

Primavera Unifier

Visualizations User Guide



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About This Content

This guide explains how to use Unifier to view, edit, and modify visualizations in **User** mode.

Audience

Project/Shell users/groups with access to visualizations should review this information.

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Using Visualizations

Visualizations Overview

[Video: Using Unifier Visualizations in User Mode](#)

Visualizations are an approach to render data in a graphical or pictorial format to help you identify and understand underlying trends and nuances of the data in an intuitive manner. Using various types of charts, grids, and Key Performance Indicators (KPIs) from multiple data sources, project/shell users can manage content, edit, and view visualizations to provide a pictorial representation of critical information and key insights related to record and line-item data from business process (BP) records.

You can begin working with visualizations when Project/Shell Administrators give you access to the Visualizations node in the projects/shells you have access to.

Based on permissions, you can perform specific types of visualization tasks in each project/shell, such as:

- [Access the Visualizations Log in a Project/Shell \(User Mode\)](#)
- [Edit Visualizations in Projects/Shells](#)
- [Create or Edit Content Items for Visualizations](#)
- [Remove Content Items From Visualizations in Projects/Shells](#)
- [Rearrange the Visualization Layout](#)

Users with access to visualizations in projects/shells in the User mode should review this information.

Permission-Based Visualization Tasks for Project/Shell Users

Visualization users can perform tasks based on their visualization permissions and their access to specific projects/shells. Your Project/Shell Administrator can assign any of the following permissions to perform corresponding visualizations tasks:

- **Manage Content:** You can edit visualizations in a project/shell by creating new content and modifying existing content. By default, you also get modify and view permissions in the User mode.
- **Modify:** You can edit visualizations in a project/shell by modifying only the displayed content. By default, you also get view permission in the User mode.
- **View (Default):** You can only view visualizations in a project/shell in the User mode.

The following visualization tasks can be performed by users/groups assigned with each permission:

Visualization Tasks	Modify Content Permission	Modify Permission	View Permission
---------------------	---------------------------	-------------------	-----------------

View visualizations in multiple tabs	Yes	Yes	Yes
Edit visualizations in multiple tabs	Yes	Yes	No
Rearrange visualization layout and content items	Yes	Yes	No
Add content items from the content library	Yes	Yes	No
Create and edit content items in the content library	Yes	No	No
Remove content items from the library	Yes	No	No
Edit content items in the layout	Yes	Yes	No
Remove content items from the layout	Yes	Yes	No

Access the Visualizations Log in a Project/Shell (User Mode)

Project/Shell users can access visualizations from the Visualizations node or from a Business Process log node. The Visualization node is visible if your Project/Shell Administrator has assigned visualization permissions in the projects/shells you have access to.

To access the Visualizations log in a project/shell (User mode):

1. Sign in to Unifier with project/shell user credentials.
2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
3. In the left Navigator, select **Visualizations**.

or

Access the **Visualizations** log from a business process log as follows:

- a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
 - b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. On the **Visualizations** page (right pane), the following information is displayed for each visualization:
 - **Name:** Name of the visualization. For example, a visualization called *RFI Summary*.
 - **Description:** (Optional) A short statement that outlines the purpose of the visualization.
 - **Location:** (Optional) The location of the visualization in the left Navigator in the **User** mode.
If a location is specified, the visualization will display under the selected business process node in the **User** mode. For example, a **Visualizations** list will display in the **Contracts** business process log (right pane).

(Default) If a location is not specified, the visualizations will display under the **Visualizations** node in the left Navigator.

- **Last Modified Date:** The most recent date that the visualization was modified.
 - **Last Modified By:** The name of the user who last modified the visualization.
5. (Optional) To further focus on a subset of visualizations displayed in the **Visualizations** log (right pane), select any of the following search filters:
- **Location:** Select this filter to focus on visualizations in a specific location or node. For example, visualizations in the **Contracts** business process node.
 - **Last Modified Date:** Select this filter and enter a date range to select only those visualizations that were last modified between the selected dates.
 - **Last Modified By:** Select this filter to focus on visualizations modified by a specific user.

Based on the visualization permissions assigned to you as Project/Shell users, you can perform certain types of visualization tasks from the **Visualizations** log. See [Permission-Based Visualization Tasks for Project/Shell Users](#).

Keyboard Navigation

You can use your computer keyboard to navigate through the application. Use the following keyboard shortcuts to access frequently used or important functionality. Note that keyboard shortcuts may change depending on your selected browser, and disabled buttons/fields are skipped.

Common Shortcuts

Action	Windows Shortcut Key	Mac Shortcut Key
Move right through elements in a log/page (right pane)	Press Tab	Press Tab
Move left through the elements in a log/page (right pane)	Press Shift+Tab	Press Shift+Tab
Select a current focus element	Press Spacebar or Enter	Press Spacebar or Enter

Edit Visualizations in Projects/Shells

Project/Shell users can edit visualizations by using default content items in the Content Library. These items are provided by your Project/Shell Administrators. If you have the Manage Content permission, you can create content items in the Content Library, which can then be used in visualizations. For more information, see [Create or Edit Content Items for Visualizations](#).

To edit visualizations in a project/shell (User mode):

1. Sign in to Unifier with project/shell user credentials.
2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
3. In the left Navigator, select **Visualizations**.

or

Access the **Visualizations** log from a business process log as follows:

- a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
- b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. In the **Visualizations** log (right pane), select **Create**.
5. In the **Create Visualization** drawer, enter the following information:
 - a. In the **Name** field, enter a user-friendly name for the visualization.
 - b. (Optional) In the **Description** field, enter a short description of the visualization.
 - c. (Optional) From the **Location** list, select the location of the visualization in the left Navigator. For example, select **Document Issues** to display the **Visualizations** node under the **Document Issues** business process in the **User** mode.

(Default) If a location is not specified, the visualization displays in the **Visualization** node of the project/shell in the **User** mode.
 - d. Select **Continue** to select a layout for the visualization.

Note

You can select **Cancel** in any step to discontinue creating the visualization.

6. In the **Choose layout to start** drawer, select a layout for the visualization. Options include:
 - 1-panel collection
 - 2-panel hero visualization
 - 2-panel side-by-side
 - 2-panel vertical collection
 - 3-panel auto fit
 - 3-panel collection
 - 5-panel collection
7. In the selected blank layout page, select **Library**.
8. In the **Library** drawer, select the **Content** tab.
 - The name of the content item.
 - The type of content, such as a KPI card, Bar chart, and so on.
 - The data source used for creating the content item.
 - The published status can be any of the following:
 - **Synced**: Indicates the published content item is in sync with the saved version.
 - **Local**: Indicates the content item has been newly created and is available only in this project/shell.
9. Select a content item, and then select and drag the item onto a block in the visualization layout. Repeat to populate all blocks in the layout. For example, select and drag a stacked Bar chart to the layout.
10. (Optional) Select **Create** if you want to create new content items for the visualization. See [Create or Edit Content Items for Visualizations](#).
11. Perform any of the following actions in any order:

- In the **Search** bar, locate a content item by name, data source, view type (such as a Bar chart, Area chart, and so on), or published status.
 - Select **Refresh** (🔄) to refresh the list of displayed content items.
 - Select the **Layout** tab to change the visualization layout.
12. If you have Modify permission, you can add one or more tabs. Select **Add new tab** (+), adjacent to the **Default** or a renamed tab, and repeat the previous step in each tab. Tab names cannot exceed a maximum of 120 characters.
 - Add, remove, or update a maximum of 15 tabs with layout and content.
 - Select a different layout in each tab.
 - Drag and reorder the tab sequence.
 - Set up independent filters for each tab.
 - Select **Save** to save changes across all tabs.
 13. Make changes as needed to refine the above selections.
 14. After populating the visualization, select **Create**. Return to the **Visualizations** log.

