TECH TIP

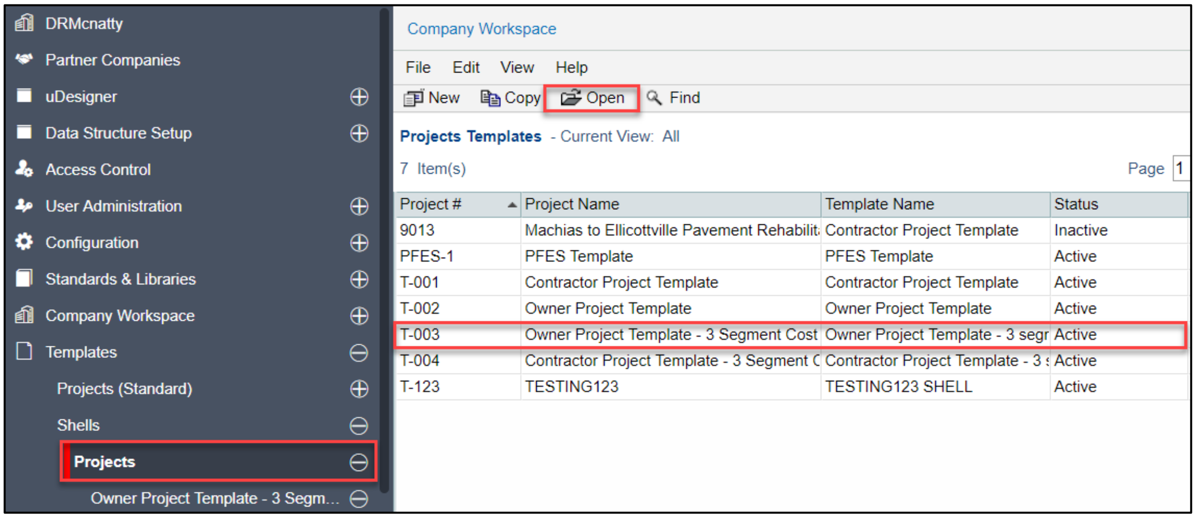
JUNE 2019
ORACLE UNIFIER
ADDING A NEW BP FOR USE IN A SHELL

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

- How do I add a new BP to a Project Template?
- How do I add a new BP to a Project (shell)?
- How do I Activate and make sure I can see and use the BP inside my Project (Shell)?

In today's topic, we are going to explore these items and give you recommendations on how & when to use these design features in Unifier development.

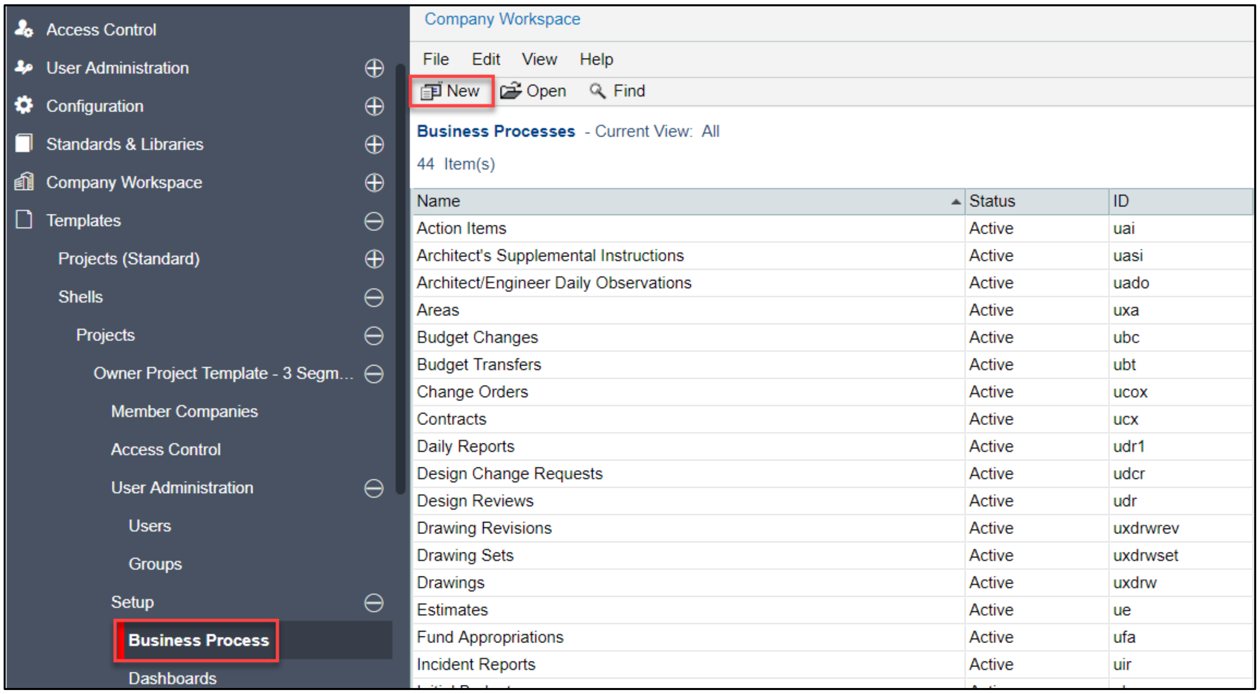
Add a BP to a Project Template
To find the Shell Template, navigate to **Company Workspace** > **Admin** mode > **Templates** > **Shell**s > **Projects**



