

TECH TIP

FEBRUARY 2020 UNIFIER 19.11 AND LATER MODIFYING THE SUBJECT LINE IN UNIFIER EMAIL NOTIFICATIONS

OVERVIEW

Unifier utilizes system emails to notify users of records that are routed for their action or as a copy. Unifier supported customizing the email body to include additional data element references or boilerplate text in the body of the email.

However, the subject line of the email was standard and referred only to the Unifier record number, which often reviewers did not understand.

Starting in Unifier version 19.11, you now can customize the email subject line for Personal Tasks, CC'd tasks, Overview Tasks, Record Workflow Complete and Decline Tasks emails. You can have different subject lines for each of these, and it supports adding data elements and text into the subject line to make the SUBJECT make sense to the user receiving.

This feature also supports modifying these in multiple languages, should you be working in a multi-language Unifier environment.

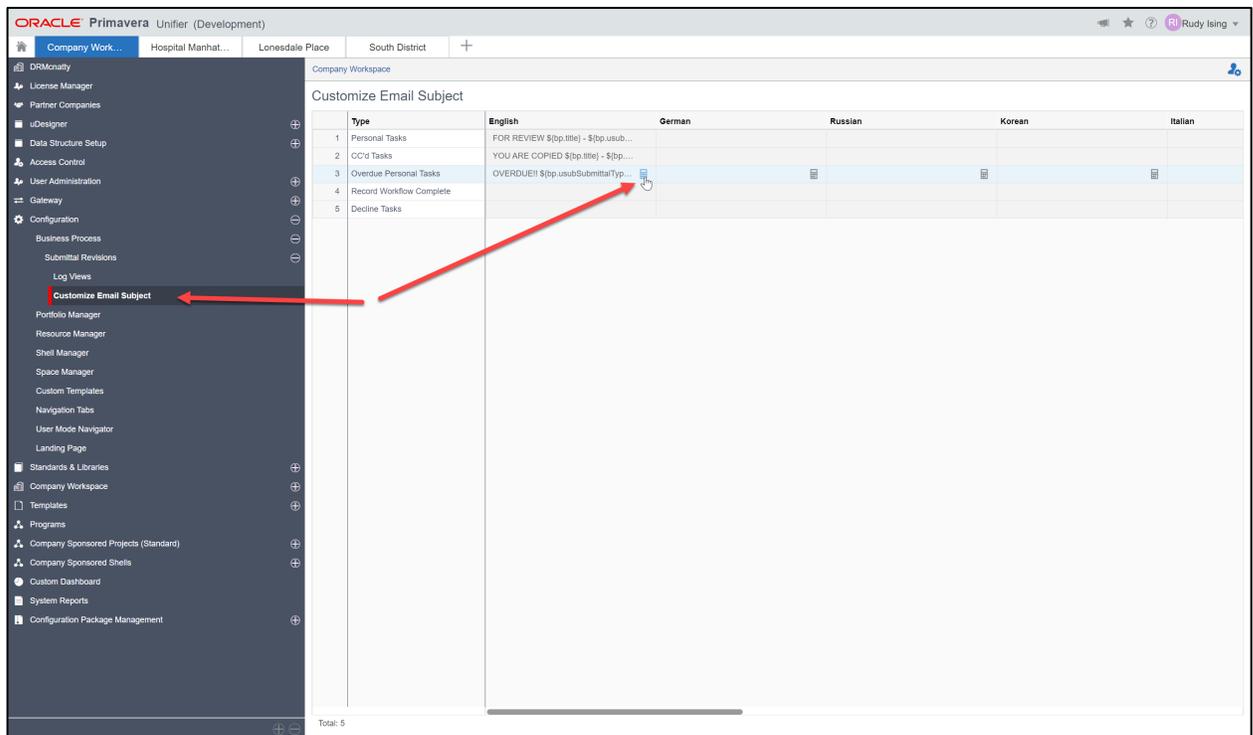
This configuration change is available at the BP Configuration level. This means:

1. Each BP can have its own subject line modified for these types of emails.
2. This is a configuration at the BP level, so different subject lines PER Project (Shell) is NOT supported.

MODIFYING THE SUBJECT LINE IN UNIFIER EMAIL NOTIFICATIONS

SETUP/CONFIGURATION

1. From Company Workspace, Administration Mode, navigate to Configuration, Business Processes.
2. Select the Business Process to edit and you should see a “Customize Email Subject” node.
3. Highlight the type of notification you want to edit (e.g. “Personal Tasks”) and click the edit icon in the box under the language option (e.g. “English”)



4. Type text in the box or scroll through the data elements list and double click any to select. You can concatenate (combine) text, DE references etc. in this window.
 - a. Example: You want to include instructions “For Review” as text; you want to include a project number, actual contract or document number or name/title in this subject so that the user has a common language understanding of what they are receiving.

