

TECH TIP

AUTOMATING TO AND CC FIELDS BASED ON FORMS ORACLE PRIMAVERA UNIFIER

A Unifier workflow can use data elements to automatically route to specific assignees or CC users. This feature can be particularly useful in communication BPs, such as Meeting Minutes where the meeting coordinator can automatically be assigned and attendees can be copied on specific steps of the workflow.

The following steps are required for configuration:

1. Update the Workflow Step Properties to map the data element(s) that will be used.
2. Update BP Setup to allow additional CC users from the form(s).

Prerequisite: Make sure the Data Element(s) are based on the User Picker Data Definition

The screenshot shows a dialog box titled "Data Element:". It contains the following fields:

- Data Element Name: Requested_By *
- Data Definition Source: User Picker *
- Form Label: Requested By *
- Description: (empty text area)
- Tooltip: (empty text area)

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

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uDesigner Workflow Step Properties: Map the data elements for each form/tab.

The screenshot shows the 'Step Properties' dialog box. At the top, there are fields for 'VIEW FORM:' (set to '01VIEW'), 'Edit Form:' (set to '02Results'), and 'Sub-Workflow Name:'. Below this is a table for 'Trigger Element' with columns 'Data Element' and 'Form Label'. Underneath, there are 'Add...' and 'Remove' buttons. A checked checkbox 'Add additional task assignees from the following data elements' is followed by a section for 'Form/Tab Name' with three rows: 'Upper Form' (with 'Meeting Coordinator (User Pi)' and a 'Select...' button), 'Meeting Items' (with an empty field and 'Select...' button), and 'Attendees' (with an empty field and 'Select...' button). Another checked checkbox 'Add additional Cc users from the following data elements' is followed by a similar section for 'Form/Tab Name' with three rows: 'Upper Form' (with an empty field and 'Select...' button), 'Meeting Items' (with an empty field and 'Select...' button), and 'Attendees' (with 'Attendee' and a 'Select...' button). A 'Close' button is at the bottom.

Configure BP Setup for appropriate steps:

The screenshot shows the 'Workflow Configuration' dialog box, with the 'Settings' tab selected. On the left is a tree view for 'Meetings WF' with sub-items 'Creation', 'Results', 'Review', and 'End'. The main area has 'Enable Step for Integration: No (selected) / Yes'. Under 'Assignees', 'Assignment Policy' is 'User Select', 'Assignees' is 'Project Managers' (with a 'Select...' button), and 'Additional conditions to filter assignees' is 'Define...'. A blue arrow points to the checked checkbox 'Add additional assignees from upper form and line item tabs'. Below this, 'Allow Cc:' has radio buttons for 'No' (selected), 'Yes', 'Preassigned', and 'Preassigned and Allow Add Cc'. A 'Cc' field with a 'Select...' button is below. Another blue arrow points to the checked checkbox 'Copy additional users from upper form and line item tabs'. Below this, 'Allow Add Assignees:' has radio buttons for 'No' (selected) and 'Yes', followed by a 'Select...' button. 'Allow Add Cc:' has radio buttons for 'No' (selected) and 'Yes', followed by a 'Select...' button. 'Step Editors:' has a 'Select...' button. 'Step Revisiting:' has radio buttons for 'Include only previous action takers' (selected) and 'Include all step assignees'.

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At runtime, the Additional Task Assignees and CC users will be shown for the steps configured.

Workflow Action Details

Action Details

Workflow Actions * Send For Results

Document Results ▼

To ☰

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Additional Task assignees from record and tabs

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Additional CC users from record and tabs

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