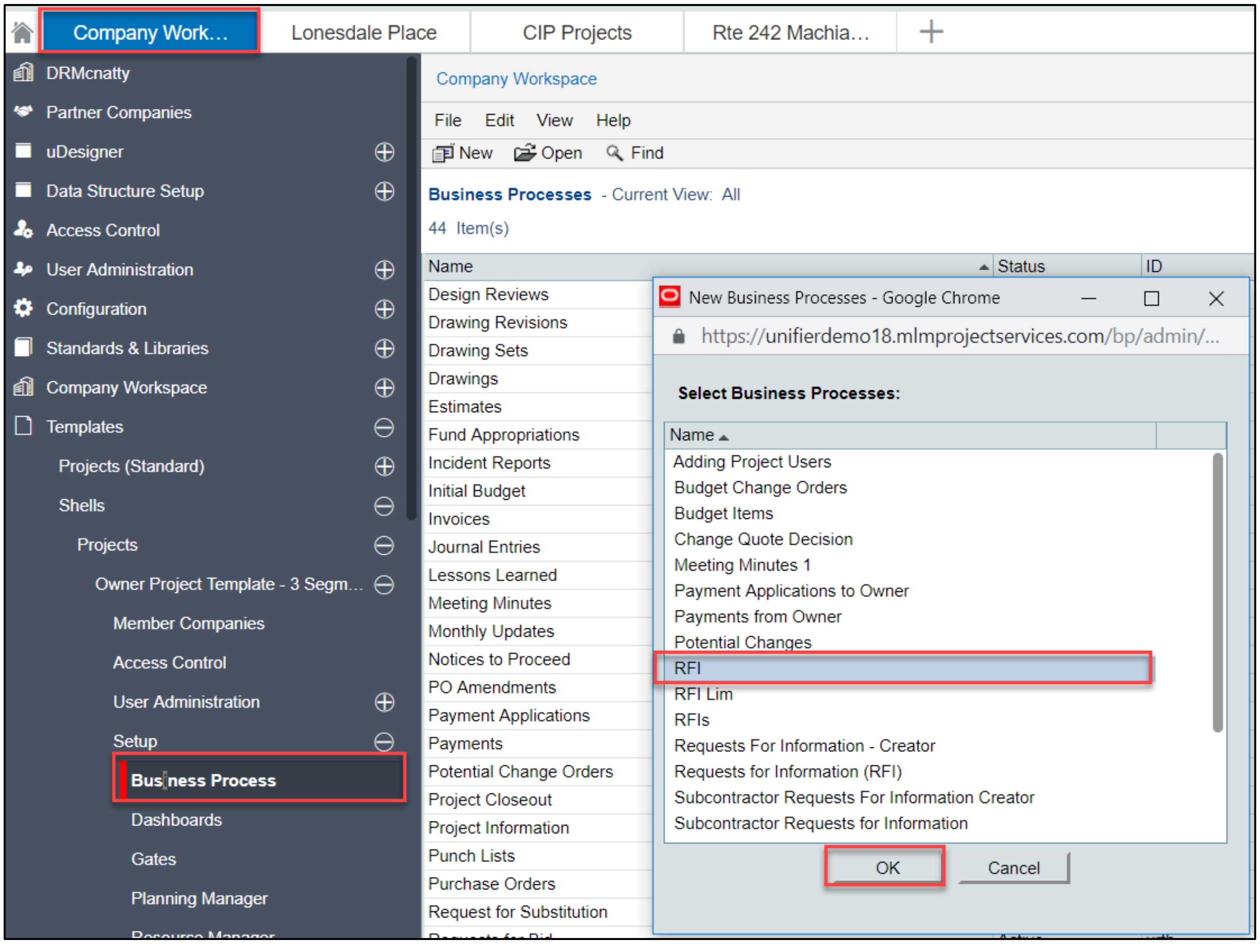
ADDING A NEW BP FOR USE IN A SHELL

Open the shell template you want to add the New BP to. Within the shell type template, navigate to **Setup** > **Business Processes**

