard, select the applicable phase.
- 4) In the right column, click the linked **Condition Name**.

The Phase Condition window displays the data type, data element, and trigger condition in a view-only format.

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 the gates setup so that conditions are validated on each gates run.

To validate conditions manually:

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Gates**.
- 3) In the upper section of the **Gates** dashboard, click **Actions**, and then select **Refresh**.

If a gates condition is met, the condition is marked as Complete. If all gates conditions are found to have been met for a project/shell phase (and if Automatic Advancement is **Yes**), the project/shell phase advances to the next phase.

Edit Phase Details

To edit phase details:

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Gates**.

- 3) In the left column of the **Gates** dashboard, select the applicable phase.
- 4) In the right column, 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 by clicking the linked **Condition Name**.
 - ▶ Add or view comments by clicking **Comment** .
- 5) When you are done, click **Save**.

Advance to the Next Phase

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

To advance to the next phase:

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Gates**.
- 3) In the upper section of the **Gates** dashboard, click **Advance to Next Phase**.
- 4) In the **Confirmation** message, click **Yes** to confirm the advancement.

The system validates whether all gates conditions have been met for that phase. If all gates conditions have been met for the current phase, the project/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. For more information, see **Edit Phase Details** (on page 163).
 - ▶ Select the phase and click the linked **Condition Name** to view details about the phase and gate conditions to determine what needs to be done to meet the condition.
- 5) After changing the **Project Phase** in the **Shell Details** form, perform any of the following actions to prevent creating a workflow BP record in a different project phase:
 - ▶ Reload the page.
 - ▶ Close and reopen the **Shell** tab.

Return to a Previous Phase

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

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Gates**.
- 3) In the right column, do one of the following:
 - ▶ Select a gate condition and deselect the **Complete** check box so that it is no longer complete.
 - ▶ In **Admin** mode, add a new condition so that the completed phases are no longer complete. To do so, you must deactivate the gate, add the new condition, and then activate the gate. For more information, see **How to Set Up Gates** in the *Unifier Modules Setup Administration Guide*.

- 4) When you are done, click **Save**.

Add or View Phase Comments

To view or add comments in a phase:

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Gates**.
- 3) In the left column of the **Gates** dashboard, select the applicable phase.
- 4) In the right column, add or view comments by clicking **Comment** .

You can view comments posted by others and upload files from your local system. To view attached files, you must download them to your system first. The types of files that you can upload is based on the settings established by your administrator in the **Security** tab of the **Edit Company** window (for more information, see **Access Company Details** in the *Unifier General Administration Guide*).

- 5) If you added a comment or uploaded an attachment, click **Post** to save your changes.

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

- 6) When you are done, click the **X** to close the Comments box.

View, Print, or Delete Saved Gates Runs

You can view results from prior scheduled gates runs and search the list for specific results. You can also download a PDF version of a selected run or delete one or more selected runs.

To view saved gates runs:

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Gates**.
- 3) In the upper section of the **Gates** dashboard, click **Actions**, and then select **Saved Gates Runs**.
- 4) On the **Saved Gates Runs** tab, do any of the following:
 - ▶ To search for a specific run, enter the search criteria in the **Search Log** field.
 - ▶ To view a specific run, select the check box for the run, and click **Download**. The system generates a PDF file, whose name includes the shell/project name and the date and time of the gates run.
 - ▶ To delete one or more runs, select the applicable check boxes, and click **Delete**. When the **Confirmation** message appears, click **Yes** to continue.

View the Gates Audit Log

You can view the Audit Log and search the list for specific results. You can also download a PDF version of the log.

To view the Gates Audit Log:

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Gates**.
- 3) In the upper section of the **Gates** dashboard, click **Actions**, and then select **Audit Log**.
The Audit Log captures information such as the date and time at which a specific Event or Action occurred.
- 4) On the **Audit Log** tab, do either of the following:
 - ▶ To search for a specific entry, enter the search criteria in the **Search Log** field.
 - ▶ To download a PDF version of the log, click **Download**. The system generates a PDF file named Report.

Common Procedures

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

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Queries

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

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

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

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Using Formulas or Conditions in Queries

For queries, you can evaluate the data before retrieving it from the database to determine whether to include the value in the report, manager sheet, or data picker, or to spawn an auto-creation. To evaluate the data, you can use a formula or a condition.

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

You can include formulas in conditions.

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

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

Field Value Comparison

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

The 'Add Query Condition' dialog box is shown with the following fields and annotations:

- Data Element:** A dropdown menu with 'Contact Last Name' selected. An arrow points to it with the text: 'Test the value of this field...'.
- Condition:** A dropdown menu with 'contains' selected. An arrow points to it with the text: '...using this operator...'.
- Values:** A section containing two options:
 - Dynamic:** Selected with a radio button. It contains:
 - Data Source:** A dropdown menu with '-Select-' selected. An arrow points to it with the text: '...against the value of this field in this data source (business process or shell)'.
 - Data Element:** A dropdown menu with '-Select-' selected. An arrow points to it with the text: 'OR'.
 - Constant:** An empty text field. An arrow points to it with the text: '...against this word(s) or number(s)'.

Buttons at the bottom: OK, Cancel.

Date Plus or Minus

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

The 'Date Trigger Condition' dialog box is shown with the following fields and annotations:

- Check auto creation conditions on date:** A checkbox that is checked.
- Data Element:** A dropdown menu with 'Last Service Date' selected. An arrow points to it with the text: 'This date...'.
- Add/Subtract days:** A dropdown menu with 'Plus' selected. An arrow points to it with the text: '...plus or minus...'.
- Number of days:** A section containing two options:
 - Data Element:** A dropdown menu with '-Select-' selected. An arrow points to it with the text: '...the value in this element...'.
 - Days:** A text field with '0' entered. An arrow points to it with the text: 'OR' and '...this number of days.'.

Date Difference

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

The 'Date Difference' dialog box is shown with the following fields and annotations:

- Earlier Date:** A dropdown menu with 'Last Update Date of Planning Sheet' selected. An arrow points to it with the text: 'This date...'.
- Later Date:** A dropdown menu with 'Last Update Date of Planning Sheet' selected. An arrow points to it with the text: '...will be subtracted from this date to produce the date difference.'.
- Calculation based on:** Radio buttons for 'Calendar days' (selected) and 'Work days'.
- Show Partial Days:** A checkbox that is unchecked.
- The date difference (in days) is calculated as (Later Date) - (Earlier Date).**

Buttons at the bottom: OK, Cancel.

Compare Date Fields

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

The screenshot shows the 'Add Query Condition' dialog box. It contains the following fields and annotations:

- Data Element:** A dropdown menu with 'Creation Date' selected. An arrow points to it with the text: 'Test the value of this data element... using this operator...'.
- Condition:** A dropdown menu with 'equals' selected. An arrow points to it with the text: '...using this operator...'.
- Date Section:**
 - Data Element:** A dropdown menu with '-Select-' selected. An arrow points to it with the text: '...against the value in this element...'.
 - Date:** A text input field with a calendar icon. An arrow points to it with the text: '...against the date you enter here...'.
 - Today:** A radio button. An arrow points to it with the text: '...against today's date'.
- Add/Subtract days:** A dropdown menu with 'Plus' selected. An arrow points to it with the text: '...(optionally) plus or minus...'.
- Number of days Section:**
 - Data Element:** A dropdown menu with '-Select-' selected. An arrow points to it with the text: '...the value in this element...'.
 - Days:** A text input field. An arrow points to it with the text: '...this number of days...'.

OR

Dynamic Date Value

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

The screenshot shows the 'Add Query Condition' dialog box. It contains the following fields and annotations:

- Data Element:** A dropdown menu with 'Date' selected. An arrow points to it with the text: 'Test the value of this data element... using this operator...'.
- Condition:** A dropdown menu with 'equals' selected. An arrow points to it with the text: '...using this operator...'.
- Date Section:**
 - Dynamic:** A radio button. An arrow points to it with the text: '...against the value of this field in this data source (business process or shell)'.
 - Data Source:** A dropdown menu with '-Select-' selected. An arrow points to it with the text: '...against the date you enter here...'.
 - Data Element:** A dropdown menu with '-Select-' selected. An arrow points to it with the text: '...against today's date'.
 - Date:** A text input field with a calendar icon. An arrow points to it with the text: '...(optionally) plus or minus...'.
 - Today:** A radio button. An arrow points to it with the text: '...the value of this field in this data source...'.
- Add/Subtract days:** A dropdown menu with 'Plus' selected. An arrow points to it with the text: '...this number of days...'.
- Number of days Section:**
 - Dynamic:** A radio button. An arrow points to it with the text: '...the value of this field in this data source...'.
 - Data Source:** A dropdown menu with '-Select-' selected. An arrow points to it with the text: '...this number of days...'.
 - Data Element:** A dropdown menu with '-Select-' selected. An arrow points to it with the text: '...this number of days...'.
 - Days:** A text input field. An arrow points to it with the text: '...this number of days...'.

OR

Between Dates

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

Add Query Condition

Data Element:

Condition:

Date

☒ Dynamic:

☐ Date:

☐ Today

AND

Date

☒ Dynamic:

☐ Date:

☐ Today

Test the value of this date to see if it is between...

...the date in this field in this data source (business process or shell)

OR

...the date you enter here...

OR

...today's date...

...the date in this field in this data source

OR

...the date you enter here...

OR

...today's date.

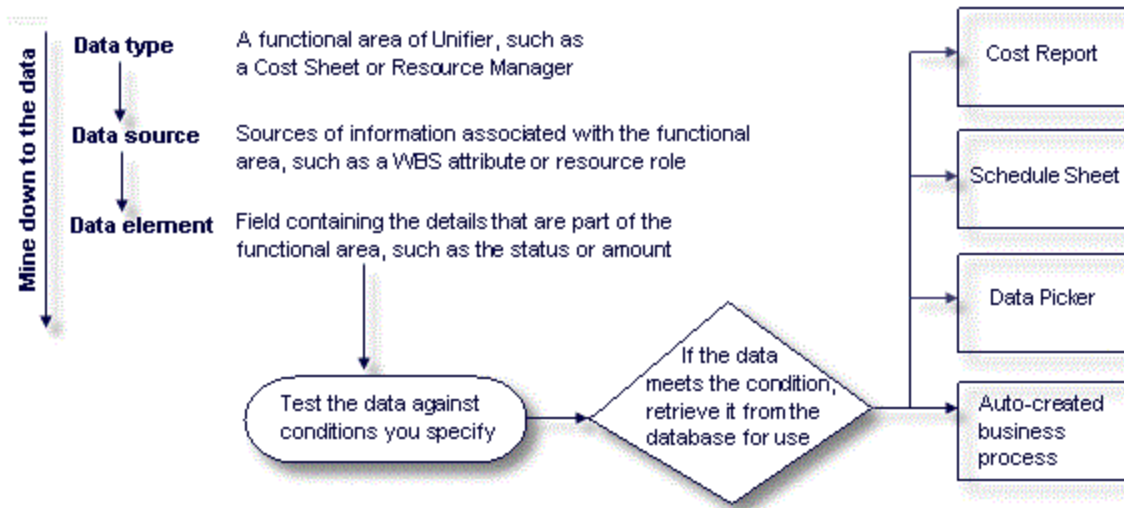
How Queries Work

The way queries work in Unifier is as follows:

- ▶ You mine down to the information you want by choosing an element (field) in the database on which to base the query.
- ▶ You test the data against conditions and values that you specify.

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

- ▶ When (or if) the data meets the condition you specify, the system retrieves it from the database for use in a report, manager sheet, auto-creation, data picker, and so on.



Assignee Filter Query Condition

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

- ▶ Contains
- ▶ Does not contain
- ▶ Exists in
- ▶ Does not exist in
- ▶ Equals
- ▶ Does not equal
- ▶ is empty
- ▶ is not empty

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

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

Assignee	Query Field (Role as defined in the User Attribute Form)
G	Approver

The following shows examples with condition/operator:

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

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

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

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

Query Based Data Element (QBDE)

A Query Based Data Element (QBDE) lets you view data from the Upper Form or Detail Form of a Business Process (BP). QBDE also lets you view data from:

- ▶ Other BPs
- ▶ Sheets
- ▶ Cash Flow

The QBDEs are based on the “SYS Numeric Query Based” Data Definition (DD), and the query for these QBDEs is set in the Business Process Configuration setup. For more information, see **Configure a Query for a Query Based Data Element on a BP** in the *Unifier Modules Setup Administration Guide*.

