

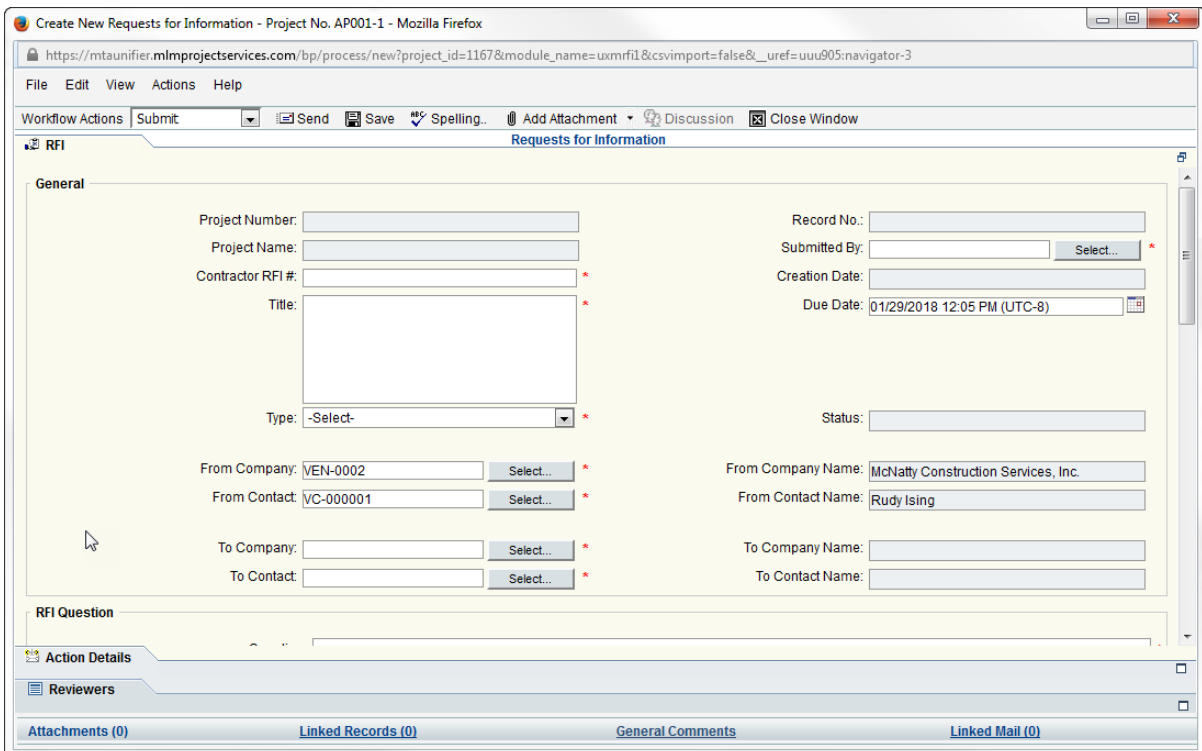
# TECH TIP

## USING COMPANY NAME VS. ID ORACLE PRIMAVERA UNIFIER

Many typical Unifier forms let you pick Vendors from the Vendor BP and then display the vendor code and have read-only views of the actual company name. For many, these vendor codes are meaningless, especially in instances where Unifier auto-numbers these code values.

This Tech Tip outlines how to omit displaying the vendor code and create active/filtered pickers using the company name.

**Old Method:** User picks From and To company from the picker, the ID is stored and next to the field the From Company Name is displayed in read only fashion.



# USING COMPANY NAME VS. ID

**New Method:** User picks the To Company, and the input box displays the company name (not the ID). Then when you pick the To Contact, the list is filtered automatically for the contacts from that company name.

The image shows two overlapping browser windows from the mtaunifier.mlmprojectservices.com application.

The background window is titled "Master Contract - Project No. AP001-1 - Mozilla Firefox". It displays a form for creating a new master contract. The "General" tab is active, showing fields for Master Contract No. (EN077), CIMS # (23444398-eoiuuou-0999444-asdfdsafds), Master Contract Title (Master Contract Sample), Master Contract Issue Date (12/26/2017), Record No. (uxmmcon-0000), Creator (Rudy Ising), Creation Date (12/26/2017 01:33 PM (UTC-8)), Status (New), To Company (McNatty Construction Services), To Contact (Rudy Ising), CMA Amount (\$0.00), and Authorized Value (\$0.00). A "Contract Summary" section shows an Amount of \$4,000,000.00. The bottom of the window shows "Standard" and "Attachments (0)" tabs.