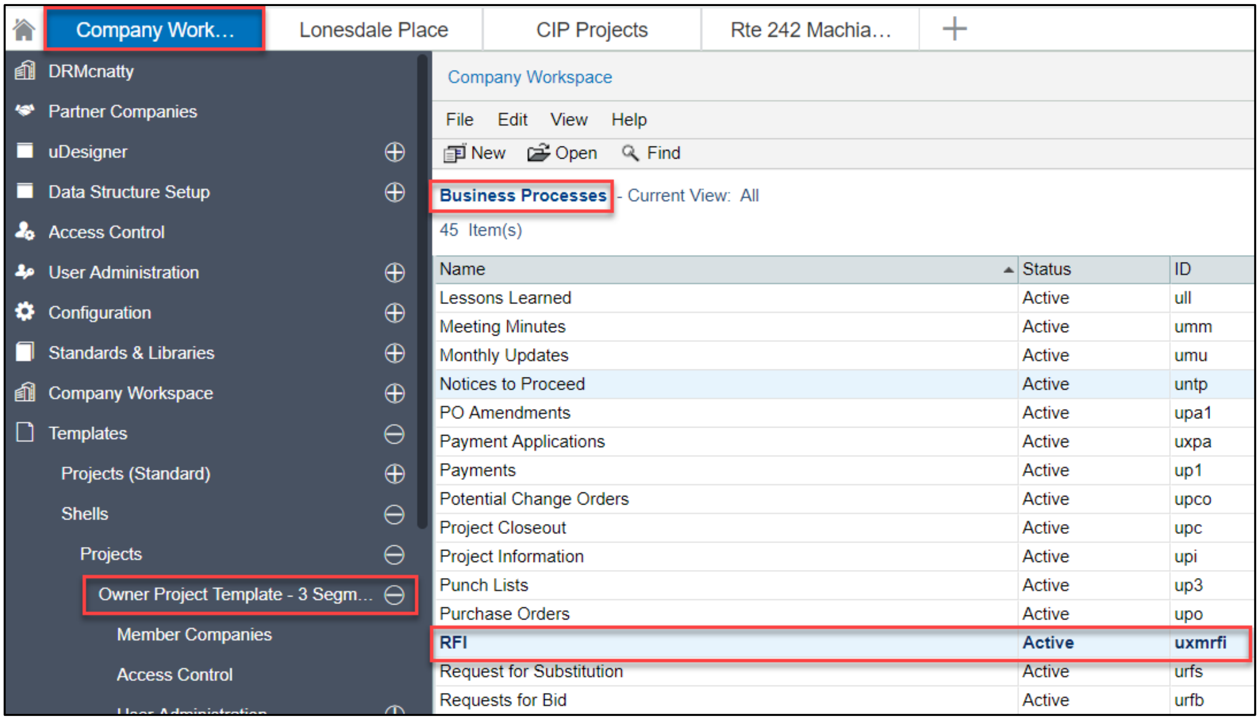
- For a new business process, you must click “New” to add the business process to the template.
    - This presumes the process has already been deployed and configured at the company level.



