Oracle® Primavera Administration

Identity Management Configuration Guide

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Oracle Primavera Administration Identity Management Configuration Guide, Version 25

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Contents

About This Content

Audience and Scope

This guide is intended for administrators who need to perform administration tasks in Primavera Administration.

> **Note**
>
> If you use Primavera Unifier and your tenancy is Single Tenant, use this guide. If you administer your users in Primavera Unifier, use the *Primavera Unifier General Administration Guide* . To understand the difference between Single Tenancy and Multi-Tenancy for Primavera Unifier, see the *Primavera Unifier General User Guide*.

Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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Manage Personal Information in Primavera Administration

About Consent Notices

Consent notices inform users how personal information (PI) is collected, processed, stored, and transmitted, along with details related to applicable regulations and policies. Consent notices also alert users that the action they are taking may risk exposing PI. Primavera Administration helps you to ensure that you have requested the appropriate consent to collect, process, store, and transmit the PI your organization holds as part of Primavera Administration data.

Consent notices should:

- be written in clear language which is easy to understand.
- provide the right level of detail.
- identify the purpose and legal basis for your collection, processing, storage, and transmission of PI.
- identify whether data will be transferred to named third parties.
- identify PI categories and list the data which will be collected, processed, stored, and transmitted.

About Personal Information

Personal information (PI) is any piece of data which can be used on its own or with other information to identify, contact, or locate an individual or identify an individual in context. This information is not limited to a person's name, address, and contact details. For example a person's IP address, phone IMEI number, gender, and location at a particular time could all be personal information. Depending on local data protection laws, organizations may be responsible for ensuring the privacy of PI wherever it is stored, including in backups, locally stored downloads, and data stored in development environments.

Cookies Usage in Primavera Administration

When using Primavera Administration, 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.

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.

Your Responsibilities

Information security and privacy laws can carry heavy penalties and fines for organizations which do not adequately protect PI they gather and store. If these laws apply to your organization, it is your responsibility to configure consent notices before they are required. You should work with your data security and legal teams to determine the wording of the consent notices you will configure in Primavera Administration.

If a consent notice is declined, it is your responsibility to take any necessary action. For example, you may be required to ensure that the data is not stored or shared.

Personal Information (PI) Data in Primavera Administration

PI may be visible in multiple areas of Primavera Administration, including but not limited to user administration, company administration, and password policy administration.

PI may be at risk of exposure in multiple areas of Primavera Administration, including but not limited to user export, web services, the API, and DACS.

As part of Primavera Administration, you may be using an identity domain to manage your user access and entitlements across a number of cloud and on-premises applications and services. If you are using or accessing an identity domain, you are responsible for deleting your details and data from the identity domain. You are responsible for retrieving your content in the identity domain during your applicable services period.

Configure Consent Notices for Primavera Administration

To configure consent notices for Primavera Administration:

- On the **Consent Settings** tab:
  1. In the **Consent Message** field, enter the text of the consent notice.

     > **Note**
     >
     > Work with your data security and legal teams to determine the wording of the consent notice.

  2. Toggle the **Enable Consent Notice** setting to activate the consent notice field.

     > **Note**
     >
     > If you change the text of an already configured consent notice, consent status for all users is reset to Pending and all users will be presented with the new text of the consent notices next time they log in.

Audit Consent Notices for Primavera Administration

You can see the status of consent acceptance for users.

To audit consent status for Primavera Administration:

- On the **Consent Settings** tab, in the **User Acceptance** area:
  - View the consent status for each user in the Status column.
  - View the date and time when the status was most recently changed in the Last Modified column.
  - Click a column heading to order the user acceptance table by that data item.

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About Notifications

The Notifications list shows your activities in Primavera Administration. Typically, Primavera Administration creates a notification any time you attempt to save table changes.

To view the Notifications list, click **View Notifications** at the upper right of the screen.

> **Note**
>
> You can only view notifications for the activities of the current user account.

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Manage User Accounts

The User Administration table in Primavera Administration enables you to manage user accounts for your applications. You can add user accounts one at a time or import them in bulk. You can also edit the fields associated with a user account.

Click the **User Administration** tab to view the User Administration table.

About the User Administration Table

By default, the User Administration table displays all user accounts. See About User Administration Table Filters for details on applying filters to control the users accounts that appear.

