



PROJECT MANAGEMENT SOLUTIONS THAT *SIMPLY WORK* SINCE 1989.

WHAT'S NEW IN ORACLE PRIMAVERA UNIFIER 17.7

September 27, 2017

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www.drmcnatty.com



Thank you for joining today's webinar

- Mute – all call in phones are automatically muted in order to preserve the quality of the audio for all attendees.
- Questions – during the session, questions can be submitted through the Questions Box on the right side of the screen . We will try to address your questions at the end of the presentation, time permitting.
- Follow up – all registrants will receive an Excel file listing all questions and responses along with a link to the recorded webinar.

Safe Harbor

- The statements made in this technical presentation are based on our current knowledge of the tools.
- Our statements should not be construed to be an official “Vendor perspective”, but are intended to be the sharing of technical and user knowledge gained as we explore new paths and technologies, usually in advance of our clients.
- You need to make your own judgments as to the application of our shared ideas in your own, unique environment.

Products and Services

- Project Controls System Implementation
- Cloud Based, Global Managed Hosting Services
- Software Training Services
- Integration, Analytics, Dashboards, Risk and Role-based User Access Tools
- Program and Project System Support Services and Partnering
- Mentored and Supported SB/DVBE Project Staffing Resources

Tool Matrix

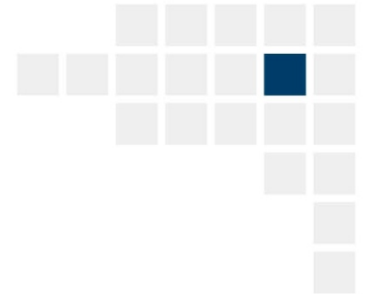
Business Process	ORACLE PRIMAVERA	ABES PRISM	Deltak ACUMEN	SYNCHRO SOFTWARE	SPITFIRE SOFTWARE	ProjectStatus
Portfolio Management	P6, Unifier					View
Planning & Budgeting	Unifier	G2			Spitfire	Collaborate
Estimating		Estimating				
CPM Scheduling	P6	Scheduling	Fuse	Synchro Scheduler		Status
Cost Management & Reporting	P6, Unifier	G2	Fuse		Spitfire	Collaborate
Document Management	Unifier	Prism Docs			Spitfire	
Change Management	Unifier	G2			Spitfire	
Engineering Forms	Unifier	G2			Spitfire	
BIM/Schedule Integration				Synchro		
Risk Analysis	P6 Risk		Risk			Collaborate
Risk Management & Mitigation	P6		Risk			Collaborate
Role Based Cloud Dashboard	Dashboard	Dashboard				View
Earned Value	P6	Earned Value				
Claims Support & Analysis	P6		Fuse			
Facility Management/Work Orders	Unifier					
Mobile online/offline support	Mobile				Browser	Browser
Integration with Finance/ERP	Gateway	Integrator			Spitfire	Gateway

DRMcNatty supports these project controls tools as an authorized partner, trainer and implementer as well as providing trained and supported project staffing resources.

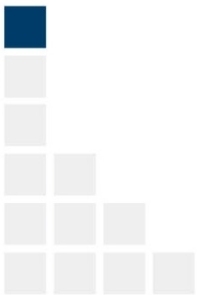
Abstract

For clients looking for a "Complete Lifecycle" management tool, Oracle offers Unifier as a key product intended to meet this requirement. This webinar will take a look at some of the enhancements in the newest on-premise version of Unifier released in July of this year. The user interface has been improved along with other improvements to logs and processes. There are also system changes, including enhanced configuration management options and also enhancements to the iOS mobile application.

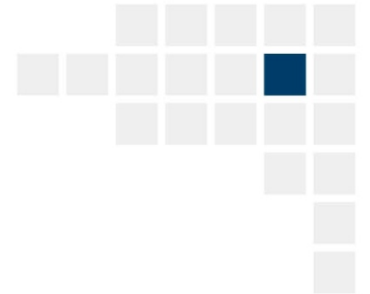
Agenda



- Unifier Overview & Release Schedule
- User Interface Enhancements
- Process Related Enhancements
- System Related Enhancements
- Wish List
- Final Notes
- Live Demo/Q&A (time allowed)



What Is Unifier?



