Primavera Unifier

Mobile Help for iOS

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Oracle Primavera Unifier Mobile Help for iOS

Getting Started

Prerequisites

- The Unifier Mobile App supports Unifier version 20 or later.
- 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.
- To use Unifier Mobile App, you must access the network that hosts Unifier by way of a Virtual Private Network (VPN).
- If your iOS device does not have the Passcode feature enabled, you can download and install the mobile application; 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 mobile application; however, the system displays a message that you cannot use it with a jailbroken device.
- To view data related to the business process (BP) records and assigned tasks, the BPs must be enabled for Unifier Mobile App. For the fields of a BP record to be updated with the latest values, the Data Elements (DEs) must be included in the Integration Interface.

> **Note**
>
> If you receive a message regarding the Base Currency for the company the first time that you sign in, tap **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.

About Consent Notices

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 for iOS.

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

Cookies Policy

Cookies are small text files that are placed on your computer, smartphone, or other device when you access the internet.

When you use Unifier for iOS, the server may generate the following cookies and send them to your application. The cookies are stored, either temporarily by the browser, or permanently until they expire or are removed.

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.

Accessibility Overview

This product is designed to work with iOS accessibility features. Exceptions, if present, are noted in the VPAT for the product:

http://www.oracle.com/us/corporate/accessibility/vpats/index.html

Logging On with SSO

If you are not sure whether your organization uses Single Sign On (SSO), contact your administrator.

The first time that you log on after downloading the app and accepting the end-user agreement, the server data that you have access to is downloaded onto the device. Only tasks that are assigned to the logged-in user, the projects that the logged-in user has access to, and records associated with tasks that were received in the last 30 days are downloaded.

To log on with SSO:

1. Ensure that your device is connected to the internet.
2. On the **Home** screen of your device, tap **Unifier** ().
3. On the **Oracle Primavera Unifier** sign-in screen, tap the **Single Sign On** slider to turn it on.
4. In the **Server URL** field, under the Single Sign On option, enter the server URL.
   In the Server URL drop-down menu, you can view and select from the list of the five most recent server URLs you have accessed.
5. Tap **Authenticate**.
6. Follow the sign-on procedure of your SSO server.
7. If the consent notice displays, tap **Agree** or **Decline**.
   If you decline, you will be logged out of the application.

> **Note**
>
> - If you can access Unifier using a web browser on a different device, you can scan a QR code to log on more quickly. For more information, see Logging On with a QR Code.
> - To enable and disable task notifications from Unifier, if you did not do so during installation/upgrade, see Enabling or Disabling Push Notifications.
> - Unifier does not capture your user name and password. The first name, last name, and email address are all stored in the Unifier database and are not shared with any other application, including third-party applications.
> - If you receive a message regarding the Base Currency for the company the first time that you sign in, tap **OK** and contact your Company Administrator. For more information, see Prerequisites.

Subsequent Logon Activities

If your organization supports native authentication for logging on, the app automatically logs you on when you access the app in the future, or after a session expires.

Logging On without SSO

If you are not sure whether your organization uses Single Sign On (SSO), contact your administrator.

The first time that you log on after downloading the app and accepting the end-user agreement, the server data that you have access to is downloaded onto the device. Only tasks that are assigned to the logged-in user, the projects that the logged-in user has access to, and records associated with tasks that were received in the last 30 days are downloaded.

To log on without SSO:

1. Ensure that your device is connected to the internet.
2. On the **Home** screen for your device, tap **Unifier** ().
3. On the **Oracle Primavera Unifier** sign-in screen, tap the **Single Sign On** slider to turn it off.
4. In the **Server URL** field, under the Single Sign On option, enter the server URL.
   In the Server URL drop-down menu, you can view and select from the list of the five most recent server URLs you have accessed.
5. In the **Username** field, enter your Unifier user name.
6. In the **Password** field, enter your Unifier password.
7. Tap **Sign In**.
8. If the consent notice displays, tap **Agree** or **Decline**.
   If you decline, you will be logged out of the application.

> **Note**
>
> - If you can access Unifier using a web browser on a different device, you can scan a QR code to log on more quickly. For more information, see Logging On with a QR Code.
> - To enable and disable task notifications from Unifier, if you did not do so during installation/upgrade, see Enabling or Disabling Push Notifications.
> - Unifier captures your user name, password, first name, last name, and email address. This information is stored in a shared object that uses encrypted format, and is not shared with any other application, including third-party applications.
> - If you receive a message regarding the Base Currency for the company the first time that you sign in, tap **OK** and contact your Company Administrator. For more information, see Prerequisites.

Password Recovery

If your company requires you to set up a password recovery process, you must set it up in the Web or Mobile application before accessing the Mobile application.

Subsequent logon activities

If your organization supports native authentication for logging on, the app automatically logs you on when you access the app in the future, or after a session expires.

> **Note**
>
> - When Auto Login is initiated within the app, only the Login screen is shown, and the app will remain on the same screen the user was on before the Auto Login was triggered. This behavior does not apply to SSO login.
> - If your organization supports both native authentication and SSO, the app automatically signs you in using native authentication after an SSO session expires.
> - SSO authorization tokens expire weekly. You will be prompted to reauthenticate with SSO 7 days after your last login.

Logging On with a QR Code

You can use the Quick Response (QR) code on the Unifier Mobile App to populate the Unifier Server URL and user name if you can access the Unifier web application on a different device.

To log in by scanning a QR code:

1. On your other device, use a web browser to log in to the Unifier application.
2. In Unifier, select your name and click **Get Unifier Mobile App**.
   The **Get the Unifier App** page shows the QR code.
3. With your mobile device connected to the internet, tap **Unifier** ().
4. Tap **QR code** ().

5. Hold the camera on your mobile device up to the QR code displayed on the **Get Unifier Mobile App** page.
   Make sure the entire QR code is in the frame. The app should automatically process the QR code. The **Login** screen will then reappear with the server URL and your user name. If the server is integrated with a Single Sign-On (SSO) system, the QR code only populates the **Server URL** field. If the server is a non-SSO environment, the QR code populates the **Server URL** and **Username** fields.
6. In the **Password** field, enter your password.
   This field is required if you are logging on without SSO.
7. Tap **Sign In**.
8. If the consent notice displays, tap **Agree** or **Decline**.
   If you decline, you will be logged out of the application.

> **Note**
>
> If you receive a message regarding the Base Currency for the company the first time that you sign in, tap **OK** and contact your Company Administrator. For more information, see Prerequisites.

Subsequent logon activities

If your organization supports native authentication for logging on, the app automatically logs you on when you access the app in the future, or after a session expires.

Logging On with Access to Multiple Tenants

If you have access to multiple tenants, your organization must use the Single Sign On (SSO) configuration.

The first time that you log on after downloading the app and accepting the end-user agreement, the server data for the first tenant that you have access to is downloaded to the device. For subsequent logins, the data for the tenant that you access through the Construction and Engineering Lobby is automatically downloaded.

To log on:

1. Ensure that your device is connected to the internet.
2. On the **Home** screen for your device, tap **Unifier** ( ).
3. On the **Oracle Primavera Unifier** sign-in screen, tap the **Single Sign On** slider to turn it on.
4. In the **Server URL** field, under the Single Sign On option, enter the server URL.
   In the Server URL drop-down menu, you can view and select from the list of the five most recent server URLs you have accessed.
5. Tap **Authenticate**.
6. After you are redirected to the **Lobby** screen, follow the sign-on procedure of your SSO server.
7. If the consent notice displays, tap **Agree** or **Decline**.
   If you decline, you will be logged out of the application.

> **Note**
>
> - Unifier does not capture your user name and password. The first name, last name, and email address are all stored in the Unifier database and are not shared with any other application, including third-party applications.
> - If you receive a message regarding the Base Currency for the company the first time that you sign in, tap **OK** and contact your Company Administrator. For more information, see Prerequisites.

To switch tenants:

1. Go to **Home Workspace**.
2. Tap **Settings** ( ).
3. Tap **Switch Company** ( ).
   The Switch Company list displays a check mark next to the tenant you are currently using.
4. Tap the name of the tenant that you want to switch to.
5. Confirm your selection.

Subsequent logon activities

If your organization supports native authentication for logging on, the app automatically logs you on when you access the app in the future, or after a session expires.

Logging Off

To log off:

1. Tap **User Profile** ( ).
2. Tap **Profile**.
3. Tap **Sign Out**.

> **Note**
>
> To log on, you will need network connectivity.

Trying Out Unifier for iOS

The **Demo** mode allows you to see how the app looks and behaves when connected to a typical populated server. You do not need access to the Unifier server to use the demo mode. You must have network connectivity only when you open the demo the first time.

To try out Unifier in **Demo** mode:

1. On the **Home** screen for your device, tap **Unifier** ( ).
2. On the **Oracle Primavera Unifier** sign-in screen, tap **Proceed to Demo**.
3. When finished, tap the **User Profile** ( ).

4. Tap **Profile**.
5. Tap **Sign Out**.

Viewing Information About Your Unifier iOS Installation

You can view information about the Unifier app installed on your device, such as the version, version history if you have updated the app, and build ID; the version of the Unifier server that your device is accessing; and legal information regarding privacy and cookies.

To view this information:

1. Go to **Home Workspace**.
2. Tap **Settings** ⚙.
3. Tap **About** ⓘ.
4. If you have updated the app, tap the **Version History** caret to display or hide a list of previous versions that were installed on your device.

> **Note**
>
> You can also view the Version History on the sign-in screen by tapping the Information icon.

User Types in Mobile App

- **Standard Users:** Refers to Company and Partner users who have access to all components.
- **Portal Users:** Refers to users who only has access to the Unifier Portal and company-level Portal-enabled business processes (BPs).
- **Partner Users:** Refers to Partner users who have limited or permission-based access to BPs and files and folders in Document Manager.

Navigation

Navigation Overview

The first time that you log on, you are taken to the **Workspace Selection** screen. At a minimum, you will see the **Home Workspace** and **Search** options. The app displays a message if you do not currently have access to other workspaces. Otherwise, the **All Workspaces** section displays an alphabetical list of the workspaces that you have access to.

> **Note**
>
> After you select a workspace, your device takes you to the selected workspace the next time that you log on. To select a different workspace from the **Workspace Selection** screen, tap the down arrow next to the current workspace name.

The **Recent Workspaces** section displays a list of up to four workspaces that have been accessed only on mobile devices.

The attributes of the **Workspaces** list include **Workspace Number**, **Workspace Name**, and **Location** (if available).

To limit the list of workspaces in **All Workspaces** to those that are view-only, tap **Filter** ( ), enable **View Only Workspaces**, and tap **Apply**.

Workspaces provide access to your **Company Workspace** and your projects. You can view, create, and manage workflow and non-workflow business process (BP) records. You can also download and synchronize projects for use in **Offline** mode. This component is available only for standard users.

The navigation bar at the top displays your **User Profile** icon and provides access to a **Search** ( ) option that lets you search for a specific workspace.

Your **User Profile** icon indicates whether you are in **Online** mode (green dot) or **Offline** mode (gray dot). Whether you are in **Online** or **Offline** mode, you can access **Profile**, **Company**, and **App Settings**, as well as help, by tapping your **User Profile** icon.

Using Search

You can search **Workspaces**, **Tasks**, **Outbox**, **Documents**, **BP Tiles**, **Recent** logs, and **Line Item** logs.

To search logs:

1. From the **Workspace Selection** screen, navigate to the applicable **Workspace**, **Tasks**, **Outbox**, **Documents** or **Recent** page.
   When you search for a workspace, all matching workspaces except Home Workspace are listed.
2. If a **Search** box is not visible, perform a pull-down gesture.
3. Type a value in the **Search** box, and tap **Search**.
4. If the item, such as a workspace or document is located, tap the item to go directly to it.

Workspaces

Workspaces Overview

Workspaces provide access to your projects/shells and **Company Workspace**. You can access a project if you are a member of that project, or if you have the permission to view that project's business process (BP) records. You can view, create, and manage workflow and non-workflow BP records. You can also download and synchronize projects for use in **Offline** mode. This component is available only for standard users.

Within each workspace, all BPs that have been enabled for the Unifier Mobile App are displayed. You can access or view a BP record only if you have the applicable permissions. The number of BP records that you can see in your project depends on the amount of data that you have downloaded.

The first time that you log on, you are taken to the **Workspace Selection** screen. After you select a workspace, your device takes you to the selected workspace the next time that you log on. To select a different workspace from the **Workspace Selection** screen, tap the down arrow next to the current workspace name.

When you access a workspace, a **Video Tutorials** banner appears at the top. To view applicable videos, tap **Show Videos**. To dismiss the **Video Tutorials** banner, tap **Close** (x). You can access the videos at any time through **Settings**.

Home Workspace provides access to the components that are common to all workspaces, include **Tasks**, **Outbox**, **Recent**, and **Settings**.

All Workspaces displays an alphabetical list of the workspaces that you have access to. To limit the list of workspaces in **All Workspaces** to those that are view-only, tap **Filter** ( ), enable **View Only Workspaces**, and tap **APPLY**.

Recent Workspaces displays a list of up to four workspaces that have been accessed only on mobile devices.

Search ( ) lets you look for any workspace except **Home Workspace**.

Additional Cases

If you are scrolling and you are offline, but have internet and server connectivity, an alert is displayed. If you select **Yes**, you are switched to **Online** mode and you can download the next set of data. If you select **No**, the alert is dismissed.

If you are scrolling and you are offline with no internet or server connectivity, an alert is displayed, which you can dismiss by tapping **OK**.

Using a Workspace

A workspace, including **Company Workspace**, provides access to the following components for the selected workspace:

- **Tasks** ( ): Access your assigned tasks, synchronize data, and filter tasks for the selected project. Badge notification displays the number of tasks that have not been started. This component is available only for standard users.
- **Documents** ( ): Access documents and other files for the selected project.
  As a portal user, you can access saved and recently accessed business process (BP) record attachments.
- **Mailbox** ( ): (Not available on **Company Workspace**) Provides access to the email and notifications for the selected project.