Each row in the User Administration table represents a single user account. The User Administration table includes the following columns:

- **Last Name**: The last name of the user.
- **First Name**: The first name of the user.
- **Email**: The email address of the user.
- **User Name**: The user name of the user account.
- **Company**: The company to which the user account belongs.
- **User Type**: The type of the user. The data in this column is provided by the identity domain and you can change the user type to categorize your users.

> **Note**
>
> If you make a Primavera Unifier user a Contractor by assigning the Contractor User Type in Primavera Administration, then the user will consume a Collaborator license in Primavera Unifier. Any other user classification (Employee, Intern, Temp, External, Service, Generic) will consume a Standard Unifier license. For more information about setting the user type, see the following topics in the *Primavera Unifier General Administration Guide*:
>
> – Adding and Managing Company Users
>
> – Collaborator User

- **Application Access**: The applications that users are permitted to access.
- **Date & Time Added**: The date and time on which the user was successfully created. The date format is Month/Date/Year.
- **Added By**: The user name of the cloud administrator that created the user.

See Customize the User Administration Table for details on adding, removing, or rearranging columns.

Customize the User Administration Table

You can customize the User Administration table by adding, removing, or rearranging columns.

> **Note**
>
> Required fields (including **Last Name**, **First Name**, **Company**, **Email**, **User Name**, and **User Type**) cannot be removed from the User Administration table.

Add Columns

To add columns to the User Administration table:

1. On the **User Administration** tab, click **Settings**.
2. In the **Available Columns** pane, select one or more columns that you want to add to the User Administration table.
3. Click **Add to selected column**.
4. Click **Apply**.

Alternatively, you can double-click a column in the **Available Columns** pane to immediately add it.

Remove Columns

> **Note**
>
> Required fields (including **Last Name**, **First Name**, **Company**, **Email**, **User Name**, and **User Type**) cannot be removed from the User Administration table. If you multi-select a required field in addition to other fields that you want to remove, the **Remove from selected column** button will be disabled. To re-enable the button, you must deselect the required fields.

To remove columns from the table:

1. On the **User Administration** tab, click **Settings**.
2. In the **Selected Columns** pane, select one or more columns that you want to remove from your view of the table.
3. Click **Remove from selected column**.
4. Click **Apply**.

Alternatively, you can double-click a column in the **Selected Columns** pane to immediately remove it.

Rearrange Columns

You can rearrange the columns in the table.

To rearrange column using the **Settings** dialog box:

1. On the **User Administration** tab, click **Settings**.
2. In **Selected Columns**, select one or more columns.
3. Click **Move Down** or **Move Up**.
4. Click **Apply**.

To rearrange columns by dragging:

1. On the table, click and hold the header of a column.
2. Drag the column to a new location in the table.

About User Administration Table Filters

By default, the User Administration table displays all user accounts for the companies managed by the current cloud administrator. Use the **Filter** field to apply one or more filters and control the user accounts that appear.

> **Note**
>
> If you have more than one filter applied, click **Only** for a filter to remove all other filters.

The following filters are available:

- **Primavera Users**: Displays users who have been assigned a company.
- **Enabled**: Displays users whose account is enabled.
- **No Access**: Displays users who have not been assigned access to any application.
- **Modified**: Displays users whose accounts have been modified in the current session of Primavera Administration, including new users that have not been saved.
- **Locked**: Displays users whose account has been locked. See Unlock User Accounts for details.
- **Disabled**: Displays users whose account is disabled. Disabled users cannot log in to any applications.

Add Single User Accounts

Use Primavera Administration to add individual user accounts.

To add single user accounts:

1. On the **User Administration** tab, click **Add**.
2. In the **Last Name** field, enter the user's last name.

3. In the **First Name** field, enter the user's first name.
4. In the **Email** field, enter the user's email address.
5. In the **Username** field, enter the user name for the user account.
6. In the **Company** field, click ••• **Select** and select a company for the user account.
7. In the **User Type** field, click the list and select the user type for each account.
8. In the **Application Access** field, triple-click ••• **Select** and do the following:

   > **Note**
   >
   > This step is optional. You can assign application access later.

   a. In the **Available** pane, select the application assignments for the user account. Hold down the **Control** key and click to select more than one application.
   b. Click > **Add to selected column**.
   c. Click **Apply**.
9. Repeat these steps for each user account you want to add.
10. Do one of the following:
    - Click **Save** to commit your changes and save your users.

      or
    - Click **Export Changes** to save a CSV file (`Create_User_<date>.csv`) in your Downloads folder. No users are saved at this time. You can import the CSV file and save your users later.