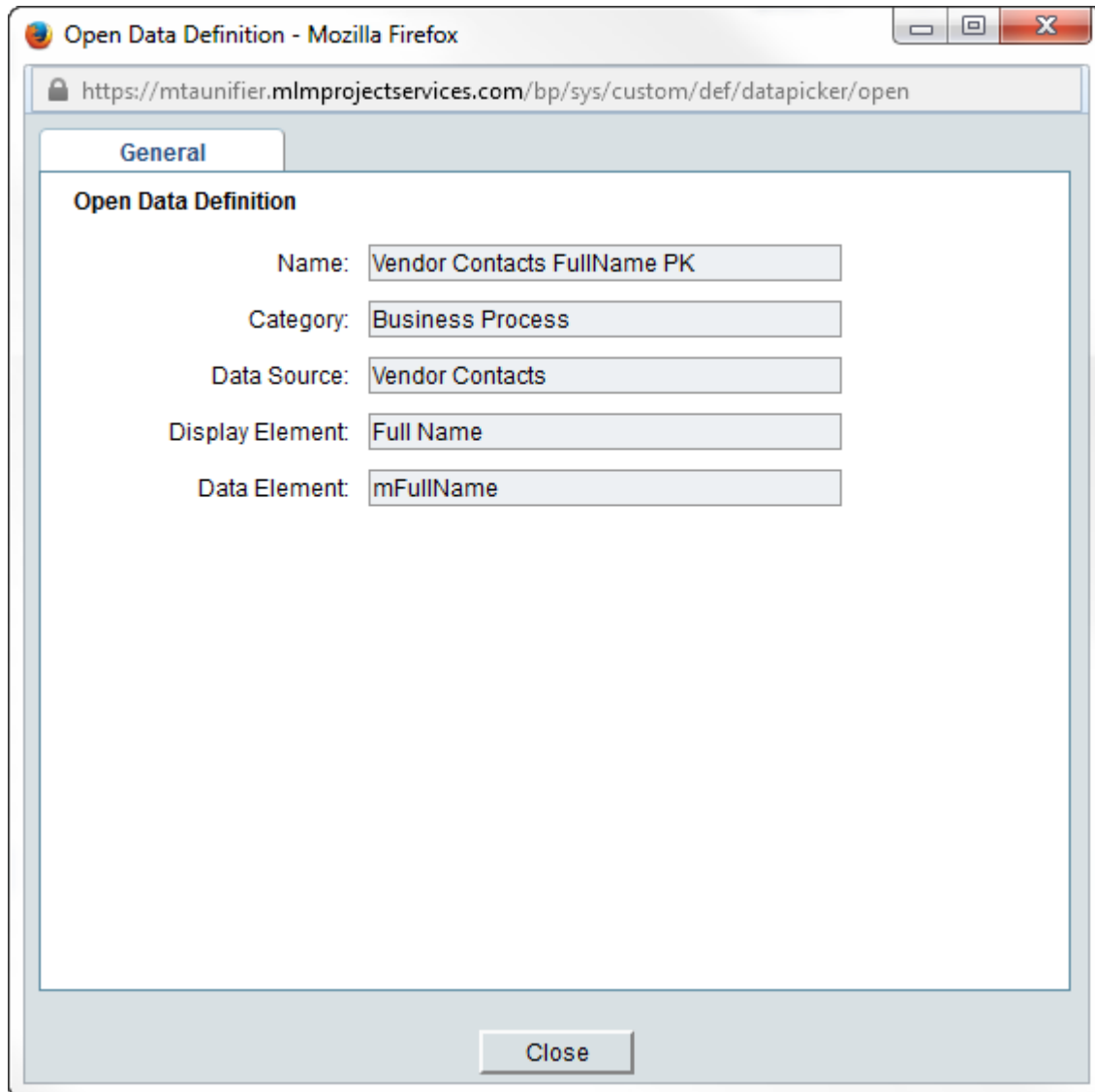
The foreground window is titled "Vendor Contacts - Mozilla Firefox". It displays a list of vendor contacts for McNatty Construction Services. The list is filtered to show 6 items. The table below represents the data shown in the screenshot:

Contact First Name	Contact Last Name	Job Title	E-Mail	Vendor
Rudy	Ising	Director of Services	rising@drmcnatty.com	McN
James	Lyons		ltan@drmcnatty.com	McN
Company	Administrator	Administrator	ltan@drmcnatty.com	McN
Cesar	Ho		alin@drmcnatty.com	McN
Cesar	Ho		alin@drmcnatty.com	McN
Ben	Lee		blee@drmcnatty.com	McN

## USING COMPANY NAME VS. ID

Steps:

1. Data Definition, Data Pickers—set up a new picker with the display element of Full Name not Record No for both the Company and Contact.
  - a. Note: You'll set up both Company Name (displaying the Vendor Name) and the Company Contact (displaying the Full Name).