The **Recent Business Process** section displays a list of up to four BPs that have been accessed only on mobile devices. To display a list of available BPs, tap **See All**.

You can also perform the following:

- **Download** ( ): Download project data to work in **Offline** mode. If you previously accessed BPs in the selected workspace, the downloaded data includes designs, permissions, and up to 20 recent records for up to 6 of the most recently accessed BPs. Attachments and Data Pickers are not downloaded. (If you tap Download and you have not previously accessed any BPs, the system fetches only non-BP-related information.) After data is downloaded, the icon changes to **Sync** ( ) .

  > **Note**
  >
  > While you are in **Online** mode, you can use the **Download Record(s)** option in the Business Process Log (BP log) to download one or more records and corresponding BP Line Item Pickers.

- **Sync** ( ): Synchronize downloaded project data. If you previously downloaded the selected workspace and you tap Sync, synchronization of the downloaded data includes designs, permissions, and up to 20 recent records for up to 6 of the most recently accessed BPs. (If you tap Sync and you have not previously accessed and synchronized any BPs, the system fetches only non-BP-related information.)
- **QR code** ( ): If any of the BPs for the project use the QR code Data Element (DE), you can scan the code to view tasks, view records, or create records within the project.
- **Menu** (•••): Access **Map View** and **Delete Offline Workspace Data**. If your project has geo-coding values for latitude and longitude, you can view the location of your project in a map using **Map View**. If you downloaded the workspace and want to remove it from your device, you can remove it using **Delete Offline Workspace Data**.

Business Process Log

For better device memory usage and performance upon fetching all records, you are prompted to add filter criteria by tapping **Filter Settings** to get a precise set of records. To ensure that device performance is not significantly impacted, you can download 200 or fewer records at one time.

On the **Filter** page, enabling the **Show Records That Have Not Been Downloaded** option helps you select only records that are not currently downloaded to your device.

If you select the **All** option, the operation might take a few minutes. If you fetch an excessive number of records, you might get a timeout error. After selecting **All**, if you want to view only those records that you have not downloaded yet, tap **Menu** (•••) in the upper-right corner, tap **Filter**, and then enable the **Show Records That Have Not Been Downloaded** option. **Show Records That Have Not Been Downloaded** is off by default.

The values included in the log details are listed below:

- For workflow records that have been sent to the next step:
  - <Record Number><Record Title>
  - <Record Status>
  - <Due Date if applicable>
  - Updated: <Date and time that the record was last updated>
- For workflow records that have been saved as Draft:
  - <Record Number><Record Title>
  - <Record Status>

  - <Due Date if applicable>
  - Draft Last Saved: <Date and time that the record was last updated>
- For non-workflow records in a saved state:
  - <Record Number><Record Title>
  - <Record Status>
  - <Due Date if applicable>
  - Saved: <Date and time that the record was last saved>
- For non-workflow records that have been submitted:
  - <Record Number><Record Title>
  - <Record Status>
  - <Due Date if applicable>
  - Submitted: <Date and time that the record was submitted>

> **Note**
>
> If a record has attachments in the Main Form or in any of the line items, the **Attachments** indicator is displayed.

In addition to the **All** tab, you can also use the **Saved Records/Drafts** and **Offline Records** tabs to filter what is listed. The **Saved Records** tab is available for non-workflow BPs and displays only the records that are in edit mode or that have not been submitted. The **Drafts** tab is available for workflow BPs and displays only the records that are saved as drafts. **Offline Records** displays all the downloaded records.

> **Note**
>
> The BP log for Text-type non-workflow BPs will not display a **Saved Records** tab.

If your administrator created customized mobile log views, the **All** tab displays the active predefined views. For example, one view might sort the BP records based on the current date, while another might sort based on Due Date. The system remembers which view you last selected for the BP and uses it the next time that you access the BP, even if it is from a different device.

The log information is saved on your device. To view the details of a record that does not fall under the first 200 record count, scroll down to view the next set of records. A "Loading next 200 items…" indicator is displayed as the records are being retrieved. The log information for records that exceed the first 200 records are not saved on your device.

If you are working offline, the first 200 records are displayed. All the records that have been saved are also displayed. Find older records in the BP tile by selecting the **Search Bar** option seen with a pull-down gesture.

Using Home Workspace

Based on a typical setup, **Home Workspace** provides access to the following components:

> **Note**
>
> : Unless specified, all components are available to portal and standard users.

- **Tasks** ()
  Access your assigned tasks, synchronize data, and filter tasks. Badge notification displays the number of tasks that have not been started. This component is available only for standard users.
- **Outbox** ()
  Access BP records that you have worked on and are in **Draft** mode and records that you were working on while offline that have not been synchronized with the server.
- **Recent** ()
  Access the last 20 BP records that you worked on. It shows the record title, BP name, project name, and due date. This list is reset when you reset the data on your device.
- **Settings** ()
  Access the following options:
  - **Profile** ()
  - **Preferences** ()
  - **Notifications** ()
  - **Data Synchronization** ()
  - **Switch Company** ()
  - **About** ()
  - **Help** ()
  - **Report an Issue** ()
  - **Smart Assistance** ()

Using Map View in Projects, BP Logs, and BP Records

If your project has geo-coding values for latitude and longitude, you can view the location of your project in a map. To see the map, in the Workspace screen, tap **Menu** (•••), and select **Map View**.

You can view the geo-location of your BP records if geo-coding values for latitude and longitude are available. To see the map, in the BP record log, tap **Menu** (•••), and select **Map View**.

If your organization uses Unifier 22.9 or later, BP records that use the Image Picker DE or an attachment block in the upper form or detail form and that have images that were attached through the Gallery or Camera, display the location for each image if the image contains geo-coding values for latitude and longitude. To see the location of the image on a map, tap **Location** (). Note that location service must be enabled when the image is attached to the record.

Business Process Records

Business Process Records Overview

You can create a business process (BP) record if you have the appropriate permissions and can see the **Plus** (**+**) sign in the mobile app. You can access your tasks from the **Home** Workspace or a selected workspace.

To access existing BPs, use any of the following methods:

- To access the recent 20 BP records, from the **Home** Workspace, tap **Recent**.
- For a selected workspace, the **Recent Business Process** section displays a maximum of four BPs that have been accessed only on mobile devices.
- To access a list of available BPs in a selected workspace, tap **See All**.

To access additional options in the BP Records log, tap **Menu** (•••):

- If enabled to view the geo-location of your BP records, tap **Map View**.
- To reload the BPs with the latest updates, tap **Refresh Business Process Design**.
- To download multiple records in Online mode, tap **Download Records for Editing**.
- To download all records in Online mode, tap **Download All Records for Reference**. Only the required minimum data is downloaded. In Offline mode, these minimized sets of downloaded records are not displayed in the BP log. Instead, they are available through BP pickers. However, attachments, Comments, and Detail Forms cannot be viewed from the BP log.

  Depending on the number of records being downloaded, it may still require substantial time and bandwidth.
- To delete all offline records on your device for a selected BP tile, tap **Delete Downloaded Record(s)**.
- To delete drafts of new and existing records, tap **Delete Draft**.

> **Note**
>
> When you create a new BP record, or view or work with existing ones, multiple fields may appear as read-only (dimmed). This includes, but is not limited to, fields such as **BP Creator**, **BP Line Item Creator**, and **Issue Record**.

To return to the selected workspace screen, tap **< Menu**.

Creating Business Process Records

To create a business process (BP) record, populate the Main Form.

If the business process supports attachments and comments, these can be accessed through secondary tabs (if *enabled*) under the Main Form. These secondary tabs are collectively referred to as Quick Access tabs. Use the Quick Access tabs to quickly navigate through various blocks of the form. The Main Form may also contain unnamed blocks. To access such unnamed blocks, tap .

If the BP (workflow or non-workflow) supports folders or line items, Populating Detail Form with Line Items.

Prerequisite

- You have the required permission to create BP records.
- You have the required permissions to create BP records, attachments, comments, and so on.

Populate Main Form (Online Mode)

1. Begin a new BP record:
   a. Select the applicable workspace and BP tile where you want to create the record.
   b. Tap the **Plus** (**+**) icon. On split-view devices, tap the **Plus** (**+**) icon in the left pane.
   c. If prompted, select a workflow.
2. To select a form view, tap **Menu** (•••) and then tap **Switch to Standard Form** or **Switch to Mobile Form**.
   For standard forms, the form is identical to the format in Unifier web with the same block structure, and Quick Access tabs.

   For mobile forms, form fields display as a flat list.
3. Use any of the following navigation options:
   - To navigate to each block of the record, tap a Quick Access tab in the form's toolbar.
   - To navigate to a record's attachments, tap the **Attachments** () tab.
   - To navigate to the record's comments, tap **Comments** () tab, or scroll down to the **Comments** block.
   - If you want to work offline, Downloading Records and Working Offline.
4. Populate the **Main Form** of the BP record. If *enabled and applicable*:
   - Enter information for various types of fields as outlined in Common Data Entry Tasks.
   - Attach supporting files. For more details, see Working with Attachments.
   - Add comments. For more details, see Working with Comments.
5. If the BP record (workflow or non-workflow) is associated with folders or line items, Populating Detail Form with Line Items.
6. For workflow BPs, complete the workflow step assigned to you as outlined in Working with Workflow BPs.
7. To complete the BP record, tap **Send** (for workflow BP records) or **Submit** (for non-workflow BP records).
   For workflow BPs, to save the record to the server and retain the record in an editable state without sending, tap **Save Draft**.

   For non-workflow BPs, you can also select any of the following alternatives to **Submit:**
   - To save the record to the server and retain the record in an editable state, tap **Save**. The updated record content is saved in the Unifier web application as well.
   - To complete the submission of the record, tap **Submit**.

- To modify the record, tap **Edit**.

  If the record contains validation errors, you cannot switch to the **Detail Form**, save, submit, or send the record.

Offline Mode

- You can create BP records.
- You can toggle between **Standard Form** and **Mobile Form**.
- If you save a BP record, it is saved on your device.
- When you save a record, the updated record content is saved in the **Outbox** of your mobile application. When you switch to Online mode, you must sync the record in the **Outbox** to save changes.
- The BP record moves through the workflow only when your device is set to Online mode and has network connectivity. If you have a file with annotations, it is also sent to the server with the BP record.

Populating Detail Form with Line Items

To create BP records that support folders or line items, scroll to view additional tabs. If the business process supports attachments and comments, access these through secondary tabs (if *enabled*) under the Detail Form. These secondary tabs are collectively referred to as Quick Access tabs. Use the Quick Access tabs to quickly navigate through various blocks of the form.

A Detail Form may also contain unnamed blocks. To access such unnamed blocks, tap ().

Prerequisite

- The **Main Form** of the BP record is populated as outlined in Creating Business Process Records.
- You have the required permissions to create line items, attachments, comments, and so on.

Online Mode

1. Add line items:
   a. Tap the **Detail Form**, scroll through Detail Form tabs, and then tap the appropriate tab.
   b. To add a new line item, tap **Add** in List view or tap **Add Line item** in Grid view.
   c. For Contract BPs and Change Order BPs, enter line items with corresponding cost codes, quantities, and amounts.
      Select one of the following methods:
      - **Lump Sum**: If you select this option, enter line items with lump sum costs.
      - **Unit Cost**: If you select this option, enter line items with unit costs.
      - **Variable Unit Cost**: If you select this option, enter line items with variable unit costs.
      - **Modify Committed Line Item**: (Displays for Change Orders only) If you select this option, enter modified committed line items.
2. Populate additional tabs as needed. If *enabled and applicable*:
   - Enter information for various types of fields as outlined in Common Data Entry Tasks.
   - Attach supporting files to line items as outlined in Working with Attachments.

3. Perform any of the following actions:
   - To save the current line item, tap **Save**.
   - To continue adding line items, tap **Save & Add New**.
   - To delete a line item, tap **Delete**.
4. For workflow BPs, complete the workflow step assigned to you as outlined in Working with Workflow BPs.

If the record contains validation errors, you cannot switch to the **Main Form**, save, submit, or send the record.

Entering Line Items with Lump Sum Costs

If *enabled and applicable*, you can populate the Detail Form tab and additional tabs of a Contract or Change Order BP record with a list of items and their corresponding cost codes, quantities, and amounts.

Prerequisites

- You have the required permissions to create Contract or Change Order BP records.
- Populate the **Main Form** of the Contract or Change Order BP record as outlined in Creating Business Process Records.

Online Mode

To populate the line items of a Contract or Change Order BP record with lump sum cost breakdown:

1. Tap the **Standard** tab.
2. To add a new line item, tap the **Plus** (**+**) icon and select **Lump Sum**.
3. In the **Line Item** tab, enter information of the purchased item.
4. In the **Amount** field enter the amount billed for each line item. Any formulas, if applicable, are calculated by default.
   The **Item Quantity** and **Item Unit Cost** fields display relevant values.
5. To provide a detailed cost breakdown for each line item entered in step 3, tap the **Cost Breakdown** tab.
   - To add multiple cost breakdown lines, tap the **Plus** (**+**) icon and proceed to the next step.
   - To add a single cost code, tap **Remaining Amount** and proceed to step 7.
6. If you selected the **Plus** (**+**) icon in the previous step:
   a. From the **CBS** picker list, select one or more CBS codes.
   b. Enter the following information:
      - **Cost Code**: To modify the cost code, double-tap and select another cost code from the CBS picker.
      - **Short Description**: Enter relevant information for the costed line item.
      - **Amount**: Enter the amount for each cost line item.

      Displays the following information:
      - **Cost Name**: The code name associated with the cost code.
      - **Item Quantity**: The quantity of the costed line item purchased.