> **Note**
>
> - After creating a user account, you must reset that password for the account. Resetting a password sends the user an email with a link to allow them to change their own password. See About Passwords for details.
> - For Primavera Unifier, if you use Primavera Administration to create users, you can use a user preference template within Primavera Unifier to update user account information such as the time zone and a date format. For more information, see the *Primavera Unifier General Administration Guide*.

Add Multiple User Accounts

Use an import template to add multiple user accounts to your cloud environment. You can either import a custom import template or a CSV file created from a previous session.

The import template is a CSV file that you can download from Primavera Administration. After you add information on your users accounts to the template, you can import that information to the User Administration table.

Use the following topics to add multiple user accounts:

> **Note**
>
> For Primavera Unifier, if you use Primavera Administration to create users, you can use a user preference template within Primavera Unifier to update user account information such as the time zone and a date format. For more information, see the *Primavera Unifier General Administration Guide*.

Create an Import Template

You can download the import template from Primavera Administration.

The import template contains the following columns:

- **Last Name**
- **First Name**
- **Email**
- **Username**
- **Company**
- **User Type**
- Application Assignment Columns: When you download the import template, you select the application assignments that you want to include in the template. The import template contains a column for each application assignment you select. Each application assignment column is prefixed with **#R#** (for example, **#R#BI Authors**).

> **Caution**
>
> Do not modify the header row of the import template. This will produce unpredictable results when you import users to Primavera Administration.

To create an import template:

1. On the **User Administration** tab, click **Actions** and select **Download Import Template**.
2. In the of the **Select Application Access** dialog box, in the **Available** pane, select the application assignments that you want to include in the template. Hold down the **Control** key and click to select more than one application assignment.
3. Click **Add to selected column**.
4. Click **Select**.
5. Save the template locally and open it.

   The default name of the import template is `User_Import_Template.csv`.
6. Enter the following information for each user account:

- **Last Name**: The user's last name.
- **First Name**: The user's first name.
- **Email**: The user's email address.
- **Username**: The user name for the user account.
- **Company**: The company for the user account.
- **User Type**: The user type for the user account.

7. In the application assignment fields, enter **Y** or **Yes** to assign application access to the user account.

> **Note**
>
> If you import data for existing user accounts, it is important that all application assignment field columns remain in the template file. If an application assignment column does not exist in a file when it is imported, access to that application will be removed from all the user accounts imported from the file.

8. Repeat steps 6 and 7 for each user you want to add.
9. Save and close the template.

Export a List of Users

When you export the user list, all the columns on the User Administration page are exported. Two extra columns are also exported:

- **Locked**: Shows whether the account is locked, for example following a failure to authenticate the password.
- **Active**: Shows whether the account is active.

To export a list of all users to a CSV file:

1. On the **User Administration** tab, click **Actions**.
2. Select **Export All Users**.

Import User Accounts

To import user accounts:

1. On the **User Administration** tab, click **Actions** and select **Import Users**.
2. Click **Browse** and select the import template.

   The default name of the import template is `User_Import_Template.csv`.
3. Click **OK**.
4. Review the User Administration table to ensure there are no errors.
5. Click **Save**.

Note

- After creating a user account, you must reset that password for the account. Resetting a password sends the user an email with a link to allow them to change their own password. See About Passwords for details.
- If you import data for existing user accounts, it is important that all application assignment field columns remain in the template file. If an application assignment column does not exist in a file when it is imported, access to that application will be removed from all the user accounts imported from the file.

Delete a User Account

User accounts cannot be deleted. Instead, you can disable a user account to block access to the Primavera Portal and applications. See Disable User Accounts for details.

Modify a User Account

You can modify the following fields for a user account in the User Administration table:

- **Last Name**
- **First Name**
- **Email**
- **User Name**
- **Company**
- **User Type**
- **Application Access**

Note

To modify the user name of a tenant administrator, submit a Service Request to My Oracle Support. See Actions That Require Service Requests for details.

Manage Application Access

Assigning application access is the process by which you authorize specific employees in your company to access specific applications. User accounts that are not assigned access cannot use any applications. A user must be assigned to a company before you can assign access to applications.

> **Note**
>
> In addition to being assigned access to one or more applications, application-specific security assignments must be provided for your user accounts in the target application. See the Administration Guide for your application for details.