Create or Edit Content Items for Visualizations

Permissions determine whether project/shell users can create or edit visualizations in the User mode.

Project/shell users with the Modify permission can only edit existing visualizations by rearranging content items in a layout or selecting alternate content items from the library they have access to.

Project/Shell users with the Manage Content permission can create content items for visualizations in the content library of a project/shell. The Create page for such content items is initially labeled Local Copy. Upon creating content items, you can select and drag these content items onto the visualization layout. The status of these content items displays as Local to indicate the content item has been newly created and is available only in this project/shell.

You can create the following types of content items:

- [Create or Edit Area Charts, Bar Charts, and Line Charts for Visualizations in Projects/ Shells](#)
- [Create or Edit Bubble Charts for Visualizations in Projects/Shells](#)
- [Create or Edit Combo Charts for Visualizations in Projects/Shells](#)
- [Create or Edit Pie Charts and Donut Charts for Visualizations in Projects/Shells](#)
- [Create or Edit Funnel Charts for Visualizations in Projects/Shells](#)
- [Create or Edit Gauge Charts for Visualizations in Projects/Shells](#)
- [Create or Edit KPI Cards for Visualizations in Projects/Shells](#)
- [Create or Edit Pivot Grids for Visualizations in Projects/Shells](#)
- [Create or Edit Pyramid Charts for Visualizations in Projects/Shells](#)
- [Create or Edit Scatter Charts for Visualizations in Projects/Shells](#)
- [Create or Edit Tables for Visualizations in Projects/Shells](#)

Create or Edit Area Charts, Bar Charts, and Line Charts for Visualizations in Projects/ Shells

You can create or edit Area charts, Bar charts, and Line charts for visualizations if you have the Manage Content permission to perform this task.

To create or edit Area charts, Bar charts, and Line charts for visualizations in a project/shell (User mode):

1. Sign in to Unifier with project/shell user credentials.
2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
3. In the left Navigator, select **Visualizations**.

or

Access the **Visualizations** log from a business process log as follows:

- a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
- b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. In the **Visualizations** log (right pane), perform any of the following actions:
 - Select **Create** to add a new visualization in the project/shell. Proceed to step 6.
 - Select a visualization in the log, and then select **Edit**. Proceed to step 5.
5. On the **Edit** page, select **Edit** (✎) for a content item in the visualization layout; proceed to step 6b.
6. On the **Create** or **Edit** page, specify or update the following information:
 - a. To preview the data before creating the chart:
 - i. From the **Data Source** list, select the data source to use for creating the content item. The list shows published content in the alphabetical order.
 - ii. From the **Preview Project** list, select an active project/shell and then click **Preview Data**.
 - b. From the **View Type** list, select **Area Chart**, **Bar Chart**, or **Line Chart**.
 - c. In the **Name** field, enter a name for the chart.
 - d. (Optional) In the **Description** field, enter a short description about the chart.
 - e. From the **Value** list, select a data element from the data source selected above. Displays **Count** by default.

For the selected data element in the **Value** list, select any of the following measures:

- **Average**: The mean of all values of the selected data element.
- **Count**: (Default) The total number of rows of the selected data element.
- **Max**: For numeric fields, displays the highest value. For date fields, displays the maximum date.
- **Median**: The central value among all values of the selected data element.

- **Min:** For numeric fields, displays the lowest value of the selected data element. For date fields, displays the minimum date.
 - **Percentage:** A percent of the filtered value from the total of the selected data element.
 - **Sum:** Sum of all values of the selected data element.
- f. (Optional) From the **Color By** list, select a data element to differentiate using a color code. Perform any of the following actions:
- To color-code additional data elements, click **Add Color By**.
 - To remove a color code and the associated data element, click **Delete (x)**.
 - If you have selected more than one color code, click **Drag (≡)** to reorder the color codes.
- g. From the **Category** list, select a data element that you can use as a category to differentiate the bars in the chart. Perform any of the following actions:
- To select a data element for the category, click **Add Category**.
 - To remove a category and the associated data element, click **Delete (x)**.
 - If you have selected more than one category, click **Drag (≡)** to reorder the categories.
- h. From the **Data Labels** list, select the location for displaying labels on the chart. Common options are:
- **Auto:** The default data label display setting for all types of charts.
 - **Center:** The data label displays in the center of an Area chart, Bar chart, or Line chart.
 - **None:** The data labels do not display in the chart.
- For Area charts and Line charts, the following additional options display:
- **Above Marker:** The data label displays above the marker point.
 - **Below Marker:** The data label displays below the marker point.
 - **Before Marker:** The data label displays before the marker point.
 - **After Marker:** The data label displays after the marker point.
- For Bar charts, the following additional options display:
- **Inside Bar Edge:** The data label displays on the inside edge in a Bar chart.
 - **Outside Bar Edge:** The data label displays on the outside edge in a Bar chart.
- i. From the **Orientation** list, select the orientation as either **Horizontal** or **Vertical** (default).
- j. In the **Stacked** field, toggle to show or hide a stacked Bar chart.
- k. In the **Show Category Axis Title** field, toggle to show or hide the label of the data element you selected for the X-axis.
- l. In the **Show Value Axis Title** field, toggle to show or hide the label of the data element you selected for the Y-axis.
- m. Make changes as needed to refine your selections.
7. After making all changes, perform any of the following actions:

- If you created an Area chart, Bar chart, or Line chart, select **Create**, and return to the **Edit** page.
 - To confirm all the changes made to the edited content item, select **Update**, and return to the **Edit** page.
8. On the **Edit** page, select **Save** to update the visualization with any created or edited content.

Create or Edit Bubble Charts for Visualizations in Projects/Shells

You can create or edit Bubble charts for visualizations if you have the Manage Content permission to perform this task.

