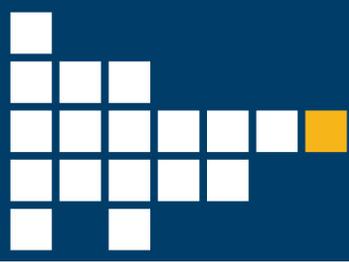




# TECH TIP



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

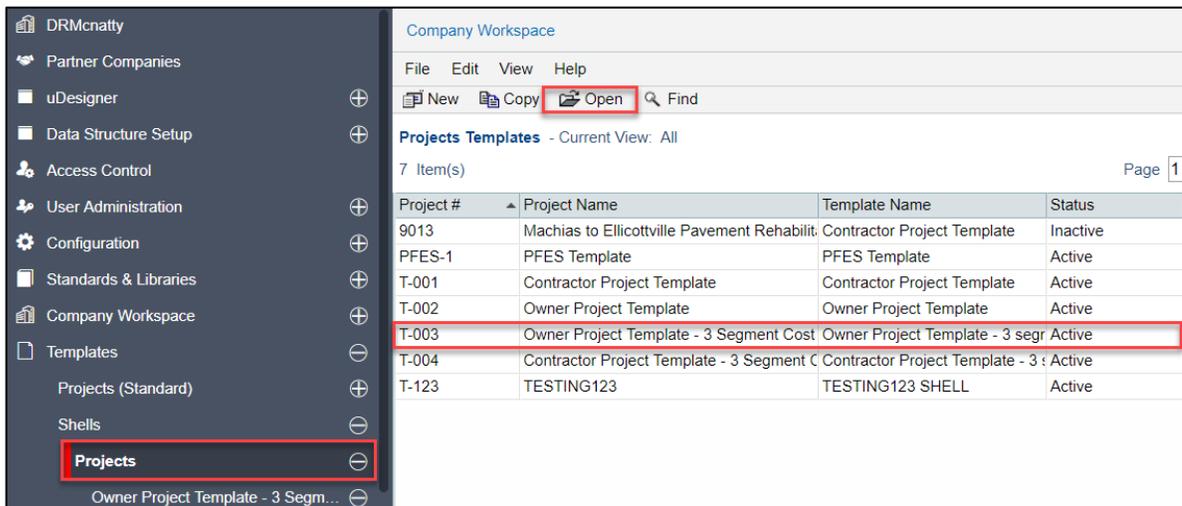
As a Unifier administrator or developer, you may have the following questions in BP design:

- 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 > Shells > Projects**



Company Workspace

File Edit View Help

New Copy **Open** Find

**Projects Templates** - Current View: All

7 Item(s) Page 1

Project #	Project Name	Template Name	Status
9013	Machias to Ellicottville Pavement Rehabil.	Contractor Project Template	Inactive
PFES-1	PFES Template	PFES Template	Active
T-001	Contractor Project Template	Contractor Project Template	Active
T-002	Owner Project Template	Owner Project Template	Active
<b>T-003</b>	<b>Owner Project Template - 3 Segment Cost</b>	<b>Owner Project Template - 3 segr</b>	<b>Active</b>
T-004	Contractor Project Template - 3 Segment C	Contractor Project Template - 3 :	Active
T-123	TESTING123	TESTING123 SHELL	Active

# 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.

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains a tree view of navigation options: Access Control, User Administration, Configuration, Standards & Libraries, Company Workspace, Templates, Projects (Standard), Shells, Projects, Owner Project Template - 3 Segm..., Member Companies, Access Control, User Administration, Users, Groups, Setup, **Business Process**, and Dashboards. The 'Business Process' option is highlighted with a red box. The main content area is titled 'Company Workspace' and has a menu bar with 'File', 'Edit', 'View', and 'Help'. Below the menu bar, there are buttons for 'New', 'Open', and 'Find'. The 'New' button is highlighted with a red box. Below the buttons, there is a section titled 'Business Processes - Current View: All' with a sub-header '44 Item(s)'. This section contains a table with columns for 'Name', 'Status', and 'ID'. The table lists various business processes, all with a status of 'Active'.

