

## 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.

🥑 Create New Reque	ests for Information - Projec	t No. AP001-1 - Mozilla Firefo	ох		
A https://mtaunifie	er.mlmprojectservices.com/	bp/process/new?project_id=1	1167&module_name=	uxmrfi1&csvimport=false&_uref=uuu905:nav	igator-3
File Edit View	Actions Help				
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🖉 RFI			Requests for I	nformation	a
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	Project Number:			Record No.:	
	Project Name:			Submitted By:	Select *
	Contractor RFI #:		*	Creation Date:	
	Title:		*	Due Date:	01/29/2018 12:05 PM (UTC-8)
	Type:	-Select-	*	Status:	
	From Company:	VEN-0002	Select *	From Company Name:	McNatty Construction Services, Inc.
	From Contact:	VC-000001	Select *	From Contact Name:	Rudy Ising
N					
3	To Company:		Select *	To Company Name:	
	To Contact:		Select *	To Contact Name:	
RFI Question					
Action Details	<u> </u>				
Reviewers					
Attachments (0)		Linked Records (0)		General Comments	Linked Mail (0)

These tech tips are offered free of charge in the spirit of sharing knowledge with others. They do not include technical support, should you have a problem with them. We are always interested in how they can be improved, please do not hesitate to email us your comments. These tips have been thoroughly tested by our consultants in a variety of environments. Please read these tech tips thoroughly and be sure that you understand them before trying to use them. We can not be responsible for issues that evelop because of the configuration of your hardware, technical environment or application of the tech memos. If you are not sure, then we urge you contact Oracle technical support or your local support consultant for assistance.

## 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.

Master Contract - Project No. AP001-1 - Mozilla Firefox			_ 0	23		
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To Contact: Rudy Ising Select *		18	(1.5. 1.1. A		D. T.O. 1. 15 11	- 13- I
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\$0.00	Vendor Contacts      McNatty Construction	Vendor Contacts - Cur	rrent View: All			
Contract Summary		6 Item(s)	Pa	age 1 of 1	Display 100 💌 Items F	Per Page
Amount: \$4,000,000.00		Contact First Name	▼ Contact Last Name	Job Title	E-Mail	Vendor
		Rudy	Ising	Director of Services	rising@drmcnatty.com	McN ^
		James	Lyons Administrator	Administrator	Itan@drmcnatty.com	MCN
		Cesar	Ho	Administrator	alin@drmcnatty.com	McN
		Cesar	Ho		alin@drmcnatty.com	McN
		Ben	Lee		blee@drmcnatty.com	McN
Standard						
Attachments (0) Linked Records (0)						



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).

🕘 Open Data Definition - Mozi	lla Firefox				
A https://mtaunifier.mlmproj	jectservices.com/bp/sys/custom/def/datapicke	r/open			
General					
Open Data Definition					
Name:	Vendor Contacts FullName PK				
Category:	Business Process				
Data Source:	Vendor Contacts				
Display Element:	Full Name				
Data Element:	mFullName				
	Close				



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

Modify Data Element - Mozilla	Firefox	
Spelling	tservices.com/bp/sys/custom/element/edit/cop	y=0ccview=designe
Modify Data Element:		
Data Element Name:	mToContactsPK	*
Data Definition Source:	Vendor Contacts PK	*
Form Label:	To Contact	*
Description:		1
		_
	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.



- 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.

Data Picker Configuration - Mozilla https://mtaunifier.mlmprojectserv	Firefox ices.com/bp/sys/studio/datapicker/con	fig?studio_id=94&mo	del=uxmmcon&company_bp=Project/Shell&cl	ass=0&class_type=bp&_uref=uuu90	
Data Picker Configuration					
Data Elements	Query Condition:				
To Contact	Data Element	Condition	Value(s)		
	Vendor Name	equals	equals Master Contract/Upper Form/From Company Name		
	AddModify.	Add Query Con Dat Values © Dynamic:	anifier.mlmprojectservices.com/bp/admin/bp/c dition ta Element: Vendor Name Condition: equals	onfig/dp_conditions?edit_n	
		© Constant	From Company Name		

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.