To create or edit Bubble charts for visualizations in a project/shell (User mode):

1. Sign in to Unifier with project/shell user credentials.
 2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
 3. In the left Navigator, select **Visualizations**.
- or
- Access the **Visualizations** log from a business process log as follows:
- a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
 - b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. In the **Visualizations** log (right pane), select any of the following actions:
- Select **Create** to add a new visualization in the project/shell. Proceed to step 6.
 - Select a visualization in the log, and then select **Edit**. Proceed to step 5.
5. On the **Edit** page, select **Edit** (✎) for a Bubble chart in the visualization layout. Proceed to step 6b.
6. On the **Create** or **Edit** page, specify or update the following information:
- a. To preview the data before creating the chart:
 - i. From the **Data Source** list, select the data source to use for creating the content item. The list shows published content in the alphabetical order.
 - ii. From the **Preview Project** list, select an active project/shell and then click **Preview Data**.
 - b. From the **View Type** list, select **Bubble Chart**.
 - c. In the **Name** field, enter a name for the Bubble chart.
 - d. (Optional) In the **Description** field, enter a short description about the Bubble chart.
 - e. From the **Size By** list, select a data element to use as the criteria to size the bubble from the data source selected above. Displays **Count** by default.

For the selected data element in the **Size By** list, select any of the following measures:

- **Average**: The mean of all values of the selected data element.
- **Count**: (Default) The total number of rows of the selected data element.

- **Max:** For numeric fields, displays the highest value. For date fields, displays the maximum date.
 - **Median:** The central value among all values of the selected data element.
 - **Min:** For numeric fields, displays the lowest value of the selected data element. For date fields, displays the minimum date.
 - **Percentage:** A percent of the filtered value from the total of the selected data element.
 - **Sum:** Sum of all values of the selected data element.
- f. From the **X Axis** list, select a data element.
- For the selected data element in the **X-Axis** list, select any of the following measures:
- **Average:** The mean of all values of the selected data element.
 - **Count:** (Default) The total number of rows of the selected data element.
 - **Max:** For numeric fields, displays the highest value. For date fields, displays the maximum date.
 - **Median:** The central value among all values of the selected data element.
 - **Min:** For numeric fields, displays the lowest value of the selected data element. For date fields, displays the minimum date.
 - **Percentage:** A percent of the filtered value from the total of the selected data element.
 - **Sum:** Sum of all values of the selected data element.
- g. From the **Y Axis** list, select a data element.
- For the selected data element in the **Y-Axis** list, select any of the following measures:
- **Average:** The mean of all values of the selected data element.
 - **Count:** (Default) The total number of rows of the selected data element.
 - **Max:** For numeric fields, displays the highest value. For date fields, displays the maximum date.
 - **Median:** The central value among all values of the selected data element.
 - **Min:** For numeric fields, displays the lowest value of the selected data element. For date fields, displays the minimum date.
 - **Percentage:** A percent of the filtered value from the total of the selected data element.
 - **Sum:** Sum of all values of the selected data element.
- h. (Optional) From the **Color By** list, select one or more data elements to measure using a color-code. Perform any of the following actions:
- To color-code additional data elements, click **Add Color By**.
 - To remove a color code and the associated data element, click **Delete (x)**.
 - If you have selected more than one color code, click **Drag (≡)** to reorder the color codes.
- i. From the **Category** list, select a data element to use as a category to differentiate the bars in the chart. Perform any of the following actions:
- To select a data element for the category, click **Add Category**.

- To remove a category and the associated data element, click **Delete (x)**.
 - If you have selected more than one category, click **Drag (≡)** to reorder the categories.
 - j. From the **Data Labels** list, select the location for displaying labels on the chart. Choices include:

The following options display:

 - **Auto**: The default data label display setting for all types of charts.
 - **Center**: The data label displays in the center of each data point on an Area chart, Bar chart or Line chart.
 - **Above Marker**: The data label displays above the marker point.
 - **Below Marker**: The data label displays below the marker point.
 - **Before Marker**: The data label displays before the marker point.
 - **After Marker**: The data label displays after the marker point.
 - **None**: The data labels do not display on the chart.
 - k. In the **Show X Axis Title** field, slide right to display the label of the data element you selected for the X-axis (See step g).
 - l. In the **Show Y Axis Title** field, slide right to display the label of the data element you selected for the Y-axis (See step h).
 - m. Make changes as needed to refine the above selections.
7. After making all changes, perform any of the following actions:
 - If you created a Bubble chart, select **Create**, and return to the **Edit** page.
 - To confirm all the changes made to the edited Bubble chart, select **Update**, and return to the **Edit** page.
 8. On the **Edit** page, select **Save** to update the visualization with any created or edited content.

Create or Edit Combo Charts for Visualizations in Projects/Shells

You can create or edit Combo charts for visualizations if you have the Manage Content permission to perform this task.

To create or edit Combo charts for visualizations in a project/shell (User mode):

1. Sign in to Unifier with project/shell user credentials.
2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
3. In the left Navigator, select **Visualizations**.

or

Access the **Visualizations** log from a business process log as follows:

- a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
- b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.

4. In the **Visualizations** log (right pane), perform any of the following actions:
 - Select **Create** to add a new visualization in the project/shell. Proceed to step 6.
 - Select a visualization in the log, and then select **Edit**. Proceed to step 5.
5. On the **Edit** page, select **Edit** (✎) for a content item in the visualization layout; proceed to step 6b.
6. On the **Create** or **Edit** page, specify or update the following information:
 - a. To preview the data before creating the chart:
 - i. From the **Data Source** list, select the data source to use for creating the content item. The list shows published content in the alphabetical order.
 - ii. From the **Preview Project** list, select an active project/shell, and then select **Preview Data**.
 - b. From the **View Type** list, select **Combo Chart**.
 - c. In the **Name** field, enter a name for the Combo chart.
 - d. (Optional) In the **Description** field, enter a short description about the Combo chart.
 - e. From the **Values** list, select a data element from the data source selected above. A maximum of three values can be selected for a Combo chart. For each value, select a type of chart (Bar, Line, or Area) and a measure listed below. Displays **Count** by default.

For each data element selected in the **Value** list, select any of the following measures:

- **Average**: The mean of all values of the selected data element.
 - **Count**: (Default) The total number of rows of the selected data element.
 - **Max**: For numeric fields, displays the highest value. For date fields, displays the maximum date.
 - **Median**: The central value among all values of the selected data element.
 - **Min**: For numeric fields, displays the lowest value of the selected data element. For date fields, displays the minimum date.
 - **Sum**: Sum of all values of the selected data element.
- f. (Optional) From the **Color By** list, select a data element to measure using a color-code. A maximum of three Color By values can be selected for a Combo chart. Perform any of the following actions:
 - To color-code additional data elements, select **Add Color By**.
 - To remove a color code and the associated data element, select **Delete (x)**.
 - If you have selected more than one color code, select **Drag** (≡) to reorder the color codes.
 - g. From the **Category** list, select a data element to use as a category to differentiate the bars on the chart. A maximum of three categories can be selected for a Combo chart. Perform any of the following actions:
 - To select a data element for the category, select **Add Category**.
 - To remove a category and the associated data element, select **Delete (x)**.
 - If you have selected more than one category, select **Drag** (≡) to reorder the categories.

