

TECH TIP

RECORD COPY / COPY WITH CONDITIONS ORACLE PRIMAVERA UNIFIER

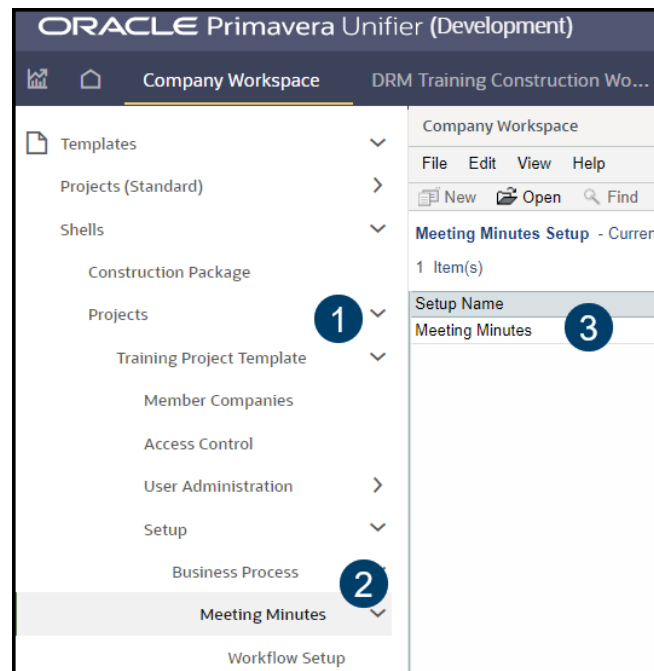
Setting up Record Copy gives the Unifier user the ability to copy specific (rather than all) line items, based on a pre-defined filter. This feature is available on the following types of BPs:

BP Type	Sub Type	Classification
Line Item		Generic, Transfer, Line Items to filter company Business Process records
Cost	Line Item with WBS Code	Generic, Transfer, Base Commit, Change Commit & General Spends
Cost	Line Item with Multiple Codes	Generic, Transfer, Base Commit, Change Commit & General Spends

Configuration of this feature requires completion of the Record Copy tab in BP Setup. You will create a condition that the Data Element must meet in order for the line item to be copied.

1. From Company Workspace > Admin Mode, navigate to Templates > Shells and the shell type. Open the appropriate template.
2. Click on Setup > Business Process and the specific BP.
3. Open the BP Setup.

RECORD COPY / COPY WITH CONDITIONS



4. Select the Record Copy tab. This tab will only be seen on the BPs where this feature is available.
5. Click Add.
6. Complete the screen. Type a meaningful name as this will be seen at runtime. Description is optional.
7. Click Add to add a filter.

RECORD COPY / COPY WITH CONDITIONS

Record Copy Setup

List of Record Copy Options

Name

Add... Modify...

Record Copy Condition Setup - Google Chrome

Copy Condition Setup

6 Name: *

Description:

Condition	Data Element	Conditions	Value(s)
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7 Add... Modify... Remove

Include Attachments
 Copy Linked Records

8. Select a Data Element from the list. All DEs across all tabs for this BP will be available. Select a Condition. The options for condition will depend on the type of DE selected.
9. Click OK.

Add Query Condition

8 Data Element: -Select- ▼

Condition: ▼ *

9 OK Cancel

10. Specify the additional copy options.
11. Click OK.

RECORD COPY / COPY WITH CONDITIONS

Copy Condition Setup

Name: Active Line Item Details *

Description: Only line items with an active status will be copied.

Data Element	Conditions	Value(s)
Line Item Status	equals	Active

Add... Modify... Remove

Include Attachments

Copy Linked Records

Retain reference to auto-created Business Process records on record upper form

Retain reference to auto-created Business Process records on line items across all tabs

OK Cancel

12. Repeat the process for additional filtering options, as desired.
13. Click OK.

Record Copy Setup

List of Record Copy Options

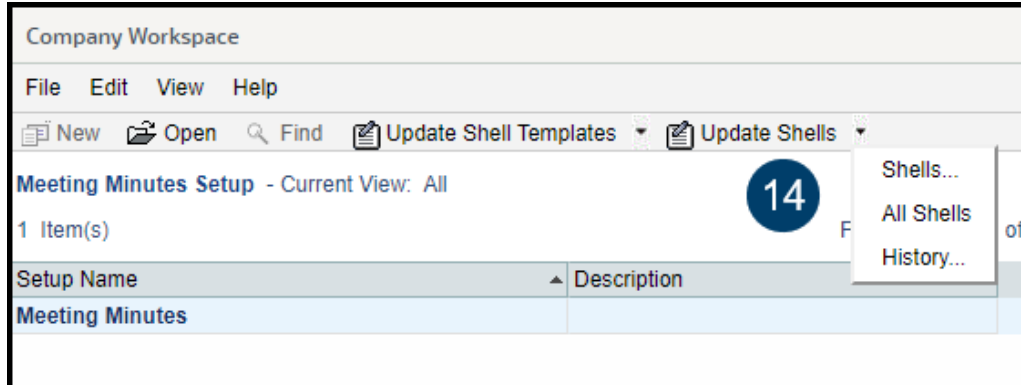
Name	Description
Active Line Item Details	Only line items with an active status will be copied.

Add... Modify... Remove

Apply OK Cancel

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14. Push the BP Setup from the Template, as usual.



Runtime Behavior

Navigate to the BP, select the record to be copied, and click the icon on the left to choose Copy with Conditions.

- If only one condition is configured, the new, copied, record will open for editing/updating.
- If multiple conditions are configured, they will be listed for selection.

