

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:

ВР Туре	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.

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 ray you to contact technical support or your local support to sure that you are not sure, then we ray you to contact technical support or your local support or your local



- 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

General	Settings	View Forms	Record Properties	Notification	Auto Creation	4 Record Copy
Record Copy Setu		Copy Condition Setup	- Google Chrome			- 0
List of Record Co Name						
	Сору С	ondition Setup				
	6	Name:		*		
	Desc	ription:				
	Cor	ndition: Data Element	Conditi	ons	Value(s)	
5		Add	Modify Rem	ove		
Add	Modify	Include Attac Copy Linked				
1			Necolus			

- 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				
Data Element: Condition:	-Select-		~	*
9				
	ОК	Cancel		

10. Specify the additional copy options.

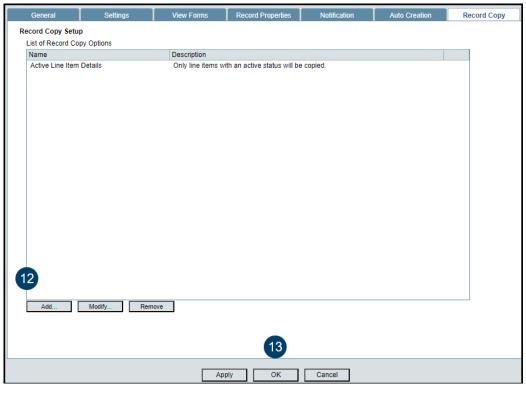
11.Click OK.



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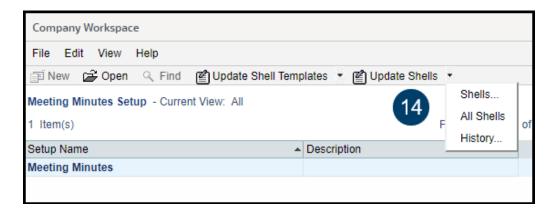
Copy Condition Setup						
Name: Active Line Item Details						
Description:	on: Only line items with an active status will be copied.					
Condition:	Data Element	Conditions	Value(s)			
	Line Item Status	equals	Active			
	Add Modify	Remove				
	Include Attachments					
(10)	Copy Linked Records					
	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					
	11	OK Cancel]			

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





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.

1	Meeting Minutes							
	+	Create	Actions		•	View :	All Records	•
	.	. 0	Record #	•	Title			
ф		0	MM-00006		Week	ly Safety N	leeting	
0	Open			٦	Unifier Training Step			
(Copy with Attachments				Project Updates			
(Copy without Attachments				BP SETUP			
(Copy with Conditions 🕨			Þ	Active Line Item Details			
F	Print - HTML				Action Item Status is Empty 🕨			
F	Print - PDF			ľ				
F	Print - Custom							
٦	Transfer Ownership							
Terminate Record								
				-				