- Select **Create** to add a new visualization in the project/shell. Proceed to step 6.
 - Select a visualization in the log, and then select **Edit**. Proceed to step 5.
5. On the **Edit** page, select **Edit** (✎) for a Pie chart or Donut chart in the visualization layout. Proceed to step 6b.
 6. On the **Create** or **Edit** page, specify or update the following information:
 - a. To preview the data before creating the chart:
 - i. From the **Data Source** list, select the data source to use for creating the content item. The list shows published content in the alphabetical order.
 - ii. From the **Preview Project** list, select an active project/shell and then click **Preview Data**.
 - b. From the **View Type** list, select **Pie Chart**.
 - c. In the **Name** field, enter a name for the bubble chart.
 - d. (Optional) In the **Description** field, enter a short description about the bubble chart.
 - e. From the **Value** list, select a data element from the data source selected above. Displays **Count** by default.

For the selected data element in the **Value** list, select any of the following measures:

- **Average**: The mean of all values of the selected data element.
 - **Count**: (Default) The total number of rows of the selected data element.
 - **Max**: For numeric fields, displays the highest value. For date fields, displays the maximum date.
 - **Median**: The central value among all values of the selected data element.
 - **Min**: For numeric fields, displays the lowest value of the selected data element. For date fields, displays the minimum date.
 - **Sum**: Sum of all values of the selected data element.
- f. (Optional) From the **Color By** list, select one or more data elements to measure using a color code. Perform any of the following actions:
 - To color-code additional data elements, click **Add Color By**.
 - To remove a color code and the associated data element, click **Delete (x)**.
 - If you have selected more than one color code, click **Drag (≡)** to reorder the color codes.
 - g. From the **Data Labels** list, select the location for displaying labels on the bar chart. Choices include:

The following options display:


 - **Auto**: The default data label display setting for all types of charts.
 - **Center**: The data label displays in the center of each data point on an Area chart, Bar chart or Line chart.
 - **Above Marker**: The data label displays above the marker point.
 - **Below Marker**: The data label displays below the marker point.
 - **Before Marker**: The data label displays before the marker point.
 - **After Marker**: The data label displays after the marker point.

- **None:** The data labels do not display in the chart.
 - h. In the **Donut** field, slide right to display the pie chart shaped as a donut chart.
 - i. Make changes as needed to refine the above selections.
7. After making all changes, perform any of the following actions:
 - If you created a Pie chart or Donut chart, select **Create**, and return to the **Edit** page.
 - To confirm all the changes made to the edited charts, select **Update**, and return to the **Edit** page.
 8. On the **Edit** page, select **Save** to update the visualization with any created or edited content.

Create or Edit Funnel Charts for Visualizations in Projects/Shells

You can create or edit Funnel charts for visualizations if you have the Manage Content permission to perform this task.

To create or edit Funnel charts for visualizations in a project/shell (User mode):

1. Sign in to Unifier with project/shell user credentials.
 2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
 3. In the left Navigator, select **Visualizations**.
- or
- Access the **Visualizations** log from a business process log as follows:
- a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
 - b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. In the **Visualizations** log (right pane), perform any of the following actions:
 - Select **Create** to add a new visualization in the project/shell. Proceed to step 6.
 - Select a visualization in the log, and then select **Edit**. Proceed to step 5.
 5. On the **Edit** page, select (**Edit** ) for a content item in the visualization layout; proceed to step 6b.
 6. On the **Create** or **Edit** page, specify or update the following information:
 - a. To preview the data before creating the chart:
 - i. From the **Data Source** list, select the data source to use for creating the content item. The list shows published content in the alphabetical order.
 - ii. From the **Preview Project** list, select an active project/shell and then click **Preview Data**.
 - b. From the **View Type** list, select **Funnel Chart**.
 - c. In the **Name** field, enter a name for the Funnel chart.
 - d. (Optional) In the **Description** field, enter a short description about the bubble chart.
 - e. From the **Value** list, select a data element from the above selected data source to represent the actual value measured in each stage. This is represented by the filled-in area of each horizontal slice of the Funnel chart. Displays **Count** by default.

For the selected data element in the **Value** list, select any of the following measures:

- **Average:** The mean of all values of the selected data element.
 - **Count:** (Default) The total number of rows of the selected data element.
 - **Max:** For numeric fields, displays the highest value. For date fields, displays the maximum date.
 - **Median:** The central value among all values of the selected data element.
 - **Min:** For numeric fields, displays the lowest value of the selected data element. For date fields, displays the minimum date.
 - **Sum:** Sum of all values of the selected data element.
- f. From the **Target Value** list, select a data element to represent the goals to be achieved at each stage as a horizontal slice in the Funnel chart.
- g. (Optional) From the **Color By** list, select one or more data elements to measure using a color code. Perform any of the following actions:
- To color-code additional data elements, click **Add Color By**.
 - To remove a color code and the associated data element, click **Delete (x)**.
 - If you have selected more than one color code, click **Drag (≡)** to reorder the color codes.
- h. From the **Data Labels** list, select the location for displaying labels on the bar chart. Choices include:
- The following options display:
- **Auto:** The default data label display setting for all types of charts.
 - **Center:** The data label displays in the center of each data point on an Area chart, Bar chart or Line chart.
 - **Above Marker:** The data label displays above the marker point.
 - **Below Marker:** The data label displays below the marker point.
 - **Before Marker:** The data label displays before the marker point.
 - **After Marker:** The data label displays after the marker point.
 - **None:** The data labels do not display in the chart.
- i. In the **Donut** field, slide right to display the pie chart shaped as a donut chart.
- j. Make changes as needed to refine the above selections.
7. After making all changes, perform any of the following actions:
- If you created a Funnel chart, select **Create**, and return to the **Edit** page.
 - To confirm all the changes made to the edited Combo chart, select **Update**, and return to the **Edit** page.
8. On the **Edit** page, select **Save** to update the visualization with any created or edited content.

Create or Edit Gauge Charts for Visualizations in Projects/Shells

You can create or edit Gauge charts for visualizations if you have the Manage Content permission to perform this task.

To create or edit Gauge charts for visualizations in a project/shell (User mode):

1. Sign in to Unifier with project/shell user credentials.
2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
3. In the left Navigator, select **Visualizations**.


or

Access the **Visualizations** log from a business process log as follows:

- a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
 - b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. In the **Visualizations** log (right pane), perform any of the following actions:
 - Select **Create** to add a new visualization in the project/shell. Proceed to step 6.
 - Select a visualization in the log, and then select **Edit**. Proceed to step 5.
 5. On the **Edit** page, select **Edit** (✎) for a content item in the visualization layout; proceed to step 6b.
 6. On the **Create** or **Edit** page, specify or update the following information:
 - a. To preview the data before creating the chart:
 - i. From the **Data Source** list, select the data source to use for creating the content item. The list shows published content in the alphabetical order.
 - ii. From the **Preview Project** list, select an active project/shell and then click **Preview Data**.
 - b. From the **View Type** list, select **Gauge Chart**.
 - c. In the **Name** field, enter a name for the Gauge chart.
 - d. (Optional) In the **Description** field, enter a short description about the Gauge chart.
 - e. From the **Value** list, select a data element from the data source selected above. Displays **Count** by default.