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

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

Notes:

- Because the system evaluates QBDEs in a random order, Oracle recommends that you do not create a QBDE that uses a formula that references another QBDE.
 - DEs that have been defined as a QBDE trigger element should not be evaluated as part of QBDE calculation.
 - Oracle recommends that you do not use a Required field to create a query that uses a Data Picker, Cost Breakdown Structure (CBS) Picker, or Fund Breakdown Structure (FBS) Picker. If the data entered in a data element (DE) field with a Required condition is *cleared*, the system bases the query on the previous value of the field.
 - When using QBDE, be aware that query elements are rounded off to use two decimal places, even if the Base Currency and various defined currency fields are different.
-

Evaluating Query Setups of Data Picker Data Elements

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

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

The following is a list of the supported Data Pickers:

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

Note: If a BP Data Picker (BP Picker) or any Data Picker is selected as a trigger element for QBDE and the picker value is automatically populated (auto populated) instead of manually entered, the QBDE element will not be evaluated.

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

Creating a Record from the Query Based Tab

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

If a query condition involves only constant dates, it is not converted based on the user's time zone.

Attaching Files

This section outlines the rules for attaching files.

Assuming you have the proper permissions, you may attach files (such as Word documents, spreadsheets, drawings, PDFs, and so on) to business process forms, cells (such as a Cost Sheet or Funding Sheet), and Mailbox messages.

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

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

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

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

Files can be uploaded and attached from your local system, or they can be attached from documents already uploaded and stored in the **Document Manager**.

The file attachment procedures are similar across the system. When an Attach Files option or Attachments tab is available in a window, it is associated with the ability to attach a file. When attaching files, you will be presented with two options:

- ▶ Browse
- ▶ Document Manager

Antivirus scanning of files

If you are using an Oracle Cloud-based deployment, Unifier includes a virus scanner. To prevent virus attacks from infiltrating your system through external files, the system scans each file that is uploaded. Until the scan is completed, the file remains in a Scan Pending state.

At a minimum, the system scans each file that is uploaded, submitted, or attached through the following channels:

- ▶ Document Manager
- ▶ Business processes (BPs)
- ▶ Image pickers
- ▶ Cells within forms or sheets
- ▶ Custom Templates for use with custom prints and reports
- ▶ XML Localization Interchange File Format (XLIFF) files used for translation support
- ▶ Custom Help files, such as those provided through a uDesigner object
- ▶ Bluebeam sessions
- ▶ Webservice Get calls
- ▶ Import of comma-separated values (CSV) or Microsoft Excel files

Depending on how your environment is configured, the following actions might occur:

- ▶ If the virus scanner detects an issue with a file that a user is uploading, the system sends an email to the user who uploaded the file and the designated company contact. Depending on the location of the infected file, the system might display a bug icon  (if the system is configured to display alerts) or an ellipsis icon  (if the system is configured to prevent the display of alerts).
- ▶ If a user tries to access or download a file that has not yet been scanned and the environment is configured to display alerts, the system displays a Confirmation message that requires a response to continue. If a Confirmation message appears, the user can wait and try to access the file later.
- ▶ If the virus scanner detects an issue with a file that a user is trying to view or download, an alert is displayed that indicates the file contains a threat. If multiple files were selected for download, the uninfected files are downloaded.

Note: If you are using an Oracle Cloud-based Unifier deployment, see **Edit Company (Security Tab)** in the *Unifier General Administration*

Guide for more information about configuring the environment to allow the display of messages regarding Scan Pending states.

Browse Option for File Attachments

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

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

In the lower portion of the window, you are provided with options that pertain to the uploading process. You can select **Revise automatically if file with same name exists**. However, unless you have more than one file with the same name, the **Revise automatically if file with same name exists** check box cannot be selected. You can choose whether to upload the files from your computer, auto-resolve the files from **Documents** as **Dynamic Links**, or auto-resolve the files from **Documents** as **Static Links**.

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

Document Manager Option for File Attachments

Files are uploaded to the Document Manager and stored in a folder system. Access permissions can be applied to individual folders and documents. You can attach documents from the Document Manager if you have at least view permission on the documents.

Click the **Attach** button. If you select the **Document Manager** option, a new **Select Files** window opens. This window displays the folder structure in the project/shell Documents functional node in the Document Manager. Here you can:

- 1) Open folders to view contents.
- 2) Select multiple documents or folders to attach.

Notes:

- All documents within folders and subfolders will be attached in a flat file.
 - Documents with duplicate file names will not attach.
-

You can browse a variety of existing folders from the **Document Manager** by clicking any of the folders in the **Project Documents** log. This log contains the following columns:

- ▶ Name

- ▶ Comments
- ▶ Location
- ▶ Owner
- ▶ Title
- ▶ Rev. No.
- ▶ Issue Date
- ▶ Size

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

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

Notes:

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

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

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

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

- ▶ Browse
- ▶ Document Manager
- ▶ Custom Print

Custom Print Option for File Attachments

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

Notes:

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

After you select **Custom Print Templates** to attach, click the **Attach** option in the lower-right corner of the window. To close the window, click the **Cancel** option.

Adding Images

In many forms, you can add an image to a business process, project/shell, and so on. For example, you can add an image that shows progress on the project information record, pictures of assets related to a specific asset record, or a photo of an employee in the Resource Manager. You can add images to attribute forms in projects/shells, companies, and BPs. You can also use multiple images (rolling images) for a project/shell landing page.

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

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

To add an image to a form:

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

Valid image file types are:

- ▶ .jpg
- ▶ .jpeg
- ▶ .gif
- ▶ .png
- ▶ .tif

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

To add an image to a project/shell:

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select the project/shell name (Home icon).
- 3) In the upper-right corner, click **My Dashboard** and select **Details** to open the Details form.
- 4) Select the Images tab, click the **Attach Images (+)** icon, and select **Browse** or **Document Manager**.
- 5) Select the applicable images and click **Save**.

Adding or Updating Hyperlinks

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

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

To add a hyperlink:

- 1) Click the hyperlink area on the form.
- 2) In the Hyperlink window, enter the hyperlink name and the Uniform Resource Locator (URL). Only the URL is required. If you enter the name and the URL, the hyperlink displays as the name you entered. If you only enter the URL, the hyperlink displays as the URL. The protocols HTTP and HTTPS are the only protocols allowed. FTP is not supported for hyperlink creation on forms.
- 3) Make sure that the URL adheres to accepted formats, such as starting with an approved protocol, followed by `://`, and then followed by a host name or domain name. The system validates the specified URL based on the Uniform Resource Identifier (URI) provided by the administrator for your organization, if applicable, and on current standards for URLs.

Examples of HTTP and HTTPS URLs:

`http://MyCompany.com`

`https://YourCompany.net`

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

`ftp://UserName:Password@MyCompany.edu`

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

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

- 4) Click **OK**.

To update a hyperlink:

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

Note: If you attempt to open a hyperlink to a website that is not controlled by Unifier, a Confirmation message appears and you must

click **Yes** to access the external website. If the URL of the hyperlink is invalid, you will receive an error message and you will not be able to save the record until a valid hyperlink is added.

CSV File

A Comma-Separated Values (CSV) data file, or a CSV template file, enables you to import or export data to and from Unifier. Each row in a CSV file corresponds to a new record and each column is a field to be populated on the form. For more information about importing and exporting a CSV template, see ***Importing Data from an Outside Data Source*** (on page 185).

Note: CSV supports all data definitions.

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

Project-level business process

When Company Picker exists in a project-level business process, the system checks to ensure that the value you had entered in the Company Picker field of the CSV template is an active and valid company. The valid values for the Company Picker are:

- ▶ Owner company
- ▶ Member companies in the shell

Company-level business process

When Company Picker exists in a project-level business process, the system checks to ensure that the value you had entered in the Company Picker field of the CSV template is an active and valid company. The valid values for the Company Picker are:

- ▶ Owner company
- ▶ All active partner companies

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

Exporting a CSV File

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

- ▶ If you enter data for any text type DE, the data is not translated. Example: "Vendor Specialty" is a text type DE. If the User enters "Electrical Appliances" as the data, the entry is not translated according to the **Preferences** settings.

- ▶ You must not include currency and digit grouping symbols when you enter data because the information is captured as a part of header information and according to your User Preferences settings. If you enter currency and digit grouping symbols when you enter data, you receive an error message.
- ▶ Ensure that you enter the negative number format with a minus sign at the beginning of the number: Example: -10000,99 (minus 10000 comma 99). The decimal symbol is a comma)
- ▶ If you enter a value in the date field, or in line items, through CSV, the values display according to your User Preferences settings.

Additional Information about Exporting a CSV File

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

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

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

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

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

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

The following lists the impacted modules:

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

Exporting a CSV File with or without an Import

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

- ▶ In functionalities that allow export and import of data through a CSV file, the currency symbol and digit grouping symbol are not displayed.
- ▶ In functionalities that allow only exporting of data but not importing data through a CSV file, the currency symbol and the digit grouping symbol are displayed.
- ▶ In Unifier functionalities that allow only exporting of data but not importing data through a CSV file, the negative numbers display according to your **Preferences** settings.
- ▶ Decimal symbol display according to your **Preferences** settings.
- ▶ In functionalities, which allow exporting and importing of data through a CSV, the negative numbers, if any, displays as: -<Number, Decimal Symbol, Number> (Example: -100000,99 - The decimal symbol is comma)
- ▶ If there are any date fields, the dates are formatted based on your **Preferences** settings.

Importing a CSV Template Data File

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

- ▶ You do not need to enter the Currency symbol manually because the symbol is included in the header. Entering the Currency symbol manually generates an error message.
- ▶ When importing a CSV file is complete, the number formatting displays according to your **Preferences** settings.
- ▶ When importing a CSV file is complete, the date formatting displays according to your **Preferences** settings.
- ▶ Oracle recommends that you use custom data elements for defining queries for a data picker filter condition. You can use the auto-populate to get the shell name or other shell properties populated on the record for the required custom data element.

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

List of Impacted Sheets and Modules

The following is a list of impacted sheets and modules:

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

List of Modules Only Impacted by Exporting

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

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

Importing Data from an Outside Data Source

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

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

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

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

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

The integration interface feature supports:

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

Antivirus scanning of files

If you are using an Oracle Cloud-based deployment, Unifier includes a virus scanner. To prevent virus attacks from infiltrating your system through external files, the system scans each file that is uploaded. Until the scan is completed, the file remains in a Scan Pending state.

At a minimum, the system scans each file that is uploaded, submitted, or attached through the following channels:

- ▶ Document Manager
- ▶ Business processes (BPs)
- ▶ Image pickers
- ▶ Cells within forms or sheets
- ▶ Custom Templates for use with custom prints and reports
- ▶ XML Localization Interchange File Format (XLIFF) files used for translation support
- ▶ Custom Help files, such as those provided through a uDesigner object
- ▶ Bluebeam sessions
- ▶ Webservice Get calls
- ▶ Import of comma-separated values (CSV) or Microsoft Excel files

Depending on how your environment is configured, the following actions might occur:

- ▶ If the virus scanner detects an issue with a file that a user is uploading, the system sends an email to the user who uploaded the file and the designated company contact. Depending on the location of the infected file, the system might display a bug icon  (if the system is configured to display alerts) or an ellipsis icon  (if the system is configured to prevent the display of alerts).
- ▶ If a user tries to access or download a file that has not yet been scanned and the environment is configured to display alerts, the system displays a Confirmation message that requires a response to continue. If a Confirmation message appears, the user can wait and try to access the file later.
- ▶ If the virus scanner detects an issue with a file that a user is trying to view or download, an alert is displayed that indicates the file contains a threat. If multiple files were selected for download, the uninfected files are downloaded.