   - **Total Amount**: The sum of the amount entered for each cost line item
   - **Not Costed** The difference between the **Amount** field of the line item (from step 4) and the **Total Amount** field of costed line items (step 6b).
7. If you selected **Remaining Amount** in step 5, enter the following information:
   - **Cost Code**: To modify the cost code, double-tap and select another cost code from the CBS picker.
   - **Short Description**: Enter relevant information about the costed line item.
   - **Amount**:Displays the amount of the line item.
   - **Not Costed Amount**: Displays zero (0).
8. Finalize the costed line items as needed. Perform any of the following actions:
   - To save the current line item, tap **Save**.
   - To continue adding line items, tap **Save and Add New**.
   - To add multiple line items, repeat the entire above sequence.
   - To delete a costed line, swipe on the costed line and then tap **Remove Cost**.
   - To copy a costed line, swipe on the costed line and then tap **Copy**.

   The **Non-Costed Quantity** and the **Non-Costed Amount** are recalculated.
9. To complete the BP record, tap **Send** (for workflow BP records) or **Submit** (for non-workflow BP records).
   For workflow BPs, if you want to just retain the record in an editable state without sending, tap **Save Draft** to save the record to the server.

   For non-workflow BPs, you can also select any of the following alternatives to **Submit:**
   - To save the record to the server and retain the record in an editable state, tap **Save**.
   - To complete the submission of the record, tap **Submit**.
   - To modify the record, tap **Edit**.

   If the record contains validation errors, you cannot save the record.

Entering Line Items with Unit Costs

If *enabled and applicable*, you can populate the Detail Form tab and additional tabs of a Contract or Change Order BP record with a unit cost breakdown of line items with their corresponding cost codes, quantities, and amounts.

Prerequisites

- You have the required permissions to create Contract or Change Order BP records.
- Populate the **Main Form** of the Contract or Change Order BP record as outlined in Creating Business Process Records.

Online Mode

To populate a Contract or Change Order BP record with unit cost breakdown of line items:

1. Tap the **Standard** tab.
2. To add a new line item, tap the **Plus** (**+**) icon and then select **Unit Cost**.
3. In the **Line Items** tab, enter information about the purchased item:
   a. In the **Item Quantity** field, enter the quantity purchased.

b. In the **Item Unit Cost,** enter the cost per unit of the purchased item. Any formulas, if applicable, are calculated by default.
   The **Amount** field displays the cost based on the Unit Price formula by default.

4. To provide a detailed cost breakdown of each line item entered above, tap the **Cost Breakdown** tab.
   - To add multiple cost breakdown lines, tap the **Plus** (**+**) icon and proceed to the next step.
   - To add a single cost code, tap **Remaining Amount** and proceed to step 6.
5. If you selected the **Plus** (**+**) icon, enter the following information:
   a. From the **CBS** picker list, select a CBS code.
   b. Enter the following information:
      - **Cost Code**: To modify the cost code, double-tap and select another cost code from the CBS picker.
      - **Short Description**: Enter relevant information about the line item.
      - **Quantity**: Enter the quantity of each line item.
      - **Unit Cost**: The cost per unit of the purchased item.
      - **Amount**: The amount for each costed line item.
      - **Total Amount**: The sum of the amount entered for each costed line item by default.

      Displays the following information:
      - **Code Name**: The code name associated with the cost code by default.
      - **Not Costed Amount**: The difference between the **Amount** field of the line item (from step3) and the **Total Amount** field of costed line items (step 5b).
6. If you selected **Remaining Amount** in step 4, enter the following information:
   - **Cost Code**: Select a cost code from the CBS picker.
   - **Short Description**: Enter relevant information about the line item.
     Displays the following information:
     – **Amount**: Displays the amount of the line item.
     – **Not Costed Amount**: Displays zero (0).
7. Finalize the cost line items as needed. Perform any of the following actions:
   - To save the current line item, tap **Save**.
   - To continue adding line items, tap **Save and Add New**.
   - To add multiple line items, repeat the entire above sequence.
   - To delete a costed line, swipe on a costed line and then tap **Remove Cost**.
   - To copy a costed line, swipe on a costed line and then tap **Copy**.

   The **Non-Costed Quantity** and the **Non-Costed Amount** are recalculated.
8. To complete the BP record, tap **Send** (for workflow BP records) or **Submit** (for non-workflow BP records).
   For workflow BPs, if you want to just retain the record in an editable state without sending, tap **Save Draft** to save the record to the server.

   For non-workflow BPs, you can also select any of the following alternatives to **Submit**.

- To save the record to the server and retain the record in an editable state, tap **Save**.
- To complete the submission of the record, tap **Submit**.
- To modify the record, tap **Edit**.

If the record contains validation errors, you cannot switch to the **Main Form**, save, submit, or send the record.

Entering Line Items with Variable Unit Costs

If *enabled and applicable*, you can populate the Detail Form tab and additional tabs of a Contract or Change Order BP record with a variable costs of line items with their corresponding cost codes, quantities, and amounts.

Prerequisites

- You have the required permissions to create Contract or Change Order BP records.
- Populate the **Main Form** of the Contract or Change Order BP record as outlined in Creating Business Process Records.

Online Mode

To populate a Contract or Change Order BP record with a variable cost breakdown of line items:

1. Tap the **Standard** tab.
2. To add a new line item, tap the **Plus** (**+**) icon and then select **Variable Unit Cost**.
3. In the **Line Item** tab, enter information of the purchased items.
   a. In the **Variable Unit Cost** field, enter the cost per unit value.
   b. In the **Item Quantity** field, enter the quantity of the purchased line item.
   c. In the **Amount** field enter the amount billed for each line item. Any formulas, if applicable, are calculated by default.
4. To provide a detailed cost breakdown of each line item entered above, tap the **Cost Breakdown** tab.
   - To add multiple cost breakdown lines, tap the **Plus** (**+**) icon and proceed to the next step.
   - To add a single cost code, tap **Remaining Amount** and proceed to step 6.
5. If you selected the **Plus** (**+**) icon in the previous step:
   a. From the **CBS** picker list, select one or more CBS codes.
   b. Enter the following information:
      - **Cost Code**: Displays the cost code by default. To modify the cost code, double-tap.
      - **Code Name**: Displays the code name associated with the cost code by default.
      - **Short Description**: Enter relevant information about the line item.
      - **Amount**: Displays the amount for each cost line item.
      - **Quantity**: Enter the quantity of each line item.
      - **Unit Cost**: Enter the unit cost of each line item.

- **Total Amount**: Displays the sum of the amount entered for each cost line item by default.
- **Not Costed Amount**: Displays the difference between the **Amount** field (step 3) and the **Total Amount** field (step 5b).

6. If you selected **Remaining Amount** in step 4, enter the following information:
   - **Cost Code**: Select a cost code from the CBS picker.
   - **Short Description**: Enter relevant information about the line item.
   - **Amount**: Displays the amount of the line item.
   - **Not Costed Amount**: Displays zero (0).
7. Finalize the cost line items as needed. Perform any of the following actions:
   - To save the current line item, tap **Save**.
   - To continue adding line items, tap **Save and Add New**.
   - To add multiple line items, repeat the entire above sequence.
   - To delete a cost line item, swipe on a costed line and then tap **Remove Cost**.
   - To copy a cost line item, swipe on a costed line and then tap **Copy**.

   The **Non-Costed Quantity** and the **Non-Costed Amount** are recalculated.
8. To complete the BP record, tap **Send** (for workflow BP records) or **Submit** (for non-workflow BP records).
   For workflow BPs, if you want to just retain the record in an editable state without sending, tap **Save Draft** to save the record to the server.

   For non-workflow BPs, you can also select any of the following alternatives to **Submit:**
   - To save the record to the server and retain the record in an editable state, tap **Save**.
   - To complete the submission of the record, tap **Submit**.
   - To modify the record, tap **Edit**.

   If the record contains validation errors, you cannot switch to the **Main Form**, save, submit, or send the record.

Entering Modified Committed Line Items

If *enabled and applicable*, you can populate the Detail Form tab and additional tabs of a Change Order BP record with modified committed line items with their corresponding cost codes, quantities, and amounts.

Prerequisites

- You have the required permissions to create Change Order BP records.
- Populate the **Main Form** of the Change Order BP record as outlined in Creating Business Process Records.

Online Mode

To populate a Change Order BP record with modified committed line items:

1. Tap the **Standard** tab.
2. To add a new line item, tap the **Plus** (**+**) icon and then select **Modify Committed Line Item**.

3. From the **Commit line item picker**, select a line item.
4. Depending on the type of cost associated with a line item, **Unit Cost** or **Variable Unit Cost** may display for the line item.
5. For costed lines that were copied from the SOV, the following information displays in the cost breakdown of a **Committed Line Item**:
   - **Cost Code**: For SOV-referenced line items, displays the cost code from the **Commit Line Item Picker** (step 3).
     For new costed line items, select a cost code from the CBS Picker.
   - **Code Name**: Displays the name of the selected cost code
   - **Short Description**: Displays the description from the **Summary Line Item** field by default. Enter or modify the description as needed.
   - **Current Quantity**: Displays the quantity purchased from the selected commit record. For new costed lines, displays a blank.
   - **Current Unit Cost**: Displays the Item Unit Cost value from the selected commit record. For the new costed lines, enter the unit cost of the line item. By default, displays blank.
   - **Current Scheduled Value**: For existing costed lines, displays the scheduled value from the SOV.
     For the new costed lines, displays zero.
   - **Change Quantity**: Enter the modified quantity for existing and new costed lines.
   - **Change Amount**: Displays the value from the Current Unit Cost calculation.
   - **New Scheduled Value**: Displays the calculated value from a combination of the **Current Scheduled Value** and the **Change Amount** fields.
6. To add multiple line items, repeat the entire above sequence.
7. Tap the **Cost Breakdown** tab of a **Standard** line item, and perform any of the following actions:
   - To save the current line item, tap **Save**.
   - To continue adding line items, tap **Save and Add New**.
   - To delete a costed line, swipe on a costed line and then tap **Delete**.
   - To remove a new costed line item, tap **Delete**. Note, for committed costed line items from the SOV, the **Delete** option is not displayed.
   - To copy a costed line, swipe on a costed line and then tap **Copy**. Note, the **Current Scheduled Value** is not copied.
8. Finalize the line items and costed line items as needed.
9. To complete the BP record, tap **Send** (for workflow BP records) or **Submit** (for non-workflow BP records).
   For workflow BPs, if you want to just retain the record in an editable state without sending, tap **Save Draft** to save the record to the server.

   For non-workflow BPs, you can also select any of the following alternatives to **Submit**.
   - To save the record to the server and retain the record in an editable state, tap **Save**.
   - To complete the submission of the record, tap **Submit**.
   - To modify the record, tap **Edit**.

   If the record contains validation errors, you cannot switch to the **Main Form**, save, submit, or send the record.

Result

- After the Change Order BP record is routed to the terminal step, the costed lines in the SOV are updated with modified values for **Quantity** and **New Scheduled Value**.
- For new lines, the variable unit rates provided in the cost breakdowns are rolled up to the SOV along with the **Quantity** and the **Amount**.

Creating BP Records Using the Camera

As an alternative to creating a BP record and then adding attachments, you can now do the reverse by first capturing images using the camera from the Workspace dashboard and then attaching them to a new BP record.

Prerequisites

You have the required permissions to attach files.

Online Mode

To capture images and then create a BP record:

1. Navigate to the **Company Workspace** or a Project Workspace such as Biotech Research Facility.
2. Tap **Camera** ().
3. To select your default image size, from the **Select size for image(s)** list, tap any: **Small (900 KB)**, **Medium (1.5 MB)**, **Large (2 MB)**, or **Actual Size (3.5 MB)**.
   Except for the **Multiple Photos** option, the selected image size applies to all image file formats and becomes your default **Image Size** setting.
4. Use the camera to take a maximum of 10 images.
   Images are saved with the default file name format, *<Img_DateTime>*.
5. Preview the images by tapping the image count.
6. On the **Preview** screen, perform any of the following actions:
   - To use the camera, tap **Back**.
   - To discard an image, tap **Delete** () on the selected image.
   - To rename an image file, overwrite the default file name.
7. After finalizing the images, tap **Done**.
8. On the **Select Business Process** screen, search or select a business process to attach the images.
9. If applicable, select a workflow.
   Images are attached as individual files in the **Attachments** block of the BP form.
10. Populate the BP record as outlined in [Creating Business Process Records](#).
11. To create the BP record:
    a. Tap **Save**.
    b. For non-workflow BPs tap **Submit**, or tap **Send** to transfer the BP record to the next workflow step.

> **Note**
>
> If you no longer have the required attachment permissions, when you access a draft BP record you created, an alert message displays. Tap **OK**. All attachments will be removed from the draft BP record. Populate the BP record as needed.

Offline Mode

This feature is supported in Offline mode.

Manually Initiate Auto-Creation of Destination BPs

You can also manually initiate auto-creation of destination BP records (workflow or non-workflow) or line items when they meet specific conditions, frequency, or both.

Use this method to auto-create:

- A BP record from the Main Form or Detail Form for line items.
- Multiple BP records from line items in the Detail Form. Individual line items can be copied or ignored.

Prerequisites

- You have update or create permissions for the BP record.
- The business process supports one or more BP Creator data elements in the Main Form or Detail Form.
- Each BP Creator data element is configured to auto-create a BP record or a line item.
- BP Workflow setup has not been configured to trigger an auto-create by the system.
- Source and destination BPs are setup for auto-creation.

Online Mode

To manually auto-create a destination BP record or line items:

1. In the source business process record, navigate to the **Main Form** or **Detail Form.**
2. In the field label associated with the BP Creator data element, select the option to initiate the auto-creation process.
   A **Pending Creation** action displays.
3. To auto-create the record in the destination BP, tap **Send** (for workflow records) or tap **Submit** (for non-workflow records).
4. On successfully auto-creating BP records or line items in the destination, in the source BP record, tap the hyperlink in the field label associated with the BP Creator data element to access the auto-created destination BP record.

If you receive a permission error, contact your administrator for access.