Select the New BP you want to add to your Template > Click **OK**

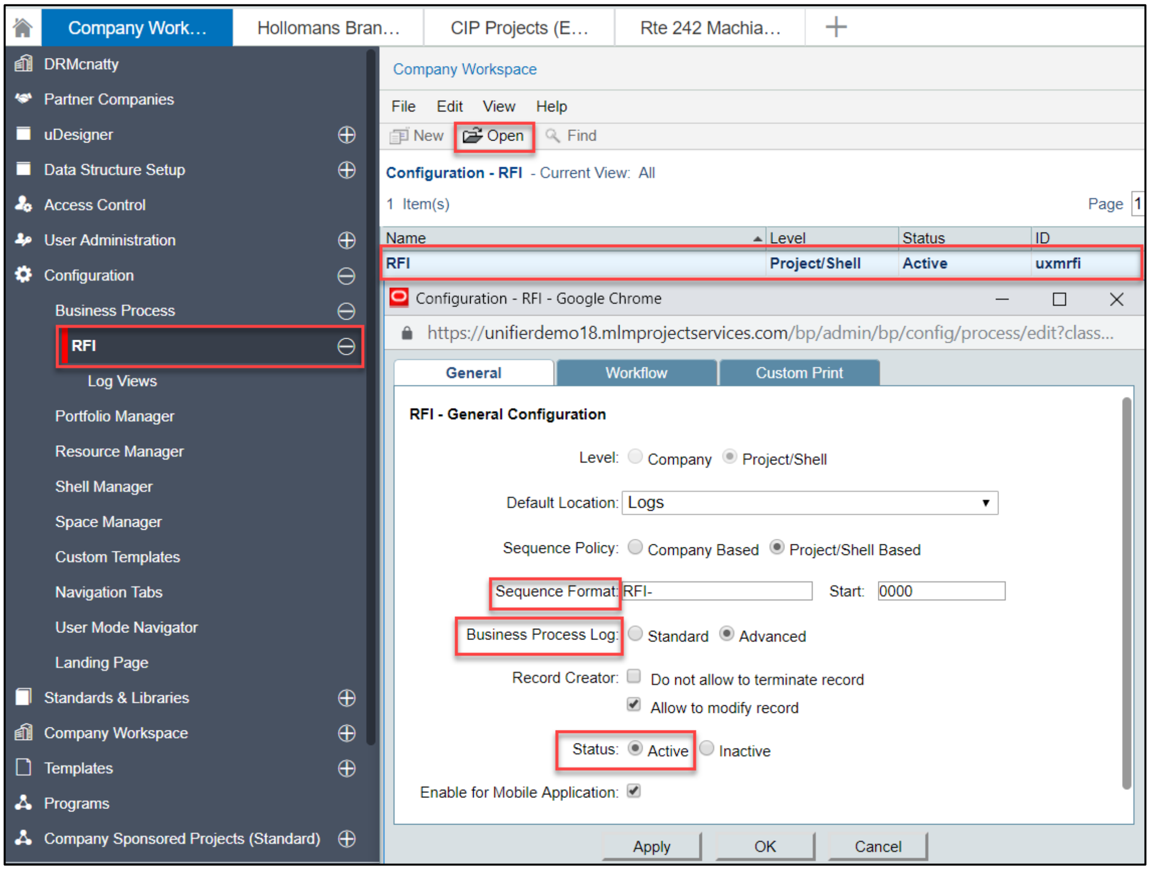


Find your new BP in the Business Processes List > Make Sure it says Status: **Active**