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b. Notes:

- i. If the action allows for a response to action via email, the system will automatically append the ID reference used by Unifier to import the response.
 - ii. Subject Line should not exceed 300 characters
5. Once you are done configuring the subject, click SAVE in the popup window. This will return you to the main window.

The screenshot shows the Oracle Primavera Unifier (Development) interface. The main window is titled 'Customize Email Subject' and displays a table with columns for 'Type', 'English', 'German', 'Russian', 'Korean', and 'Italian'. The table lists several task types and their corresponding subject lines. A popup window titled 'Subject Line in English' is open, showing the subject line text 'OVERDUE!' followed by a red arrow pointing to the variable '\$(bp.usubSubmittalTypePD)' and another variable '\$(bp.title)'. Below the text is a table of 'Element Label', 'Element Name', and 'Data Definition'. The table lists various elements like 'Decision Date', 'Submittal Type', 'Acknowledged Date', 'Assigned Date', 'Revision Sequencing', 'Title', and 'Submittal Revert #'. The 'Save' button in the popup is highlighted with a yellow circle.

Type	English	German	Russian	Korean	Italian
1 Personal Tasks	FOR REVIEW \$(bp.title) - \$(bp.usub...				
2 CC'd Tasks	YOU ARE COPIED \$(bp.title) - \$(bp...				
3 Overdue Personal Tasks	OVERDUE! \$(bp.usubSubmittalTyp...				
4 Record Workflow Complete					
5 Decline Tasks					

Element Label	Element Name	Data Definition
Decision Date	tp.usubDecisionDP	Date Picker
Submittal Type	tp.usubSubmittalTypePD	Submittal Type PD
Acknowledged Date	tp.usubAcknowledgeDP	Date Picker
Assigned Date	tp.usubAssignedDP	Date Picker
Revision Sequencing	tp.ugenRevSeqDP	Submittal Revision Sequence DP
Title	tp.title	Short Description Text
Submittal Revert #	hn.usubSubRevertPK	RP Picker

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6. Once you return to the main menu, click the SAVE button at the bottom of the window to save all changes.
 - a. Note: If you exit without saving, none of the configuration changes you made will be saved.
7. If you do not create a custom entry, the default email subject line will be sent.
 - a. So, if you do not want to modify only the Personal Tasks, you only need to edit that entry.
 - b. If you modify only English, users who have selected another language as their default will also receive only the default email subject line.

The screenshot displays the 'Customize Email Subject' configuration interface in Oracle Primavera Unifier. The interface includes a left-hand navigation menu with various system settings, and a main table for configuring email subject lines for different task types across multiple languages. The table has columns for 'Type', 'English', 'German', 'Russian', 'Korean', and 'Italian'. The 'Overdue Personal Tasks' row is highlighted, and a red arrow points from its 'English' column to the 'Save' button at the bottom right of the window.

Type	English	German	Russian	Korean	Italian
1 Personal Tasks	FOR REVIEW \$(bp.title) - \$(bp.usub...				
2 CC'd Tasks	YOU ARE COPIED \$(bp.title) - \$(bp...				
3 Overdue Personal Tasks	OVERDUE!! \$(bp.usubmittalT...				
4 Record Workflow Complete					
5 Decline Tasks					

MODIFYING THE SUBJECT LINE IN UNIFIER EMAIL NOTIFICATIONS

EMAIL SAMPLES

Below is an example of a default email subject line:

“Submittal Revisions SBMTR-000028 is sent to you for Document Controller”

Problem: I know it's a submittal and why it came to me (for Document Control processing) but I don't know what it is—just the Unifier record number. I don't know the contractor's number or my custom submittal number, or who sent it, or the title of the document. I could add a lot of this in the body of the email, but I get tons of emails and want to scroll through the emails without actually reading the body of the email...

Submittal Revisions SBMTR-000028 is sent to you for Document Controller.

This is a system-generated e-mail message. Do not reply to sender.

Project/Shell: Prototype Project

Submittal Revisions SBMTR-000028 is sent to you for Document Controller.