Offline Mode

You can manually trigger the auto-creation of a BP record. The record is automatically created when the offline source record syncs. If you receive an error that the BP has not been set up after your device syncs, contact your administrator.

Editing BP Records

To update an existing business process (BP) record, review and edit information in the Main Form, and if *applicable* or *enabled*, the Detail Form tab.

Prerequisite

You have Edit permission to perform this task.

Main Form (Online Mode)

1. From your **Tasks** log or BP tile, select a BP record with an **Active** status:
   - To open a workflow BP record, tap **Accept.**
   - Touch a non-workflow BP record, to open in Edit mode by default.
   - On devices that support split-view:
     a. In the left pane, select a record.
     b. To edit the record, tap **Menu** (•••) in the right pane and select **Edit** or **Accept**, or expand the right pane.

     > **Note**
     >
     > You cannot edit a non-workflow BP record with an **Inactive** status

2. In the BP log, use any of the following navigation options to review BP records and then tap **Accept**:
   - To navigate to each block of the record, tap a Quick Access tab in the form's toolbar.
   - To navigate to a record's attachments, tap the **Attachments** () tab.
   - To navigate to the record's comments, tap the **Comments** () tab or scroll down to the **Comments** block.
   - To toggle between form views, tap **Menu** (•••) and then tap **Switch to Standard Form** or **Switch to Mobile Form**.
3. If you want to work offline, Downloading Records and Working Offline.
4. Edit the BP record. If *enabled and applicable*:
   a. Edit information for various types of fields as outlined in Common Data Entry Tasks.
   b. Attach supporting files. For more details, see Working with Attachments.
   c. Add comments. For more details, see Working with Comments.
   d. If the BP record is associated with a workflow, has folders or line items, Editing Detail Form.
5. To complete the BP record, tap **Send** (for workflow BP records) or **Submit** (for non-workflow BP records).
   If the record contains validation errors, you cannot switch to the **Detail Form** tab, save, submit, or send the record.

Offline Mode

The BP record is saved on your device. A workflow BP record (workflow or non-workflow) moves only when your device is set to Online mode and has network connectivity. If you have a file with annotations, it is also sent to the server along with the BP record information.

Editing Detail Form

For business process (BP) records that support workflows, line items, or folders, edit the Detail Form and additional tabs as needed.

1. To access line-item tabs or additional tabs, scroll.

   > **Note**
   >
   > If you select a Query-based tab (QBT) to process a BP record, the BP record may display in a QBT log view only if:
   >
   > - Query-based tabs are *enabled and applicable* for the business process.
   > - A QBT log view has been configured for the business process instead of the mobile log view.

2. Add or edit line items:
   a. To select an appropriate tab, scroll horizontally.
   b. To add a new line item, tap **Add** in List view or tap **Add Line item** in Grid view.
   c. Tap **Save** to close a line item.
3. Edit the Detail Form or additional tabs. If *enabled and applicable*:
   a. Edit information for fields outlined in Common Data Entry Tasks.
   b. For workflow BPs, complete the workflow step assigned to you as outlined in Working with Workflow BPs.
   c. Attach supporting files. For more details, see Working with Attachments.
   d. Add comments. For more details, see Working with Comments.
   e. For Contract BPs and Change Order BPs, enter line items with corresponding cost codes, quantities, and amounts as outlined in Populating Detail Form with Line Items.
4. Perform any of the following actions:
   a. To save the current line item, tap **Save**.
   b. To continue adding line items, tap **Save and Add New**.

   If the record contains validation errors, you cannot switch to the **Main Form**, save, submit, or send the record.

Copying BP Records and Line Items

You can copy a business process (BP) record or individual line items within a record. The copied record is created in the same location as the source record.

When you copy a BP record, the following information is replicated:

- Content in the Main Form and Detail Form.
- Auto-populated values and image pickers from the source record or line items.

- Attachments are included only if you select the **Copy with Attachment option**.
- For Text-type BPs, only the BP record, general comments, and attachments are copied. Responses are not copied.

The following information is *not* replicated:

- BP Picker values that do not meet filtering conditions in the source record. Instead, the BP picker value is a blank.
- In the Step Form of the created BP, any data elements that auto-populate from the picker are cleared.

Prerequisite

You have the required permissions to copy BP records and line items.

Copying BP Records in Online Mode

To copy a BP record:

1. Navigate to the applicable workspace and select a BP tile.
2. Tap to select a row and then swipe left to select: **Copy without Attachments** or **Copy with Attachments**.
   On devices that support split-view:
   a. In the left pane, select a record.
   b. To copy the record, tap **Menu** (•••) in the right pane, and then select **Copy without Attachments** or **Copy with Attachments**.
3. If multiple workflows are present, select a workflow.
4. Select one of the following options:
   - To discard the copy, tap **Back**.
   - To save the record, tap **Save**. The record appears in the BP record log and in the **Outbox**.
   - To send the record to the server, tap **Send** (for workflow BPs) or tap **Submit** (for non-workflow BPs).

Copying Line Items in Online Mode

To copy a line item:

1. Navigate to the applicable workspace or BP tile, and open a BP record.
2. To open a line item tab, scroll to choose an appropriate tab within the record.
3. Tap to select a specific line item row.
4. Swipe left and select one of the following options: **Copy without Attachments or Copy with Attachments**.

Offline Mode

Copied records and line items are available in the **Outbox**.

Grouping BP Line Items

To navigate through BP line items, you can group and organize them into meaningful categories. You can group BP line items in:

- Cost BPs (Workflow and Non-workflow)
- Line Item BPs (Workflow and Non-workflow)

Groups display in the alphabetical order.

Prerequisite

Grouping is enabled for mobile BPs.

Online Mode

You can group line items only when you create or copy a line item. When you copy a *line item*, it is duplicated within the *same* group. However, when you copy a *line item record*, it is duplicated with *all* the groups.

To move line items between groups, access Unifier web.

To group new BP line items:

1. Select the applicable workspace.
2. Tap a business process with the BP line items you want to group from any of the following locations: **Recent Business Processes**, **See All**, or your **Tasks** log.
   Alternately, select a BP record with line items in any of the following modes: Pre-creation, Draft, or Edit.
3. Tap a BP line item tab, and then tap **Add**.
4. In the **Select Group** screen:
   - Tap a group from the group list.
   - To avoid grouping the line item, tap **Skip**.

   Skipped line items are added to **Not Grouped**, at the bottom of the group list.

   > **Note**
   >
   > - BP line items cannot be grouped at the grid level.
   > - When you create or copy a line item, if a selected group is deleted from Unifier web, the line item is listed under **Not Grouped** by default.
   > - The Amount column, if configured, displays the total amount of BP line items in the Line Items tab.

Offline Mode

You can group BP line items in Offline mode. The groups get associated only when the device syncs with the server.

Working with Workflow BPs

If you have the required permissions to view a workflow, or you are an assignee on a workflow step of a workflow business process (BP) record, you will be notified to complete the workflow step. You can perform the following types of tasks in a workflow:

Completing a Workflow Step

In a workflow, each step within a workflow must be completed by an assigned user. The workflow design, configuration, and setup determines whether any or all steps listed below apply to you.

Online Mode

To complete the workflow step assigned to you:

1. Select a workflow action.
2. To select assignees for the workflow step, tap **To**, and then tap **Select All Assignees** or search for specific assignees.
   The list of assignees and groups you can see or select is based on the workflow design and filter conditions set for the workflow.
3. If applicable, perform the following actions:
   - To select and notify recipients of the workflow, tap **Additional assignees** and **Copied Users**.
   - If a contact list is *enabled* for a workflow step:
     a. Tap **Contact List**.
     b. Select the applicable lists.
     c. Tap **Done**.
4. In the **Due Date Details** block, enter the **Task Due Date** for completing the task.

Offline Mode

The BP record is saved on your device. The record moves through the workflow only when your device is set to Online mode and has network connectivity. If you have a file with annotations, it is also sent to the server along with the BP record information.

You can filter assignees only when you are working in Online mode. If you were working offline, the system checks for any changes to the list of assignees when you synchronize. If the assignees have changed, you may have to resend the BP record.

Viewing Workflow Progress of a BP Record

Workflow progress is available for viewing when accessing:

- Records in View mode or Edit mode
- Records from the BP log, Notifications log, and Tasks logs

To view workflow progress:

1. Select the BP record you want to view the Workflow Progress for.
2. In the upper-right corner of the BP record, tap **Menu** (•••), and then tap **View Workflow Progress**.
   On devices that support split-view:
   a. In the left pane, select a record.
   b. To view the record, tap **Menu** (•••) in the right pane and select **View Workflow Progress**, or expand the right pane.

The **Workflow Progress** tab selection (**Visited Steps** or **All Steps** tabs) is retained until the session expires or you log out. For example, if you access a record from the BP log and select the **All Steps** tab, it becomes the default selected tab. Otherwise, defaults to the **Visited Steps** tab.

Offline Mode

You cannot view the progress of a workflow.

Working with AI-Assisted Business Processes

If enabled, you can use Artificial Intelligence (AI) to perform various types of tasks on one or more business process records.

Prerequisite

Your company Administrator has enabled AI features for applicable business processes.

Generating AI-Assisted BP Summaries

AI-assisted summaries provide a synopsis from one or more selected BP records. This feature provides individuals performing different roles within your organization with the opportunity to highlight information, identify challenges, and review specific details.

> **Note**
>
> Summaries created using the AI BP Summarization feature are prepared by generative AI. Carefully review and verify these against trusted sources, as it may include out-of-date, inaccurate, or incomplete information.

Prerequisites

Your Company Administrator has enabled BP summarization with artificial intelligence (AI) for a specific business process.

Online Mode

To generate a BP summary:

1. Select the applicable workspace.
2. Navigate to the BP log menu.
3. Tap **Summarize Records**.
4. Use any of the following options to select BP records to include in the summary:
   - To include specific BP records in the summary, tap each BP record.
   - To include or remove all BP records from the summary, tap **Select All** in the BP log.
   - To filter the BP records, tap the **Filter** icon.
5. Tap **Generate** to view the summary.
6. To save the BP summary, tap **Menu** (**…**) and then tap **Save**. BP summaries are saved in the default format *<BPName>_AI Summary_<Date & time stamp>*.
7. Perform any of the following actions:
   - To rename the summary file, enter the desired filename and then tap **Save**.
     You can save and access a summary for up to 30 calendar days. You can also rename or delete saved summaries during this timeframe.

- To share the summary pdf, tap **Menu** (**...**) and then tap **Share as PDF**.

Offline Mode

You cannot generate AI-assisted BP summaries.

Viewing Saved BP Summaries

AI-assisted Business Process (BP) summaries provide a synopsis from one or more selected BP records.

> **Note**
>
> Summaries created using the AI BP Summarization feature are prepared by generative AI. Carefully review and verify these against trusted sources, as it may include out-of-date, inaccurate, or incomplete information.

Prerequisite

Your Company Administrator has enabled BP summarization with artificial intelligence (AI) for a specific business process.

Online Mode

To view a saved summary:

1. Select the applicable workspace.
2. Navigate to the BP log menu.
3. Tap **Saved Summaries**. Saved summaries display in the reverse chronological order (most recent, first).
4. Tap the summary you want to view, and perform any of the following actions:
   - To rename the summary, swipe left and tap **Rename**.
   - To share the summary, swipe left and tap **Share**.
   - To delete the summary, swipe left and tap **Delete**.

Offline Mode

You cannot view saved BP summaries.

Common Data Entry Tasks

Complete data entry for the following types of fields in the Main Form and the Detail Form of a business process (BP) record where applicable.

Scanning or Manually Entering Bar Codes

If *enabled and applicable*, you can scan bar codes for specific fields in a BP record.

Online Mode

To scan a bar code:

1. Tap the **Bar Code** ( ).

2. Aim your camera at the bar code,and wait for the scan is complete.
3. In low-light conditions, tap the **Flashlight** (⚡).

Alternatively, select the record and enter the bar code value.

Offline Mode

You can scan bar codes or enter bar code values.

Populating Hyperlink-Enabled Fields

If *enabled and applicable*, populate hyperlink-enabled fields in the Main Form and Detail Form of a BP record.

Online Mode

To add a hyperlink:

1. In the field, tap the **Hyperlink** ().
2. Enter a name and the URL address, and then tap **Done**.
   If the name is omitted, the URL address appears as the field value.

Offline Mode

You can add hyperlinks.

Entering Geolocation Details of a BP Record

If *enabled and applicable*, autofill or manually specify the location of the BP record in the Main Form.

Online Mode

To populate geolocation details for the BP record:

1. To use your device’s GPS, tap **Autofill with Current Location**.
2. Select the permission you wish to grant: **Allow Once** or **Allow While Using App.**
   The system automatically fills the **Latitude** and **Longitude** fields.

   If autofill is unavailable, tap the **Map** () icon and select a location, or manually enter the coordinates.

Offline Mode

You can add geolocation details in a BP record.

Populating Rich Text Fields

A Main Form or Detail Form may contain rich text fields that support more text formatting options.

Online Mode

If *enabled and applicable,* to populate rich text fields in a BP record:

1. Navigate to the relevant field, and tap the **Rich Text Editor** option.
2. Use the formatting options to style text as needed.

> **Note**
>
> Avoid uploading large images directly. Instead, add large images as attachments as outlined in Working with Attachments.

Offline Mode

You can populate rich text fields in a BP record.

Using Pickers for Data Entry

If *enabled and applicable*, use pickers to select data in the Main Form and Detail Form of a BP record. For example, use pickers such as BP Data Picker, Shell Data Picker, or CBS Picker.

Prerequisite

The business process (BP) is configured to support pickers.

Online Mode

To populate picker fields:

1. In the picker field, tap the **Picker** icon.
2. Start typing in the field to filter results and select from authorized codes or values. For CBS Picker, use the **Show CBS Hierarchy** toggle to switch and display the code hierarchy when filtering.
3. Use the **Information** ( ) icon to view additional details for each picker value.

Offline Mode

The pickers are available if the referenced BP is already downloaded.