Note: If you are using an Oracle Cloud-based Unifier deployment, see **Edit Company (Security Tab)** in the *Unifier General Administration Guide* for more information about configuring the environment to allow the display of messages regarding Scan Pending states.

Overall Steps for Importing Data

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

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

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

2) **Modify the CSV file.**

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

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

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

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

Exporting the CSV Template to Your Machine (Integration)

To export an integration template:

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

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

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

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

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

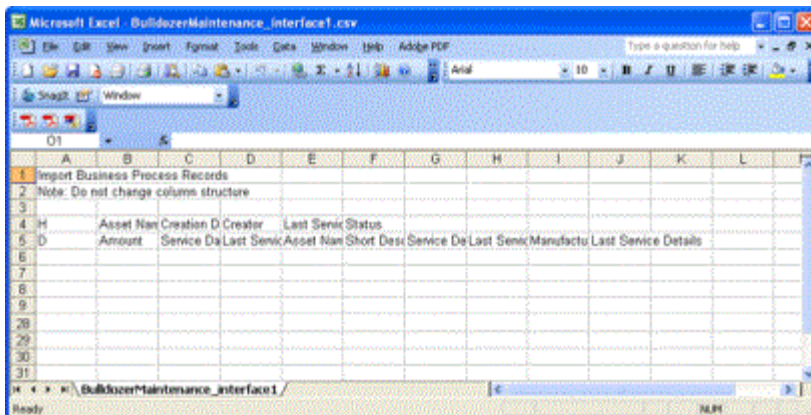
Editing the CSV File

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

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

To edit the CSV file:

- 1) Open the CSV file in Microsoft Excel or a compatible application, such as a text editor or Notepad.



The letter **H** in column A indicates that this row is for upper form data. The row shows the names of the fields from the **upper form** that were specified when the integration interface was designed in uDesigner.

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

- 2) To add header (upper form) data to the file:
 - a. Move your cursor to an empty line and type an **H** in column A.
 - b. Press the **Tab** key to move to the next column and enter the value that you want to import for that field.
 - c. Repeat step **b** for all the fields in the row.
- 3) To add detail form data to the file:
 - a. Move your cursor to an empty line and type a **D** in column A.
 - b. Press the **Tab** key to move to the next column and enter the value that you want to import for that field.

- c. Repeat step **b** for all the fields in the row.
- 4) If you have additional line item data that needs to be imported, repeat step **3** and its sub-steps until you have entered all the line items you want to import.
- 5) Save the file.

Importing CSV File into Unifier

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

To import the file:

- 1) Display the toolbar with the Import button as shown in the table below.
- 2) Click the **Import** button. The File Upload window opens.
- 3) Fill in the fields on the File Upload window and click **OK**.

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

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

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

Using CSV File to Import Attachments

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

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

Example

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

For details on how to import a CSV file back into Unifier, see ***Importing CSV File into Unifier.***

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

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

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

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

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

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

Note: For security, the Company Administrators can use the **Security** tab on the **Company Settings** page to specify the type and size of files that can be uploaded by users and per company policy. Contact your Company Administrator for more information.

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

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

Upload CSV and Add Attachments

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

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

For BP Record import

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

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

For Line Item import

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

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

For Document-type BP

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

For Text-type BP

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

Blocked file extension

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

Audit log

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

Internationalization and CSV Files

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

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

Generic CSV files

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

- ▶ All column headers
- ▶ All informational text

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

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

Notes:

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

Additional information about exporting and importing CSV files

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

Example

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

Internationalization and Web Services

About Web Services

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

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

Web Services and Internationalization

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

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

Number formatting of data

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

Examples

XML Tag: <Committed_Amount>100.99</Committed_Amount>

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

Sample JSON request

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

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

Get Web Services

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

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

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

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

Searching and Finding in Unifier

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

- ▶ Business Processes
- ▶ Manager sheets
- ▶ Pickers

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

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

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

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

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

Searching and Finding: Search Option

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

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

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

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

If you are searching a BP log, you can also use the wildcard characters percent (%) and underscore (_) to refine your search. The percent character represents any number of characters, including letters, spaces, numbers and so on; the search returns all results that contain the search string. The underscore character represents one character.

Searching and Finding: Find on Page Option

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

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

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

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

Searching and Finding a Shell

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

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

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

- 1) Go to the home dashboard of the shell (anchor shell) that contains the shell you want to find (the top node in the left Navigator).
- 2) Click the **Workspaces** tab.
- 3) From the toolbar in the left pane, click **Search** () to open the **Search** window. The Search window has the following options:
 - ▶ **Clear**
 - ▶ **Apply**
 - ▶ **Dock Right / Dock Bottom**
 - ▶ **Close**
- 4) Scroll down and enter values in the fields under the **Geocode Search** section.

Select an address or a latitude and longitude.

- ▶ In the **Address** field, enter a full or partial address for the shell.
- ▶ In the **Latitude** and **Longitude** fields, enter the values, if you know them.

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

- ▶ Select the **Address, City, State, Country, Postal Code** field and enter a full or partial address.
- ▶ To see the location on the map displayed in the window, you can select the **Map It** option. The system fills in the **Decimal Degrees** for the latitude and longitude as well as the **Degrees, Minutes, and Seconds**. The **Map It** option is also available for **Decimal Degrees** and **Degrees, Minutes, and Seconds**. To clear the fields, select the **Clear** option.
- ▶ Click the **Done** option to go back to the previous **Search** window. The system fills in the **Latitude** and **Longitude** fields in the **Search** window.
- ▶ In the **Search** window, you can enter a value in the **Radius** field to specify a search radius surrounding the address or latitude and longitude coordinates.

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

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

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

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

2) Click the **Workspaces** tab.

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

- ▶ **Clear**
- ▶ **Apply**
- ▶ **Dock Right / Dock Bottom**
- ▶ **Close**

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

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

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

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

The screenshot shows a 'Search' window with a title bar containing 'Search', 'Clear', 'Apply', and a close button. The window is divided into two main sections: 'Shell' and 'Geocode Search'.

Shell Section:

- Region ID:** A dropdown menu set to 'contains' and an empty text input field.
- Region Name:** A dropdown menu set to 'contains' and an empty text input field.
- Hierarchy Path:** A dropdown menu set to 'contains' and an empty text input field.
- Status:** A dropdown menu set to 'equals' and a text input field containing the word 'Select'.

Geocode Search Section:

- Co-ordinates:** A label next to a location pin icon.
- Address:** A dropdown menu set to 'equals' and an empty text input field.
- Latitude:** A dropdown menu set to 'equals' and an empty text input field.
- Longitude:** A dropdown menu set to 'equals' and an empty text input field.

Searching in Managers Logs

Most manager logs, including **Configurable Modules** logs, display a static **Search** window to enable you to find information. See **Searching and Finding: Search Option** (on page 194) for more details.

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

- ▶ **Searching and Finding a Shell** (on page 195)

► **Searching in Document Manager Node**

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

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

- **Resource Manager**
- **Schedule Manager**

To search in most manager logs:

- 1) Go to the **Company Workspace** tab or the project/shell tab where the manager resides.
- 2) In the left Navigator, select the manager grouping node you want to search. The manager expands to list functional sub-nodes.
- 3) If there are functional sub-nodes in the left Navigator, select the functional sub-node you want to search.
- 4) From the toolbar, click **Search**.
The system displays a **Search** window. The window will display different fields, depending on how the manager has been designed.
- 5) Enter your search criteria and click **Apply** (or press **Enter** on your keyboard). The system displays all the items that meet the search criteria you entered.

Searching in Document Manager Node

For more information on searching, see **Searching Content** in the *Unifier Managers User Guide*.

Searching in Document Manager Sub-Nodes

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

- Project (User mode)
- Company Workspace (User mode)

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

- Documents
- Recycle Bin
- Unpublished Documents

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

Search

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

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Document Manager**, and then select **Documents** to display the **Documents** log.

- 3) From the toolbar, click **Search** () to open the search window. The **Search** window enables you to search for document properties or contents. Some of the options are:
 - ▶ Content
 - ▶ Linked Records
 - ▶ Name
 - ▶ Title
 - ▶ Description

Find on Page

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

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Document Manager**, and then select **Documents** to display the **Documents** log.
- 3) From the toolbar, click **Find on Page** to open a new row in the table (log columns) within the **Documents** log.
- 4) Enter values in the fields to narrow your search in the records displayed within the log.

Supported Documents

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

- ▶ Microsoft Word Document (.doc/.docx)
- ▶ Microsoft Excel Document (.xls/.xlsx)
- ▶ Microsoft PowerPoint Document (.ppt/.pptx)
- ▶ Microsoft Project (.mpp)
- ▶ Rich Text Format (.rtf)
- ▶ Adobe Portable Document Format (.pdf)
- ▶ Hypertext Markup Language (.html)
- ▶ Extensible HyperText Markup Language (.xhtml)
- ▶ Plain Text files (.txt, .java, .bat, and so on)
- ▶ Document formats supported by Apache Tika 1.3

Indexing and Content Search

The following contains general information about indexing and content search:

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

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

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

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

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

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

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

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

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

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

Document Index Migration

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

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

Searching Date Fields

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

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

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

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

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

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

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

Inbox

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

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

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

- ▶ Field
- ▶ Operator
- ▶ Value

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

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

See the **Home Workspace** (on page 45) topic for more details.

Notifications

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

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

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

- ▶ Field
- ▶ Operator
- ▶ Value

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

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

See the **Home Workspace** (on page 45) topic for more details.

Sent Items

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

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

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

- ▶ Field
- ▶ Operator
- ▶ Value

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

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

See the **Home Workspace** (on page 45) topic for more details.

Searching Sheets

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

To search a sheet:

- 1) Open the sheet.

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

Searching Pickers

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

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

For most pickers, the Find feature works as generally described under **Searching and Finding: Search Option** (on page 194) and **Searching and Finding: Find on Page Option** (on page 195); however, the User/Group Picker works differently.

Notes:

- Fund Pickers are most often searchable by the fields that were created for the Fund Attribute Form in uDesigner. However, if no attribute form was created for the fund, you can search for the fund by its name or code.
 - Pickers that include CBS codes display information generated from a sheet (the cost sheet or an SOV). Consequently, the Find feature on the CBS Picker, Commit Line Item Picker, and SOV Picker works the same way as it does on manager sheets. For instructions on using these pickers, see **Searching Sheets** (on page 202).
-

To find a user in the User/Group Picker:

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

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

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

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

User/Group Picker and type-ahead

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

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

Example

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

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

Internationalization

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

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

- ▶ Email notifications
- ▶ Tools
- ▶ Oracle Analytics Server Custom Reports
- ▶ Dashboards
- ▶ Help files
- ▶ Spell check
- ▶ Date and time zone formats
- ▶ Audit log

Internationalization (Email Notifications)

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

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

- ▶ Text
- ▶ Attachments

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

If a scheduled UDR is sent as a part of an email attachment, the language in the PDF attachment is according to the **Preferences** of the UDR owner; however, the email text content is according to the recipient's User Preferences.

When a UDR is generated manually and saved by a User, the language in the PDF attachment is according to the **Preferences** of the User who generated, or ran, the UDR.

If a scheduled job such as Project Gates, where the "Auto-email as PDF attachment to users and groups" option is selected, the language in the PDF attachment is according to the User Preferences of the creator of the job (Project Gates creator).

When a manual refresh of the Gates is requested, the language in the PDF attachment is according to the **Preferences** of the User who requested the refresh.

Internationalization (Support for Tools)

When used within the system, the following tools support internationalization:

- ▶ Oracle Map
- ▶ AutoVue Server
- ▶ Flex replacement (O charts)

Note: The Unifier Plug-ins do not support internationalization.

Oracle Map viewer supports internationalization for Tier 1 languages. Refer to the *Oracle Fusion Middleware User's Guide for Oracle* for more details.

The language displayed in the map, and the following subsequent areas, is according to the language selected in the **Preferences** of the user:

- ▶ View map for BP records from log
- ▶ Shell Landing Page
- ▶ Map Picker in Log Find
- ▶ Map Picker in Bulk Edit
- ▶ View Map when invoked from the BP record

Note: eLocation services, which is used for geocoding, does not support internationalization. As a result, the map labels are displayed in English. If a user enters a label in a different language, the Find feature does not provide the desired results.