The following access types are available for each application:

BI Publisher

- **BI Production Superusers**: Users have access to BI Publisher or Oracle Analytics Publisher and can create, run, and view all of the reports that were made available to their folders. Users can also archive catalogs, undo the archiving of catalogs, set ownership of catalogs, upload files, save system-wide column formats, and save content with HTML mark-up.
- **BI Production Authors**: Users have access to BI Publisher or Oracle Analytics Publisher and can create, run, and view all of the reports that were made available to their folders.
- **BI Production Consumers**: Users have access to BI Publisher or Oracle Analytics Publisher and can run and view all of the reports that were made available to their folders.

Primavera Administration

- **Cloud Administrator**: Users have access to Primavera Administration and can administer users.
- **Primavera Data Services Production**: Users have access to your production environments using the Primavera Data Service and can extract data from the application database.
- **Primavera Data Services Stage**: Users have access to your stage environments using the Primavera Data Service and can extract data from the application database.
- **Primavera Communication Administrator**: Users will be able to receive administrative notices as we roll out automated communications.

Primavera Analytics

- **Primavera Analytics Production**: Users have administrative access to Primavera Analytics and can manage and run the extract, transform, and load (ETL) process.

Construction Intelligence Cloud Advisor

- **CIC Advisor Production Administrator**: Users have complete access to Construction Intelligence Cloud Advisor as a user and administrator. The Construction Intelligence Cloud Advisor administrator has complete administrative privileges, access to all data, can manage users, and can manage and run the extract, transform, and load (ETL) process.
- **CIC Advisor Production Consumer**: Users have access to Construction Intelligence Cloud Advisor insights.

Construction Intelligence Cloud Analytics

- **CIC Analytics Production Administrator**: Users have complete access to Construction Intelligence Cloud Analytics as a user and administrator. The Construction Intelligence Cloud Analytics administrator has complete administrative privileges, access to all data, can manage users, and can manage and run the extract, transform, and load (ETL) process.

- **CIC Analytics Production Creator**: Users can design visualization projects, load data for data visualizations, explore data visualizations, and share data visualizations with others.
- **CIC Analytics Production Consumer**: Users can explore data visualizations.

Primavera Gateway

- **Primavera Gateway Production Administrator**: Users have complete access to Primavera Gateway as a user, developer, and administrator. The Primavera Gateway administrator has complete administration privileges and access to data.
- **Primavera Gateway Production Administrator (Limited Access)**: Users have complete administration privileges, but no access to integrated data.
- **Primavera Gateway Production Developer**: Users have access to Primavera Gateway the data dictionary, workflows, and configuration global settings. They can also create data mappings and flow types.
- **Primavera Gateway Production User**: Users have access to Primavera Gateway to create, run, and monitor synchronization jobs in Primavera Gateway. Primavera Gateway users only have access to data.
- **Primavera Gateway Production User (Limited Access)**: Users have access to Primavera Gateway to create, run, and monitor synchronization jobs in Primavera Gateway, but no access to integrated data.

P6 EPPM

- **Primavera P6 Production**: Users have access to P6 EPPM applications, including P6, P6 Team Member, and P6 EPPM Web Services.
- **Primavera P6 Virtual Desktop User**: Users can use Primavera Virtual Desktop to access P6 Professional.

> **Note**
>
> Primavera Virtual Desktop is not available with P6 Standard Service.

Primavera Unifier

- **Primavera Unifier Production**: Users have access to Primavera Unifier.
- **Primavera Unifier Production REST Webservices**: Users have access to Primavera Unifier REST Web Services.

> **Note**
>
> By default, data sources to product schema, such as P6 EPPM and Primavera Unifier, are automatically assigned to the BI Consumer and BI Author access types.

Manage Application Access for a Single User Account

Use the **Select Application Access** dialog box to assign application access for a single user account.

In the **Select Application Access** dialog box, the **Available** pane (on the left) shows the available applications. The **Selected** pane (on the right) shows the applications that the user account can access.

Assign Application Access for a Single User Account

To assign application access for a single user account:

1. On the **User Administration** tab, select the check box for a user account.
2. Click **Settings** and select **Manage Application Access**.
3. In the **Available** list, select one or more applications.

   > **Tip**
   >
   > Hold the **Control** key and click to select more than one application.

4. Click **Add to selected column**.
5. Click **Select**.
6. Click **Save**.

Remove Application Access for a Single User Account

To remove application access for a single user account:

1. On the **User Administration** tab, select the check box for a user account.
2. Click **Manage Application Access**.
3. In the **Selected** pane, select one or more applications.