Leveraging the Search Bar and Filters

Use the search bar to quickly locate field values, such as CBS codes.

Online Mode

To search and locate field values:

1. On the screen, swipe down to view and access the **Search Bar**.
2. To specify advanced filter conditions, tap **Filter** ( ). If **Show CBS Hierarchy** is enabled, the filter shows the hierarchy for your search selection.
3. Only choose leaf-level nodes for code-type pickers as summary nodes are not valid selections.

Offline Mode

You can search and filter values.

Working with Line Item Grids on Tablets

The Line Item Grid, which is currently available only on tablets, provides the ability to create and update line items in a tabular format. The grid consists of columns and rows (editable or not editable). You can determine whether a line item is editable (in editable mode) by viewing the color of the column:

- A column that appears dimmed (gray) indicates that the column is not editable.
- A column with red-colored text indicates that the column is mandatory and must be filled before submitting.

Resizing a Column

Select the column you want to resize, navigate to the green rectangle on the top-right side of the column ( ), press and hold the rectangle, drag your finger to the right or left of the screen, and take your finger off the screen when you reach your desired column size.

> **Note**
>
> - The first column will never be editable.
> - To select the entire column, tap the label of the column.

Copying Rows

1. Select the entire row that you want to copy.
   To select an entire row, tap the number in the **Line No.** column.
2. After you select the row and the options to **Copy**, **Copy with Attachments**, or **Delete** the row appear, select the applicable action:
   - To create a duplicate of the selected row *without* attachments, tap **Copy**
   - To create a duplicate of the selected row *with* attachments, tap **Copy with Attachments**.

   The copied line will have the line number prefixed with "New."

Picker icon

When the **Picker** icon ( ) is visible on a selected cell, you can either tap the icon and select from the list of options or type your own response.

Saving Updates

When you enter a value into a cell, the color of the text in the cell turns purple until you tap **Save**, **Error Check**, or **Cancel** on the top-right corner of the screen. If you tap **Save**, the purple text changes to black to match the rest of the grid. If you tap **Error Check** and there is an error, the **Errors & Warnings** screen opens and displays the rows where an error has occurred. Tap the line number to proceed. You will see a red triangle appear on the **No.** column on the row where an error is present. A cell highlighted in red is also an indication of where an error occurred.

Image Picker and Adding Attachments

Like other pickers, the **Image Picker** icon ( ) appears on certain cells when selected. When you tap the **Image Picker** icon, it gives you the option to add an image attachment from the following locations:

- **Gallery**
- **Camera**
- **Document Manager**

After picking an image, you can rename the image, if you do not want to use the default file name, and then tap **Save** to resolve the purple text. (Duplicate file names are not allowed.) If location service is enabled, the image can later be viewed on a map.

If there is an image attached and you choose another image, the new image that you select replaces the existing attachment. This process is different than the attachment selection process (using the **Paperclip** () icon), which lets you add multiple attachments.

> **Note**
>
> You can preview the image by tapping the image name in the cell.

Find on Page

Use this option to search in each column separately. Tap **Find on Page** and individual search fields will appear above each column. Select a search box, type, and then tap **Done**. All matching values are highlighted in yellow; if there are no matches a "No Matches Found" message appears.

> **Note**
>
> To close the Find on Page feature, tap Find on Page again. After you tap one of them, the grid should return to its original look with your changes included.

Filtering

Filtering lets you refine the search results displayed when you look for something specific on a page. In the upper-middle section of the page, tap **Filter** to open the filtering option. Select the applicable options, enter the terms you are looking for, and tap **Apply**.

> **Note**
>
> If the filters applied are too specific, the filtering option might not work and a "No Matches Found" message will appear.

To clear a filter, tap **Filter** again, select **Clear All**, and tap **Apply**.

Downloading Records and Working Offline

If you prefer to work in offline mode, you can download one or more business process (BP) records.

To download an individual BP record, tap **Download** ().

To download multiple BP records:

1. Navigate to the applicable workspace or BP tile.
2. Tap **Menu** (•••), and then select **Download Record(s)**.
3. To select multiple records for download, tap the checkbox for each record, and then tap **Done**.
   Downloaded BP records display a check mark.
4. To access the downloaded records, tap the **Offline Records** tab.

Tasks

Tasks Overview

Tasks () lists all the tasks that have been assigned to you for the selected workspace. From the **Tasks** page, you can access all your tasks, tasks that are in progress, or tasks that have you have not started by selecting the **All**, **Not Started,** or **In progress** tabs. You can view your tasks for a given BP only if the BP has been enabled for the Unifier Mobile App. For tasks associated with mobile-enabled BPs that you have accepted but not addressed, **Tasks** includes a **Pending** badge. The **Pending** count can reach up to **999+**. You can also search and filter the **Tasks** log.

> **Note**
>
> When you access **Tasks** from the **Home Workspace**, *all* your tasks for all projects are listed, and the count on the **Pending** badge reflects the same. Otherwise, only the tasks for the selected workspace are listed.

Even if a BP record does not have an overall workflow duration specified, steps within the process might have due dates for specific steps. Depending on the workflow and the configuration of a record, you might be able to change the due date for a task, whether it is assigned to you or to others.

In devices that support split view, the **Tasks** page has panes: the left pane shows all the tasks, and the right pane displays the selected task record.

To return to the selected workspace screen, tap **< Menu**.

Viewing Your Tasks

To view your tasks:

1. Tap **Tasks** () or tap **QR code** ().
   You can:
   - View a list of tasks based on the scanned code.
   - View Records based on the scanned code.
   - Create a BP record based on the scanned code. For more information, see [Creating Business Process Records](#).
2. Select a tab (**All**, **In progress**, or **Completed**) to open the log and see your tasks.

For each task, this screen displays the following information about your tasks:

- Record number and title
- Business Process name
- Due date
- Project number
- Project name

> **Note**
>
> Project number and name are only displayed if you accessed the **Tasks** log from **Home Workspace**.

3. Tap any task to see more details and work on the task.
4. Tap the **Map** icon to view task or record location based on latitude & longitude.

Searching and Filtering Tasks

Using Search

Searching lets you look for a particular task by entering the value of a known field. When you enter a value in the search box, the system searches the **Tasks** log and displays all the records that match the criteria.

To search:

1. Tap **Tasks** ( ).
2. Swipe down to view the search box.
3. Enter a value in the search box.

Using Filters

Filtering lets you search in logs and picker screens.

To filter your tasks:

1. Tap **Tasks** ( ).
2. Tap **Filter** ( ) to open the **Filter** screen.
3. Tap **Apply Filter** selector.
4. Enter or select a value for one or all the following fields:
   - From (User)
   - Type
   - Sent For
   - Record Number
   - Record Title
   - Show Late Records Only

5. When finished, tap **Done**.

> **Note**
>
> - To reset all filter parameters, tap **Clear All** and then tap **Done**.
> - To retain your last filter selection, tap the **Apply Filter** selector to turn it off.

Working on Your Tasks

To work on your task:

1. Tap **Tasks** ( ) or tap **QR code** ( ).
   You can:
   - View a list of tasks based on the scanned code.
   - View Records based on the scanned code.
   - Download data and view offline, clear data, and view location of BP in map view.
   - Touch and hold the **Tooltip** icon next to data elements where it is available. A dialog box provides information on the data element.
   - Create a BP record based on the scanned code. For more information, see Creating Business Process Records.
2. Select a tab (**All**, **In progress**, or **Completed**) to open the log and see your tasks.
3. If an attachment exists, tap **Paperclip** ( ) to view all attachments associated with the record. Tap the **Pin** icon to list view.
4. Tap the task that you want to work on.
5. Tap **Accept** to accept your task.
   On devices that support split view, select a task on the left pane, tap **Menu** ( ) and select **Accept** from the right pane.

   If the completion policy for the business process is set as **Single**, upon accepting the task:
   - This task is now locked for all other users.
   - In the **Workflow Progress** tab of the BP record, the **Action Date** field displays the date and time you accepted the task.
6. Review your task and make changes if needed.
7. From the **Workflow Actions** drop-down list, select a workflow action.
   If there is only one possible action, the Send For field is auto-populated.
8. Tap the **Right** ( ) icon to view and select assignees from a complete list of preassigned users and groups.
   The assignment of users and groups on the next step depends on the **Assignment** policy of the step set forth in the workflow setup. If the policy is **Preassigned**, the list of users and groups is displayed. If the policy is **User Select**, you can select the list of assignees.

   Depending on the configuration of the workflow step, you might see additional assignees, **Additional Task assignees from record and tabs**, and copied users, **Additional CC users from record and tabs**. This information is read-only; however, you can tap a linked name to view a person's user profile.

> **Note**
>
> If you are requesting revision of a task, the following settings are configured for the BP, and the specified Assignee is no longer active, an alert is displayed and the **To** field remains empty.
>
> - The **Assignment Policy** is **Preassigned**.
> - The **Assignees** must match the **Create** step or the specified **Step Name**.
> - **Step Revisiting** is set to **Include only previous action takers**.

9. If your administrator enabled access to Contact Lists for a workflow BP, tap the **Contact List** field, select the applicable lists, and tap **Done**.
10. In the **Due Date Details** section, note whether the Task Due Date is editable.
    - If not, continue to the next step.
    - If so, specify the applicable due date:
      - To enter the same date for all assignees, enter the new date in the **Set All Task Due Date As** field.
      - To enter a date for specific assignees, select **Set Individual Task Due Date As**, and enter the applicable date for each assignee.

      > **Note**
      >
      > The Task Due Date usually displays the date based on the task's duration, even if it is not editable. The only exception is when a duration is not specified, in which case the system indicates that a date is not available.

11. Tap **Send**.
    If you are working offline, the business record is saved in the **Outbox**. When you switch to **Online** mode, you must sync the record in **Outbox** to save changes in Unifier server. The record moves through the workflow only when your device is set to **Online** mode and has network connectivity. If you have a file with annotations, it is also sent to the server along with the BP record information.

Undoing the Acceptance of your Tasks

You can tap the **Undo Accept** option to reverse the acceptance of a task and restore a BP form back to its original state. **Undo Accept** only applies to additions or changes made during the period in which you accept the task and then select the **Undo Accept** option. This option is only applicable to active tasks and workflow records where you have an active task.

Upon undoing an accepted task, for all other users:

- The task is unlocked, and the task status is now set to **In Progress**.
- In the **Workflow Progress** tab of the BP record, the **Action Date** field displays the date and time the undo task action was invoked.

Undo Accept rolls back the following to their previous state:

- Changes to the **Upper** form fields

- Auto-populated fields

The following changes cannot roll back to their previous state:

- Changes made to existing line items
- Existing line items that were deleted

Any new additions are removed from the following:

- Line items
- File attachments

Working with Drafts in Tasks

You can view, filter, sync, and delete drafts in **Tasks**.

Viewing Drafts

To view your drafts in the App:

1. Tap **Tasks** ( ).
2. Tap **All** tab or **In Progress** tab of the **Tasks** screen.
   Tasks containing drafts have an additional row with the following indicators:
   - "Draft Last Saved" to indicate that the task has a draft.
   - **Warning** ( ) indicates that you have a draft that exists only on your device. This will be seen when you create a draft in **Offline** mode.

Filtering Drafts

To filter the **In Progress** view to see only drafts:

1. Tap **Tasks** ( ).
2. Tap **Filter** ( ) to open the **Filter** screen.
3. Tap **Show Draft Only** selector.
4. When finished tap **Done**.

Syncing Drafts

To sync your drafts between Web and App:

- If you are working online in the web and have an active Unifier session in the app, the draft is seen in the app when you tap **Tasks** log and **BP** log.
- If you are working online in the app and create a draft in the app, the same draft is seen immediately in the Unifier web application.
- If you are working offline in the app, create a draft for a record that already has a draft in the web, the draft version with the latest date and timestamp is retained. This happens when you switch back to **Online** mode and an auto-sync is performed between the app and the web.
- If you are working offline in the app and in an existing record, the **Warning** icon( ) appears in the log and the **Outbox** tile displays the # of records pending sync. When you

switch to online, the **Outbox** badge count is 0, the **Warning** icon( ) disappears, and the same draft is seen in Unifier server.

- If you are working offline in the app and in a new record, the **Warning** icon( ) appears in the log and the **Outbox** tile displays the # of records pending sync. When you switch to online, the **Outbox** badge count is 0, the **Warning** icon( ) disappears, and the same draft is seen in Unifier server.

> **Note**
>
> The same conditions apply to non-workflow BP records.

Deleting Drafts

To delete your drafts of existing and new records from the **Tasks** and the **BP** tiles, use either of the following methods:

- Tap **Menu** (**•••**) and select **Delete Drafts** to delete drafts in bulk.
- Tap **Menu** (**•••**) and select **Delete Draft** to delete drafts within the record.

> **Note**
>
> :
>
> – **Outbox** tile will only list the records and drafts that are waiting to be synced with the server.
>
> – **Automatically sync Outbox** selector will no longer be available in the Data Synchronization page in the **Settings** tile.

Documents

Documents Overview

Documents ( ) lists all documents that you have permission to access.

While inside a workspace on the devices that support split screen, there is a left pane that has folders found in that workspace. The right pane shows the preview area for documents. Other devices display the files and folders in a flat list.

Choose any of the following:

- To see all the files in the workspace, tap **All** (the default tab).
- To view all documents that have been saved on your device, tap **Saved**.
- To view all documents you have viewed recently, tap **Recent**.
- To view all the documents with e-signatures, tap **E-signature**.
- To return to the selected workspace screen, tap **< Menu**.

Actions that you take, such as uploading a document, are automatically noted on the Document Manager Audit Log in the Unifier web application.

Viewing Documents

From the **Documents** screen, you can view the files that are in the selected workspace Document Manager. You must have network connectivity to view the files that are not yet saved on your device.