Internationalization (Oracle Analytics Server Custom Reports)

The Oracle Analytics Server Reports support internationalization as follows:

Custom Report (Report File tab) window

If there are no templates available for the report, the Custom Report window (Report File tab) displays according to the default settings.

To upload the translated XLIFF files and report layout, click **Add** to open the Add Template and Files window, enter data in the required fields, and click **OK**.

Notes:

- The non-RTF templates do not support internationalization.
 - You can only change the template type when the template is in Creation stage. After you create a template, you cannot change the template type. Use the report designer to create a template with the desired template type and remove the template that is no longer needed.
-

In the Custom Report window (Report File tab), the only editable column is the Default column, which lets you set the default template by selecting the corresponding template.

Note: The system sets the first template, or XLIFF file, that you upload as the default template.

Use **Modify** in the Custom Report window (Report File tab) to modify an existing template. After you click Modify, the Modify Template and Files window opens, which lets you modify the template and the translated XLIFF file for that template. When finished, click **OK**.

Use **Download** in the Custom Report window (Report File tab) to download a template and the corresponding translated XLIFF file, in a zip file.

External Data Model Oracle Analytics Server Reports

If you want to download the data model of a template, select the template, and click **Download** in the Custom Report window (Report File tab). When the download is complete for an Oracle Analytics Server report, the data model is included.

Non-RTF type template

Oracle Analytics Server supports RTF templates and XLIFF files. If the report designer selects a non-RTF type template, the Browse option in the Modify Template and Files window (Translated XLIFF files for the Template section) will be disabled.

Custom Report (Query tab) window

Queries based on Data Definition (DD) support internationalization and number formatting associated with internationalization according to the **Preferences** settings.

Queries based on Data Views do not support internationalization and formatting because raw data is being used.

Queries based on Ad-Hoc support internationalization and number formatting associated with internationalization according to the **Preferences** settings.

Internationalization (Dashboards)

Shell Dashboards

The Shell Dashboards support Internationalization and number formatting for System Strings as well as Custom Strings according to the **Preferences** settings.

Internationalization (Help Files)

Unifier Help files do not support Internationalization and are not translated.

Note: You can translate the Help files using a third-party translator and display the files based on your **Preferences** settings. This includes uploading a single PDF with multiple language help information.

Internationalization (Spell Check)

The Spell Check feature does not support Internationalization.

Note: If the language selected in your **Preferences** is not English, the Spell Check option will not be available.

Internationalization (Date and Time Zone Formats)

Date formats

The following additional date formats support Internationalization:

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

Time Zone formats

The Time Zone setting is based on the Coordinated Universal Time (UTC) and supports Internationalization.

Note: The time format for all dates is: HH:mm AM.

Internationalization (Audit Log)

Within the Audit log, the following columns support Internationalization according to the **Preferences**:

- ▶ Event
- ▶ Description
- ▶ Field

System and custom strings can be translated for Event, Description, and Field columns.

P6, Unifier, and Gateway

Unifier uses the **Rate Sheet** object in Gateway, with canned fields, for connecting Rate Sheet with P6.

An out-of-the-box (OOTB) Unifier Object, "Rate Sheet" (in Gateway), contains all the canned fields present under the **Master Rate Sheet** in Unifier.

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Gateway Data Dictionary

The following objects, in Gateway data dictionary, support the integration:

- ▶ **P6Resource**
- ▶ **P6ResourceRate**
- ▶ **P6Role**
- ▶ **P6RoleRate**

Each of these objects are explained in the following tables:

P6Resource

Note: P6Resource exists in Gateway only, and it is not deployed through Unifier.

Field	Type	Description
uuu_resc_parent_id	String	Resource Parent ID
uuu_resc_short_name	String	Resource short name
uuu_resc_name	String	Resource Name
uuu_resc_status	String	Resource Status
uuu_resc_curr	String	Currency

P6ResourceRate

Note: P6ResourceRate exists in Gateway only, and it is not deployed through Unifier.

Field	Type	Description
ResourceObjectId	Foreign Key	Resource object ID to map the rate
effective_date	String	effective date for the rate
standard_rate	String	price per unit

P6Role

Note: P6Role exists in Gateway only, and it is not deployed through Unifier.

Field	Type	Description
uuu_role_parent_id	String	Role Parent ID
uuu_role_short_name	String	Role Code
uuu_role_name	String	Role Name
uuu_role_status	String	Role Status

P6RoleRate

Note: P6RoleRate exists in Gateway only, and it is not deployed through Unifier.

Field	Type	Description
RoleObjectId	Foreign Key	Role object ID to map the rate
standard_rate	String	price per unit

Gateway Field Mappings

The following out of the box (OOB) field mapping templates are in Gateway to support the integration:

Mapping	Type	Flow Type	Unifier Object	Gateway Object	P6 Object
Sync Resource data from P6 for EVM	Both	Master Data	P6Resource (New)	Resource	Resource
Create Resource Rate from P6 for EVM	Create	Master Data	P6Resource Rate (New)	Resource Rate	Resource Rate
Sync Role data from P6 for EVM	Both	Master Data	P6Role (New)	Role	Role
Create Role Rate from P6 for EVM	Create	Master Data	P6RoleRate (New)	Role Rate	Role Rate

Resource Data from P6

A mapping template is created to map the fields of **Resource** object in P6 to **P6Resource** object in Unifier. The following is used for creating/updating a new Rate Sheet:

Unifier Field Name	Gateway Field Name	P6 Field Name
uuu_resc_parent_id	ParentObjectId	ParentObjectId
uuu_resc_short_name	Id	Id
uuu_resc_name	Name	Name
uuu_resc_status	IsActive	IsActive
uuu_resc_curr	CurrencyName	CurrencyName

Resource Rate from P6

A mapping template is created to map the fields of **Resource Rate** object in P6 to **P6ResourceRate** object in Unifier. The following is used for creating/updating a new Rate Sheet in Unifier:

Unifier Field Name	Gateway Field Name	P6 Field Name
ResourceObjectId	ResourceObjectId	ResourceObjectId
effective_date	EffectiveDate	EffectiveDate
standard_rate	PricePerUnit	PricePerUnit

Role Data from P6

A mapping template is created to map the fields of **Roles** object in P6 to **P6Role** object in Unifier. The following is used for creating/updating a new Rate Sheet:

Unifier Field Name	Gateway Field Name	P6 Field Name
uuu_role_parent_id	ParentObjectId	ParentObjectId
uuu_role_short_name	Id	Id
uuu_role_name	Name	Name
uuu_role_status	IsActive	IsActive

Create Role Rate from P6

A mapping template is created to map the fields of **Role Rate** object in P6 to **P6RoleRate** object in Unifier. The following is used for creating a new Role in the Rate Sheet:

P6 Field Name	Gateway Field Name	P6 Field Name
RoleObjectId	RoleObjectId	RoleObjectId
standard_rate	PricePerUnit	PricePerUnit

This mapping template contains the pre-defined elements of Unifier mapped to corresponding fields in P6, but you can deploy additional custom attributes to Gateway (for Activity Sheet), and they will be available for the data mapping templates.

For required fields, the integration will fail if you change the data mapping template (or create your own data mapping template) such that a required element is no longer in the template (that is, you remove a required element from the mapping template).

Note: The schedule type is a required field while sending the data across multiple P6 projects to Unifier.

Business Flows in Gateway

The following out of the box (OOB) Business Flows are available in Gateway:

Business Flow	Field Mapping Template (Applied for)	Description
Get Resource and Role Rates from P6 for EVM	Sync Resource data from P6 for EVM (Both) Sync Resource Rate from P6 for EVM (Create) Sync Role data from P6 for EVM (Both) Sync Role Rate from P6 for EVM (Create)	Create/Update Rate Sheets from P6 to Unifier

Get Resource and Role Rates from P6

This business flow is used to push Rates data from P6 to Unifier **Company Workspace**. The business flow can be initiated from Unifier or Gateway. After it is initiated from either of these applications, Gateway will have all the data from P6 and will send the data to Unifier Provider. Unifier Provider then creates/updates the **Master Rate Sheet** in Unifier **Company Workspace**.

The following P6 parameters are enabled for this flow:

- ▶ Include resource hierarchy
- ▶ Include role hierarchy

The following parameter is enabled for this flow:

Delete data that no longer exists in the source application? (Default value = Yes)

Synchronization: Resource and Role Rates from P6

This synchronization is set:

- ▶ To be out-of-the-box (OOB) to be initiated from Unifier.
- ▶ To fetch the *Resource* and *Role* list from P6, along with the respective standard rate.

Only one Master Rate Sheet is allowed at the Company level in Unifier. If the Master Rate Sheet does not exist, create one manually or use the Get Data option in the Master Rate Sheet log.

When the Master Rate Sheet exists, the fields values will be updated regularly with the latest data from Gateway.

Notes:

- If a transaction fails because of connection issues with Gateway, or incorrect Gateway parameters in Admin mode, it is recorded in the job history with an error message.
 - While only one Master Rate Sheet exists at the Company level, users can create multiple Rate Sheets at the project/shell level.
 - Resource and Role rates will be imported from P6 the first time a Master Rate Sheet is synchronized. Subsequent imports will not update the rates.
-

Oracle Primavera Cloud, Oracle Integration, and Unifier

If the Company Administrator integrates Unifier, Oracle Primavera Cloud, and Oracle Integration and assigns you the applicable permissions, you can use Oracle Integration recipes to view and update the System Activity Sheet or the Master Rate Sheet (or both) in Unifier with information from Oracle Primavera Cloud by using Oracle Integration Recipes.

When the Master Rate Sheet is integrated, it lets you use **Get Data**  to bring in information from Oracle Primavera Cloud through the Rate Sheet Recipe. You can then view the Roles and Resources information, as well as Rates. When the System Activity Sheet is integrated, it lets you use the Activity sheet Recipe to add connections on the **Details** page for a project/shell. For more information, see the *Unifier General Administration Guide*.

To view the Master Rate Sheet:

- 1) Go to the **Company Workspace** tab and switch to **User** mode.
- 2) In the left Navigator, select **Master Rate Sheet**.
- 3) Double-click the sheet to open it.

You can filter the sheet based on different fields by clicking **Find on Page** and entering the applicable information from Oracle Primavera Cloud.

To view a System Activity Sheet:

- 1) Go to the shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Activity Manager**, and then select **Activity Sheet**.
- 3) In the **Activity Sheets** log, select the **System Activity Sheet**.
- 4) In the right pane, use the **History** tab to view a list of **Actions** taken.

User-Defined Reports

The following sections provide details about the User Defined Report (UDRs).

Also see the ***Internationalization and CSV Files*** section for language (Internationalization) details.

Designing Accessible Reports

Unifier provides the ability to build accessible report layouts. Users create reports and layouts. As such, it is up to the users creating the reports to ensure that they are built meeting accessibility criteria, if necessary.

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About User-Defined Reports (UDRs)

A user-defined report (UDR) is a customizable report that can be run at the project/shell, program, and company level (User mode). UDRs are defined the same way for each level; only the query fields vary for each report.

You can:

- ▶ Define as many reports as you need and save them for other users to access and run
- ▶ Run reports on cash flow curve values in either transaction or project currencies. The UDR will show the values in the chosen currency, and it will display the exchange rate used for the conversion between the transaction and project currency.
- ▶ Run snapshot reports in both currencies. All changes done in the UDR will be supported for Snapshot reports.

The following information can be included in a UDR:

- ▶ Business process data elements (fields found on a business process form)

- ▶ Business process workflow information
- ▶ System data elements (including company, project/shell, and user information)
- ▶ Column headings from cost, funding, and schedule sheets
- ▶ Cost sheet and work package data elements
- ▶ Shell P6 Summary

The data source for creating a report using the Shell P6 Summary data type are: P6 Summary and Spread.

You can open the tables within the P6 Summary Sheets in Unifier for data views.