- Unifier, acquired by Oracle in 2012, is an enterprise software solution intended to manage the entire lifecycle of your projects and programs.
- Very powerful and customizable, Unifier can be configured for nearly any kind of management needs. Two applications, Project Controls and Facility and Real Estate Management (FMRE) provide many processes built, these can be modified as needed. You can even build your own processes!
- Oracle provides integration capability to other products to provide a truly comprehensive and “Unified” solution for your business needs.



Unifier and P6—A Common Core

- Plan
 - Initiate
 - Capital Planning
 - Funding
- Build
 - Schedule
 - Cost
 - Risk
- Operate
 - Maintenance
 - Asset Management

■ PRIMAVERA P6
■ UNIFIER

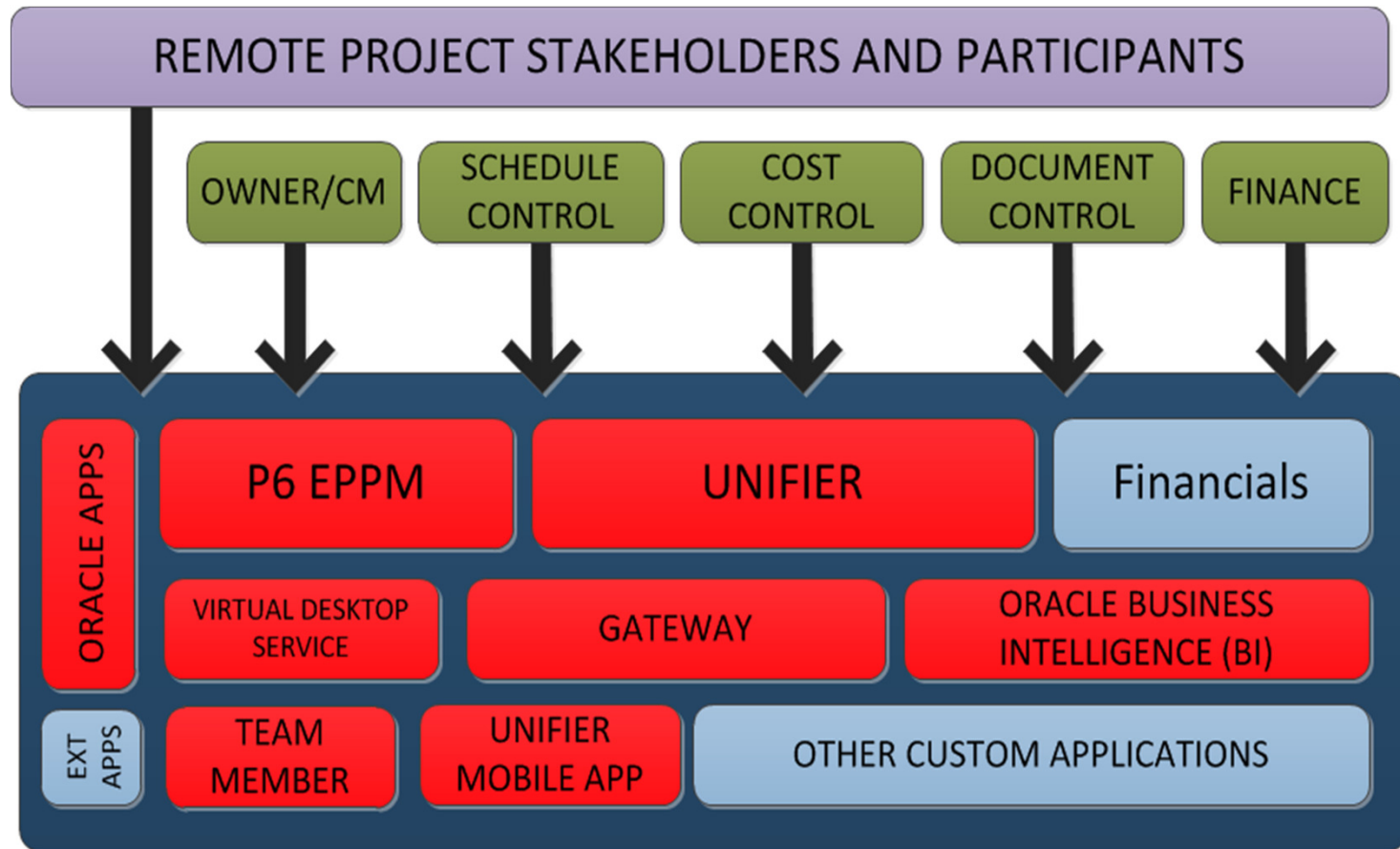


The Right Reports

The Right Decisions

The Right Actions

Unifier—An Integrated Software Solution



Unifier Key Features

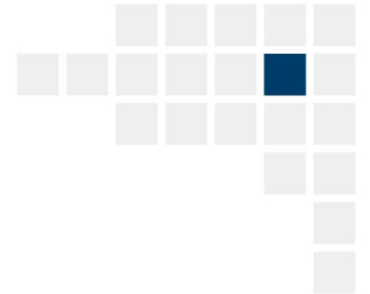
- Web based, browser/OS neutral
- Mobile app *with offline use*
- Project Controls and Facilities and Real Estate Management packages to customize
- Visual workflow design
- Email routing options
- Robust security model
- Full document manager with document level security options
- Java free without AutoVue

Release Options and Schedule

- Unifier is offered both as an on premise (perpetual) license or also in an Oracle Cloud (subscription) license
- Each release is numbered with the year and number of the release.
 - Oracle issues new releases for their Cloud versions in the first quarter of the year
 - So the first Unifier release issued earlier this year (2017) would be 17.1