1. Tap a folder to view the document inside.
2. When you are inside a folder, tap a document to view it.

If a preview is available, it will appear on the right side of the split screen. The preview is displayed without markups and annotations. You can view markups and annotations in preview mode or in edit mode using Unifier Viewer. For more information on viewing annotations or annotating files, see Working with Annotations.

You can view files in the formats shown in the table below.

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	

- Tap **Pages** () to view the file in a page format.
- Tap **Tiles** () to view the pages of a file as separate tiles.
- Tap **Search** () to search and locate text in the file.
- Tap **Expand** () to see the file in full screen mode.

You cannot upload documents, but you can save a document for offline use.

> **Note**
>
> To access documents while working offline, you can either tap **Menu** () and tap **Save** while viewing the document or tap the **Download** () displayed next to the document. A **Cloud Check Mark** () icon is displayed next to the file to indicate that the document is saved on your device and is available for offline viewing.

Searching for Documents

To search for documents across all folder hierarchies:

> **Note**
>
> The **Filter** option is displayed only when you are working online and the version of the Unifier server you are connected to is 18.2 or later.

1. In your selected workspace, tap **Documents** ().
2. Tap **Filter** (). For devices that support split screen, tap **View All Documents** on the right pane. The **Filter** icon is displayed on the left pane.
3. Enter your filter criteria. You can choose to search only in files or folders by selecting the **Search in Files** or **Search in Folders** selector. If you want all filter conditions to match, select the **Match All Conditions** checkbox. When the **Match All Conditions** checkbox is not selected, the search is performed based on one or more filter criteria.
4. Tap **Done**. The search result also contains the file/folder path.

Viewing Saved Files

To view files that you have saved from the **Documents** screen or BP record attachments:

1. In your selected workspace, tap **Documents** .
2. Select the **Saved** tab.
3. Tap a saved attachment to view it.
   The file or document is displayed without markups and annotations. For more information on viewing annotations or annotating files, see Working with Annotations.

Viewing Recent Files

To access your recently accessed files or documents:

1. In your selected workspace, tap **Documents** .
2. Tap **Recent**.

Deleting Saved Files

You can delete the local copy of the file or attachment that you saved on your device. The attachment is deleted only from your device and not from the server.

1. In your selected workspace, tap **Documents** .
2. Tap **Saved**.
3. Delete saved files or attachments using one of the following methods:
   - Tap **More** and select **Delete Downloaded Copy**.
   - In the file list, swipe left on a file row.
   - Tap **Select**. Select the attachment you want to delete, and tap **Delete**.
   - To delete all attachments, tap **Delete All**, and tap **Done**.

Uploading Documents

In Online mode, you can upload documents in your selected workspace. Only one file can be uploaded at a time.

Prerequisite: Enable the **Add Documents** permission at the root or folder level in the **Document Manager** in the Unifier web application.

To upload a document in a folder in your workspace:

1. In your project workspace, select the **Documents** tile.
2. Tap a folder and tap the **Plus** + icon to select a document from:
   - Gallery
   - Camera
   - Multiple Photos

     > **Note**
     >
     > Because you can only upload one file at a time, selecting Multiple Photos requires that the photos be merged into a single PDF file. You can included up to 10 photos.

   - Files app
   - Voice Notes
3. If you selected **Multiple Photos**, complete the following steps on the **Multiple Photos** screen before continuing:
   a. In the **PDF File Name** field, update the name, if applicable. By default, the system labels the file with PDF and a time stamp.
   b. In the **Size** field, select **Small** or **Medium**. By default, the system selects **Small**.
   c. Tap **Next**.
   d. Take or select up to 10 photos.
   e. To preview the selected images, tap the thumbnail icon that displays the image count.
   f. On the **Preview** screen, review the images.
   g. To delete an image, select it and tap the **Delete** (🗑) icon. Focus automatically moves to the next image. If you delete the last image in the display, focus automatically moves to the previous image. If you delete all images, the app returns to the camera.
   h. Tap **Merge as PDF**.
4. In the **Upload** screen, enter the details of the document being uploaded.
   - **File Name:** Enter the file name of the document.
   - **File Size:** Enter the size of the file. It should not exceed the maximum file size limit in the Unifier web application.
   - **Document Title:** Enter a title for the document.
   - **Revision Number:** Enter the version for the document.

- **Issue Date:** Select a date from the calendar. It defaults to the current date and time and displays in the format as indicated in your user preferences.
- **Revise automatically if the file with same name exists:** Select this option if you want to replace an existing file automatically. This option displays only if you have enabled the **Revise Document** permission in the **Document Manager** in the Unifier web application.

5. Tap **Done.**

Mailbox

Mailbox Overview

Using the Mailbox, you can view, forward, and reply to emails. You can also link an email to a Business Process (BP) record.

To return to the selected workspace screen, tap **< Menu**.

Working with Mailbox from Workspace

> **Note**
>
> You can only access Mailbox when you are working in **Online** mode.

To work with a mailbox from a workspace:

1. Select a workspace.
2. When you tap the **Mailbox** tab, the following options will be seen:
   - Inbox
   - Drafts
   - Sent Items
   - Workspace Mailbox
   - Outbox
3. Tap **Workspace Mailbox**.
   You must have permissions to view this option.

   Folders associated with the Mailbox will be seen. You can reply to or delete an email if you have permissions in the workspace.

Viewing Notifications

To view any tasks that you are Cc'd on:

1. Select a workspace.
2. Tap **Mailbox.**

3. Tap **Notifications**.
4. Select a task to view the form associated with that step in the workflow.
   The form will be **View-Only**.

To view the record in **Offline** mode: Tap the **Cloud** icon and download the details.

> **Note**
>
> The notification will disappear after the record has moved to the next step in the workflow.

Using Outbox

You can access **Outbox** from the Home Workspace or within the **Mailbox** for a specific workspace.

To access the BP records that you have been working on that are either in **Draft** mode or that you were working one while offline and have not been synchronized with the Unifier server, tap **Outbox** ( ).

> **Note**
>
> When you access **Outbox** from the **Home Workspace**, *all* the applicable BP records are listed.

Directory

Directory Overview

Directory provides a centralized, alphabetical list of the users associated with each project. The basic information for each user, such as name, job title, email address, and phone number, is displayed, with more information provided on the Company Directory tab versus the Project Directory tab. Depending on the settings implemented by your administrator, you might also be allowed to download the Directory information for offline use. (If your administrator does not allow the display or download of information, the app indicates that no information is available when you access a user profile in the Directory.)

You can switch between the **Company Directory** tab and the **Project Directory** tab until the session expires or you log out. You can also search the directory for a specific user's contact information.

If your organization uses company- or project-level user groups, such as Finance or Project Admins, these groups are also listed in the Directory.

Using the Directory Log

The **Directory** log displays an alphabetical list of contacts that shows their name, job title, and company name. To view additional information, tap **>**.

By default, the **Company Directory** tab is displayed. If you switch to the **Project Directory** tab, the app displays the Project Directory tab for each user until your session expires or you sign out.

If your administrator lets you download user profiles for offline use, the app displays only those groups and profiles that you have previously accessed while in Online mode.

You can also perform the following actions:

- Tap **< Menu** to return to the workspace.
- Use **Search** to locate a contact.

Using the Company Directory tab

The **Company Directory** tab displays detailed information about a user, including:

- Profile image
- First name and last name
- Company name
- Title
- Status
- Email address
- Phone numbers
- Company address

If the applicable information is provided, you can use the various icons, such as message, mobile and mail to contact the selected user from within the app.

Using the Project Directory tab

The **Project Directory** tab displays a subset of information about a user, including:

- Profile image
- First name and last name
- Company name
- Title
- Phone numbers
- Address

If the applicable information is provided, you can use the various icons, such as message and mobile to contact the selected user from within the app. (The **Mail** icon is disabled as there is no email available at project-directory level.)

To make another user's contact information available offline or outside the Unifier environment:

1. Download the profile of the selected contact from the Project Directory directly to your device's contact list by tapping **Download** ().

2. Edit the contact information that you want to save and tap **Done**.
3. To close the confirmation alert, tap **OK**.

Accessing Groups in the Directory

Groups are listed alphabetically, along with individual users. To view the list of members in a group, tap **>**.

Choose any of the following actions:

- Tap **Mail** to send an email to all members of the group.
- Tap **>** to view the details for a specific member of the group.
- Tap **<** to return to the previous screen.

Working with Attachments

Attachments Overview

You can attach images, audio files, video files, and PDFs in:

- The Main Form of a BP record
- A line item in the Detail Form of a BP record
- The Comments ( ) block of a BP record

The above file formats can be uploaded and attached from any of the following locations:

- Camera
- Document Manager
- Files App
- Gallery

> **Note**
>
> You can *record* videos by only using the camera. However, you can upload videos from any of the locations listed above.

You can also:

- Attach voice messages
- Attach videos
- Attach files for E-signatures
- Attach Multiple Photos
- Attach a PDF with Multiple Photos

If your **Image Size** setting is set to **Select size while attaching**, you need to specify a size (resolution) for each image that you attach to a BP record. After attaching the first image, you can change the default. If you select a different setting, such as **Small**, you can save the changed setting as the default for all subsequent images attached to records.

You can also manually change the default for your account at any time. For more information, see Specifying a Default Size for Image Attachments.

> **Note**
>
> You can set your preference for a default size. Your default selection does not affect images attached by other users.

Viewing and Downloading Attachments

You can view and download attachments from the Tasks log or the Attachments log of a BP record.

Online Mode

To view and download an attachment:

1. Navigate to any of the following locations:
   - Go to the **Main Form** or **Detail Form** of a BP record, navigate to the **Attachments** ( ) block, and tap **Download** or **Download All** ( ).
     The downloaded file displays the location of all images and attachments for the recorded on your device and is available for offline viewing.
   - From the **Tasks** log, tap **Attachments** ( ).
   - Select a BP record and then tap the **Attachments** ( ) tab.
   - Alternatively, while viewing the file, tap **Menu** (•••) and select **Save**. For more information, see Viewing Saved Files.
2. In the **Attachments** log, select a view format to view, download, and delete attachments:
   - **List**: Select this view to identify attachments in the Main Form, line items in the Detail Form.
   - **Map**: Select this view to identify the location of all images and attachments for the record. If multiple attachments share the same location, all the attachments are displayed in a card view.

   > **Note**
   >
   > New attachments can be deleted only if they have not yet been synced or sent to the server.

Offline Mode

To view and download an attachment:

1. Go to the BP record containing the downloaded attachments.
2. Tap the attachment to open it.
   To view all your saved files, you can also navigate to **Documents** and then select **Saved** .

For more information on viewing your downloaded attachments, see Viewing Saved Files.

Attaching Files from the Camera

If *enabled* for a business process (BP) record, you can use the camera to record videos, and attach videos and images to the Main Form or line items in the Detail Form of a BP record.

Online Mode

To record a video, or attach images and videos using the camera:

1. Navigate to your workspace and tap a BP tile.
2. Complete any of the following procedures:
   - To create a BP record as outlined in Creating Business Process Records, tap **Add (**+).
   - To edit an existing BP record as outlined in Editing BP Records, tap **Accept** (for workflow BPs) or **Edit** (for non-workflow BPs).
3. In the BP record:
   a. Tap the **Main Form** or **Detail Form**.
   b. If *enabled and applicable*, navigate to any of the following locations:
      - Select the **Attachments** () tab, and then tap **Add an Attachment**.
      - Select the **Comments** () tab, and then tap **Attachments** ()
      - Tap the image picker ().
      - Tap the document picker.
4. Tap **Camera** ().
5. Follow the prompts to either record a video or capture an image.
   The default file naming convention for image files is: <Img_DateTime>.

   For example, the file name of an image taken on October 17, 2023 at 11:05:23 AM is saved as *Img_20231017110523AM* .

   The default file naming convention for video files is: *<Vid_DateTime>*.

   For example, the file name of an video taken on October 17, 2023 at 11:05:23 AM is saved as *Vid_20231017110523AM*.
6. To attach the image or video, tap **Use Photo**.
7. Rename the file to suit your business needs.
8. Tap **Save**.

> **Note**
>
> - You can delete an image only if you have not sent the image.
> - You can update a previously uploaded image with a new updated image.
> - Duplicate file names are not allowed.

Offline Mode

You can attach images and video files.

Attaching Files from the Document Manager

If a business process (BP) supports attachments, you can attach images, audio files, video files, and PDFs from the Document Manager to a business process (BP) record.

Prerequisite

Images, audio files, and video files are available in the Document Manager.

Online Mode

To attach files from the Document Manager:

1. Navigate to your workspace and tap a BP tile.
2. Complete any of the following procedures:
   - To create a BP record as outlined in Creating Business Process Records, tap **Add** (+).
   - To edit an existing BP record as outlined in Editing BP Records, tap **Accept** (for workflow BPs) or **Edit** (for non-workflow BPs).
3. In the BP record:
   a. Tap the **Main Form** or **Detail Form**.
   b. If *enabled and applicable*, navigate to any of the following locations:
      - Select the **Attachments** ( ) tab, and then tap **Add an Attachment**.
      - Select the **Comments** ( ) tab, and then tap **Attachments**.
4. From the menu, select **Document Manager**.
5. Select a maximum of 10 files at a time.
   When attaching documents, you can choose **Include Comments** or **Don't Include Comments.**
6. Tap **Done.**

> **Note**
>
> Duplicate file names are not allowed.

Offline Mode

Document Manager is not supported.

Attaching Files from the Files App

If a business process (BP) supports attachments, you can attach images, audio files, video files, and PDFs from the Files App to a business process (BP) record.

Prerequisite

Images, audio files, video files, and PDFs are available in the Files App.