The screenshot shows a web browser window titled "Open Data Definition - Mozilla Firefox". The address bar displays the URL: <https://mtaunifier.mlmprojectservices.com/bp/sys/custom/def/datapicker/open>. The main content area is titled "Open Data Definition" and contains the following fields:

- Name: Vendor Contacts FullName PK
- Category: Business Process
- Data Source: Vendor Contacts
- Display Element: Full Name
- Data Element: mFullName

A "Close" button is located at the bottom right of the dialog.

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2. Data Element—set up a new data element using these data definitions.

**Modify Data Element:**

Data Element Name:  \*

Data Definition Source:  \*

Form Label:  \*

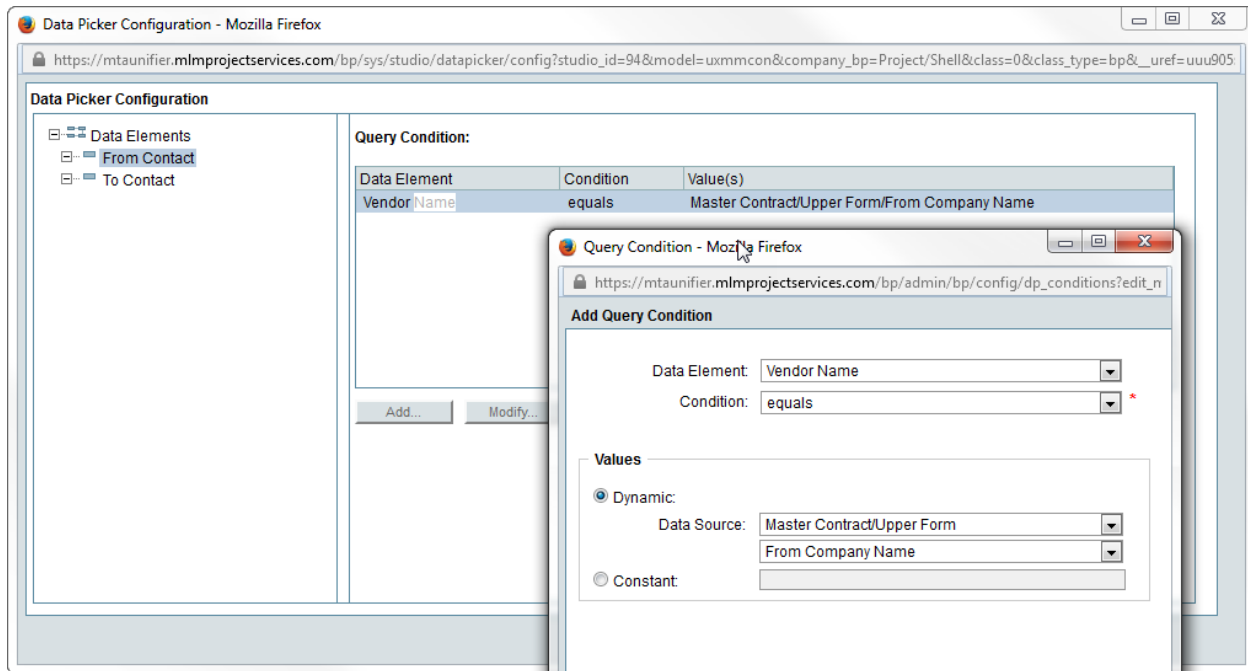
Description:

OK Cancel

3. Use these data elements in your Action Form.
4. Reference Processes—These normally are used to display the read-only Company Name in the old method, but you will not need these here.

## USING COMPANY NAME VS. ID

5. In the BP Data Picker configuration for the Contact, set up the lookup to match the Upper Form field for Company with the Vendor Name.
  - a. This is the property that filters the contacts based on the Company selection so you don't see all contacts.



6. Test and Deploy your BP.

### Final Notes:

Creating your BP design and forms this way can provide a cleaner form design, particularly where the ID fields are not relevant to users. One consideration is that the lookup by Company Name can be a potential issue if there are duplicate company names within the data set. Ideally, a best practice if you are going to do this is to make the Vendor Name field property to be unique so that there are no duplicate values.