- ▶ Data views in published status

You can save or export reports in a variety of formats, including CSV, Microsoft Excel, Adobe Acrobat PDF, and XML. File names for reports are governed by the following:

- ▶ Files generated from the Company Workspace are named using [report title].[file extension]. The report title is defined by a user on the General tab during the creation process.
- ▶ Files generated from a project/shell are named using [project number]_[report title].[file extension]. The project number indicates where the data originates.
- ▶ File names must be 255 characters or fewer; file names that exceed 255 characters are automatically truncated.
- ▶ Special characters that are not allowed by the operating system or email application are automatically replaced with underscores.
- ▶ The applicable extension is assigned based on the selected format, such as .csv, .xlsx, .pdf, or .xml.
- ▶ The language of the published report is based on the user who is signed in the system and is generating the report.

Accessing User-Defined Reports (UDRs)

User-defined reports (UDRs) are set up and run in **User** mode. You can run UDRs at the:

- ▶ Project level
- ▶ Shell level
- ▶ Program level
- ▶ Company level

When you run a report based on a permission-aware Document Manager data source, the system lets you see the report only if you have permission to see the data source, in case of:

- ▶ Document Manager - Company
- ▶ Document Manager - Project/Shell

For Collaborator Users, access to creating and viewing UDRs is also determined by permissions. If the **Create Permission Based** setting is enabled for your account, you can create and view UDRs and transfer ownership. If only the **View** setting is enabled, you can view existing UDRs and transfer ownership.

In **User** mode, UDRs reside in the **User-Defined Reports Log**. For more information, see **User-Defined Reports Log** in the *Unifier General User Guide*.

To access UDRs from this log:

- 1) Go to the applicable tab and switch to **User** mode.
- 2) In the left Navigator, select **Reports**, and then select **User-Defined**.

User-Defined Reports Log

The **User-Defined Reports** log displays the following toolbar options.

Note: You must have specific permissions to use the listed options.

Create

Enables you to select a source for your newly defined reports by providing the following options:

- ▶ **From System Data Sources**
- ▶ **From Permission Based Data Sources**
- ▶ **From Templates**

The options above will be explained in subsequent sections.

Actions

Enables you to perform the following functions on the selected report:

- ▶ **Transfer Ownership**

Enables you to transfer the report ownership. Click the **Select** check box icon to open the User Picker screen and select the user name.

- ▶ **Delete**
- ▶ **Permissions**

Enables you to open the **Permissions** window and do any of the following:

- View a list of users, groups, or both users and groups and their permissions.
- Add, modify, or remove permissions.
- Add, modify, or remove users or groups.

When you are in the Permissions window, you can use the Next or Previous arrows icons to move to the next or previous report and view the report permissions settings, users, and groups.

Click **Save** to save your changes. Click Cancel to return to the log.

View

Similar to the **View** function of a BP, it enables you to set the view of the **User-Defined Reports** log by using the following options:

- ▶ **All Reports**
- ▶ **Owned by Me**
- ▶ **Create new view**
- ▶ **Manage Views**

Edit View

Enables you to modify the user-defined view. You can use this option to modify the list of available columns, apply filters, change grouping, or change sorting.

Refresh

Enables you to refresh the information displayed on the log.

Print

Enables you to print the contents of the log.

Find on Page

Enables you to find specific information on the log.

The **User-Defined Reports** log has the following columns:

Name

The name of the report.

Description

The description of the report, if available.

Data Type

The report data type.

Access Type

The report access type.

Report Type

The report format type. By default, the **Tabular** option is selected. You can create and run user-defined reports of the following types:

- ▶ **Tabular:** This is the basic report format, arranging information vertically in columns. Tabular reports are a way to present related information for multiple records on the same page.
- ▶ **Cross tab:** Cross tab reports allow the display of data on two axes and enable users to run time-series reports defined by two data sources, for example, payments made per quarter per vendor.
- ▶ **Summary:** Summary reports can be run to display summary data. Project-level summary reports can also be used to customize the project summary page and include the information that is most useful for you.
- ▶ **Alert:** Project/shell-level alert reports are used to set up and customize system alerts based on project/shell-level triggers that you specify. For example, you have an alert let you know when your remaining budget is getting low. Alerts are set up and customized by users for their own use using alert reports.

Enable for Integration

Enables you the condition of the report, related to integration.

Owner

The owner of the report.

Last Run Date

The date the report was run the last time.

Creation Date

The creation date for the report.

Last Modified By

The person who modified the report the last time.

Last Modified Date

The date the report was modified the last time.

Schedule

The schedule that is set for the report to run.

The **User-Defined Reports** log reports have the following options for the *gear menu* ():

- ▶ **Run**
- ▶ **Copy**
- ▶ **Edit**
- ▶ **Transfer Ownership**
- ▶ **Permissions**
- ▶ **Delete**

Tabs

When you select a report, the **User-Defined Reports** log splits and displays the following report properties tabs:

Saved Results tab

This tab provides the following information about the report, if available:

- ▶ **Run Date**
- ▶ **Scheduled/Ad-Hoc**
- ▶ **Run By**
- ▶ **Output Format**

Permissions tab

This tab provides permissions related information such as groups, users, and permissions types.

Schedule tab

This tab provides information about:

- ▶ Scheduled report runs.
- ▶ Whether the report has been enabled to have scheduled Report runs.
- ▶ Output formats and scheduling frequencies

This tab also provides additional information about the report schedule, if any.

Use the **Expand** icon to expand the properties tab pane. Use the **Collapse** icon to collapse the properties tab pane.

User-Defined Report Types

You can create and run user-defined reports of the following types:

Tabular: This is the basic report format, arranging information vertically in columns. Tabular reports are a way to present related information for multiple records on the same page.

Cross tab: Cross tab reports allow the display of data on two axes. Cross tab reports enable users to run time-series reports defined by two data sources, for example, payments made per quarter per vendor.

Summary: Summary reports can be run to display summary data that can be used on project/shell, program, and company Summary views.

Alert: Project/Shell-level alert reports are used to set up and customize the generation of system alerts, based on a project/shell trigger that you specify. For example, you can have alerts let you know when your remaining budget is getting low. Alerts are set up and customized by users for their own use using alert reports.

When creating a new user-defined report, the process is similar for all report types. The **Columns** tab is the only tab that is different for each report type. Additionally, only Tabular reports have a **Group By** and **Sort By** tab.

User-Defined Report Data Types

After choosing the report type (Tabular, Cross tab, Summary or Alert), you choose a data type. This determines the type of data that will be displayed on the report.

Data Type	Project UDR	Shell UDR	Program UDR	Company UDR	UDR Template	Use for Maintenance Management Only
Accounts Sheet				x		
Active Task Information	x	x		x	x	
Asset Summary Sheet				x		
Audit				x		x
Commitment Summary	x	x			x	
Company Cash Flow				x		

Data Type	Project UDR	Shell UDR	Program UDR	Company UDR	UDR Template	Use for Maintenance Management Only
Company Cost				x		
Company User Information				x		
Cost Sheet - CBS	x	x	x		x	
Cost Transactions -CBS	x	x	x		x	
Cost Transactions MC - CBS	x	x				
Data Views	x	x	x	x	x	
Document Manager	x	x	x	x	x	
Document Manager—Company				x		
Equipment				x		x
Funding	x		x	x	x	
Gates	x	x	x		x	
Inventory				x		x
Inventory On-hand Detail				x		x
Item Master				x		x
Job Plan				x		x
Master PM Book				x		x
Master PM Meter				x		x

Data Type	Project UDR	Shell UDR	Program UDR	Company UDR	UDR Template	Use for Maintenance Management Only
Schedule						
Master PM Time Schedule				X		X
Material Transaction				X		X
Partner User Information				X		
PM Book				X		X
PM Meter Schedule				X		X
PM Time Schedule				X		X
Program Cash flow			X			
Program Cost			X			
Program Schedule			X			
Resource Booking	X				X	
Resource Manager—All Actuals				X		
Resource Manager—Allocated Roles	X		X		X	
Resource Manager—Booked Resources	X		X		X	
Resource Manager—	X		X		X	

Data Type	Project UDR	Shell UDR	Program UDR	Company UDR	UDR Template	Use for Maintenance Management Only
Project Actuals						
Resource Manager - Resources (Company)					x	
Resource Manager—Roles				x		
Resource Manager—Sheets	x		x		x	
Service Center				x		x
Service Request				x		x
Schedule of Values	x	x	x	x	x	
Shell or Project Cash Flow	x	x	x	x	x	
Shell or Project Cost	x	x	x		x	
Shell or Project Groups	x	x	x		x	
Shell or Project Information	x	x			x	
Shell or Project Users	x	x			x	
Workflow Information	x	x	x	x	x	
Work				x		x

Data Type	Project UDR	Shell UDR	Program UDR	Company UDR	UDR Template	Use for Maintenance Management Only
Order						
Work Order Items				X		X
Work Order Role				X		X
(Asset class name)				X		
(Business process name)	X	X		X		
(Planning type name)				X		

Creating a User-Defined Report

To create a new user defined report:

- 1) Navigate to the **Reports** grouping node and click the **User-Defined** functional node.
- 2) From the toolbar of the **User-Defined Reports** log, click **Create** and select one of the following:
 - ▶ **From System Data Sources**
 - ▶ **From Permission Based Data Sources**
 - ▶ **From Templates**
- 3) Fill out all tabs in the **New User Defined Report** window, and select **Save Report** or **Save Report & Run**.

For more information, see the following topics on how to complete each tab.

General Tab

The General tab allows you to input general information about the report, as well as select the type of information that will be used as the basis of the report. It contains the following fields:

- ▶ **Data Type:** Select the type of data on which the report is being run. Data Type selected will be locked for the report and cannot be reverted. This is a required field.
- ▶ **Report Name:** This is a required field.

- ▶ **Report Type:** This is a required field. It has the following options:

- ▶ **Tabular**
- ▶ **Cross Tab**
- ▶ **Summary**
- ▶ **Alert**

See **User-Defined Report Types** (on page 222) for more information about each type.

- ▶ **Report Title**
- ▶ **Element Type:** The values in this drop-down menu are based on the data type selected. This is a required field.
- ▶ **Description**
- ▶ **Access Type**
- ▶ **Report Owner**
- ▶ **Enable for Integration.**
- ▶ **Default Time Zone:** Select the time zone that will be applied when the report is run.
- ▶ **Accessible:** This option enables the manual report run results to meet accessibility standards. When enabled, the output format is HTML, and the page layout will be portrait. This option does not apply to scheduled report runs.

Note: You can only access the other tabs after the required fields of the General tab are completed. After you move to another tab, the **Data Type**, **Report Type**, and **Element Type** fields will become read only and cannot be edited.

Columns Tab

The **Columns** tab allows you to define the structure of the report based on the different report types.

In the **Available Columns** section:

- 1) From the **Select a Data Source** list, select a data source, such as query-based tabs. Query-based tabs of a BP display as a data source for UDRs at the following levels:
 - ▶ Company Templates
 - ▶ Shell Templates
 - ▶ Company Workspace
 - ▶ Shell levelQuery-based tabs display as a data source in the format: *<BP Name> / <QBT Name>*
- 2) In the **Data Element** column, select the check box for each data element.
- 3) Drag and drop the selected data elements to the left pane to add columns to the report.
- 4) Perform any of the following actions:
 - ▶ Click **Add Formula** to add a custom column that is not listed in the **Available Columns** section, and then create a formula using the other existing data elements.

For example, a formula to display the remaining number of days before the due date is reached. Create this formula by subtracting a due date data element from a current date data element.

- ▶ Click  **Refresh**, to refresh the list of selected columns in the left pane.
- ▶ Click  **Delete** to delete a selected column from the left pane.
- ▶ Click  **Reorder** to modify the display order of the selected columns in the left pane.