Online Mode

To attach files from the Files App:

1. Navigate to your workspace, and tap a BP tile.
2. Complete any of the following procedures:
   - To create a BP record as outlined in Creating Business Process Records, tap **Add** (+).
   - To edit an existing BP record as outlined in Editing BP Records, tap **Accept** (for workflow BPs) or **Edit** (for non-workflow BPs).
3. In the BP record:
   a. Tap **Main Form** or **Detail Form**.
   b. If *enabled and applicable*, navigate to any of the following locations:
      - Select the **Attachments** ( ) tab, and then tap **Add an Attachment**.
      - Select the **Comments** ( ) tab, and then tap **Attachments** ( ).
      - Tap the image picker ( ).
      - Tap **Document** picker.
4. From the menu, tap **Files App**.
5. Select files from any of these locations: iCloud, Google One, Box, and so on.
6. Select a maximum of 10 files at a time.
7. On the **Preview** screen, perform any of the following actions:
   - Rename duplicate file names highlighted in red or rename files to suit your business needs.
   - To remove any attached files or photos, tap **Delete** ( ).
   - After previewing the files, tap **Done.**
8. Tap **Done**.

> **Note**
>
> Duplicate file names are not allowed.

Offline Mode

You can attach images, audio files, video files, and PDFs.

Attaching Files from the Gallery

If enabled for a business process (BP) record, you can also use the Gallery to attach images, audio files, and video files in the Main Form or line items in the Detail Form of a BP record.

Prerequisite

Images, audio files, and video files are available in the Gallery.

Online Mode

To attach images or videos from the Gallery:

1. Navigate to your workspace, and tap a BP tile.
2. Complete any of the following procedures:
   - To create a BP record as outlined in Creating Business Process Records, tap **Add** (+).
   - To edit an existing BP record as outlined in Editing BP Records, tap **Accept** (for workflow BPs) or **Edit** (for non-workflow BPs).
3. In the BP record:
   a. Tap **Main Form** or **Detail Form**.
   b. If *enabled and applicable*, navigate to any of the following locations:
      - Select the **Attachments** ( ) tab, and then tap **Add an Attachment**.
      - Select the **Comments** ( ) tab, and then tap **Attachments** ( ).
      - Tap the image picker ( ).
      - Tap **Document** picker.
4. From the menu, tap **Gallery**.
5. In the Gallery, tap one or more images and videos.
6. Rename the files to suit your business needs.
   The default file naming convention for image files is: <Img_DateTime>.

   For example, an image taken on October 17, 2023 at 11:05:23 AM is saved as *Img_20231017110523AM*.

   The default file naming convention for video files is: *<Vid_DateTime>*.

   For example, a video taken on October 17, 2023 at 11:05:23 AM is saved as *Vid_20231017110523AM*.

   The default file naming convention for audio files is: *<Audio_DateTime>*.

   For example, an audio file taken on October 17, 2023 at 11:05:23 AM is saved as *Audio_20231017110523AM*.
7. Tap **Save**.

> **Note**
>
> Duplicate file names are not allowed.

Offline Mode

You can attach images, audio files, and video files.

Attaching Audio Files

If a business process (BP) supports attachments, you can add an audio file to the Main Form or a line item in the Detail Form of a BP record.

Online Mode

To add an audio file:

1. Navigate to your workspace and tap a BP tile.
2. Complete any of the following procedures:
   - To create a BP record as outlined in Creating Business Process Records, tap **Add** ( ).
   - To edit an existing BP record as outlined in Editing BP Records, tap **Accept** (for workflow BPs) or **Edit** (for non-workflow BPs).
3. In the BP record:
   a. Tap the **Main Form** or **Detail Form**.
   b. If *enabled and applicable*, navigate to any of the following locations:
      - Select the **Attachments** ( ) tab, and then tap **Add an Attachment**.
      - Select the **Comments** ( ) tab, and then tap **Attachments** ( ).
4. Tap **Voice Message**, and then tap **Record Audio**.
5. Save the audio file when finished.
   Audio file is saved with the default format: <Audio_DateTime>.

   For example, the file name of an audio taken on October 17, 2023 at 11:05:23 AM, displays as *Audio_20231017110523AM*.
6. Rename the file to suit your business needs.
7. Tap **Save**.

Offline Mode

You can attach audio files.

Attaching Videos

You can *record* and attach videos by only using the camera. However, you can upload existing videos from the:

- Camera
- Document Manager
- Files App
- Gallery

Offline Mode

You can attach videos.

Attaching Multiple Photos

Use the Multiple Photos option to upload and attach a maximum of 10 photos to a BP record. It is not available for Comments or the image picker.

Online Mode

To attach multiple photos:

1. Navigate to your workspace and tap a BP tile.
2. Complete any of the following procedures:
   - To create a BP record as outlined in Creating Business Process Records, tap **Add** +.
   - To edit an existing BP record as outlined in Editing BP Records, tap **Accept** (for workflow BPs) or **Edit** (for non-workflow BPs).
3. In the BP record:
   a. Tap the **Main Form** or **Detail Form**.
   b. If *enabled and applicable*, select the **Attachments** ( ) tab, tap **Add an Attachment**, and then tap **Multiple Photos**.
4. On the **Multiple Photos** screen, in the **Prefix for all the images** field, update the prefix, if applicable.
   By default, each file name begins with IMG and a time stamp.
5. In the **Size** field, select **Small** (default) or **Medium**.
6. Tap **Next**.
7. To preview the selected images:
   a. Tap the thumbnail icon that displays the image count.
   b. On the **Preview** screen, review the images.
      - To delete an image, select it, and tap **Delete** ( ).
        If you delete the last image, the focus automatically moves to the previous image.
      - If you delete all images, the app returns to the camera.
      - To return to the camera, tap **Back**.
      - To upload the selected images to the BP or line-item record, tap **Done**.
8. Tap **Done**.

Offline Mode

You can attach multiple images.

Attaching a PDF with Multiple Photos

As an alternative to attaching individual files, you can add a PDF with a maximum of 10 photos to a BP record or to the Document Manager.

Online Mode

To add a PDF with multiple photos:

1. Navigate to your workspace and tap a BP tile.
2. Complete any of the following procedures:

- To create a BP record as outlined in Creating Business Process Records, tap **Add** (+).
- To edit an existing BP record as outlined in Editing BP Records, tap **Accept** (for workflow BPs) or **Edit** (for non-workflow BPs).

3. In the BP record:
   a. Tap the **Main Form** or **Detail Form**.
   b. If *enabled and applicable*, select the **Attachments** ( ) tab, tap **Add an Attachment** or tap **Add** (+) for Document Manager.
   c. Tap **Multiple Photos**.
4. On the **Multiple Photos** screen, enable **Merge Into PDF**.

> **Note**
>
> In the Document Manager, **Merge into PDF** is preselected.

5. In the **PDF File Name** field, update the name, if applicable.
   By default, the system labels the file with PDF and a time stamp.
6. In the **Size** field, select **Small** (default) or **Medium**.
7. Tap **Next**.
8. Tap **Merge as PDF**.

Offline Mode

You can attach PDFs only to a BP, not to the Document Manager.

Attaching Files for E-Signature

You can sign the document only if you are online and the respective shell has been configured for E-signature and the record is in edit mode.

Online Mode

1. Open a record.
2. Scroll down to see the **Attachments**.
3. Select **Attachment**, and then swipe left.
4. If you want to sign this attachment, tap **Self-sign** and then tap **Continue**.
5. Choose the **Signing** option, and then tap **Finish**.

> **Note**
>
> - An orange dot ( ) indicates that the document is under the process of signing.
> - Revision history of the signed document will not be featured in the app.

Offline Mode

E-signatures are not supported.

Attachments in Comments

You can add attachments to comments in a BP record from any of the following locations:

- Camera
- Document Manager
- Files app
- Gallery

You can also attach voice messages.

You can also add markups to comment attachments just as you add markups to attachments.

Viewing and Downloading Attachments

You can view and download attachments from the Tasks log or the Attachments log of a BP record.

Online Mode

To view and download an attachment:

1. Navigate to any of the following locations:
   - Go to the **Main Form** or **Detail Form** of a BP record, navigate to the **Attachments** ( ) block, and tap **Download** or **Download All** ( ).
     The downloaded file displays the location of all images and attachments for the recorded on your device and is available for offline viewing.
   - From the **Tasks** log, tap **Attachments** ( ).
   - Select a BP record and then tap the **Attachments** ( ) tab.
   - Alternatively, while viewing the file, tap **Menu** (•••) and select **Save**. For more information, see Viewing Saved Files.
2. In the **Attachments** log, select a view format to view, download, and delete attachments:
   - **List**: Select this view to identify attachments in the Main Form, line items in the Detail Form.
   - **Map**: Select this view to identify the location of all images and attachments for the record. If multiple attachments share the same location, all the attachments are displayed in a card view.

> **Note**
>
> New attachments can be deleted only if they have not yet been synced or sent to the server.

Offline Mode

To view and download an attachment:

1. Go to the BP record containing the downloaded attachments.
2. Tap the attachment to open it.
   To view all your saved files, you can also navigate to **Documents** and then select **Saved** .

For more information on viewing your downloaded attachments, see Viewing Saved Files.

Working with Comments

You can perform the following types of tasks:

- Adding Comments to a BP Record
- Editing Draft Comments in Edit Mode
- Deleting Comments
- Show or hide comments

Adding Comments to a BP Record

If enabled, you can add comments to workflow or non-workflow BP records.

Prerequisites

- The business process (BP) supports comments.
- You have the required user or group permissions.

Online Mode

1. To access comments associated with a BP record, navigate to any of the following locations:
   - If *enabled and applicable*, from the Quick Access tabs, select the **Comments** ( ) tab.
   - Scroll down to the **Comments** block of the BP record.
2. In the text box, enter your comment.
3. Tap **Post Comment** .

   For existing records, the comment is immediately submitted to the server.

   For new records, comments are saved locally and submitted to the server after the record is created.
4. To add comments to the comments list, repeat the above steps.
5. In the text block, make changes as needed, and then tap **Save** or **Submit**. Confirm the alert message.
6. If *enabled* for a workflow step, perform any of the following actions:
   - Tap **Hide Comment** or **Show Comment**.
   - Add an attachment to a comment by tapping ( ).
7. Tap **Done**.

   By default, the most recent comment displays first in the comments list.

The total number of comments in the **Comments** ( ) Quick Access tab is updated to display the net total of comments added and deleted.

Errors, if any, display on the **Main Form**.

Offline Mode

You can save comments as draft comments. When you switch to Online mode, the comment is then submitted to the server.

For new records, comments are saved locally and submitted to the server after the record is created.

Editing Draft Comments in Edit Mode

In Edit mode, you can add comments to new and existing BP records.

For new BP records:

- You can add comments as a draft comment.
- You can edit, delete, and copy the comment even after you post it.

For existing BP records:

- You can add comments to the same step, edit them, or mark them as drafts.
- You can copy an existing comment.
- You cannot edit comments from previous steps.

Prerequisite

- The business process (BP) supports comments.
- You have the required user or group permissions.

Online Mode

To edit a draft comment:

1. Tap the **Pen** ( ), and then tap **Edit**.
2. In the text block, update the text, as well as any attachments.

   For new records, new comments are displayed as draft comments until the record is submitted to the server.

   For existing records, comments are displayed as draft comments for the same step. Draft comments display first in the comments list.
3. When you copy a draft comment, attachments are also copied.

The total number of comments in the **Comments** ( ) Quick Access tab is updated to display the net total of comments added and deleted.

Errors, if any, display in the **Main Form**.

Offline Mode

You can use edit mode for draft comments.

Deleting Comments

You can:

- Delete draft comments in Edit mode.
- Delete comments added by other users, including hidden comments.

Prerequisites

- The business process (BP) supports comments.
- You have the required user or group permissions.

Online Mode

To delete comments or draft comments:

1. Tap the **Pen** () icon, and then tap **Delete**.
2. To confirm the deletion, in the **Confirmation** dialog box, tap **Yes**.

Offline Mode

You can delete comments, and draft comments.

Show or Hide Comments Added by Other Users

You can show or hide comments added by other users.

Prerequisite

- The business process (BP) supports comments.
- You have the required user or group permissions.

Online Mode

To show or hide another user's comments:

1. Tap the **Pen** ().
2. Select the alternative option: **Hide** or **Unhide**.
   When you hide a comment, a lock icon displays .

   When you unhide a comment, the lock icon is removed .

Offline Mode

You can show or hide comments added by other users.

Working with Annotations

Annotating Files

You can annotate files to highlight important points, add notes, or communicate changes with team members. Before you begin, ensure that you have the necessary permissions to mark up files.

You can choose from the following options:

- Access annotations options by tapping **Menu** (•••) and then tapping **Annotations**. The file will open in Unifier Viewer.
- View existing annotations by tapping **Show Annotation List**.
- Submit an annotation by tapping **Submit Annotation**.
- Adjust the view mode, color mode, and page orientation setting of the document you are viewing by tapping **View Settings**.

> **Note**
>
> Changes made to View Settings will apply only to the file you are viewing/editing. You must reset the view settings for other files.

You can delete your downloaded copy of the document by tapping **Delete Downloaded Copy**. Tapping **Delete Downloaded Copy** changes the option to **Download (enabled)**.

Navigation View

To use **Navigation View**, tap **Navigation** on the top bar.

The **Comments** tab is selected by default and lists all comments posted in the document listed by most recent to least recent. The comment display in this tab includes the name of the user who added the comment and a timestamp. Comments that are synchronized to the server cannot be edited. You can **Edit** or **Delete** a comment draft using left swipe. **Delete** will delete the comment along with all markups.

The **Outline** tab displays the annotation in the document location. When you tap a comment in **Outline** view, you are taken to the given location in the document where the markup was added.

Thumbnail View

To display **Thumbnail** view, tap the **Thumbnails** icon.

To dismiss the screen, tap **Done.**

Editing the Document

- To add annotations or to edit existing draft annotations, tap on **Edit** on the top navigation bar.
  The file opens in Unifier Viewer draft mode with the options **View**, **Annotate**, **Draw**, or **Favorites**. **Draw** is selected by default.
- Underline and strike out text and add/erase highlights, text notes, and shapes by tapping **Annotate**.
- Choose shapes to add or create freehand drawings by tapping **Draw**.
- Add frequently used tools for quick access by tapping **Favorites**.
- Undo or redo changes while you are in edit mode by tapping **Undo** or **Redo** in the toolbar.
- Change **Styles**, **Duplicate**, or **Delete** your changes in the **Shortcut** menu.
- Tap **Done** to save your changes.