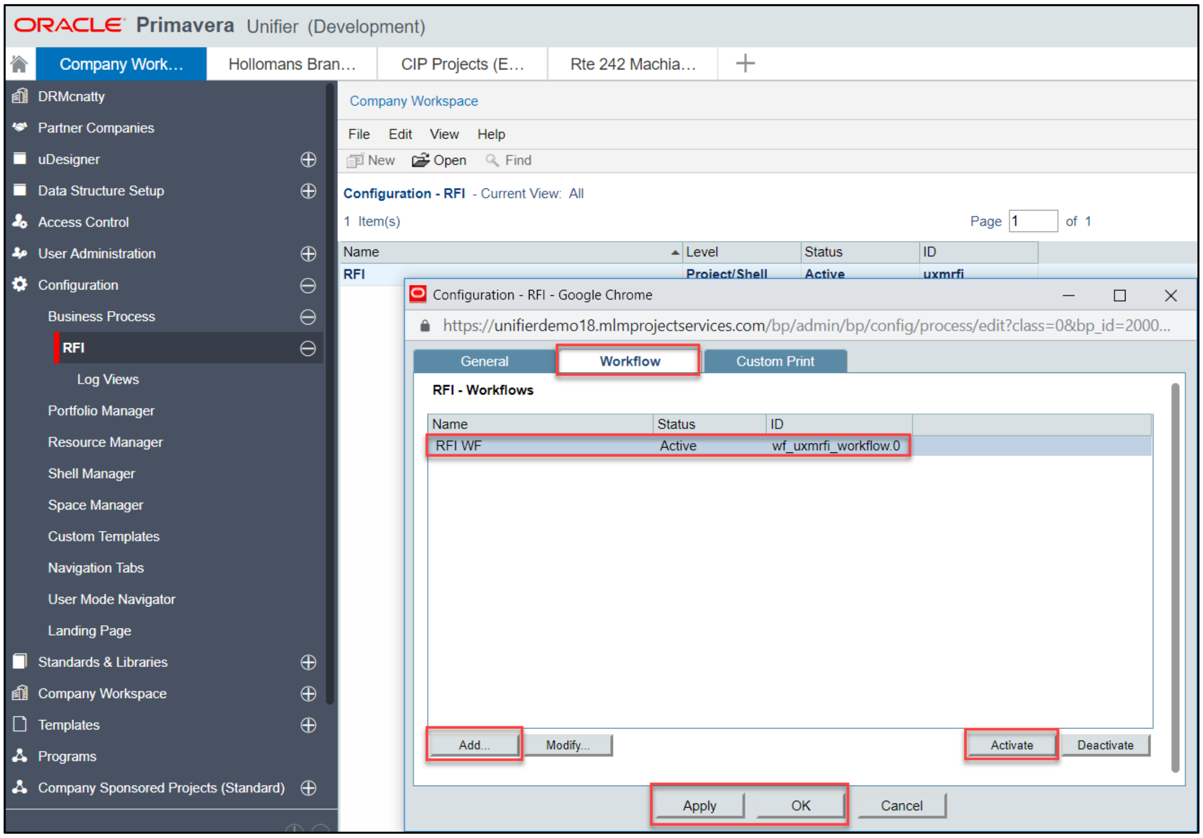


Note* If it does not say Status: Active but instead says **Inactive**: Navigate to Company Workspace: **Admin** mode > **Configuration > Business Process >** Select your New Business Process **>** Click **Open**

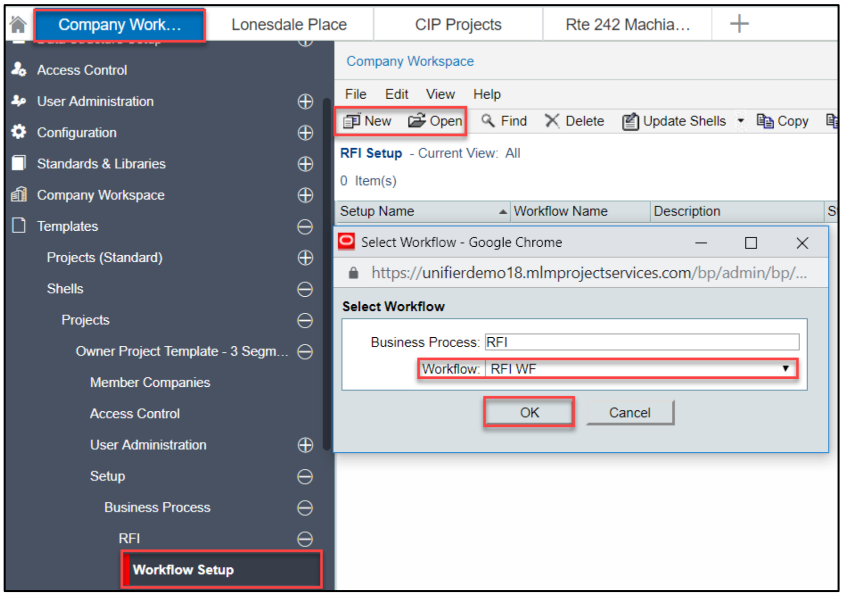
Set the Status to: Active
Set your Sequence Format: (*Format that the BP's will be continually numbered in as they are created)*
Business Process Log: Advanced
Enable for Mobile Application: checked (*for iPhone & Tablet use*)



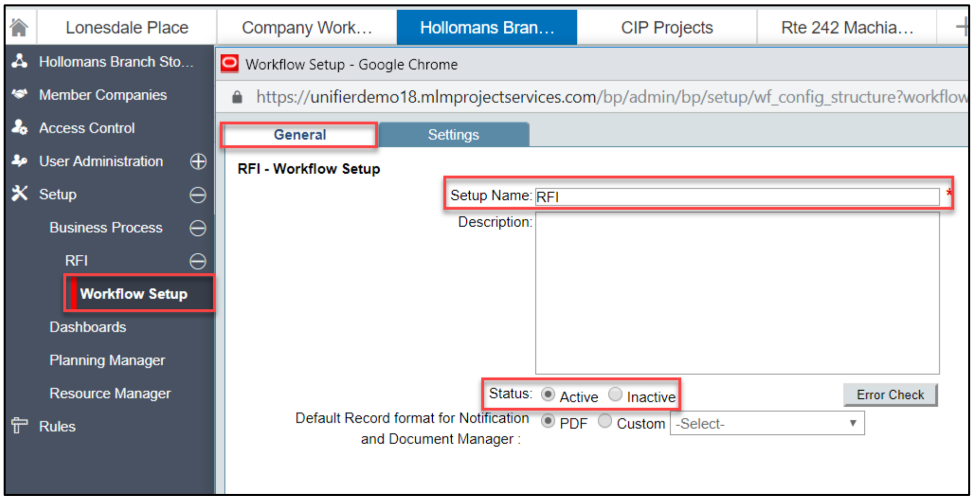
Under the Workflow Tab > Click **Add** and select the WF for the BP you want to add > Click on **Activate** > and click on **Apply** > **OK** Note* (*Now your BP and WF is active in the system and configured at the company level*)