For each data element selected in the **Value** list, select any of the following measures:


- **Average**: The mean of all values of the selected data element.
 - **Count**: (Default) The total number of rows of the selected data element.
 - **Max**: For numeric fields, displays the highest value. For date fields, displays the maximum date.
 - **Median**: The central value among all values of the selected data element.
 - **Min**: For numeric fields, displays the lowest value of the selected data element. For date fields, displays the minimum date.
 - **Sum**: Sum of all values of the selected data element.
- f. From the **Target** list, select a data element to use as a measure for targets.
 - g. In the **Threshold** field, specify a maximum of three thresholds to measure on the Gauge chart. For each threshold specify a range of values and a color code as follows:
 - i. Click **Add Threshold**.
 - ii. In the **Min** field, enter a minimum value for the threshold in the range 0 to 100.

- iii. In the **Max** field, enter the maximum value for the threshold in the range 0 to 100.
 - iv. From the **Color** () list, associate a color for each threshold defined.
 - h. From the **Currency Options** list, select the currency used by the project/shell. Choices include: **None**, **Base Currency**, and **Shell Currency**.
 - i. In the **Shape** field, select the shape of the Gauge chart as **Circle** or **Semi-circle**.
 - j. Make changes as needed to refine the above selections.
7. After making all changes, perform any of the following actions:
 - If you created a Gauge chart, select **Create**, and return to the **Edit** page.
 - To confirm all the changes made to the edited charts, select **Update**, and return to the **Edit** page.
 8. On the **Edit** page, select **Save** to update the visualization with any created or edited content.

Create or Edit KPI Cards for Visualizations in Projects/Shells

You can create or edit KPI cards for visualizations if you have the Manage Content permission to perform this task. A maximum of eight KPIs can be included in a visualization.

To create or edit KPI cards for visualizations in a project/shell (User mode):

1. Sign in to Unifier with project/shell user credentials.
 2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
 3. In the left Navigator, select **Visualizations**.
- or
- Access the **Visualizations** log from a business process log as follows:
- a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
 - b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. In the **Visualizations** log (right pane), select any of the following actions:
 - Select **Create** to add a new visualization in the project/shell. Proceed to step 6.
 - Select a visualization in the log, and then select **Edit**. Proceed to step 5.
 5. On the **Edit** page, select **Edit** () for a KPI card in the visualization layout. Proceed to step 6b.
 6. On the **Create** or **Edit** page, specify or update the following information:
 - a. To preview the data before creating the chart:
 - i. From the **Data Source** list, select the data source to use for creating the content item. The list shows published content in the alphabetical order.
 - ii. From the **Preview Project** list, select an active project/shell and then click **Preview Data**.
 - b. From the **View Type** list, select **KPI Card**.
 - c. In the **Name** field, enter a name for the KPI card.

- d. (Optional) In the **Description** field, enter a short description about the KPI card.
 - e. From the **Value** list, select a data element from the data source selected above. Displays **Count** by default.
For the selected data element in the **Value** list, select any of the following measures:
 - **Average**: The mean of all values of the selected data element.
 - **Count**: (Default) The total number of rows of the selected data element.
 - **Max**: For numeric fields, displays the highest value. For date fields, displays the maximum date.
 - **Median**: The central value among all values of the selected data element.
 - **Min**: For numeric fields, displays the lowest value of the selected data element. For date fields, displays the minimum date.
 - **Sum**: Sum of all values of the selected data element.
 - f. From the **Period** list, select a data element to measure time for the data element selected in the previous step. Select any of the following to further specify the time period:
 - **No Period**: (Default) Does not display a measure of time on the KPI card.
 - **Today**: Displays today's date in the format based on the user's preferences.
 - **Current Month**: Displays the month and the year in the format, MONTH YYYY.
 - **Current Year**: Displays the year on the KPI card in the format, YYYY.
 - **Current Quarter**: Displays the year on the KPI card in the format, Q<#> YYYY.
 - g. For KPIs that display currency and amounts, select the display format as follows:
 - i. From the **Decimal Places** list, select display format for decimal values from 0 (default) to 8 places. For example, select 2 to display values in *nn.dd* format.
 - ii. From the **Abbreviation (Show in thousands, millions etc)** list, select one from the following:
 - **Auto** (default)
 - **None**
 - **Thousands (K)**
 - **Millions (M)**
 - **Billions (B)**
 - **Trillions (T)**
 - h. Make changes as needed to refine the above selections.
7. After making all changes, perform any of the following actions:
 - If you created a KPI card, select **Create**, and return to the **Edit** page.
 - To confirm all the changes made to the edited card, select **Update**, and return to the **Edit** page.
 8. On the **Edit** page, select **Save** to update the visualization with any created or edited content.

Create or Edit Pivot Grids for Visualizations in Projects/Shells

You can create or edit Pivot grids for visualizations if you have the **Manage Content** permission to perform this task.

To create or edit Pivot grids for visualizations in a project/shell (User mode):

1. Sign in to Unifier with project/shell user credentials.
2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
3. In the left Navigator, select **Visualizations**.

or

Access the **Visualizations** log from a business process log as follows:

- a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
- b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. In the **Visualizations** log (right pane), select any of the following actions:
 - Select **Create** to add a new visualization in the project/shell. Proceed to step 6.
 - Select a visualization in the log, and then select **Edit**. Proceed to step 5.
5. On the **Edit** page, select **Edit** (✎) for a Pivot Grid in the visualization layout. Proceed to step 6b.
6. On the **Create** or **Edit** page, specify or update the following information:
 - a. To preview the data before creating the chart:
 - i. From the **Data Source** list, select the data source to use for creating the content item. The list shows published content in the alphabetical order.
 - ii. From the **Preview Project** list, select an active project/shell and then click **Preview Data**.
 - b. From the **View Type** list, select **Pivot Grid**.
 - c. In the **Name** field, enter a name for the Pivot grid.
 - d. (Optional) In the **Description** field, enter a short description about the Pivot grid.
 - e. From the **Value** list, select a data element from the data source selected above. Displays **Count** by default.

For the selected data element in the **Value** list, select any of the following measures:

- **Average**: The mean of all values of the selected data element.
- **Count**: (Default) The total number of rows of the selected data element.
- **Max**: For numeric fields, displays the highest value. For date fields, displays the maximum date.
- **Median**: The central value among all values of the selected data element.
- **Min**: For numeric fields, displays the lowest value of the selected data element. For date fields, displays the minimum date.
- **Sum**: Sum of all values of the selected data element.

- f. From the **Columns** list, select a data element to create columns for the Pivot grid.
 - g. (Optional) To include additional column tiers in the Pivot grid, click **Add Columns**.
 - h. From the **Rows** list, select a data element to create rows for the Pivot grid.
 - i. (Optional) Click **Add Rows** to include additional row tiers in the Pivot grid.
 - j. (Optional) In the **Show Totals** field, toggle to show or hide the column totals in the grid.
 - k. To visually highlight specific fields in the Pivot Grid, [Configure and Manage Conditional Formatting of Tables and Pivot Grids](#).
 - l. Make changes as needed to refine the above selections.
7. After making all changes, perform any of the following actions:
 - If you created a Pivot grid, select **Create**, and return to the **Edit** page.
 - To confirm all the changes made to the edited grid, select **Update**, and return to the **Edit** page.
 8. On the **Edit** page, select **Save** to update the visualization with any created or edited content.