> **Note**
>
> – **Undo**, **Redo**, and the **Shortcut** menu are only displayed before you tap **Post** to save your changes. Markups and comments are saved locally in draft mode.
>
> – Annotations and drawings cannot be edited or removed after you tap **Post.**
>
> – If a BP is in **View only** mode, you cannot add annotations.
>
> – Annotations cannot be added to locally added or downloaded files in Offline mode.
>
> – If you select the **Annotations** option from the **Menu** (•••) for files not supported by Unifier Viewer, an error is displayed. To dismiss the error, tap **OK**.

Using the Annotation Log

Access the **Annotation Log** by selecting the **Navigation** icon in the toolbar or **Show Annotation List** from the **Menu (•••)**. **Annotations** are sorted by the most recently added markups.

You can **Edit** or **Delete** annotations that you have not yet submitted/synchronized to the server.

Tap a comment to navigate to the page where the comment was added. A comment can be linked to multiple markup additions made to different pages.

> **Note**
>
> If you select an annotation in the **Annotation Log** that was added using an unsupported markup tool, edit permissions are disabled and an error is displayed. To dismiss the error and return to the **Annotation Log**, tap **OK**.

To exit the **Annotation Log**, select the **Navigation** icon or select **Hide Annotation List** from the **Menu** (•••).

Viewing or Hiding Annotations

To view or hide all annotations associated with a file:

1. Open a file.
   You can either tap an attachment while viewing the BP record associated with it, or tap **Documents** and navigate to the applicable file.
2. Tap **Menu** (•••) and select **Edit** ().
3. Tap **Menu** (•••) and select **Show Annotations** or **Hide Annotations**.

To add annotations, see Annotating Files.

Note

- From the annotation list, when you select an annotation, the corresponding markup and comment displays.
- Rotate your device to view both the file and the annotation list in **Landscape** mode.

Settings

Settings Overview

You can access settings from the **Home Workspace** or by tapping your **User Profile** icon in the navigation bar.

From the **Settings** ( ) screen, you can access the following options:

- **Profile** ( )
- **Preferences** ( )
- **Notifications** ( )
- **Switch Company** ( )
- **Data Synchronization** ( )
- **Image Size**
- **About** ( )
- **Help** ( )
- **Report an Issue** ( )
- **Smart Assistance** ( )
- **Video Tutorials** ( )

BP Tile Operations

You can tap **Menu** (•••) in the upper-right corner to access additional options.

You can use the **Filter** option to filter the records based on the set criteria. When you tap the **Filter** option, the **Search** fields that are based on the form settings in uDesigner are applicable.

In addition to this, the search results are sorted based on the sort order in the **Standard** log of the design.

Additional menu options include **Map View** and **Delete Downloaded Record(s)**. **Delete Downloaded Record(s)** lets you delete all the offline records on your device for the selected business process (BP) tile.

> **Note**
>
> The **Offline Records** list is refreshed to ensure the records only belong to the chosen workspace.

Specifying a Default Size for Image Attachments

You can specify a default size for attachments, which can eliminate the requirement to specify a size every time you attach an image to a record unless you use the **Select size while attaching** option as your default. You can also manually change the default for your account at any time.

> **Note**
>
> All users can set their own preference for a default size. The default that you select does not affect images attached by other users.

To change the default size:

1. Go to **Settings** and tap **Image Size**.
2. Tap one of the following:
   - **Select size while attaching**
   - **Small**
   - **Medium**
   - **Large**
   - **Actual Size**

For more information, see Attachments Overview.

Working Offline

You can switch from **Offline** mode to **Online** mode. After performing an action in **Offline** mode, select to switch to **Online** mode when prompted.

When working offline, real time data existing in the server is not retrieved. In **Offline** mode, you can only access projects that you have downloaded or projects and BP tiles that were accessed in **Online** mode.

The changes you make in **Offline** mode are stored only on your device; the changes are uploaded to the server only when your device is synchronized with the server when you have network connectivity.

Your offline session is limited to one month. If the Unifier Mobile App determines that you have not logged in for one month, an alert appears and you are required to log in again.

Downloading Projects

To download projects that you can access in **Offline** mode:

1. Select the workspace.
2. Tap **Download** .

To update the data for the projects you downloaded, tap **Sync** . You must have network connectivity to synchronize.

> **Note**
>
> Picker data and attachments are not downloaded.

Downloading Records

To download records that you can access in **Offline** mode:

1. Tap a record to download it automatically.
2. Tap the **Cloud** icon.
3. Tap ••• in the upper-right corner, and select **Download Records for Editing** (maximum 200 records at a time) or **Download All Records for Reference**.

   > **Note**
   >
   > Selecting **Download All Records for Reference** is not advised, and you will be given a confirmation message to validate the action before it is performed. Selecting **No** will take you back to the record log screen. Selecting **Yes** will trigger the download of all records, provided you are in **Online** mode.

A progress bar is displayed to indicate the download progress along with a cancel button. During a download, user actions are prohibited aside from canceling the download. The download automatically stops if there is a resource unavailability (space or internet connection), and you receive an alert message.

With **Download All Records for Reference**, only Upper forms are downloaded with all attribute details excluding attachments, comments, and Detail forms. These records are partially downloaded to save memory.

A new icon is linked along with partially downloaded records to distinguish between records that have been completely and partially downloaded. Partially downloaded records are not displayed in the BP record log in Offline mode. They are available for offline referencing in the BP Picker.

> **Note**
>
> This has no impact on completely downloaded records.

On the Filter screen, if **Show Records That Have Not Been Downloaded** is enabled, partially downloaded records are displayed in the BP record log along with records that have not been downloaded. Partially downloaded records can be completely downloaded by tapping the icon, accessing the record in **Online** mode, or selecting the record as part of **Download Records for Editing**.

Even if Mobile log view is selected or a filter is applied, all records are downloaded as part of **Download All Records for Reference**. Based on the applied filter, the app filters out other reference records and displays only the specified records. Completely downloaded records have no impact on selecting **Download All Records for Reference**.

> **Note**
>
> Using **Filter** or **Mobile log view** to load only the required data is recommended for better device performance.

When a download is done, the record details for a particular record are downloaded as well as all the picker data present in the record. If you work offline, the record and the picker details are displayed. To download the attachments of a record, continue to tap the **Download** option to save the file locally onto your device.

If you are downloading a record and you are offline, but have internet and server connectivity, an alert is displayed. If you select **Yes**, you are switched to **Online** mode, and you can download the record. If you select **No**, the alert is dismissed.

If you are downloading a record and you are offline with no internet or server connectivity, an alert is displayed, accompanied by the **OK** option.

Viewing Records

Each BP tile contains an **Offline Records** tab. The **Offline Records** tab displays all the downloaded records. Tap **Offline Records** to access these records.

In **Online** mode, when you open a record from the **Offline Records** tab, the latest information is retrieved from the server. In **Offline** mode, when you open a record from the **Offline Records** tab, the saved record details are displayed. These record details are based on the content that was present when you saved the record.

> **Note**
>
> If you downloaded records that were updated after the download, the content may be outdated. For example, if you updated a non-workflow BP record for which the Status has been changed to Inactive, the app displays an alert, and you need to select a different Status if you want to continue.

Deleting Offline Data

To delete offline data:

1. Tap ••• in the upper-right corner, and select **Delete Downloaded Record(s)**.
   The screen is in **Edit** mode so that you can perform the deletion.
2. At the bottom of the screen, tap **Delete** or **Delete All**.
   A list of all the records saved in your device is displayed. A confirmation alert is displayed in both the **Online** and **Offline** modes.

> **Note**
>
> When selecting **Delete Downloaded Record(s)**, all data—including partially downloaded records—are deleted.

Working Offline

To work offline:

1. Tap **Settings** .
2. Tap **Data Synchronization** .
3. Tap the **Work Offline** switch.

You can also access the **Work Offline** switch from the **Home Workspace** screen by tapping **Data Synchronization** .

Synchronizing Your Data

Synchronize your device when you want to upload the data that exists in your device on to the Unifier server and also to synchronize data for all your downloaded projects. The last synchronization date is the date that the Unifier data is made available, whether your synchronization has been completed successfully or not. You can choose to work offline in the **Data Synchronization** screen.

> **Note**
>
> You can synchronize data only when you have network connectivity.

To synchronize your data:

1. Go to **Settings** () and tap **Data Synchronization** ().
2. Tap **Synchronize**.

Auto-synchronization occurs when you are online and not editing any data. When the synchronization is initiated, you cannot perform any other action. After the synchronization is complete, a confirmation message is displayed.

Enabling or Disabling Push Notifications

If you selected to receive notifications from Unifier at the time of installation or upgrade, you will receive notification when tasks get assigned to you. You can choose to disable this setting from within Unifier or from Device Settings (**Settings > Notification > Unifier**). This component is available only for standard users.

All unread notifications are displayed in the Notification Center. When the app is in use, notifications are displayed as alert messages. Each notification alert displays the company short name, BP name, step name, workspace name, and name of the person who assigned the task to you. You can tap a notification to view the record.

To enable/disable task assignment notification:

1. Tap **Settings** .
2. Tap **Notifications** .
3. Tap the **Task Assignments** switch to enable/disable task assignment notifications.

Recording Screens and Reporting Issues

Use the **Report an Issue** option to record a video of a scenario or capture images of an issue and send it to your Unifier administrator.

To record a video of an issue:

1. Tap **Settings** ().
2. Tap **Report an Issue** ().
   The **Record Screen** ( ) is selected by default.
3. To disable audio, clear the **Microphone** checkbox.
4. Tap **Start** at the bottom of the screen.
5. From the **Home** screen of your device, navigate to the screen you want to record.
6. Tap the **Start** () icon to begin recording the video.

> **Note**
>
> The maximum duration allowed for any video is one minute.

7. After recording, select any of the following actions:
   - Tap the **Stop** ( ) icon to stop recording the video.
   - Tap **Cancel** to discard the video and return to the **Settings** screen.
   - Tap **Record Again** to begin recording the video.
   - Tap **Send** to email the video as an attachment to your administrator.
8. Include the following information in the email:
   - **To**: Enter the email ID of your administrator.
   - **Subject**: Enter a descriptive title about the issue.
   - **Description**: Enter a detailed description of the issue.
9. Tap **Send Mail**.

Reporting Issues Using Screen Captures

Use the **Report an Issue** option to capture a single image or a sequence of images of an issue and send it to your Unifier administrator.

To capture images of an issue:

1. Tap **Settings** ().
2. Tap **Report an Issue** ().

3. Tap **Capture Screen** ( ).
4. Tap **Start** at the bottom of the screen.
5. From the **Home** screen of your device, navigate to the screen to capture images.
6. Tap the **Camera** ( ) icon to capture an image of the screen.
7. Perform any of the following actions:
   - Tap **Cancel** to discard the image and return to the **Home** screen.
   - Tap **Take Multiple** to capture up to five images.
   - Tap **Send** to email all the images as an attachment to your administrator.
8. Include the following information in the email:
   - **To**: Enter the email ID of your administrator.
   - **Subject**: Enter a descriptive title about the issue.
   - **Description**: Enter a detailed description of the issue.
9. Tap **Send Mail**.

Using Voice Commands

To begin using voice commands and access help for commands:

1. Tap **Settings** ( ).
2. Tap **Smart Assistance** ( ).
3. Tap the **Enable Voice Command** switch and tap **OK**.
4. Shake the device when you want to begin using voice commands.
5. (Initial use only) Tap **OK** on subsequent dialog boxes to allow your phone to access speech recognition and the microphone.
6. Say the voice command and tap the **Microphone** ( ) icon.

Accessing Help for Voice Commands

To access a list of supported voice commands:

1. Tap **Settings** ( ).
2. Tap **Smart Assistance** ( ).
3. Tap **Commands Supported**.

Setting Your Preferences

From the **Preferences** page, you can do the following:

- View your language and date format.
- View time in 12- or 24-hour format, as set in Unifier web application.
- Choose to work offline.
- Choose to work in the time zone of your device or the Unifier server when working from different locations.

- View if currency symbols are displayed or hidden.
- View number and currency formats.

To access your preferences, tap **Settings** (), and then tap **Preferences** ().

The app is displayed in the language based on your language preference set in Unifier. If your language is set to **Inactive** in Unifier, you will be prompted in the app to choose your preferred language.

Switching Tenants

To switch tenants:

1. Go to **Home Workspace**.
2. Tap **Settings** ().
3. Tap **Switch Company** ().
   The Switch Company list displays a check mark next to the tenant you are currently using.
4. Tap the name of the tenant that you want to switch to.
5. Confirm your selection.

Training

How to use MyLearn for Construction & Engineering video

The MyLearn website provides free video-based training for all Construction and Engineering applications. On your first visit, create a free account with Oracle University and enjoy these benefits:

- More than 300 videos
- Site remembers which videos you have watched
- Filter by product
- Earn badges to share on social media
- Video captions translated into 14 languages
- Searchable transcript in English
- Build your own home page based on your preferences and favorites
- Track your progress and achievement on a personal dashboard

A variety of training is offered. (Not all training types offered for all products)

- **Get Started**: New user? These courses will get you up and running.
- **Mobile User**: This course for Mobile Users teaches you how to use the mobile app for Unifier.
- **What's New**: Learn about the new features introduced in the latest release.
- **Video Training**: Single-topic, short duration videos provide instruction on basic functions and common tasks.
- **Crash Courses**: Longer-duration videos (narrated by an instructor) guide you step-by-step through processes like planning a project, or take a deep-dive into a single subject.

- **Full Virtual Courses**: Do hands-on exercises in the software and view training manuals in these comprehensive instructor-led recorded courses. Requires fee.