   > **Tip**
   >
   > Hold the **Control** key and click to select more than one application.

4. Click **Remove from selected column**.
5. Click **Select**.
6. Click **Save**.

Manage Application Access for Multiple Users

Use the **Manage Application Access** dialog box to manage application access for multiple user accounts.

The Manage Application Access dialog box shows each available access type. Icons indicate the status of the access for the selected user accounts.

- **All selected users have access**: All of the selected user accounts have been assigned this access type.

- **Some of the selected users have access**: Some of the selected user accounts have been assigned this access type.
- **No icon**: None of the selected user accounts have been assigned this access type.

To assign application access to multiple user accounts:

1. On the **User Administration** tab, select the check boxes for multiple user accounts.
2. Click **Manage Application Access**.
3. In the **Available Application Access** pane, select the access type you want to manage.
4. In the **Select or Deselect Users** table, select and deselect the check boxes to assign and remove access as needed.
5. Repeat steps 3 and 4 to manage other access types.
6. Click **OK**.
7. Click **Save**.

About Passwords

You can reset passwords for a single user account or for multiple user accounts. When you reset passwords for multiple user accounts, an email is sent to each selected user with a link to follow to reset their password. When you reset the password for a single user account, you also have the option of manually generating a password.

> **Note**
>
> After creating a user account, you must reset that password for the account. Resetting a password sends the user an email with a link to allow them to change their own password.

Password policies are not managed in Primavera Administration. You can manage password policies in your identity domain.

Reset the Password for a Single User Account

To reset a password for a single user account:

1. On the **User Administration** tab, select the check box for a user account.
2. Click **Reset Password**.
3. Do one of the following:
   a. Select **Auto-generate the Password** to send the user an email containing a link to allow them to change their own password.
   b. Select **Manually Change the Password** to enter a new password.
4. Click **Reset Password**.
5. Click **OK**.

> **Note**
>
> If you select the option to generate the password automatically, the link in the email that the user receives automatically expires after 60 minutes.

Reset Passwords for Multiple User Accounts

To reset passwords for multiple user accounts:

1. On the **User Administration** tab, select the check boxes for multiple user accounts.
2. Click **Reset Password**.
3. Click **Yes**.

The passwords are reset and each selected user is sent an email containing a link to follow to reset their password.

Change User Account Status

A user account can be locked, enabled, or disabled.

This section describes how to unlock a user account, enable a disabled user account, and disable an enabled user account.

Unlock User Accounts

When a user account becomes locked, the user is unable to log in to the Primavera Portal or any applications.

The following are some typical reasons why a user account becomes locked:

- The user attempts to log in too many times with an incorrect password.
- The user's password expires.

> **Note**
>
> A user with an expired password can also unlock their account by attempting to log in with their expired password.

To unlock a user account:

1. On the **User Administration** tab, select the check boxes for one or more locked user accounts.

   > **Note**
   >
   > Apply the **Locked** filter to display only Locked user accounts in the User Administration table. See About User Administration Table Filters for details.

2. Click **Unlock**.

   The **Unlock** button appears only when you select the check boxes for one or more locked user accounts. If you select one or more unlocked user accounts, the **Unlock** button will not appear.

Disable User Accounts

When you disable a user account, the user is blocked from accessing the Primavera Portal and any applications. In addition, a cloud administrator is unable to perform most tasks for the user in Primavera Administration (other than enabling the account). For example, you might choose to disable a user account if a user moves to a different role in your organization or takes a sabbatical.

To disable a user account:

1. On the **User Administration** tab, select the check boxes for one or more enabled user accounts.

   > **Note**
   >
   > Apply the **Enabled** filter to display only enabled user accounts in the User Administration table. See About User Administration Table Filters for details.

2. Click **Disable**.

   The **Disable** button appears only when you select the check box for one or more enabled user accounts. If you select one or more disabled user accounts, the **Disable** button will not appear.

> **Note**
>
> To ensure that a user is removed from P6 and shown as disabled in Unifier, you must also de-provision the account. See De-provision User Accounts for details.

Enable User Accounts

When you enable a user account, the user can access Primavera Portal and applications.

To enable a user account:

1. On the **User Administration** tab, select the check boxes for one or more disabled user accounts.

   > **Note**
   >
   > Apply the **Disabled** filter to display only disabled user accounts in the User Administration table. See About User Administration Table Filters for details.