Create or Edit Pyramid Charts for Visualizations in Projects/Shells


You can create or edit Pyramid charts for visualizations if you have the Manage Content permission to perform this task.

To create or edit Pyramid charts for visualizations in a project/shell (User mode):

1. Sign in to Unifier with project/shell user credentials.
2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
3. In the left Navigator, select **Visualizations**.

or

Access the **Visualizations** log from a business process log as follows:

- a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
 - b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. In the **Visualizations** log (right pane), perform any of the following actions:
 - Select **Create** to add a new visualization in the project/shell. Proceed to step 6.
 - Select a visualization in the log, and then select **Edit**. Proceed to step 5.
 5. On the **Edit** page, select (**Edit** ) for a content item in the visualization layout; proceed to step 6b.
 6. On the **Create** or **Edit** page, specify or update the following information:
 - a. To preview the data before creating the chart:
 - i. From the **Data Source** list, select the data source to use for creating the content item. The list shows published content in the alphabetical order.
 - ii. From the **Preview Project** list, select an active project/shell, and then select **Preview Data**.

- b. From the **View Type** list, select **Pyramid Chart**.
 - c. In the **Name** field, enter a name for the Pyramid chart.
 - d. (Optional) In the **Description** field, enter a short description about the Pyramid chart.
 - e. From the **Value** list, select a data element from the data source selected above. A maximum of three values can be selected for a Pyramid chart. Displays **Count** by default.
For each data element selected in the **Value** list, select any of the following measures:
 - **Average**: The mean of all values of the selected data element.
 - **Count**: (Default) The total number of rows of the selected data element.
 - **Max**: For numeric fields, displays the highest value. For date fields, displays the maximum date.
 - **Median**: The central value among all values of the selected data element.
 - **Min**: For numeric fields, displays the lowest value of the selected data element. For date fields, displays the minimum date.
 - **Sum**: Sum of all values of the selected data element.
 - f. (Optional) From the **Color By** list, select a non-numeric data element to differentiate using a color-code. A maximum of six colors can be added in the chart. Perform any of the following actions:
 - To color-code additional data elements, select **Add Color By**.
 - To remove a color code and the associated data element, select **Delete (x)**.
 - If you have selected more than one color code, select **Drag (=)** to reorder the color codes.
 - g. From the **Currency Options** list, select the currency used by the project/shell. Choices include: **None**, **Base Currency**, and **Shell Currency**.
 - h. Make changes as needed to refine the above selections.
7. After making all changes, perform any of the following actions:
 - If you created a Pyramid chart, select **Create**, and return to the **Edit** page.
 - To confirm all the changes made to the edited chart, select **Update**, and return to the **Edit** page.
 8. On the **Edit** page, select **Save** to update the visualization with any created or edited content.

Create or Edit Scatter Charts for Visualizations in Projects/Shells


You can create or edit Scatter charts for visualizations if you have the Manage Content permission to perform this task.

To create or edit Scatter charts for visualizations in a project/shell (User mode):

1. Sign in to Unifier with project/shell user credentials.
2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
3. In the left Navigator, select **Visualizations**.

or

Access the **Visualizations** log from a business process log as follows:

- a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
 - b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. In the **Visualizations** log (right pane), perform any of the following actions:
- Select **Create** to add a new visualization in the project/shell. Proceed to step 6.
 - Select a visualization in the log, and then select **Edit**. Proceed to step 5.
5. On the **Edit** page, select (**Edit** ) for a content item in the visualization layout; proceed to step 6b.
6. On the **Create** or **Edit** page, specify or update the following information:
- a. To preview the data before creating the chart:
 - i. From the **Data Source** list, select the data source to use for creating the content item. The list shows published content in the alphabetical order.
 - ii. From the **Preview Project** list, select an active project/shell, and then select **Preview Data**.
 - b. From the **View Type** list, select **Scatter Chart**.
 - c. In the **Name** field, enter a name for the Scatter chart.
 - d. (Optional) In the **Description** field, enter a short description about the Scatter chart.
 - e. From the **Y-Axis** list, select a data element from the data source selected in step 5b. The selected values display as metrics on the y-axis. Displays **Count** by default.

For the selected data element in the **Values** list, select any of the following measures:

- **Average**: The mean of all values of the selected data element.
 - **Count**: (Default for non-numeric data elements) The total number of rows of the selected data element.
 - **Max**: For numeric fields, displays the highest value. For date fields, displays the maximum date.
 - **Median**: The central value among all values of the selected data element.
 - **Min**: For numeric fields, displays the lowest value of the selected data element. This measure is not applicable to date fields.
 - **Percentage**: A percent of the filtered value from the total of the selected data element.
 - **Sum**: Sum of all values of the selected data element.
- f. From the **X-Axis** list, select a data element from the data source selected in step 5b. The selected values display as metrics on the y-axis. Displays **Count** by default.

For the selected data element in the **Values** list, select any of the following measures:

- **Average**: The mean of all values of the selected data element.
- **Count**: (Default for non-numeric data elements) The total number of rows of the selected data element.
- **Max**: For numeric fields, displays the highest value. For date fields, displays the maximum date.
- **Median**: The central value among all values of the selected data element.

- **Min:** For numeric fields, displays the lowest value of the selected data element. This measure is not applicable to date fields.
 - **Percentage:** A percent of the filtered value from the total of the selected data element.
 - **Sum:** Sum of all values of the selected data element.
- g. (Optional) From the **Color By** list, select a non-numeric data element to differentiate using a color-code. A maximum of three colors can be added in the chart. Perform any of the following actions:
- To color-code additional data elements, select **Add Color By**.
 - To remove a color code and the associated data element, select **Delete (x)**.
 - If you have selected more than one color code, select **Drag (=)** to reorder the color codes.
- h. From the **Category** list, select a non-numeric data element to use as a metric on the x-axis. A maximum of three categories can be included on the chart. Perform any of the following actions:
- To select a data element for the category, select **Add Category** .
 - To remove a category and the associated data element, select **Delete (x)**.
 - If you have selected more than one category, select **Drag (=)** to reorder the categories.
- i. From the **Markers** list, select a data element to associate different shapes with distinct groups to differentiate between data points on the Scatter chart.
- For example, RFIs associated with the Architectural discipline display as diamond shapes whereas Electrical discipline display as squares.
- j. From the **Currency Options** list, select the currency used by the project/shell. Choices include: **None**, **Base Currency**, and **Shell Currency**.
- k. From the **Data Labels** list, select the location for displaying labels on the Scatter chart. Common options are:
- **Auto:** The default data label display setting for all types of charts.
 - **Center:** The data label displays in the center of an Area chart, Bar chart, or Line chart.
 - **None:** The data labels do not display in the chart.
 - **Above:** The data label displays above the marker point.
 - **Below:** The data label displays below the marker point.
 - **Before:** The data label displays before the marker point.
 - **After:** The data label displays after the marker point.
- l. In the **Zoom and Scroll** field, toggle to enable or disable the ability to zoom and scroll the Scatter chart.
- m. In the **Show X Axis Title** field, toggle to show or hide the label of the data element selected for the X-axis (See step g).
- n. In the **Show Y Axis Title** field, toggle to show or hide the label of the data element selected for the Y-axis (See step f).
- o. Make changes as needed to refine the above selections.