 - On premise (perpetual) release versions are then issued usually in the second half of the year
 - The first Unifier release issued in 2017 for on premise was 17.7
 - One of the potential benefits for on premise (perpetual) users is that many of the issues encountered in the new releases are worked out by the time of the on premise release

New Features

- User Interface
 - Navigation
 - Layouts/Logs
- Design Enhancements
 - SOV Enhancements
 - Document Type BP's
 - Document Manager
- Mobile
- P6
- System Enhancements
 - Configuration Packages



User Interface



Top Navigation

ORACLE **PRIMAVERA** Unifier (Development) Rudy Ising ★ ? Sign Out

Company Workspaces

- DRMcNatty
- Partner Companies
- uDesigner
- Data Structure Se...
- Access Control
- User Administration
- Configuration
- Standards & Libra...
- Company Worksp...
- Templates
- Programs
- Company Sponsor...
- Company Sponsor...
- Custom Dashboard
- System Reports

Company Addresses

Address Type
Headquarters

Partner Companies

Company Name
Anastasi Trucking & Paving
Decide Analytics
Di Pizio Construction
Eastern Municipal Water District
LC Whitford, Inc.
McNatty Construction Services, Inc.
Midland Asphalt Materials
NYSDOT Region 5
PFES
Walt's Tree Service

Cleaner Navigation Tab

User/Admin Switch Relocated

Top Navigation Browse

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar includes the Oracle logo, the application name 'PRIMAVERA Unifier (Development)', and user information 'Rudy Ising' with a 'Sign Out' link. The main navigation pane on the left shows 'Company Work...' as the active section. A callout box points to the 'Project/Shell List now Scrolling List'.