2. Click **Enable**.

The **Enable** button appears only when you select the check box for one or more disabled user accounts. If you select one or more enabled user accounts, the **Enable** button will not appear.

De-provision User Accounts

When you de-provision a user account, the user is blocked from accessing the Primavera Portal and any applications. A cloud administrator is unable to perform most tasks for the user in Primavera Administration until the account is re-enabled.

> **Note**
>
> When you de-provision a user from access to P6 EPPM, all module access will be removed from that user in P6 EPPM. The user account and all its associated data will remain in the database, however the user will no longer have access to the application.

To de-provision a user account:

1. On the **User Administration** tab, select the check box for an enabled user account.
2. Click **Disable**.
3. Double-click in the **Application Access** cell for the user in the grid.
4. In the Select Application Access dialog box:
   a. Select all the columns in the Selected list.
   b. Click **Remove from selected column**.
   c. Click **Select**.

View User History

You can view the history of a user account including when and by whom the user was created and given access to an application, changes which have been made to the user's name and email address, and when a user's password was reset. User history data is available for 90 days.

To view the history for a user account:

1. On the **User Administration** tab, select a user account.
2. Click the **User History** tab in the lower pane.

Add a Note to a User Account

You can add a note to a user account to record information about the account.

To add a note to a user account:

1. On the **User Administration** tab, select a user account.

2. Click the **User Notes** tab in the lower pane.
3. Click + **Add**.
4. In the Add Note dialog window, type a note into the **Description** field and click **Add**.

> **Tip**
>
> To edit an existing note, click + **Edit**.
>
> To delete a note, click + **Edit** and click **Delete**.

4

Manage Companies

The Manage Companies table in Primavera Administration enables you to manage companies for your applications.

A company represents a logical container of users in Primavera Administration.

There are two types of companies:

- **Owner company**: An owner company has been created for you. A single owner company is required by Primavera Administration. You can modify certain aspects of the owner company (including the company full name and the password policy). It is not possible to delete an owner company.
- **Partner companies**: A partner company is a separate entity from the owner company that needs to access your applications. Examples of partner companies include vendors, resellers, subcontractors, suppliers, and other consultants. Partner companies are listed under the owner company on the left side of the **Manage Companies** page.
  When you add a partner company in Primavera Administration, you can also assign one or more applications to the company. If you assign Primavera Unifier, the partner company is also created within that application.

Click the **Manage Companies** tab to view the Manage Companies table.

About the Manage Companies Table

By default, the Manage Companies table displays the owner company and all partner companies. See About Manage Companies Table Filters for details on applying filters to control the companies that appear.

Each row in the Manage Companies table represents a single company. The Manage Companies table includes the following columns:

- **Company Short Name**: The short name for the company.
- **Company Full Name**: The full name for the company.
- **Assign To (Applications)**: The application for the company.

About Manage Companies Table Filters

By default, the Manage Companies table displays the owner company and all partner companies. Use the **Filter** field to apply a filter and control the companies that appear.

The following filter is available:

- **Primavera Unifier Production**: Displays companies assigned to access to Primavera Unifier.

Add a Partner Company

To add a company:

1. On the **Manage Companies** tab, click **Add Company**.
2. In the **Company Short Name** field, enter a short name for the partner company.
3. In the **Company Full Name** field, enter the full name for the partner company.
4. Do the following to add the partner company to Primavera Unifier:
   a. On the **Assign To (Applications)** field, triple-click **Select**.
   b. In the left pane, select **Primavera Unifier Production**.
   c. Click **Add to selected column**.
   d. Click **OK**.
5. Click **Save**.

> **Note**
>
> When you add a partner company, the address from the owner company is used by default. To change the address, modify the address details in Primavera Unifier.

Modify a Partner Company

You can modify any of the fields for a partner company in the Manage Companies table.

> **Note**
>
> To modify the **Company Short Name** field, submit a Service Request to My Oracle Support. See Actions That Require Service Requests for details.

Delete a Partner Company

You can delete a partner company if the following is true:

- The company is not assigned to an application.
- No user accounts have been associated with the company.

> **Note**
>
> If a partner company is no longer needed, Oracle recommends that you disable that company instead of deleting it. See Modify a Partner Company for details.