7. After making all changes, perform any of the following actions:
 - If you created a Scatter chart, select **Create**, and return to the **Edit** page.
 - To confirm all the changes made to the edited chart, select **Update**, and return to the **Edit** page.
8. On the **Edit** page, select **Save** to update the visualization with any created or edited content.

Create or Edit Tables for Visualizations in Projects/Shells

You can create or edit tables for visualizations if you have the Manage Content permission to perform this task.

To create or edit tables for visualizations in a project/shell (User mode):

1. Sign in to Unifier with project/shell user credentials.
2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
3. In the left Navigator, select **Visualizations**.

or

Access the **Visualizations** log from a business process log as follows:

- a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
 - b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. In the **Visualizations** log (right pane), select any of the following actions:
 - Select **Create** to add a new visualization in the project/shell. Proceed to step 6.
 - Select a visualization in the log, and then select **Edit**. Proceed to step 5.
 5. On the **Edit** page, select **Edit** (✎) for a table in the visualization layout. Proceed to step 6b.
 6. On the **Create** or **Edit** page, specify or update the following information:
 - a. To preview the data before creating the chart:
 - i. From the **Data Source** list, select the data source to use for creating the content item. The list shows published content in the alphabetical order.
 - ii. From the **Preview Project** list, select an active project/shell and then click **Preview Data**.
 - b. From the **View Type** list, select **Table**.
 - c. In the **Name** field, enter a name for the table.
 - d. (Optional) In the **Description** field, enter a short description about the table.
 - e. From the **Columns** list, select a data element to create columns for the table.
 - f. (Optional) To include additional columns in the table, click **Add Columns** and select a data element.
 - g. From the **Group By** list, select a data element to organize the information based on a specific characteristic. For example, group RFIs based on the RFI reasons.
 - h. (Optional) In the **Show Totals** field, toggle to show or hide the column totals in the grid.

- i. To visually highlight specific fields in the Pivot Grid, [Configure and Manage Conditional Formatting of Tables and Pivot Grids](#).
 - j. Make changes as needed to refine the above selections.
7. After making all changes, perform any of the following actions:
 - If you created a table, select **Create**, and return to the **Edit** page.
 - To confirm all the changes made to the edited table, select **Update**, and return to the **Edit** page.
8. On the **Edit** page, select **Save** to update the visualization with any created or edited content.

Create or Edit Timeline Charts for Visualizations in Projects/Shells

You can create or edit Timeline charts for visualizations if you have the Manage Content permission to perform this task.

To create or edit Timeline charts for visualizations in a project/shell (User mode):

1. Sign in to Unifier with project/shell user credentials.
2. Select the specific project/shell tab, and switch to **User** mode.
For example, select a tab called Vision Corporation.
3. In the left Navigator, select **Visualizations** or
Access the **Visualizations** log from a business process log as follows:
 - a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
 - b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. In the **Visualizations** log (right pane), select any of the following actions:
 - Select **Create** to add a new visualization in the project/shell. Proceed to step 6.
 - Select a visualization in the log, and then select **Edit**. Proceed to step 5.
5. On the **Edit** page, select **Edit** (✎) for a Timeline chart in the visualization layout. Proceed to step 6b.
6. On the **Create** or **Edit** page, specify or update the following information:
 - a. To preview the data before creating the chart:
 - i. From the **Data Source** list, select the data source to use for creating the content item. The list shows published content in the alphabetical order.
 - ii. From the **Preview Project** list, select an active project/shell and then select **Preview Data**.
 - b. From the **View Type** list, select **Timeline Chart**.
 - c. In the **Name** field, enter a name for the Timeline chart.

Note

The combination of **Name** and **View Type** field values must be unique.

- d. (Optional) In the **Description** field, enter a short description about the Timeline chart.

- e. From the **Event Type** list, select **Single Event** (default) or **Duration Event**.
 - f. If you chose **Single Event**, from the **Category (Time Axis)**, select a date field that defines the event timeline.
 - g. From the **Event Title** list, select a data element that can be used as the title for the timeline event.
 - h. From the **Event Detail** list, select a maximum of two event details to track in the timeline chart.
 - To add a another event detail, select **Add**.
 - To remove an event detail and its associated data element, select **Delete (x)**.
 - i. If you chose a **Duration Event**, in the **Event Duration** field, select a date or date/time data element to choose the start date and end date of the duration of the Timeline chart.
 - j. From the **Color By** list, select a data element to measure using a color-code. To remove a color code and the associated data element, select **Delete (x)**.
 - k. From the **Orientation** list, select **Vertical** or **Horizontal** (default).
 - l. In the **Timeline Overview** field, toggle to hide or display a compressed overview of the entire timeline.
 - m. In the **Tooltip** field, toggle to hide or display tooltips when you hover over events on the Timeline chart.
 - n. Make changes as needed to refine the above selections.
7. After making all changes, perform any of the following actions:
 - If you created the Timeline chart, select **Create**, and return to the **Edit** page.
 - To confirm all the changes made to the edited Timeline chart, select **Update**, and return to the **Edit** page.
 8. On the **Edit** page, select **Save** to update the visualization with any created or edited content.

Edit Content Items in the Visualization Layout

Apart from editing content items you add to the Library, you can also edit content items on the visualization layout page if you have Manage Content or Modify permission to perform this task.

To edit content items from visualizations in a project/shell (User mode):

1. Sign in to Unifier with project/shell user credentials.
2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
3. In the left Navigator, select **Visualizations**.

or

Access the **Visualizations** log from a business process log as follows:

- a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
- b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.

4. In the **Visualizations** log (right pane), select a visualization, and select **Edit**.
5. In the **Edit** page, select a content item *in the visualization layout*, and select **Edit** (✎).
6. Make changes to the content item, and then select **Update**.

The status of the content item displays as **Not Synced**.

Note

The changes made to the content item is specific to this instance of the visualization. These changes will not be the default for this content item.

Configure and Manage Conditional Formatting of Tables and Pivot Grids

Conditional formatting enhances the clarity of data in Table and Pivot Grid views by allowing you to set rules that visually highlight values based on criteria. You can use this to identify trends, outliers, or key metrics through defined formatting styles such as font color, background color, and font style.

Limitations

The following limitations apply:

- Only Table/Pivot Grid view is supported.
- Maximum 5 rules per column, 10 columns with rules, 5 conditions per rule.
- Rule names must be unique. At least one condition and style required.
- Conditional formatting not applicable to charts.
- Columns with rules cannot be removed until rules are deleted.
- Export to PDF retains formatting.