Name	Status	ID
Action Items	Active	uai
Architect's Supplemental Instructions	Active	uasi
Architect/Engineer Daily Observations	Active	uado
Areas	Active	uxa
Budget Changes	Active	ubc
Budget Transfers	Active	ubt
Change Orders	Active	ucox
Contracts	Active	ucx
Daily Reports	Active	udr1
Design Change Requests	Active	udcr
Design Reviews	Active	udr
Drawing Revisions	Active	uxdrwrev
Drawing Sets	Active	uxdrwset
Drawings	Active	uxdrw
Estimates	Active	ue
Fund Appropriations	Active	ufa
Incident Reports	Active	uir

# ADDING A NEW BP FOR USE IN A SHELL

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

The screenshot shows a software interface with a sidebar on the left and a main content area. The sidebar contains a list of menu items, with 'Business Process' highlighted in a red box. The main content area displays a list of business processes, including 'Design Reviews', 'Drawing Revisions', 'Drawing Sets', 'Drawings', 'Estimates', 'Fund Appropriations', 'Incident Reports', 'Initial Budget', 'Invoices', 'Journal Entries', 'Lessons Learned', 'Meeting Minutes', 'Monthly Updates', 'Notices to Proceed', 'PO Amendments', 'Payment Applications', 'Payments', 'Potential Change Orders', 'Project Closeout', 'Project Information', 'Punch Lists', 'Purchase Orders', and 'Request for Substitution'. A dialog box titled 'Select Business Processes:' is open, showing a list of business processes, with 'RFI' highlighted in a red box. The 'OK' button is also highlighted in a red box.

# ADDING A NEW BP FOR USE IN A SHELL

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

Name	Status	ID
Lessons Learned	Active	ull
Meeting Minutes	Active	umm
Monthly Updates	Active	umu
Notices to Proceed	Active	untp
PO Amendments	Active	upa1
Payment Applications	Active	uxpa
Payments	Active	up1
Potential Change Orders	Active	upco
Project Closeout	Active	upc
Project Information	Active	upi
Punch Lists	Active	up3
Purchase Orders	Active	upo
<b>RFI</b>	<b>Active</b>	<b>uxmrfi</b>
Request for Substitution	Active	urfs
Requests for Bid	Active	urfb

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**

# ADDING A NEW BP FOR USE IN A SHELL

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)*

The screenshot displays the 'RFI - General Configuration' modal window. The configuration settings are as follows:

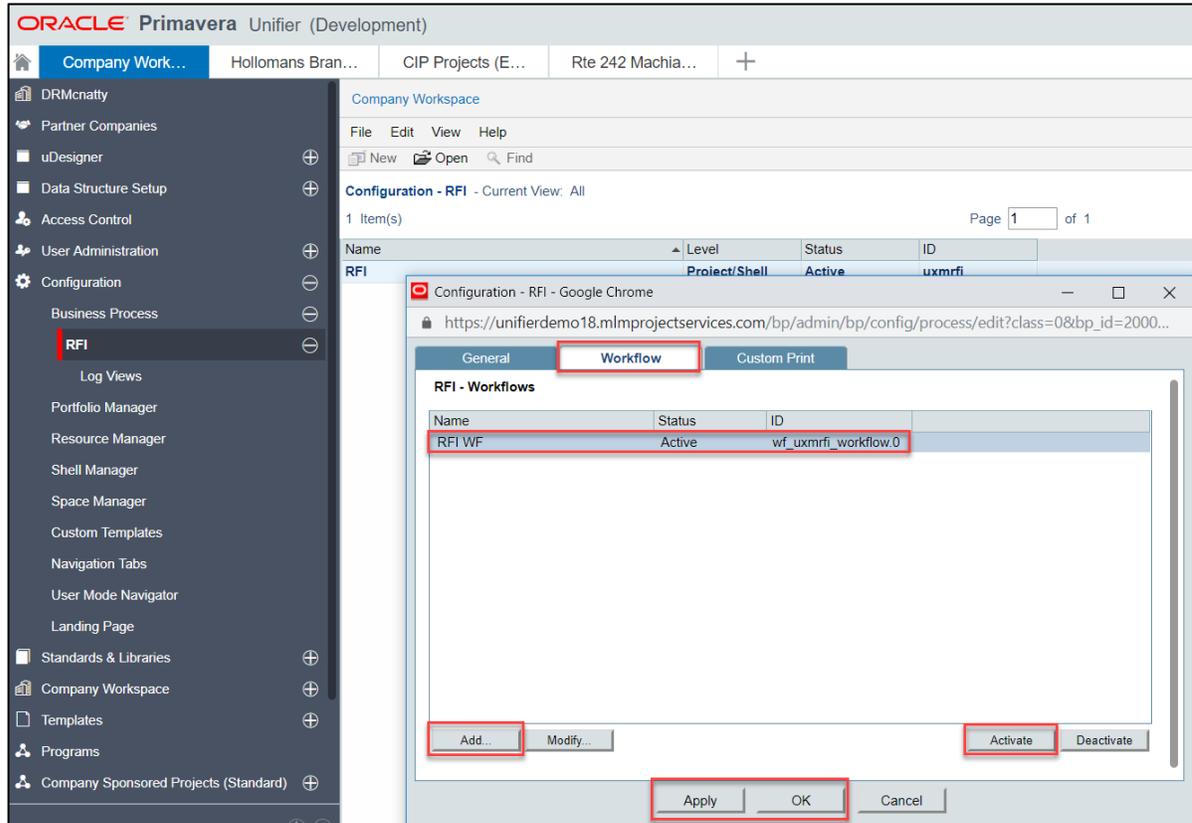
- Level:  Project/Shell
- Default Location:
- Sequence Policy:  Project/Shell Based
- Sequence Format:  Start:
- Business Process Log:  Advanced
- Record Creator:  Do not allow to terminate record,  Allow to modify record
- Status:  Active,  Inactive
- Enable for Mobile Application:

The table below shows the configuration for the 'RFI' item:

Name	Level	Status	ID
RFI	Project/Shell	Active	uxmrfi

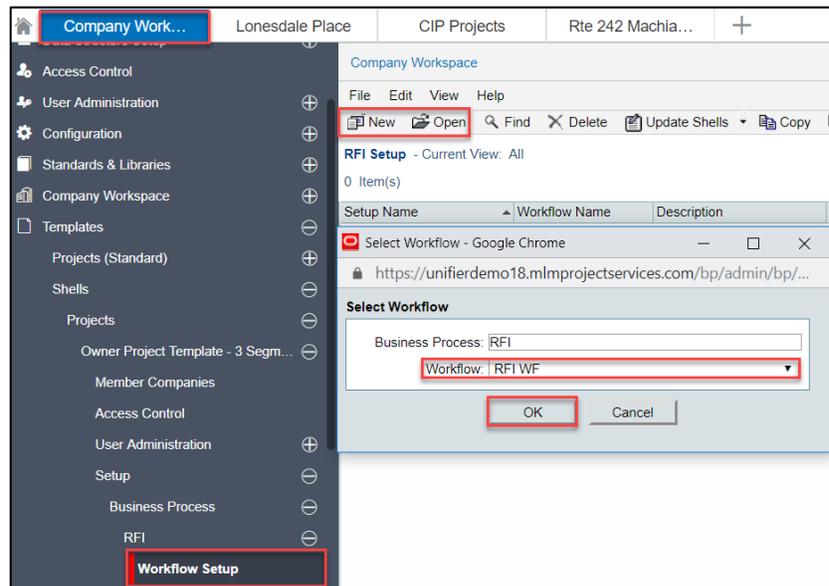
# ADDING A NEW BP FOR USE IN A SHELL

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)