Tabular Report - Columns Tab

Add Formula 

Data Element	Column Heading	Alignment	Width	Summary	Formula
Inspections / Record No.	Record No.	Left		No	
Inspections / Title	Title	Left		No	
Inspections / Due Date	Due Date	Center		No	

Current width(in pixels): 10

Maximum available width: 572

Note: Unspecified column widths will be displayed evenly for user during execution

Available Columns [Ⓢ]

Select a Data Source

Inspections /

▼

Filter Data Element ✕

☐ Data Element	Data Element Label	Type
☐ end_date	End Date	Timesta...
☐ uu_record_...	Record Last Up...	Timesta...
☐ status	Status	String
☐ creator_id	Creator	String
☐ amount	Amount	Double
☐ usrAppEstR...	Request an Esti...	String
☐ usrMaterialR...	Material Reques...	String
☐ ucwoTotalM...	Material Costs	Double
☐ ueqpWarran...	Warranty Details	String

Figure 1: Columns Tab of a Tabular User-Defined Report

The left pane header contains the following elements and columns:

- ▶ **Data Element**
- ▶ **Column Heading**
- ▶ **Alignment**
- ▶ **Width**
- ▶ **Summary**
- ▶ **Formula**
- ▶ **Hide**

Crosstab Report - Columns Tab

The color of each block corresponds to the picture in the top left block, to display how data is arranged. Select at least one Data Element for the **Body Columns**, **First Column**, and **Body Data** blocks.



The diagram shows a report layout with three main sections: a header section (top left), a first column section (bottom left), and a body section (right). The header section contains a grid of cells. The first column section contains a single column of cells. The body section contains a grid of cells.

Body Columns

Data Element * Width

First Column

Data Element * Column Heading * Required

Width

Body Data

Data Element * Currency Format

Row Sort Row Alignment Decimal Places ☐ Show Row Total

Column Sort ☐ Show Column Total

Summary Report - Columns Tab

This is the **Columns** tab for a **Summary** report. The following fields are required:

- ▶ First Column
 - ▶ **Select Data Element for First Column**
 - ▶ **Column Heading**
- ▶ Second Column
 - ▶ **Column Type**
 - ▶ **Column Heading**
 - ▶ **Type**
 - ▶ **Formula**

First Column

Select Data Element for First Column * Column Heading * Required

Width

Second Column

Column Type * Column Heading *

Width Decimal Places

Currency Format Type *

Formula *

Alert Report - Columns Tab

This is the **Columns** tab for an **Alert** report. Enter a formula for the report column.

The screenshot shows a form for configuring an Alert report column. It includes the following fields:

- Type:** A dropdown menu with "Summary Value" selected.
- Condition:** A dropdown menu with "equals" selected.
- Trigger Value:** A text input field containing the value "0".
- Indicator:** A dropdown menu with "Green" selected.
- Formula:** A large text area for entering a formula, marked with a red asterisk and a "Required" label at the bottom right.
- Summary Type:** A dropdown menu with "Summary" selected.

Query Tab

The Query tab allows the entry of query parameters as defined during creation and setup. If the report has been set up to enter query parameters, you may enter query information, which will give report results based on records that match the parameters you entered, or you can run a report on all records by leaving the field blank.

User-Defined Report (UDR) and Query-Based Tab

Users will be able to use the Summary Elements, from any of the QBTs, in any of the UDRs that the user wants to use if the UDR is based on the same business process record.

The toolbar of the Query tab has the following elements:

- ▶ **Add**
- ▶ **Refresh**
- ▶ **Filter**
- ▶ **Show results matching any of the following conditions**

To add a query condition in the Query tab:

Click **Add** and select **Query Condition based on Data Element** or **Query Condition based on Formula**.

- ▶ When selecting **Query Condition Based on Data Element**, the Add Data Element Query Condition window opens and displays the following fields and elements:
 - ▶ **Data Element:** The source of the data that will be used to create the query condition. This is a required field.

- ▶ **Label**
- ▶ **Condition:** Defines how the data element will be checked, such as if the value of the data element is equal to, less than, or greater than the specified value. This is a required field.
- ▶ **Values:** The values that are used by the Condition when checking the data element.
- ▶ **Allow users to modify value(s) during execution**
- ▶ **Cancel**
- ▶ **Save**
- ▶ **Save & Add New**
- ▶ When selecting **Query Condition Based on Formula**, the Add Formula Query Condition window opens and the following fields and elements:
 - ▶ **Formula Label:** This is a required field.
 - ▶ **Formula:** To create a formula with multiple data elements when an existing data element does not capture the desired value.

For example: You can create a formula that subtracts a due date data element from a current date data element to represent how many days are left before the due date is reached, and you can create a condition based on that value.
 - ▶ **Condition:** Defines how the formula will be checked, such as if the value of the formula is equal to, less than, or greater than the specified value. This is a required field.
 - ▶ **Values:** The values that are used by the Condition when checking the data element.
 - ▶ **Allow users to modify value(s) during execution**
 - ▶ **Cancel**
 - ▶ **Save**
 - ▶ **Save & Add New**

Note: If you select the **Allow users to modify value(s) during execution** option, the Allow Modify at Run column will contain a check mark. You have the option to deselect the **Allow users to modify value(s) during execution** option. However, the Allow Modify at Run column will display a check box regardless of whether the box is selected in the query condition (Add Data Element Query Condition).

The log of the Query tab displays the settings of each query condition, along with the actions you can perform on each query condition. It contains the following columns:

- ▶ **Data Element**
- ▶ **Label**
- ▶ **Condition**
- ▶ **Value(s)**
- ▶ **Allow Modify at Run**
- ▶ **and/or**
- ▶ **Delete**
- ▶ **Reorder**
- ▶ **Action**

- ▶ **Open**
- ▶ **Delete**

To edit a previously added query condition, click the three dots in the **Action** column of the log and click **Open**.

Note: You cannot open a previously added query condition by double-clicking it in the log.

Group By and Sort By Tabs (Tabular Report Only)

Group By tab

The Group By tab allows you to create groups based on the selected columns. You can create a max of three groups using the **Add** button.

The Group By log has the following columns:

- ▶ **Group By**
- ▶ **Group Heading**
- ▶ **Order**
- ▶ **Delete**
- ▶ **Reorder**

After a group is added, you can edit the **Group By** and **Order** fields for that group by double-clicking.

The right tab has the following additional options:

- ▶ **Show Group Header**
- ▶ **Show Detail Rows**
- ▶ **Show Summary Row in Footer**
- ▶ **Show Group Name**
- ▶ **Show Count in Footer**

Sort By tab

The Sort By tab allows you to arrange the results in ascending or descending order, based on the added columns.

Layout Tab

The Layout tab allows you to configure where the content of the report is displayed. It contains the following elements:

- ▶ **Paper Size**
- ▶ **Page Orientation**
- ▶ **Add**
- ▶ **Show Border**

Below the header options is a visual representation of how information will be organized when the report is run. It contains the following columns:

- ▶ **Left Column**
- ▶ **Center Column**
- ▶ **Right Column**
- ▶ **Row Height**
- ▶ **Delete**
- ▶ **Reorder**

Each column contains cells that represent blocks of information. To add content to a cell, click the **Add** button. The Page Layout window opens.

Select which section to add content to with the **Select Layout for** field, using one of the following options:

- ▶ **Title**
- ▶ **Header**
- ▶ **Footer**
- ▶ **Summary**

Input a row height in the **Select row height** field.

You can select the content for the Left, Center, and Right columns, and then select the Vertical Alignment for each. Once finished, click **Save**.

Workspaces Tab

The Workspaces tab allows you to choose which shells to pull data from when the report is generated. It contains the following options:

- ▶ **Current Shell and Sub Shells**
- ▶ **Current Shell Only**
- ▶ **Sub Shells Only**
- ▶ **User-Defined**
- ▶ **Exclude Inactive Workspaces**

If you select **User-Defined**, you can specify which shells will be used in the report generation. Click **Add** and use the arrow buttons to move shells from the Available Workspaces list to the Selected Workspaces list.

User-Defined Report Formats

You can choose the format of user-defined report results. The report format options are available in the **Query and Format** section of the report at runtime.

The report format options are:

- ▶ **HTML**: Displays the report in the standard format in a browser window. You may print a copy of the report from the browser window. (Right-click and select your browser's Print option)

- ▶ **CSV:** Formats the report in an exportable CSV format, usually in Microsoft Excel or another software application you have set up for this format. You will be prompted to save the file or open it.
- ▶ **Excel:** Downloads the report in Microsoft Excel format. Depending on your browser, it will be downloaded automatically, or you may be prompted to download or save it manually. By default, the system uses the XLSX format (.xlsx extension) for the file name.
- ▶ **PDF:** Displays the report as a PDF in a browser window. Depending on your browser, it will be downloaded automatically, or you may be prompted to download or save it manually.
- ▶ **XML:** Generates the output in XML format. Depending on your browser, it will be downloaded automatically, or you may be prompted to download or save it manually.

If you want to save the report results in Unifier, select the **Save results in Unifier** check box in the Report Location section of the report. Selecting this check box will save a copy of the PDF, XML, or CSV report and make it available for retrieval. For information on file names, see **About User-Defined Reports (UDRs)** (on page 217).

Notes:

- Scheduled report runs can only be saved and retrieved in PDF, XML, or CSV formats and sent to the report owner or to the owner and other users and groups. These are chosen in the Schedule tab of the Edit Report window.
 - If you select a report format other than PDF, XML, or CSV, the **Save results in Unifier** check box will be disabled.
 - The DE of type Rich Text DE is not available to be added to the User-Defined Reports (located in the left Navigator, under Reports).
-

Running a User-Defined Report

Running a user-defined report consists of the following elements:

- ▶ Define query parameters if applicable
- ▶ Review/choose projects/shells to include if applicable
- ▶ Add runtime notes if applicable
- ▶ Choose the report format (HTML, CSV, Excel, PDF, XML)
- ▶ Run the report

The following describes how to run project/shell, program, and company-level user-defined reports.

Note: User-defined reports created with data view data types require the data view to be in "published" status. If the data view was changed to "draft" status, the report will not run, and you will see an alert.

To run a user-defined report:

- 1) Go to the shell tab, program tab, or **Company Workspace** tab and switch to **User** mode.
- 2) In the left Navigator, select **Reports**, and then select **User-Defined**.

3) In the **User-Defined Reports** log, double-click the applicable report or select it and then click the *gear menu* () and select **Run**.

4) In the report dialog box, select and enter values in the applicable values, which vary depending on the report.

For more information, see the table below.

5) Click **Run Report** to generate the user-defined report.

Depending on your browser and your report format, the file will be downloaded automatically or you will be prompted to download the file manually.

Query and Format

Option	Description
Report Format	Choose the format in which the report should appear: HTML, PDF, CSV, Excel, or XML. ▶ HTML: Displays the report in the standard format in a browser window. You may print a copy of the report from the browser window. (Right-click and select your browser's Print option.) ▶ CSV: Formats the report in an exportable CSV format, usually in Microsoft Excel or another software application you have set up for this format. You will be prompted to save the file or open it. ▶ Excel: Downloads the report in Microsoft Excel format. Depending on your browser, it will be downloaded automatically, or you may be prompted to download or save it manually. By default, the system uses the XLSX format (.xlsx extension) for the file name. ▶ PDF: Displays the report as a PDF in a browser window. Depending on your browser, it will be downloaded automatically, or you may be prompted to download or save it manually. ▶ XML: Generates the output in XML format. Depending on your browser, it will be downloaded automatically, or you may be prompted to download or save it manually.

Option	Description
Record count or UDR	This option is available for Tabular, Summary, and Cross Tab type reports. You have ability to set the number of records to be retrieved for the report. This number will be set equal to the maximum number set at the company level by default, by the company administrator. The maximum number will be divided into intervals so that you can select the appropriate number. Also, the numeric format for the count must match your preferences. For more information, see the Options Available for Record Count table.
Time Zone	For information purposes, the Query tab displays the time zone that is used for date fields in the report. The default time zone for a report is set up when the report is designed. It can reflect your user time zone, as defined in your user preferences, or it can be fixed to a particular time zone, such as the project location or company headquarters.

