

TECH TIP



APRIL 2019 PRIMAVERA UNIFIER CREATING A NEW CALCULATE COLUMN IN THE COST SHEET

As a Unifier administrator or developer, you may have the following questions in BP design:

- How do I add a new column to my Project Cost Sheet?
- How do I create a custom column calculation in my Project Cost Sheet?

In today's topic, we are going to explore these two items on how to use these design features in Unifier development.

First navigate to your Project (shell) in Unifier > navigate to User Mode > your cost Sheet Node > Double-Click on > Cost Sheet

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4	Lonesdale Place - Home	CIP Projects (Ent > Public	Works (PW) > Stor	mwater (STW) >	Major Neighborho.	> Lonesd	ale Place	
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Expand your Cost Sheet to Full Screen > click on Edit > Columns > New

File	Edit View							
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1		🗊 New 🗳 Open 📑 Restrictio	ns				\$0.00	\$0.00
3	E 01.00000.00000	Cost Sheet Columns					\$0.00	\$0.00
5	E 02.00000.00000	Name	Data Source	Data Format	Order	Display Mode	\$0.00	\$0.00
7	<u>■ a.00000.00000</u>	Estimates (Open)	Estimates (Open)	Currency	1		\$0.00	\$0.00
9		Initial Budget	Initial Budget (Approved)	Currency	2		\$0.00	\$0.00
11	€ 05.00000.00000	Pending Budget Revisions	Project Cost 1	Currency	3		\$0.00	\$0.00
13	€ 06.00000.00000	- Approved Budget Revisions	Project Cost 2 Revised Budget	Currency	4		\$0.00	\$0.00
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22	01 01500 O 1 1	 Pending Spends 	Project Cost 6	Currency	10		\$0.00	\$0.00
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27	02 02100 0.1.1						50.00	\$0.00
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29	02 02300 S.1.1						\$0.00	\$0.00

In the Pop-up Window: Give the Name of your new column: i.e. "*Custom Calculation*" Select your Datasource: Such as "Project Cost 20" Next to Formula Click > **Create**

Name:	Custom Calculation					
Datasource:	Project Cost 20					
Element:	-Select One-					
Entry Method:	O Manual Entry					
	Direct entry into cell					
	Line item content					
	◯ Sheet					
	Type: Worksheet					
	Name: -Select One-					
	Eormula Create					
Data Format:	Ourrency Percentage Decimal					
Display Mode:	: Show Hide					
Total:	tal: O Blank Sum of All Rows Use Formula Definition					
Column Position After:	-Select One-					
	Delete OK Cancel					



Add the Other Columns or data sources you wish to include in your calculation > click OK

Cost Column:	Formula:			
Columns	Initial Budget	+ Revised Budget	- (Original Com	mitments)
Estimates (Open)				
Initial Budget				
Pending Budget Revisions				
Approved Budget Revisions				
Revised Budget				
Original Commitments				
Pending Commitment Changes				
Approved Commitment Changes				
Current Commitments	Undo	Clear	()
Pending Spends		- Crican		/
Spends	7	8	9	1
Risks & Issues	· · ·			/
Forecast Adjustments	4	5	6	х
Forecast				
Budget Variance	1	2	3	-
Remaining Budget				
Budget Percent	0		%	+
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Tip in a Formula column: The column values are calculated based on a formula that normally includes values from other columns. For example, if there are multiple cost type business processes affecting the sheet, you may want to have a column that shows the sum of all of them such as ("Total Commitments"). Custom data sources can be applied to these columns to enable them to roll up to program or company cost sheets and be reportable.

Choose your Column Position After where you want to put your new Column > Click OK

Name:	Custom Calculation	*				
Datasource:	Project Cost 20					
Element:	Select One-					
Entry Method:	Manual Entry					
	Direct entry into cell					
	Line item content					
	Sheet					
	Type: Worksheet					
	Name: -Select One-					
	Column: -Select One-					
	Formula Modify					
Data Format:	Currency Percentage Decimal					
Display Mode:	Show Hide					
Total: O Blank Sum of All Rows Use Formula Definition						
Column Position After: Revised Budget *						
Column Position After:	Revised Budget	1				



Click > Close to view your newly created column in the cost sheet

Name	Data Source	Data Format	Order	Display Mor			
Estimates (Open)	Estimates (Open)	Currency	1	Display mot			
Initial Budget	Initial Budget (Approved)	Currency	2				
Ponding Budget Povisions	Broject Cost 1	Currency	2				
Approved Budget Revisions	Project Cost 7	Currency	4				
Revised Budget	Revised Budget	Currency	5				
Custom Calculation	Project Cost 20	Currency	6				
Original Commitments	Project Cost 3	Currency	7				
Pending Commitment Changes	Project Cost 4	Currency	8				
Approved Commitment Changes	Project Cost 5	Currency	9				
Current Commitments	Commits	Currency	10				
Pending Spends	Project Cost 6	Currency	11				
Spends	Spends	Currency	12				
Risks & Issues	Risks & Issues (Open)	Currency	13				
	D 1 1 0 1 7	-					
Move Up (Left) Move Down (Right)							

See your newly added column in the Cost Sheet and > click on the column heading to view the calculation source formula.

Approved Budget Revisions	Revised Budget	Custom Calculation	Original Commitments	Pending Commitment Changes				
\$0.0	0 \$0	.00 \$0.00	\$0.00	\$0.00				
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\$()	\$ View Column							
\$0	Name: Custom Calculation							
\$								
\$(Si Project Cost 20							
\$	Data Format: Curr	ency		\$0.00				
<u>\$1</u>	Formula: Set Formula:							
<u>.</u>								
<u>\$</u>	S Total: Sum of All Rows							
\$	\$0.00							
\$6-0	<u></u>	<u></u>	<u>90.00</u>	<u>\$0.00</u>				
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\$0.0	\$0.00							