From : Rudy Ising
Sent For : Document Controller
Task Due Date :

Source Name : Prototype Project
Record No : Submittal Revisions SBMTR-000028
Title :

Project Number:	AP001-1
Project Name:	Prototype Project
Contract No.:	C-PP001
Submittal Link:	SBMT-000017
Contractor Submittal #:	2700-001
Revision Description:	Submittal Revision title
Rev #:	000
Contractor's Required Date:	
Metro Document Status:	Open
Status:	Open

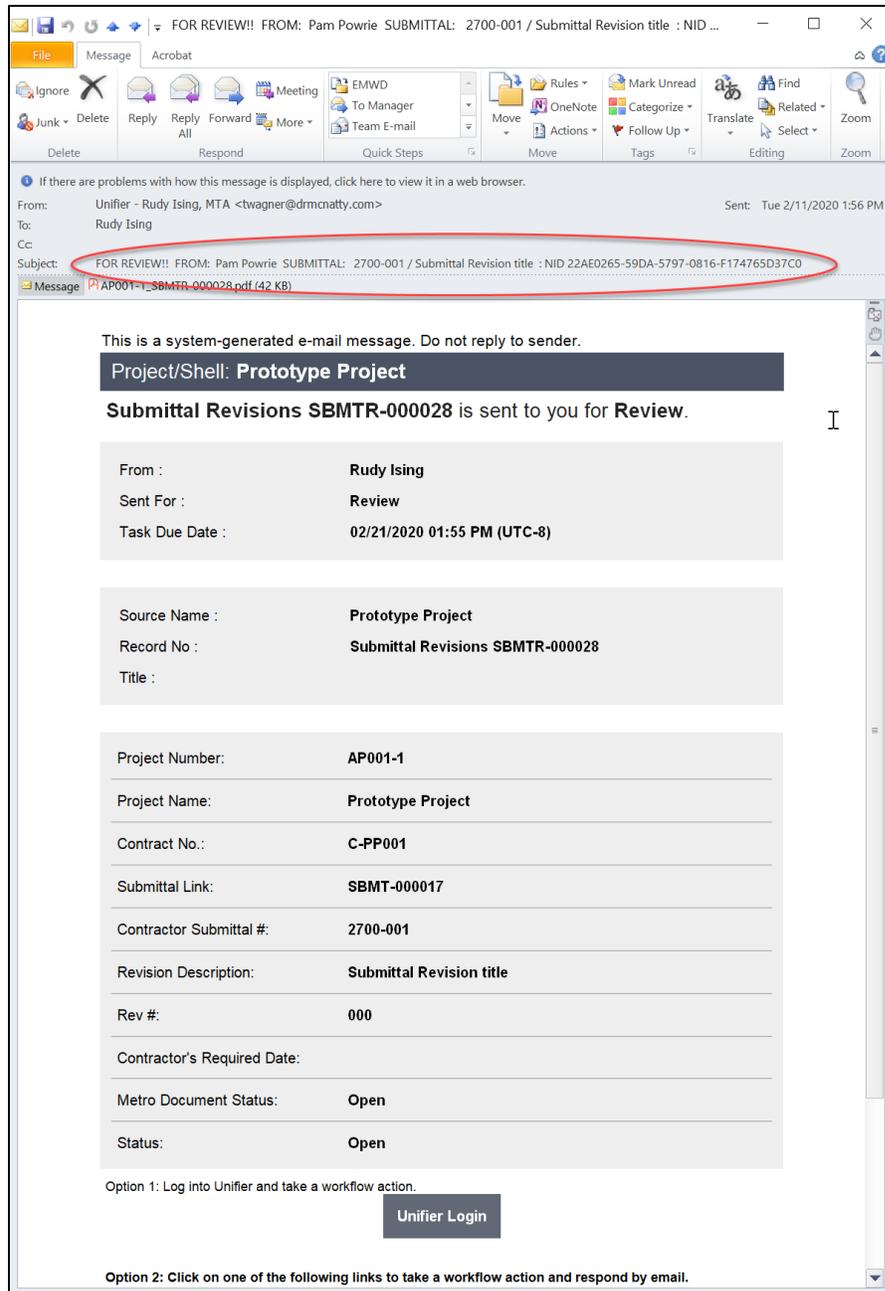
Login to Unifier and click the User control panel link. Select Proxy For and login as Company Administrator to take a workflow action.

[Unifier Login](#)

MODIFYING THE SUBJECT LINE IN UNIFIER EMAIL NOTIFICATIONS

Here's an example of one sent as an action.