Navigate back to your **Company Workspace** in Unifier > navigate to **Admin** mode > **Templates** > **Shells** > **Projects** > Open your **Template Type** > **Setup** > **Business Process** > Find your new Active BP in the Business Processes List > Click **Open** > **Workflow Setup** > **New**

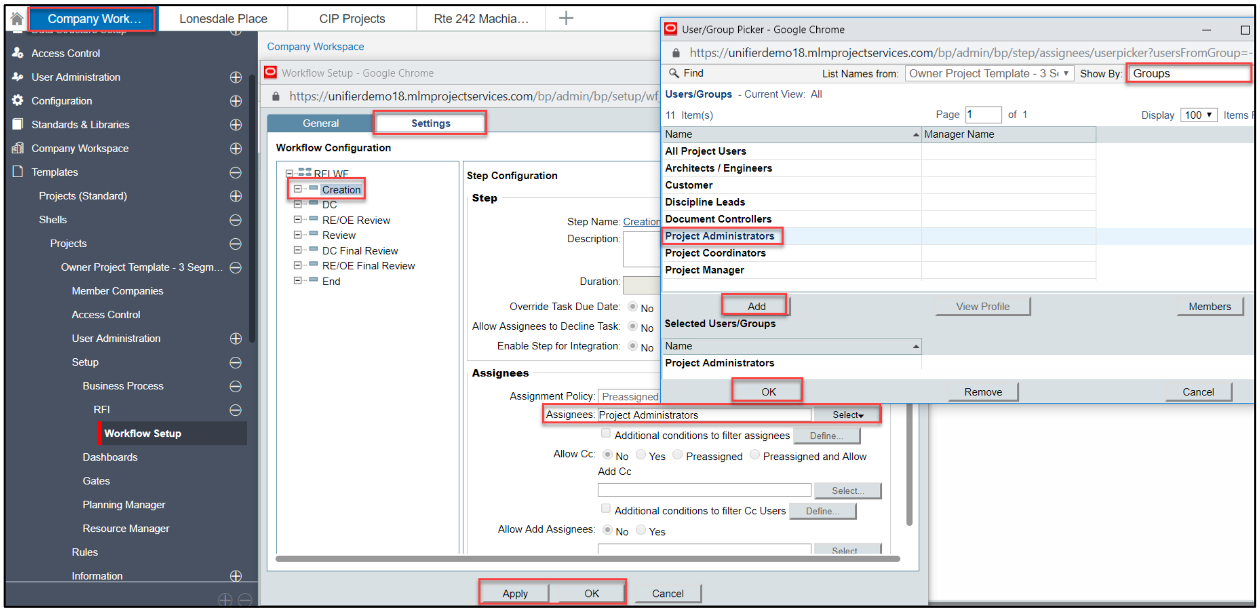


Select the Workflow You Just Activated from the Dropdown Menu > Click **OK**
Under **General Tab**: Give the Setup Name (usually the Name of the BP) > you can give a **Description** (*usually relates to the business context*)
Status: **Active**