Project/Shell List now Scrolling List

Number	Name	Location
235300	Office Building	XYZ Owner/Capital Planning
865555	Transit Corridor	XYZ Owner/Capital Planning
ABC01	ABC Contractor	
CAP-001	Capital Planning	XYZ Owner
OP-0001	Operations Unit	XYZ Owner
P-0001	Hwy 1 Murphy City	XYZ Owner/Capital Planning/Transit Corridor
P-0002	Project Contract	IABC Contractor
P-0003	Project Rudy	IABC Contractor
P-0004	ABC-001 Retail Store	IABC Contractor
P-0005	ABC-002 High School	IABC Contractor
P-0006	ABC-003 Airport Runway	IABC Contractor

Total: 56

Company Addresses

Address Type
Headquarters

Partner Companies

Company Name
Anastasi Trucking & Paving
Decide Analytics
Di Pizio Construction
Eastern Municipal Water District
LC Whitford, Inc.
McNatty Construction Services, Inc.
Midland Asphalt Materials
NYSDOT Region 5
PFES
Walt's Tree Service

Tasks View Improvements

The screenshot shows the 'Tasks' view in a software application. The left sidebar contains navigation links: Home, Tasks, Notifications, Drafts, uMail, and Project Controls Ma... The main area displays a table of tasks with columns: Process, Record Number, Title, and Record. The 'Actions' menu is open, showing options: Accept, Undo Accept, Action with Preview..., Action without Preview..., Hide, Unhide All, and Print. A callout points to the 'Switch to Classic View' link, stating: 'Can still view in the old view (\'classic view\')'. Another callout points to the 'Accept' action, stating: 'Accept, Action on multiple records'.

Process	Record Number	Title	Record
request	SR-0007	-Draft-	
request	SR-0006		
request	SR-0005	-Draft-	
ports	DR-00008	Daily Report 032...	04/03/20
ports	0-00007	Daily Report 032...	03/31/20
CONV...	02	Steel Structures	03/31/20
SBMTR-000		Rev-	03/31/20
SBMTR-000002			03/31/20
SBMTR-000001			03/31/20
PCO-000001		Existing	03/31/20
RFI-000003		Prop	
RFI-000003		Mo	
RFI-000003		Ha	
IR-00001		Br	

Information
Details of multiple tasks cannot be viewed.

Tasks—Reassign tasks

ORACLE PRIMAVERA Unifier (Development) Company Administrator Sign Out

Company Work... Hospital Manhat... XCEL Hardened...

PFES > XCEL Hardened F...

Task Reassignment

Reassign View All Tasks

Assignee	Company	Origin	Business Process	Record Number	Title	Record Due	Creation Date	Workflow Name
Rudy Ising	DRMcnatty	XCEL Hardened FLE...	Daily Reports	DR-00008	Daily Report 0326...	04/03/2017 10:56 ...	03/27/2017 10:56 ...	Daily Reports WF
Rudy Ising	DRMc				Daily Report 0323...	03/31/2017 08:30 ...	03/26/2017 08:30 ...	Daily Reports WF
Rudy Ising	DRMc				Rev-	03/31/2017 01:01 ...	03/24/2017 01:02 ...	Standard WF
Rudy Ising	DRMc				Rev-	03/31/2017 12:59 ...	03/24/2017 12:59 ...	Standard WF
Rudy Ising	DRMc				Rev-	03/31/2017 12:56 ...	03/24/2017 12:57 ...	Standard WF
Rudy Ising	DRMc				Proposed Jacking...	03/31/2017 10:29 ...	03/24/2017 10:36 ...	Contractor RFI V
Rudy Ising	DRMc				Existing Conduit ...	03/31/2017 10:30 ...	03/24/2017 10:29 ...	Standard WF
Rudy Ising	DRMc				Broken Pipe	03/30/2017 01:39 ...	03/23/2017 01:41 ...	Incident Report V

Select New Assignee

Name	Company
Filter	Filter
Ben Lee	DRMc
Company Administrator	DRMc
Ed Jones	PFES
John Smith	PFES
Mark Atkinson	PFES
Mike Elwin	DRMc
Pam Powrie	DRMc

Cancel Select

Total: 8

Reassign tasks in bulk for Inactive Users

Log Views

ORACLE PRIMAVERA Unifier (Development) Rudy Ising Sign Out

Company Work... 865555-01 Tran... +

865555-01 Transit Ph... XYZ Owner > Capital Planning > Office Building > 865555-01 Trans...

