

TECH TIP

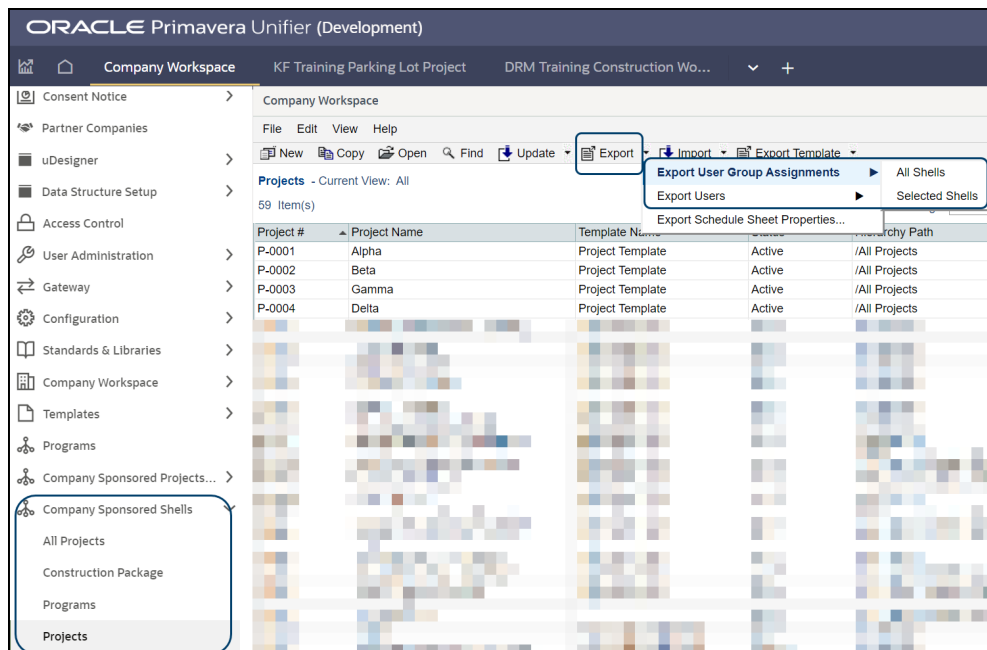
MANAGING USERS IN BULK ORACLE PRIMAVERA UNIFIER

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.



MANAGING USERS IN BULK

2. Working with the User Group Assignment Spreadsheet: 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.

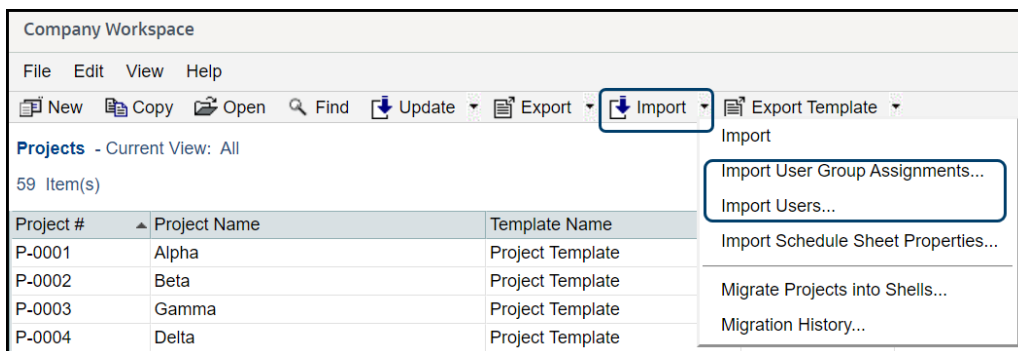
To change a group assignment for a user, Remove them from one group (on one row of the spreadsheet) and then Add them to the other (in another row on the spreadsheet).

Project/Shell Users/Groups							
Note: To assign a user to a group, provide first name, last name, company short name, email address, project/shell number, project/shell name. Action should be set to 'Add' Action should be set to 'Remove' to remove an user from a group Rows with a blank action will not be 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

Working with the Users Spreadsheet: 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/Shell Users							
Note: To add a user, provide first name, last name, company short name, email address, status, project/shell number, project/shell name. To change the status of a user, provide the new status from the following: Active, Inactive, On-Hold. To copy attributes from company directory provide the following value for 'Copy Attributes' column - 'Yes' would copy from company workspace, '' (Blank) would not copy							
First Name	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	

3. 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.



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