Option	Description
Report Query Parameters	If the report has been set up to enter query parameters, you may enter query information, which will give report results based on records that match the parameters you entered, or you can run a report on all records by leaving the field blank. The query parameters are defined during creation and set up. For example, you can set up a report to list all leases that expire within 10 days of today. You can also choose to accept the default query parameters, if any. For program-level and company-level UDRs you can see all projects/shells with a status of Active, On-Hold, or View-Only. You can specify which project/shell the report should be saved in. For shell-level reports only, you can choose to exclude Inactive shells in the report run. Depending on how the report was set up (specifically, if "Allow users to modify value(s) during execution" was enabled in the creation step), you may add or remove projects/shells as needed. For shell-level (cross-shell) UDRs, you can retrieve data across shells and sub-shells. You can select to exclude inactive shells in the report run, and the selection of shells is determined when the UDR is created. You cannot modify: ▶ Current Shell and sub-shells ▶ Current Shell only ▶ Sub-shells only You cannot modify fields unless the fields are set as user-defined. If the Allow user to modify User-defined list during execution check box was selected when the UDR was created, you can modify the list of User Defined shells at run time of the report by using the Add and Remove buttons. You can only add the shells in which you are a member user.

Report Location

Option	Description
Save Report Location	If you want to save the report, choose the location it should be saved in: ▶ Save results in Unifier: This check box becomes active if you select PDF, XML, or CSV. Selecting this check box will save a copy of the PDF, XML, or CSV report and make it available for retrieval. ▶ Document Manager: Saves the report in the Document Manager. If you choose this option, specify a name for the report (Save As) and which folder of the Document Manager it should be saved in (Location). Scheduled report runs can be saved and retrieved in PDF, XML, or CSV formats and sent to the report owner or to the owner and other users and groups. These are chosen in the Schedule tab of the Edit Report window.

Workspaces

Option	Description
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Option	Description
Workspaces	The Workspaces block is for shell-level, program-level, and company-level reports. In the Workspaces block you can add additional shells that the report can be generated from. When you run report, the Workspaces block displays "User Defined" if you have selected "User Defined" under the shells tab in the report definition. You can exclude Inactive Workspaces by checking the check box, "Exclude Inactive Workspaces," in the report definition. The project/shell tabs appear for program-level and company-level UDRs and shows all projects/shells with a status of Active, On-Hold, or View-Only. You cannot modify the list unless the Workspaces block displays "User Defined." All the shells selected in the Shells tab under Edit report will be displayed in Workspaces overlay (Available Workspaces). If the check box "Allow user to modify User-defined list during execution" is selected, you can modify the list of workspaces by using the Add or Delete options. When you click Add, a new Workspaces Picker is displayed with both available and selected workspaces (Selected Workspaces section of the Workspaces page). All the shells that are already added in the report definition are displayed in the Selected Workspaces. You can add additional shells or remove the existing ones in the Workspaces Picker. The Type field has the default value of "All." The other options are all for active shell types. You can filter shells by type. The Find on Page option is available to filter the available workspaces. The Select option will add all the newly added workspaces, as a part of filtered list, while reporting. The Cancel option will cancel the changes and closes the window.
240	When in the report definition, under shells tab, any of the following options are selected, the Workspaces block displays an empty list, and the report will be run for

Notes

Option	Description
Notes	Enables you to enter report notes that will be included only on the current report results (to be generated) and will not be saved or generated in any subsequent report results.

Options Available for Record Count

Max Limit at Company	Options available at Report level
100,000	1,000 10,000 25,000 50,000 75,000 100,000
250,000	1,000 50,000 100,000 150,000 200,000 250,000
500,000	1,000 100,000 150,000 200,000 250,000 500,000
750,000	1,000 100,000 150,000 250,000 500,000 750,000

Max Limit at Company	Options available at Report level
1,000,000	1,000 100,000 250,000 500,000 750,000 1,000,000

Retrieve scheduled report results

- 1) Navigate to the project/shell-level, program-level, or company-level User-Defined Reports log.
- 2) Select a report from the log. The **Saved Results** tab opens in the right pane.
- 3) Double-click the saved result or click the *gear menu* () and select **Download** to view.
You will be prompted to open or save the results file.

Depending on your browser, the file will be downloaded automatically, or you will be prompted to download the file manually.

Delete saved report results

- 1) Navigate to the project/shell-level, program-level, or company-level User-Defined Reports log.
- 2) Select a report from the log. The **Saved Results** tab opens in the right pane.
- 3) From the *gear menu* (), select **Delete**. Click **Yes** to confirm.

Saving and Retrieving Scheduled Report Results

Report owners can schedule user-defined reports to run automatically and save the results as PDF, XML, or CSV files. If you have run permission for a report, you can view or print any saved results. Report owners can delete saved results from a scheduled report run. For information on file names, see **About User-Defined Reports (UDRs)** (on page 217).

You can save report results and query parameters on reports that you run manually (ad hoc). This option is available only when the report is being generated in PDF, XML, or CSV format. This is available at runtime for project/shell-level, program-level, and company-level user defined reports.

Note: The default time zone for a report is set up when the report is designed. It can reflect the time zone of the person running the report, as defined in user preferences, or it can be fixed to a particular time zone, such as the project location or company headquarters. If the "user's time zone" option was selected in the setup of this report, the time zone reflected on the scheduled report results will be that of the report owner.

To save report results:

- 1) Navigate to the project/shell-level, program-level, or company-level User-Defined Reports log.
- 2) Select a report from the log. The right pane displays results that have been saved from manual (ad hoc) report runs as well as scheduled report runs.
- 3) Click the *gear menu* () and click **Run** to open the User-defined Report window.
- 4) In the Query and Format section, choose **PDF**, **XML**, or **CSV**.
- 5) In the Report Location section, select the **Save results in Unifier** check box. This saves a copy of the report results.
- 6) Click **Run Report** to run the report. This may take a few moments.
When the report is generated, you will be prompted with a download window for the report, or it will be automatically downloaded to your system. The report will also be saved in the **Saved Results** tab in the right pane.

To save report results from scheduled report runs:

- 1) Navigate to the project/shell-level, program-level, or company-level User-Defined Reports log.
- 2) Select a report from the log. The right pane displays results that have been saved from manual (ad hoc) report runs as well as scheduled report runs.
- 3) Click the **Schedule** tab in the right pane.
- 4) Select the **Enable Scheduled Reports Run** check box and select values for the **Output Format**, **Frequency**, and **Range of Recurrence** fields.
- 5) In the Saved Report Location info section, select the location in which you would like to save the reports that are generated according to the schedule.
If you select **Saved Results** log, the report results will appear in the **Saved Results** tab of the report record.
If you select **Document Manager**, the report results will appear in the Document Manager.
- 6) Click **Save** when finished.

To retrieve saved report results:

- 1) Navigate to the project/shell-level, program-level, or company-level User-Defined Reports log.
- 2) Select a report from the log and select the **Saved Results** tab in the right pane.
- 3) Double-click a saved result to download the report results to your system.

To delete saved report results:

- 1) Navigate to the project/shell-level, program-level, or company-level User-Defined Reports log.
- 2) Select a report from the log and select the **Saved Results** tab in the right pane.
- 3) Click the *gear menu* () next to the result and click **Delete**.

Printing Report Results

After running a report, you can print a copy. Depending on the report format you chose, the report results are displayed in a browser window (HTML, XML), Adobe Acrobat Reader (PDF), Microsoft Excel (Excel, CSV), or other software application displaying CSV format. The printing functionality depends on the format of the report.

To print report results:

Run a user-defined report (user defined report).

For most formats, the file is downloaded automatically, or you are prompted to download the file by your browser. For HTML and XML, you may need to right-click the browser pop-up window and choose **Print**. Additional printing functionality may be available depending upon the report format. For information on file names, see **About User-Defined Reports (UDRs)** (on page 217).

Transferring Reports Between Environments

Multiple user-defined reports (UDRs) can be transferred between Unifier environments.

- 1) Go to the **Company Workspace** tab and switch to **Admin** mode.
- 2) In the left Navigator, select **Configuration Package Management**, and then select **Component Lists**.
- 3) Click **Create**.
- 4) Scroll to the **Company Workspace** section, and select **User Defined Reports**.
- 5) Select your reports.
- 6) Enter a value in the **Name** field (top left).
- 7) (Optional) Click **Error Check** to see if there are any dependencies.
- 8) Click **Save**.

Note: You can use the **Save As** option if you want to copy the component list.

To create a configuration package:

- 1) Go to the **Company Workspace** tab and switch to **Admin** mode.
- 2) In the left Navigator, select **Configuration Package Management**, and then select **Configuration Packages**.
- 3) Click **Create**.
- 4) Enter values in the **Package Name**, **File name** (zip file name), and **Components Lists**.
- 5) Select the component list related to your selected report.
- 6) In the **New Configuration Package** window click **Next**. The window displays a preview of your reports.
- 7) Click **Next**. In case of errors, you will see messages; if no errors are detected, respond to the following:
 - Do you want to publish this package for production?
 - Download package after creation.

- 8) Click **Create** to create the configuration package.
- 9) Import the configuration package into the destination environment to transfer the reports.

Working with Custom Reports

If your company has custom reports in a program or project/shell developed through Oracle Analytics Server, the custom reports will be available under the **Custom** grouping node.

Note: You must have permission to access custom reports in User mode. For Collaborator Users, access is limited to View if permission is enabled.

To run a custom report in a program or project/shell:

- 1) Go to the program or project/shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Reports**, select **Custom**, and then select the applicable report. The Reports log shows the list of available custom reports. The **Report Settings Page** will open in the right pane.
- 3) In the **Template and Format** section, select an output format.
- 4) In the lower-right corner of the Report Page, click **Run Report** to generate the report in the selected format.

Note: The print output is based on your permissions to certain data.

Report Settings Page

When you select the **Report Name** functional node, under the **Custom** grouping node in the left Navigator, the Report Settings Page will open in the right pane.

The following explains the main elements of the Report Settings Page:

- ▶ **Name:** The Report name appears in the upper-left corner of the page.
- ▶ **Template and Format:** The Template field is a drop-down list that displays the default template that was used at the time of designing the report in the Oracle Analytics Server. If multiple templates are available for the External Report, they will be listed in this drop-down list.

The Format field is a drop-down list that displays the default format (set based on the default template) that was used at the time of designing the report in the Oracle Analytics Server. If multiple formats are available for the selected template, they will be listed in this drop-down list.

Example

Available Template: Contracts

Available Formats: PDF, RTF

- ▶ **Search Parameters:** This section contains all the parameters that are designed for the External Report in the Oracle Analytics Server. Oracle Analytics Server supports the following parameter data types:
 - ▶ String

- ▶ Integer
- ▶ Boolean
- ▶ Date
- ▶ Float

Acceptable values (which include wildcard characters) for these parameters depend on the data model used for the report definition.

Except for the Date parameter, the Reports Settings window displays a text field for the other parameters.

- ▶ **Additional Parameters:** Displays additional parameters as defined by the report.
- ▶ **Run Report:** When you click **Run Report**, the system generates the report. When you run an External Report in User mode, the system accesses the Oracle Analytics Server and the External Report output will be based on the latest design of the report in the Oracle Analytics Server. Unifier does not store any data related to the External Report content such as model, format, layout, and so forth.
- ▶ **Reset:** When you modify the Template, Format, or Parameters fields, a **Reset** button will appear in the lower-right corner of the Report Page. Clicking **Reset** will clear out all the entries made by the user and will reset the fields back to the template default.

Custom grouping node

The **Custom** grouping node, under the **Reports** grouping node in the left Navigator, includes both the Internal Reports and the External Reports.

When you select and open an Internal Report, the Internal Report log opens and contains the following columns:

- ▶ **Name:** Displays the name of the Internal Report that has been created.
- ▶ **ID:** Displays the system-generated ID, for example, uuu_ext_54 for external report and uuu_54 for internal report.

When you select and open an External Report, the External Report log opens and contains the following columns:

- ▶ **Report Name:** Displays the name of the External Report that has been created in the Oracle Analytics Server.
- ▶ **Default Template:** Displays the default template name (for the Default Format) of the External Report that has been set in the Oracle Analytics Server.
- ▶ **Default Format:** Displays the default format of the External Report that has been created in the Oracle Analytics Server.