Alerts Mailbox Task Manager Information Document Manager Financial Transactions Change Management Financial Reporting Project Design Submittal Manager RFI Manager

Requests for Information

+ Create Actions View All Records

Record #	Title	Reference No
RFIO-00039	Final Tiling	TX0971
RFIO-00038	Welding Requirements	TX0971
RFIO-00037	Pipe Cleanout	FN6900
RFIO-00036	Utilities in Area B	TX0971
RFIO-00035	Inappropriate Concrete Mix	FX34651
RFIO-00034	Final Tiling	TX0971
RFIO-00033	Additional Parking Required	TX03456
RFIO-00032	Wrong Tiling	TX041011
RFIO-00031	Concrete Pipe Question	TN074328
RFIO-00030	Tree removal	FN98761
RFIO-00029	Vapor Barrier	TX03456
RFIO-00028	Relocate Underground Utilities	TN04101
RFIO-00027	Welding Requirements	TX0971
RFIO-00026	Uneven surface	TN074328
RFIO-00025	Inappropriate Concrete Mix	FX34651
RFIO-00024	Final Tiling	TX0971
RFIO-00023	Additional Parking Required	TX03456
RFIO-00022	Concrete Pipe Question	TN074328
RFIO-00021	Unforeseen Conditions	TX041011
RFIO-00020	Vapor Barrier	TX03456
RFIO-00019	Welding Requirements	FN0970
RFIO-00018	Inappropriate Concrete Mix	TX041011
RFIO-00017	Final Tiling	FC34561
RFIO-00016	Welding Requirements	KN06835
RFIO-00015	Concrete Pipe Question	TX041011
RFIO-00014	Utilities in Area B	HD08991
RFIO-00013	Relocate Underground Utilities	TN074328
RFIO-00012	Unforeseen Conditions	FC98761
RFIO-00011	Vapor Barrier	HD08991
RFIO-00010	Tree removal	FN08761

Total: 39

Record Details Workflow Progress Attachments

General

Project Number: P-0008
Project Name: 865555-01 Transit Phase I
Title: Welding Requirements

Record No.: RFIO-00038
Creator: Company Administrator
Creation Date: 04/16/2016 08:24 AM (UTC-8)
Due Date: 04/22/2016 08:24 AM (UTC-8)
Status: Pending

RFI Information

Category: Other
Discipline: Mechanical
Specification Section: Architect Number: ARCO12
Contract: Required Date

Action Requested

Question: Steel Question
Proposed S...

Answers

Answer S...
Answer S...
Answer S...
Answer S...

Improved Log Views

Preview Window

Log Views—Search

Requests for Information Switch to Classic View

[+ Create](#) [Actions](#) [View](#) [All Records](#) [Refresh](#) [Print](#) [Export](#) [Help](#)

Record #	Title	Reference No	Subcontractor #	Category	Status	Creator
RFIO-00039	Final Tiling	TX0971	SUBC0970	Unforeseen C...	Approved	Company Ad...
RFIO-00038	Welding Requirements	TX0971	SUBC0180	Other	Pending	Company Ad...
RFIO-00037	Pipe Cleanout	FN69000	SUBC0111	Errors & Omi...	Approved	Company Ad...
RFIO-00036	Utilities in Area B	FC98761	SUBC0794	Scope Changes	Pending	Company Ad...
RFIO-00035	Inappropriate Concrete Mix	FX34651	SUBC0800	Unforeseen C...	Pending	Company Ad...
RFIO-00034	Final Tiling					
RFIO-00033	Additional Parking Required					
RFIO-00032	Wrong Tiling					
RFIO-00031	Concrete Pipe Question					
RFIO-00030	Tree removal					
RFIO-00029	Vapor Barrier					
RFIO-00028	Relocate Underground Utilities					
RFIO-00027	Welding Requirements					
RFIO-00026	Uneven surface					
RFIO-00025	Inappropriate Concrete Mix					
RFIO-00024	Final Tiling					
RFIO-00023	Additional Parking Required					
RFIO-00022	Concrete Pipe Question					
RFIO-00021	Unforeseen Conditions					
RFIO-00020	Vapor Barrier					
RFIO-00019	Welding Requirements					
RFIO-00018	Inappropriate Concrete Mix					
RFIO-00017	Final Tiling	FC34561	SUBC0800	Scope Changes	Approved	Company Ad...
RFIO-00016	Welding Requirements	KN06835	SUBC0101	Errors & Omi...	Pending	Company Ad...
RFIO-00015	Concrete Pipe Question	TX041011	SUBC0790	Other	Approved	Company Ad...
RFIO-00014	Utilities in Area B	HD08991	SUBC0790	Scope Changes	Pending	Company Ad...