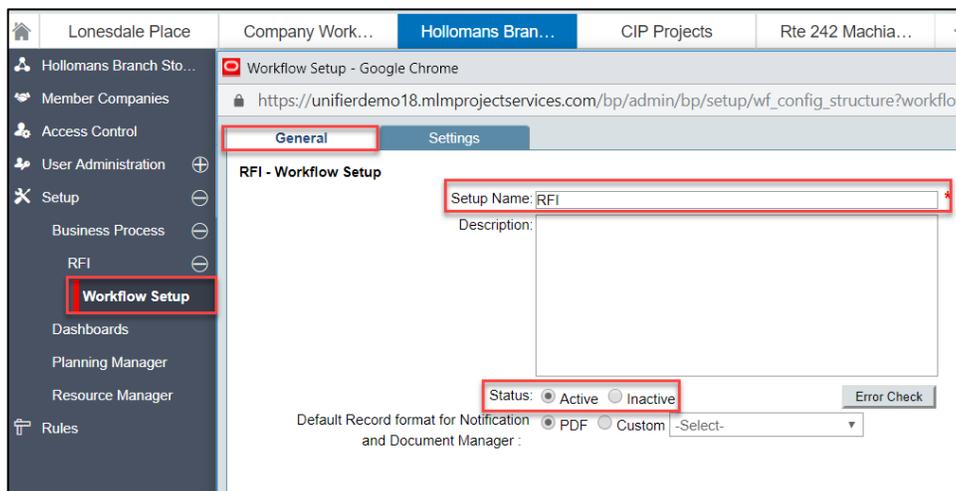


# ADDING A NEW BP FOR USE IN A SHELL

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**



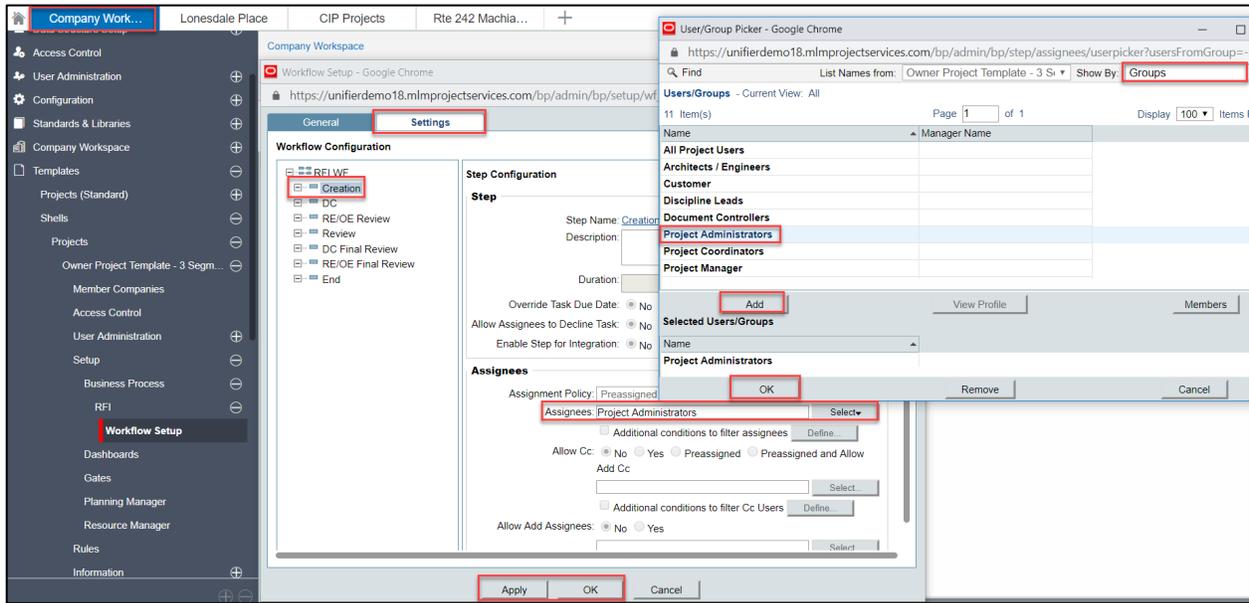
Select the Workflow You Just Activated from the Dropdown Menu > Click **OK**  
Under **General Tab**: Give the Setup Name (usually the Name of the BP) > you can give a **Description** (usually relates to the business context)  
Status: **Active**