To configure and manage conditional formatting of tables and pivot grids in a project or shell

1. Sign in to Unifier with project/shell user credentials.
2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
3. In the left Navigator, select **Visualizations**.



or

Access the **Visualizations** log from a business process log as follows:

- a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
 - b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. In the **Visualizations** log (right pane), select any of the following actions:
 - Select **Create** to add a new visualization in the project/shell.
 - Select a visualization in the log, and then select **Edit**.
 5. On the **Edit** page, select a Pivot Grid or Table in the visualization layout.

6. From the **More Actions** (*******) menu, select **Conditional Formatting**.
 7. In the **Conditional Formatting** drawer, select **Add** to create a new rule by specifying a maximum of 5 conditions:
 - a. (Required) In the **Rule Name** field, enter a unique rule name, a maximum length of 60 characters.
 - b. (Required) From the **Column** list, select a data element on which the rule will be applied.

For Tables, select a data field for a column.

For Pivot Grids, select a data field for a column, row, or value.
 - c. In the **Condition Builder** block, to define at least one condition:
 - i. Select **Any** (to apply any one condition) or **All** (to apply all conditions), and then select **Add** (+).
 - ii. (Required) From the **Data Element** list, select a data element to create a condition.
 - iii. (Required) From the **Condition** list, select a condition to apply on the selected data element such as **Contains**, **Does not contain**, **Is empty**, or **Is not empty**.
 - iv. (Required) From the **Value** list, enter a value that needs to be satisfied by the condition.
 - v. To add another condition, repeat the previous steps.
 - vi. To discard a specific condition or a group of conditions, select **Delete** ().
 - vii. Select any or all formatting options such as bold, italic, underline, strikethrough, text color, or background color.
 - viii. Preview and adjust the formatting as required, and then perform any of the following actions:
 - To add more rules, select **Create and Close** or **Create and Next**. Rules created for the same data element selected in the **Column** list are grouped together.
 - To discard the condition, select **Cancel**.
- When multiple rules are specified, the Conditional Formatting drawer groups the rules by Column or Row.
8. After creating rules, perform any of the following actions from the **Actions** (*******) menu:
 - To edit a rule, select **Edit**.
 - To discard the rule, select **Remove**.
 - To reorder the rules, select **Drag**().

Remove Content Items From Visualizations in Projects/Shells

You can remove content items from the visualization layout as needed if you have Modify and/or Manage Content permission to perform this task.

To remove content items from visualizations in a project/shell (User mode):

1. Sign in to Unifier with project/shell user credentials.

2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
3. In the left Navigator, select **Visualizations**.
or
Access the **Visualizations** log from a business process log as follows:
 - a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
 - b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. In the **Visualizations** log (right pane), select a visualization, and select **Edit**.
5. In the **Edit** page, select a content item in the visualization layout, and select **Remove (X)**.

Rearrange the Visualization Layout

You can edit visualizations by adding content items from the library onto the visualization layout and rearranging content items on the visualization layout as needed if you have Modify or Manage Content permissions to perform this task.

To rearrange visualizations in a project/shell (User mode):

1. Sign in to Unifier with project/shell user credentials.
2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
3. In the left Navigator, select **Visualizations**.
or
Access the **Visualizations** log from a business process log as follows:
 - a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
 - b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. In the **Visualizations** log (right pane), select a visualization, and select **Edit**.
5. In the **Edit** page, perform any of the following actions:
 - Select and drag a content from the **Content** tab of the **Library** to add content items in the visualization layout.
 - Select and drag a content item on the visualization layout to rearrange content items.
 - Select **Refresh** (🔄) to update the list of content items in the **Content** tab.
 - Select an alternative layout from the **Layout** tab of the **Library**.
6. Make changes as needed to refine the above selections.
7. After populating the visualization, select **Save**, and return to the Visualizations log.

Print Visualization PDFs

You can print and share visualizations or individual charts or components as PDFs for reporting or for performing an offline analysis.



If data caching is enabled, the timestamp is included below the visualization title in the downloaded PDF in the format, *Data as of <date and time>*.

To print a PDF of a visualization:

1. Sign in to Unifier with project/shell user credentials.
2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
3. In the left Navigator, select **Visualizations**.

or

Access the **Visualizations** log from a business process log as follows:

- a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
 - b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. In the **Visualizations** log (right pane), select and open a specific visualization.
 5. Print using any of the following methods:
 - For visualizations in multiple tabs, select a specific tab to print the visualizations contained in that tab.
 - To print the entire visualization, select **Print** in the title bar.
 - To print a specific component or chart within the visualization:
 - a. Hover over the chart or component in the visualization, and select **Maximize** ().
 - b. From the **Overflow** menu () of the chart, select **Print**.
 - c. Specify the following printing preferences:
 - a. In the **Orientation** field, select the print layout as either **Portrait** or **Landscape**.
 - b. From the **Page Size** list, select any of the following print dimensions: **A4**, **Letter (8.5 x 11)**, **Legal (11 x 17)**, or **Unlimited** (to print very large grids).
 - c. Select **Print**.

The individual visualization component is printed in its entirety although the component may not be completely visible in the maximized UI layout.

Known Issue: When you use Firefox and Safari browsers, expect a delay in printing the visualization.

Use Filters to Search For Visualizations

To locate visualizations that meet a specific criteria, you can specify the following types of filters:

- Components such as charts, KPIs, grids, tables, and so on.
- Contexts such as status or time periods.
- Data elements, field labels, multi-select fields, and date ranges used in a visualization.
- Data types such as Integer, Double, and so on.

Visualizations with multiple tabs can be set up with independent filters for each tab.

Note

For filters, enter date values in dd/mm/yyyy format.

To locate visualizations using filters:

1. Sign in to Unifier with project/shell user credentials.
2. Select the specific project/shell tab, and switch to **User** mode. For example, select a tab called Vision Corporation.
3. In the left Navigator, select **Visualizations**.

or

Access the **Visualizations** log from a business process log as follows:

- a. In the left Navigator, select **Logs**, and then select a specific business process, such as Contracts.
 - b. In the selected business process log (right pane), just below the **User** mode indicator, select a specific visualization from the **Visualization** list.
4. In the Search bar, enter your initial search criteria.

Note

The system displays five of the most recent search entries relevant to the current visualization content.

5. To refine your search, specify:
 - A field and a value. For example, specify **Discipline** with a value, **Mechanical**.
 - A date field used in the visualization content.
For example:
 - a. To initially view a list of date fields available in the data source, enter **Date** in the search bar.
 - b. Select a specific date field from the displayed list, such as **Last Modified By**.
 - c. Enter or select a date range using the Calendar picker in the **Start** and **End** fields.
 - For currency and decimal fields, specify a maximum value, a minimum value, or a range of values.
6. From the search results, select a visualization. You can perform any of the following actions:
 - Continue to search and filter within the selected visualization.
 - Cancel the search by selecting **More Actions** (**), and then selecting **Cancel** (X).