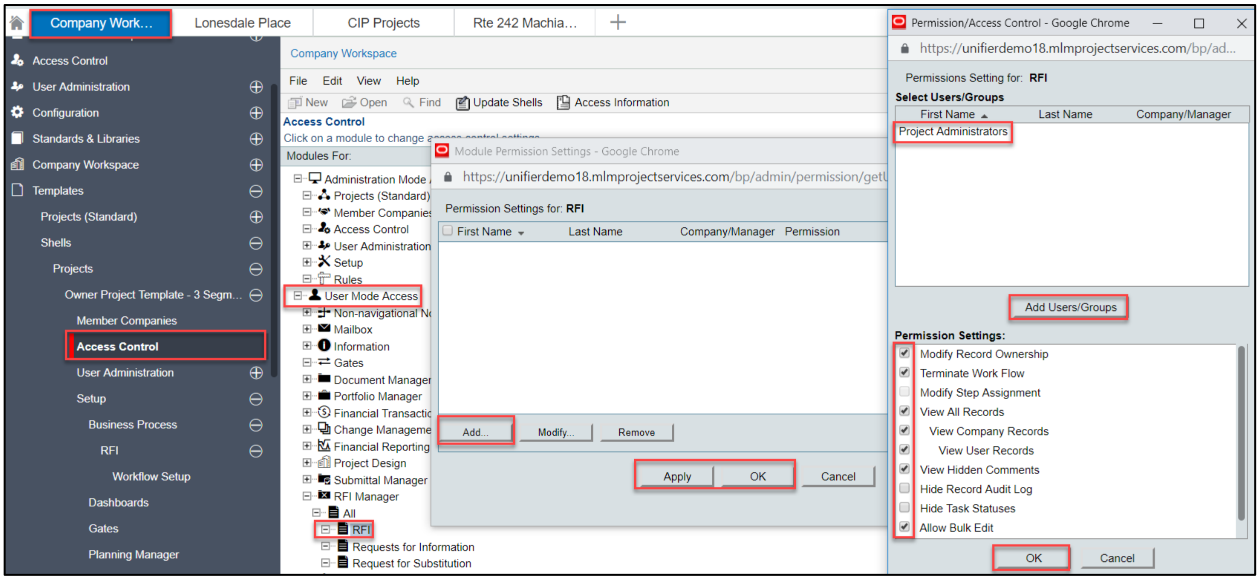


Settings Tab:

On the **Settings** Tab > Next Walk Through Each Step of the workflow and assign assignees (*users or groups; *recommended use groups*) at each step in the WF > then Click **Apply** > **OK**



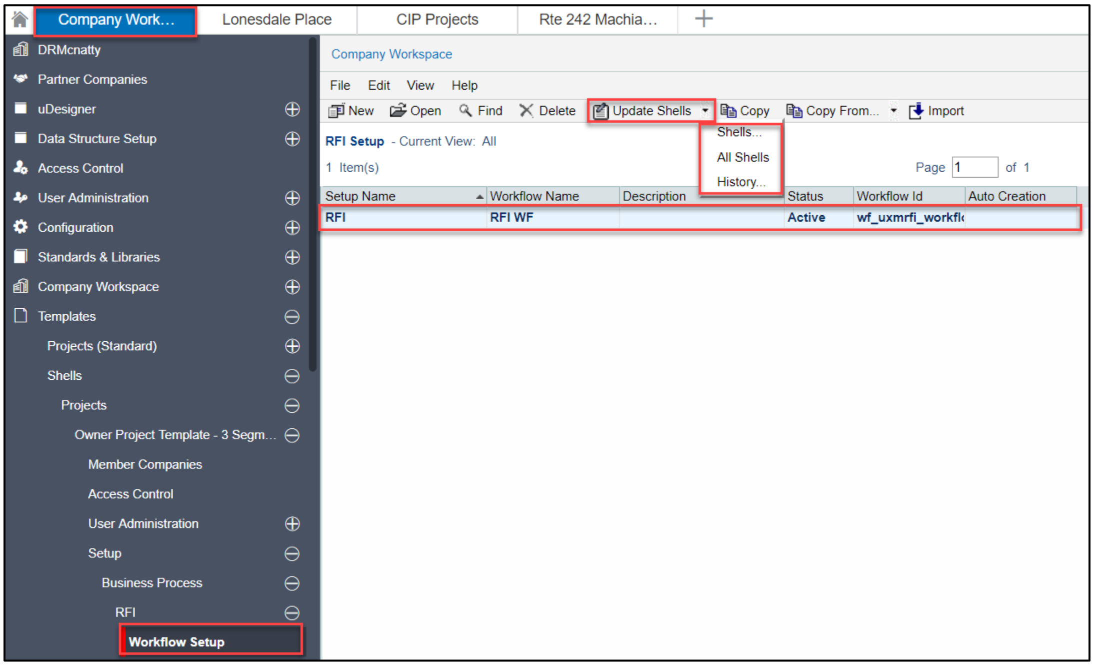
Next in your **Company Workspace** in Unifier > navigate to **Admin** mode > **Templates** > **Shells** > **Projects** > Open your **Template Type >** Access Control **> Under User Mode Access** > Navigate to your Business Process Node(name) **> Click on the BP and give the applicable Groups** the Permissions to see/ create the new Business Process > Click **OK** > **Apply > OK**



Updating your Projects (Shells) with Changes

Next, you will need to push these changes you've made to your projects.