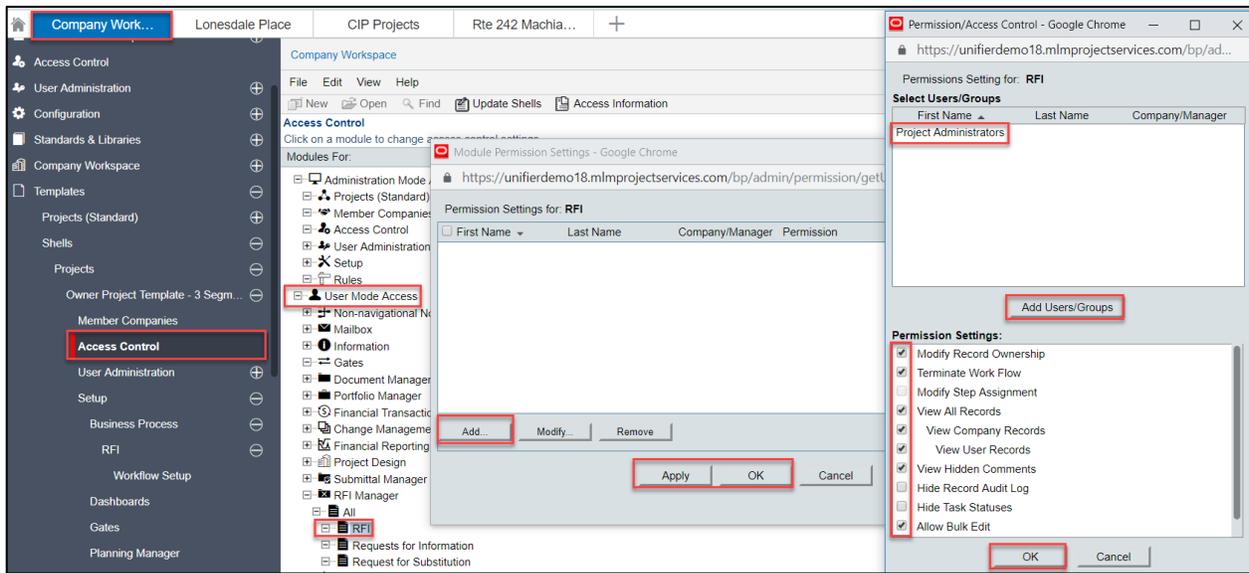
# ADDING A NEW BP FOR USE IN A SHELL

## 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**

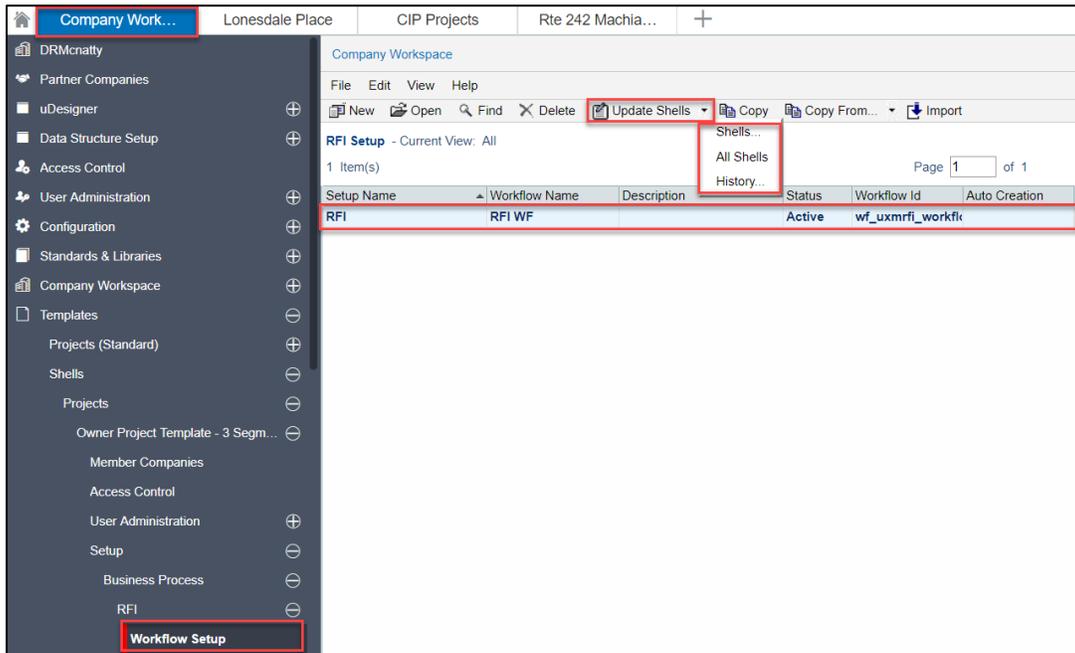


# ADDING A NEW BP FOR USE IN A SHELL

## 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:

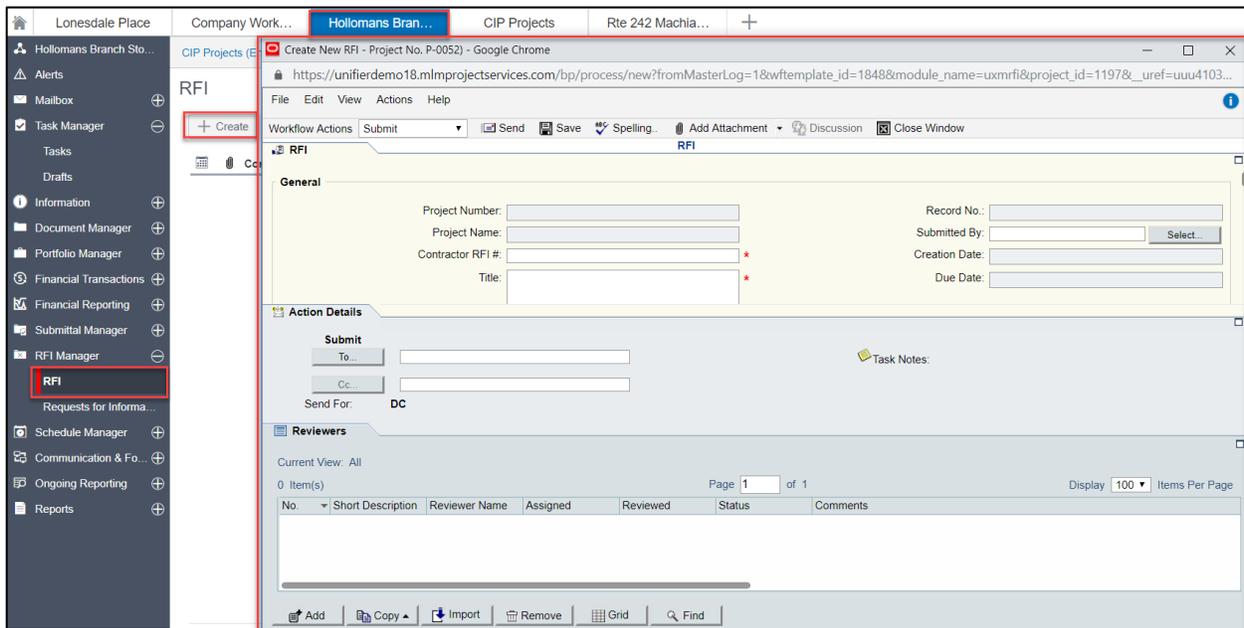


Click **Shells**, Or **All Shells** option to select one or more shells to update.

- 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.

# ADDING A NEW BP FOR USE IN A SHELL

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.

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

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.