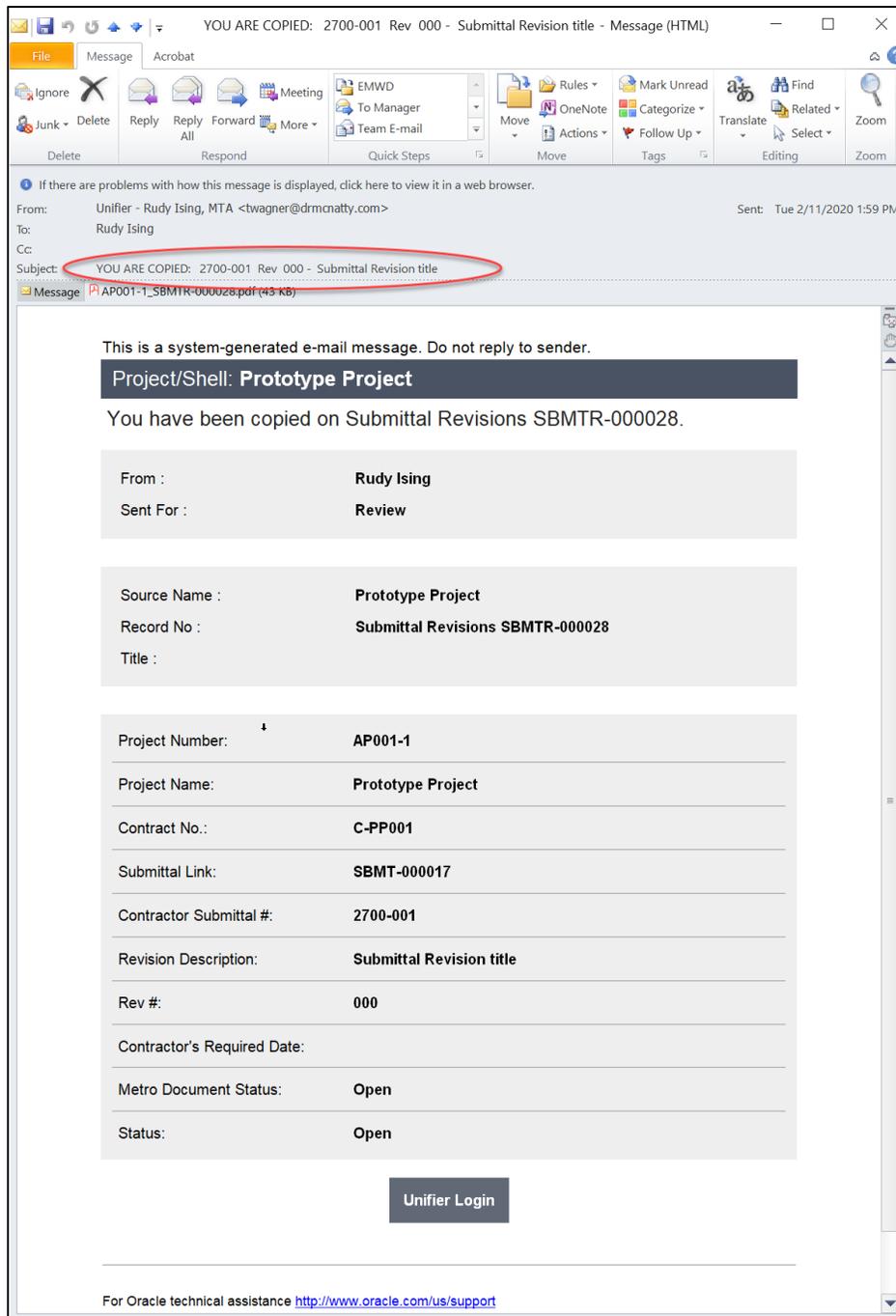
1. The subject tells me the title and the contractor's number of the submittal (which I understand); it also tells me "who" submitted it and tells me it's in my inbox "FOR REVIEW"—a quick way to flag the important emails.
2. This also helps if I get many of these in a day—I can search for specific submittals in case I wish to review it out of order.



MODIFYING THE SUBJECT LINE IN UNIFIER EMAIL NOTIFICATIONS

Here's an example of a "CC" email—in this case, similar to the other, but it tells the user it's being sent to them as a CC so no urgent action assigned to me.

This helps me sort through the Unifier emails that require immediate attention and which ones can wait.



SUMMARY

This is a great feature and goes a long way to making the Unifier notification emails more useful to the general user. Combined with customizing the body text should provide a user with all the information they need to respond to these in a timely fashion.