Search

[Clear](#)

Field	Operator	Value
<input type="text" value="Records"/>	<input type="text" value="equals"/>	<input type="text" value="All Records"/>
<input type="text" value="Workflow Status"/>	<input type="text" value="equals"/>	<input type="text" value="All"/>
<input type="text" value="Architect Number"/>	<input type="text" value="contains"/>	<input type="text" value=""/>
<input type="text" value="Category"/>	<input type="text" value="equals"/>	<input type="text" value="Select"/>
<input type="text" value="Creation Date"/>	<input type="text" value="equals"/>	<input type="text" value="MM/DD/YYYY HH:MM A"/>

☐ Today

Powerful search options

Log Views—Gears and Actions

The screenshot displays the Log Views interface. On the left, a sidebar contains a gear icon. A context menu is open, listing actions such as 'Open', 'Copy with Attachments', 'Copy without Attachments', 'Print - HTML...', 'Print - PDF...', 'Print - Custom...', 'Transfer Ownership', and 'Terminate Record'. A blue callout box points to this menu with the text 'Copy, Print Transfer Ownership'. Below the sidebar, a table lists records with columns for ID, status, and description. The 'Actions' dropdown is open, showing options like 'Import...', 'Export CSV Template...', 'Create From Template...', 'Bulk Edit...', and 'Print'. A blue callout box points to this dropdown with the text 'Action Dropdown (multi-select)'. The table contains the following data:

ID	Status	Description
RFIO-00039		Final Tiling
RFIO-00038		Welding Required
		Pipe Cleanout
		Utilities in Area B
		Inappropriate Concrete Mix
		Final Tiling
		Additional Parking
		Wrong Tiling
		Concrete Pipe Quality
		Tree removal
RFIO-00029		Vapor Barrier
RFIO-00028		Relocate Undergr
RFIO-00027		Welding Required

Print Multiple Records

ABC Contractor > ABC-001 Retail S...

Requests for Information (RFI)

Switch to Classic

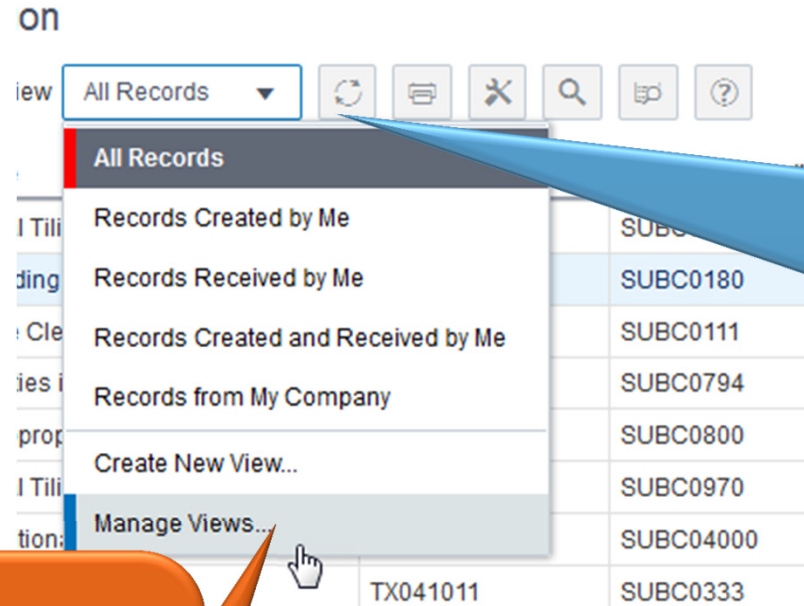
+ Create Actions View All Records

Import...
Export CSV Template...
Create From Template...
Bulk Edit...
Print
HTML ...
PDF ...
Custom ...