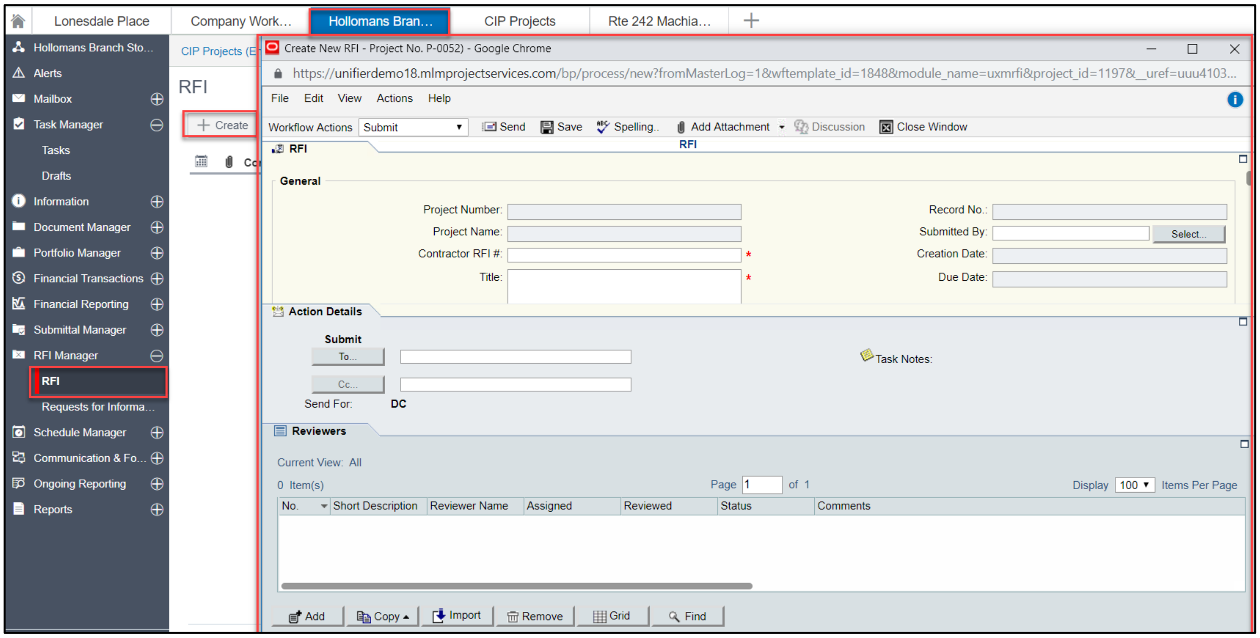
Under **Workflow Setup** > Click on **Update Shells** and choose one of the following:



Click **Shells, Or All Shells** option to select one or more shells to update.

- Selecting the "All Shells" would update all projects, and this would ONLY be used if all projects have the exact same setups.
- Select only the shells (projects) you want to update. Use the "Find" to filter the list or use Ctrl-click to select multiple.
- If you have multiple templates for your projects, this is important to select ONLY the shells that should be updated. It's **Very** important that you update only the type that you're modifying.

Now in your Project(shell) that you pushed the updates to > in Unifier Navigate to **User Mode** > Navigate to your Business Process Node(name) > Click on **Create** > and Verify you can Create your Newly Added BP for use in your Project (Shell)



Update a BP Setup in a Project

As outlined in the above section, the best practice method for managing BP changes and setups is to use the Shell Templates and then update individual project shells from the template.

If you are using Groups throughout your design, then the only additional setup at the project level would be to manage and make sure that the appropriate users are in the correct groups at the project level.

However, if there are BP variations needed from project to project, opening the project, and selecting Admin > Setup > Business Processes will display all the BP's setup in that project.

Selecting a BP design here allows you to open and further configure the workflow setup if needed.

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Examples:

- If the step duration requirement is different than what is defined in the template, it can be changed here. This change ONLY affects the project (shell) you are updating.
- If you are not using groups but assigning users in the workflow or BP setup, you may need to edit these based on personnel assigned to that project. Not recommended, but this is an option if that is how you've configured your setups.
- Also, if any of the General properties in a workflow bp change, these changes must be made in each project (shell) if the change is made after creating the shell.

Notes and Cautions

- If you are adding a BP to a template, when you update the shells this BP will be added to those projects with the setup you have configured in your template.
- Best practice in these setups would be to use Groups in your setups wherever possible and not individual users. If the groups in your BP setup are not already in the project(s), they'll be created, and you then will need to be sure that the appropriate users are assigned to those groups. If the group already exists and you're sharing it with other BP designs, then the group permissions will be updated for that group.
- When selecting what shells to update, it's important to update only the correct shells. If you update the wrong shell type (if you have multiple shell templates) you'll improperly update that shell with BP's that shouldn't be there.

Summary

Using Unifier's Shell Templates are the most efficient way to manage BP designs being updated in projects as long as you understand some of the aspects of their use and impacts, they have on your projects.