Running an External Report

When you run an External Report in User mode, the system accesses the Oracle Analytics Server and the External Report output will be based on the latest design of the report in the Oracle Analytics Server. Unifier does not store any data related to the External Report content such as model, format, layout, and so forth.

When you open an External Report, the **Report Settings** window opens, which contains fields related to the External Report parameters (listed in the Parameters section of the window), and fields related to the template and format for the External Report (Available Templates and Available Formats). The User can set the External Report attributes in the Reports Settings window.

Permission-Based User-Defined Reports (UDRs)

When you are creating User-Defined Reports (UDRs) at the project/shell, program, and company levels, you have the option to create them with **System Data Sources** or with **Permission Based Data Sources**.

Note: To be able to create the UDRs, you must have the **Full Access**, **Create All**, and **Create Permission Based** permissions.

- 1) Go to project/shell, program, or Company Workspace tab and switch to **User** mode.
- 2) In the left Navigator, select **Reports** and select **User-Defined**.
- 3) Click **Create** and select one of the following:
 - ▶ **System Data Sources**
 - ▶ **Permission Based Data Sources**

If you select the **System Data Sources** option, you can use the **Create a new report** window to create a UDR based on the following fields:

- ▶ **Data Type**
- ▶ **Report Type**
- ▶ **Element Type**
- ▶ **Access Type** (read-only)
- ▶ Query-based tabs associated with a BP

If you select the **Permission Based Data Sources** option, the following data sources are available to create permission-aware UDRs:

- ▶ Business Process (BP)
- ▶ Document Manager
- ▶ Query-based tabs associated with a BP

In the User-Defined Reports log, the **Copy from Templates** option (based on the report that is selected) will create a copy of the report based on the existing functionality.

The above applies to when you have the **Permissions Create Permission Based** permission.

When only have the **Create for Permission Based Data Sources** permission, you have the ability to create UDRs based on the permission aware data.

When creating a new UDR by way of copying an existing one, if you select a System Access Type report, the system does not allow you to create a UDR that is based on System Data Sources and displays an alert.

The permission for permission-aware data sources for a report that is packaged will be transferred from one environment to another.

Review the following for more information

When you are running report based on system-defined data sources, if your report is based on system-defined data sources, the report will contain the system-defined data irrespective of your permissions. The same result will be applicable to the Schedule Reports.

When you are running report based on permission aware BP data sources, and the permission aware reports are created based on BP data sources, then:

- ▶ The data presented in the report will be based on the permissions of the user who is running the report, and the user will only be able to access the data that they have permissions to see through the user interface.
- ▶ If you are running a permission based report, and you do not have access to the data for the BP data source, the report output will be blank.
- ▶ In case of Scheduled Reports, the data returned will be based on the permissions of the user who is creating the report.
- ▶ The permission restriction is applicable only to the first level of data source.

Example

User One and User Two are Unifier users.

User One has permission to access the Meeting Minutes BP, but User Two does not have permission to access the Meeting Minutes BP.

The Meeting Minutes BP log has a column that refers to an Action Items BP.

User One does not have permission to access the Action Items BP.

When User One creates and runs a report on the Meeting Minutes BP, User One will be able to see the data related to Meeting Minutes BP as well as the column data which references the Action Items BP.

When User Two creates and runs a report on the Meeting Minutes BP, User Two will see a blank report.

- ▶ For a Company-level UDR, if the access permission to data goes across the projects, you will be able to view the data for BPs based on permission levels present for those BPs across the projects.

When a user is running a report based on a permission-aware Document Manager data source:

- ▶ When running such a report, the data presented in the report will be based on the permissions of the user who is running the report. When present, the folder and document level permissions will also be taken into consideration.

Transfer Ownership for UDRs

The administrator can define who has access to the UDR.

At the company level as well as project level, you can use the **Transfer Ownership** option (at the log level) to change the owner of the UDR. This option will be available to change owner for multiple reports at a given time.

- 1) Go to the **Company Workspace** tab and switch to **User** mode.
- 2) In the left Navigator, select **Reports**, and then select **User-Defined** to open the **User-Defined Reports** log.

- 3) Select the reports for which you want the owners changed.
- 4) From the toolbar, click **Actions**, and then select **Transfer Ownership** to open the **User/Group Picker** window.
- 5) Select the new owner for the reports.

You can only select one user in the **User/Group Picker** window.

The list of users that you see contains the users who have access to the project/shell.

The user must have Full access permissions.

When editing, you can change the owner of a report by way of the **Report Owner** field in **General** tab.

After the owner for the report is changed, the **Permission** tab in the UDR displays the new changed owner with all permissions for that report. For example, if the ownership for report R1 was changed from A-user to B-user, the **Permission** tab displays B-user, only (with full owner permission), and the A-user will not be seen in the **Permission** tab.

Working with Audit Reports

If your company has custom report in a program or project/shell, it will be available under the **System** grouping node.

Note: You must have permission to access custom reports in User mode.

To run a custom report in a program or project/shell:

- 1) Go to the program or project/shell tab and switch to **User** mode.
- 2) In the left Navigator, select **Reports**, select **System**, and then select **Audit**.
The **Audit Report Page** will open in the right pane.
- 3) Define query parameters if applicable.
- 4) In the lower-right corner of the Report Page, click **Run Report** to generate the report in PDF format.

Audit Report Page

When you select the **Audit** functional node, under the **System** grouping node in the left Navigator, the Audit Report Page will open in the right pane.

The following explains the main elements of the Audit Report Page:

▶ Audit Summary Report Query

This section contains all the query parameters that are designed for the Audit Report. You may enter query information, which will give report results based on records that match the parameters you entered, or you can run a report on all records by leaving the fields blank. The following query parameters will be visible:

- ▶ Description contains
- ▶ Event Name contains

- From (Company)
- From (User)
- From
- To
- Sort by
- Order

‣ **Run Report**

When you click **Run Report**, the system generates the report in PDF format.

‣ **Reset**

When you modify the query parameters, a **Reset** button will appear in the lower-right corner of the Report Page. Clicking **Reset** will clear out all the entries made by the user and will reset the fields back to the template default.

Unifier Mobile Application for iOS or Android

If your company employees are often out of the office, Unifier can keep the workflow moving by using the Oracle Primavera Unifier Mobile Application. The Unifier Mobile App is built specifically for installation and use on mobile devices that use iOS or Android operating system.

By using the Unifier Mobile App you can:

- ▶ Act on the assigned tasks.
- ▶ View the various tasks.
- ▶ Create new business process records.
- ▶ Work offline.

To get the Unifier Mobile App, you have the following options:

- ▶ Download it from App Store or Play Store, or
- ▶ Launch Unifier, click your user name in the upper-right corner, click **Get Unifier Mobile App**, and follow the prompts.

After download, you can scan the QR code to set up the Server URL and user name on your Unifier Mobile App.

Notes:

- If you are in a region without access to the Google Play Store, Apple App Store, or your organization is using a Content Security Service or Mobile Device Management solution and requires that users do not download from the Apple Store or Play Store, submit a Service Request in **My Oracle Support** (<https://support.oracle.com/portal/>) to request versions of the Unifier Mobile App for those scenarios.
 - If your iOS device does not have the Passcode feature enabled, you can download and install the Unifier Mobile App; however, the system displays a message that indicates you must go to Settings and enable the Passcode feature before you can use the application.
 - If your iOS device is jailbroken (lacks the manufacturer's restriction that prevents installation of unauthorized software), you can download and install the Unifier Mobile App; however, the system displays a message that you cannot use it with a jailbroken device.
 - You must have permission to access the Unifier Mobile App. If you receive a message that indicates you do not have permission, contact your Company Administrator.
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Business Processes

The following Business Processes (BPs) can be accessed through the Unifier Mobile App:

- ▶ BPs used by field employees to record, or gather, data.
- ▶ Cost Type BPs used by executives, or approvers.
- ▶ BPs that require action.

For a Business Process (BP) to be accessed through the Unifier Mobile App for iOS, the following conditions must be present:

- ▶ The BP must be enabled for the Unifier Mobile App (**Enable for Mobile Application**) in the configuration window (**General** tab), in the business process configuration.
- ▶ The forms that are displayed in the Unifier Mobile App are the forms designed in uDesigner.
- ▶ The Payment Application and Summary Payment Application Cost BPs can be enabled for the Unifier Mobile App, but you cannot create Line Items in those BPs.
- ▶ The Request for Bid (RFB), Resource, and Project/Shell Creation BPs are not supported in, and cannot be configured for, the Unifier Mobile App.

Important!

The Unifier Mobile App does not rely on the **Enable design for Mobile Form Factor** check box option that was set in uDesigner. The **Enable for Mobile Application** must be checked in the Business Process configuration window. The uDesigner option will only control the forms seen in the Unifier Mobile App (standard form as opposed to mobile form factor forms).

The setting of this option will be exported to the created *Configuration Package* (Company Workspace, Shell template, and so forth).

You cannot view data related to Business Processes, and assigned tasks, without the proper Unifier Mobile App configuration. Before you download the Unifier Mobile App for iOS, contact your Company Administrator and verify that the required setup has been done.

Data Type and Input Type

The following data and input types are supported in the Unifier Mobile App:

Data Type	Input Type
Checkbox	Integer
Currency	Float
Multi Select Input	String
Multi Test Lines	String
Picker	String, Date, Integer
Pull Down Menu	String, Integer
Radio buttons	String, Integer
Text Box	String
Date picker	String

Pickers

The following pickers are supported in both the iOS and Android Unifier Mobile Apps:

Picker	Single/Multi select
BP Picker	Single select
User Data Picker	Single select
CBS Picker	Single select
Data Picker	Single select
BP Line Item Picker	Single select
Configurable Manager Picker (CMx Picker)	Single select

Picker	Single/Multi select
Generic Cost Picker (CM0 Picker)	Single select
User Picker	Single select
Image Picker	Single select

User Identity

If Unifier has been configured to sign in users using single sign-on (SSO), the Sign In window will not appear on your device screen. In addition:

- ▶ The Unifier Mobile App does not capture the user's username and password.
- ▶ The user's first name, last name, and email address are all stored in Unifier database, but they are not shared with any other applications, including third-party applications.

If Unifier has been configured to sign in users using basic authentication, the Sign In window will appear on your device screen. In addition:

- ▶ Unifier captures the user's username, password, first name, last name, and email address.
- ▶ The user's username, password, first name, last name, and email address are stored in a shared object that uses encrypted format, and they are not shared with any other applications, including third-party applications.

Access Other Smart Construction Platform Applications

The Oracle Construction and Engineering applications that are included in the Smart Construction Platform are accessible from the product banner so that you can access your projects across all your applications with ease.

To access the **Smart Construction Application** panel, in the application banner, select  **Switch Applications**.

The content that displays in the panel depends on what other applications and projects you have access to.

- ▶ **Applications for Current Project:** Lists all the applications that have a link to the project that you currently have open and have access to.
- ▶ **Other Available Applications:** Lists all the other applications that you have access to.

If you do not have access to any other applications, you are presented with more information about the applications that you could be using.

To open the **Oracle Construction and Engineering Lobby**, select **View all Projects**.

FAQs

What is the Smart Construction Platform?

Watch this brief *Smart Construction Platform Overview video*.

(https://players.brightcove.net/2985902027001/default_default/index.html?videoId=6300994864001)

I have access to the same project in multiple products, but I don't see a link to that project in the application switcher. Why not?

A link for the project between the multiple applications must be created in the Construction and Engineering Lobby by a Lobby administrator.

Learn more in the *Construction and Engineering Lobby Help* (https://docs.oracle.com/cd/F23711_01/help/en/202246.htm).

Why do I see the same application listed in both my Applications for Current Project list and my Other Available Applications list?

You have access to the same application but in different instances of that application. For example, one instance may be hosted on a US data center and another may be hosted on an Australian data center.

I have access to other Oracle Construction and Engineering applications. Why don't I see them here?

Only applications included in the Smart Construction Platform are available through the Switch Applications panel.

To learn more about the Smart Construction Platform applications, visit us on *Oracle Help Center* (<https://docs.oracle.com/en/industries/construction-engineering/index.html>).