To delete a partner company:

1. On the **Manage Companies** tab, click **Expand** to expand the owner company, if needed, and select the partner company you want to delete.
2. Click **Context**.
3. Select **Delete Row**.
4. Click **Yes**.
5. Click **Save**.

5 Advanced Identity Management Tasks

The following task cannot be performed in Primavera Administration:

- Users resetting their own password

To perform this task (and only this task), you will need to use the identity domain application directly. Oracle Customer Support will not be able to provide support if you use the identity domain for any other task.

Users Changing a Password

Users can log in to the identity domain to change their password. The new password must comply with the relevant password policy.

To change a password:

1. From the Primavera Portal, log in to the identity domain application with your user name and password.
2. Click **Change My Password**.
3. In the **Old Password** field, enter your current password.
4. In the **New Password** field, enter your new password.
5. In the **Confirm New Password** field, re-enter your new password.
6. Click **Submit**.

> **Note**
>
> Wait five minutes before logging in to an account after you have changed a password.

6

Enable Identity Federation with Oracle Primavera

Identity federation enables companies to provide services and share identity information across their respective security domains. The end user does not need to log in repeatedly to access a remote entity where business is conducted. Users authenticate at their local sites, and the federation mechanism enables this information to be shared with Cloud Services.

The benefits of implementing identity federation for your cloud service include:

- Users do not need to supply login credentials to access each entity where business is conducted. This also eliminates the need to remember and manage multiple logins/ passwords. Users still need accounts at the sites so that the accounts can be linked.
- Local password management (for example, resetting passwords and creating password policies)

For details on enabling identity federation with Cloud Services, see the following article on My Oracle Support at http://support.oracle.com:

- *Enabling Federated Identity Single Sign-On (SSO) Through SAML 2.0 For Primavera Products Hosted In Oracle Cloud Infrastructure (OCI) (Doc ID 2497983.1)*

7 Actions That Require Service Requests

In order to complete the following actions, submit a Service Request in My Oracle Support:

- Modifying the automatically generated email notification that is sent to users when their account is provisioned or their password is reset.
- Changing Authorization Codes in an application.

> **Note**
>
> If you change the Authorization Code in your application and do not submit a Service Request in My Oracle Support, you will experience application assignment errors.

- Changing PARTNER license counts and allocations.
- Changing the user name of a tenant administrator.
- Removing specific drivers from installation via ClickOnce for P6 Professional.

8 Test Bandwidth and Latency

The Test Bandwidth and Latency screen displays bandwidth and latency information for your Cloud Services client. All users can access the Test Bandwidth and Latency screen.

Statistics are exposed by reading the cookies generated by loading the page. Depending on your network speed, it can take up to ten seconds to generate the statistics. The expiration time for the cookies is set to thirty minutes. If you need to generate statistics before that time, delete all cookies before accessing the Test Bandwidth and Latency screen.

> **Note**
>
> The first time you access the Test Bandwidth and Latency screen, you may not see any results. However, refresh your browser to fetch the information from the browser cache.

To view remote statistics on your Cloud Services client, complete the following steps:

1. Enter the following to display the Test Bandwidth and Latency screen:

   ```
   http://cloudadminhost/cloud/p/stats
   ```

2. If this is the first time you are using the Test Bandwidth and Latency screen, click **Test**.

   > **Note**
   >
   > If the Test button doesn't appear, press **F5** to refresh your browser.

9
Context-Sensitive Help

You can access the context-sensitive help topics that are accessible from each page in the user interface directly from this topic.

User Administration

Manage and administer user accounts in your cloud environment. You can create user accounts one at a time or import them in bulk. You can also assign application access, reset passwords, and change user account status.

How do I...

Add Single User Accounts

Add Multiple User Accounts

Delete a User Account

Modify a User Account

Add a Note to a User Account

Manage Application Access

About Passwords

Change User Account Status

Learn more about...

Manage User Accounts

About the User Administration Table

Manage Companies

Manage companies in your cloud environment. You can create, modify, and delete partner companies. You can also change a company's password policy.

How do I...

Add a Partner Company

Modify a Partner Company

Delete a Partner Company

Learn more about...

Manage Companies

About the Manage Companies Table

Consent Settings

Create, preview, and enable a consent message to display to users in your cloud environment. You can also view the consent status and when the status changed for each user.

How do I...

Configure Consent Notices for Primavera Administration

Audit Consent Notices for Primavera Administration

Learn more about...

About Consent Notices

About Personal Information

Your Responsibilities