

TECH TIP

MANAGING USERS IN BULK ORACLE PRIMAVERA UNIFIER

Being able to manage users and group assignments across a large number of Workspaces (projects) can be cumbersome. Bulk processing leverages spreadsheets to add/remove user group assignments or to add new users to Workspaces.

1. Export the current state of user group assignments. The exported file contains all current user and groups assignments as well as empty groups to facilitate adding users, as needed. Users not assigned to groups are not included in the export.

The export files are located at the Company Workspace > Admin Mode > Company Sponsored Shells > select your shell type to see the list of workspaces. In the tool bar menu click Export > Export User Group Assignments or Export Users. NOTE: There is also an Export Template button that is NOT used for this activity.

TIP: Select one or two workspaces to start in order to become familiar with how this process works.

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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 develop because of the configuration of your hardware, technical environment or application of the tech memos. If you are not sure, then we urge you to contact technical support or your local support to rowical support or sure that you are not sure, then we urge you to contact technical support or your local support to rowical suport to rowical support

2. <u>Working with the User Group Assignment Spreadsheet:</u> Use "Add" or "Remove" in the action column to add or remove people from groups in the listed workspaces. Leaving the action column blank means that no action will be taken. Add new users by adding lines to the spreadsheet with the appropriate data. Copy/Paste can be helpful. Notice the instructions at the top of the spreadsheet.

To change a group assignment for a user, Remove them from one group (on one row of the spreadsheet) and then Add them to the other (in another row on the spreadsheet).

Project/Shell Users/	Groups						
Note:							
To assign a user to a	a group, provid	e first name,	last name, company shor	t name, email address, project/	shell number, project/sl	nell name. Action should be set	t to 'Add'
Action should be se	t to 'Remove' to	o remove an	user from a group				
Rows with a blank a	action will not b	e updated.					
Group Name	First Name	Last Name	Company Short Name	Email Address	Action	Project/Shell Number	Project/Shell Name
All Project Users	Karen	Fitting	CAHSR	kfitting@drmcnatty.com		P-0053	19th Ave-Greenway Trail Improv
All Project Users	Karen	Fitting	CAHSR	kfitting@drmcnatty.com		P-0055	19th Ave-Greenway Trail Improv 2
All Project Users	Karen	Fitting	CAHSR	kfitting@drmcnatty.com		P-0027	Arbuckle Reservoir
All Project Users	Karen	Fitting	CAHSR	kfitting@drmcnatty.com		P-0025	Bakersfield to Solstice
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<u>Working with the Users Spreadsheet:</u> Use the Status column to change user status within workspaces to one of the following: Active, Inactive, On-Hold. Add new users by adding lines to the spreadsheet with the appropriate data. Copy/Paste can be helpful. Notice the instructions at the top of the spreadsheet.

Project/SI	hell Users															
Note:																
To add a	user, provide fir	st name, last name, coi	npany short name, email address, stat	us, projec	t/shell number, projec	t/shell name.										
To change	e the status of a	user, provide the new	status from the following:Active, Inact	ive, On-Ho	d. To copy attributes	from company directory provide the follo	owing value for 'O	opy Attribu	ites' colum	nn - 'Yes' w	ould copy	from com	any works	pace, '' (B	lank) would	d not co
				-			-						Ċ			
First Nam	€Last Name	Company Short Name	Email Address	Status	Project/Shell Number	Project/Shell Name	Copy Attributes									
Ashley	Lin	CAHSR	alin@drmcnatty.com	Active	P-0021	DI Test										
Ashley	Lin	CAHSR	alin@drmcnatty.com	Active	P-0030	DI Test 1										
Ashley	Lin	CAHSR	alin@drmcnatty.com	Active	P-0041	DI Test 11										
Ben	Lee	CAHSR	blee@drmcnatty.com	Active	P-0001	Alpha										
Ben	Lee	CAHSR	blee@drmcnattv.com	Active	P-0002	Beta										

 Importing the spreadsheet. Save the updated spreadsheet as a .csv file and return to list of workspaces > Import and select the appropriate option (Users or User Group Assignments). The import will load all rows that have no errors.

Company Workspace											
File Edit Vie	w Help										
Image: New Image: New Projects - Current 59 Item(s)		Export •									
Project #	Project Name	Template Name									
P-0001	Alpha	Project Template	Import Schedule Sheet Properties								
P-0002	Beta	Project Template	Migrate Projects into Shells								
P-0003	Gamma	Project Template	о ,								
P-0004	Delta	Project Template	Migration History								

Import Exceptions:

- Invalid Action specified.
- A user is not an active Unifier user.
- The user/company combination is not valid.
- The group is not valid in the project/shell.
- User licenses have been exceeded.
- · Insufficient permissions exist to change the user status or to add users

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