Record	Status
RFI-000005	Contractor_Review
RFI-000006	Owner_Review
RFI-000007	Contractor_Review
RFI-000008	Contractor_Review
RFI-000009	Owner_Review
RFI-000010	Closed

Print multiple records

Log Views—Layouts



Layout options

Saved Layouts
Edit Layouts

NOTE: Views
are per user;
not global for all
users

Log Layouts

ORACLE PRIMAVERA Unifier (Development) Rudy Ising Sign Out

Company Work... XCEL Hardened...

PFES > XCEL Hardened ...

New View

Save View As
New View Cancel Save Save As

Columns Filters Group By Sort By

Available Columns
No items to display.

Selected Columns ?
Record #
Contract No

Layouts:
Select Columns
Filters
Group By
Sort By

Still missing—
grand totals
(dollars) on
columns or
group by
sections

Workflow Action Relocated

Create New Contracts - Project No. P-0004 - Mozilla Firefox

https://unifierdemo161.mlmprojectservices.com/bp/process/new?fromMasterLog=1&wftemplate_id=170&module_name=ucx&project_id=1137&_uref=uuu753:navigator-3

File Edit View Actions Help

Workflow Actions Submit Send Save Spelling.. Add Attachment Discussion Cash Flow Close Window

Contract Contracts

General

Project Number: Record No.:

Project Name: Creator: [Rudy Ising](#)

Title: Creation Date:

Due Date: 09/28/2017 08:26 PM (UTC-8)

Action Details

Submit

To... Ben Lee, Brian Criss, Company Administrator, C

Workflow action
selection
relocated next
to "Send"
button

Line items save add another

Line Item - Mozilla Firefox

https://unifieddemo161.mlmpojectservices.com

Spelling... Attach X Delete Line Item

Purchase Orders Line Item:

General

Cost Code: Type

Code Name:

Short Description:

Description:

Spend Category

Spend Category: -Select-

Work Package: Select...

Item Quantity: 0 *

Unit of Measure: -Select-

Item Unit Cost: \$0.00 *

Amount: \$0.00

Attachments (0) Linked Records (0)

Save & Close Save & Add New Cancel

Save and add another option on Line Items—time saver

Line Item - Mozilla Firefox

https://unifieddemo161.mlmpojectservices.com/bp/studio

Spelling... Attach X Delete Line Item

Purchase Orders Line Item:

General

Cost Code: 3000

Code Name: Design

Short Description: trusses

Description:

Spend Category

Spend Category:

Work Package:

Item Quantity: 100

Unit of Measure: each

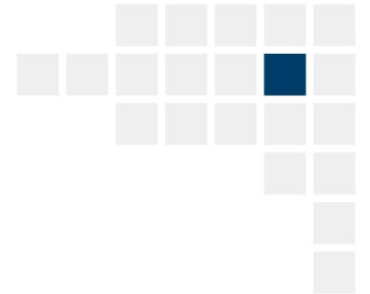
Item Unit Cost: \$4,000.00

Amount: \$400,000.00

Attachments (0) Linked Records (0)

Close << >>

View mode item scrolling instead of closing each to open next



Design Enhancements



SOV Enhancements

ORACLE PRIMAVERA Unifier (Development)

Company Work... Hospital Manhat... XCEL Hardened...

Hospital Manhattan E... Alerts Mailbox Task Manager Information Document Manager Documents Unpublished Docum... Financial Transactions Estimates Budget Commitments Requests for Bid Contracts Notices to Proceed Contracts - SOV **Payment Applica...** Work Releases Purchase Orders Payments and Jou... Risks & Issues Change Management Financial Reporting Project Design Submittal Manager

Payment Applications - Schedule of Values: Summary Payment Applications - Google Chrome

Secure | https://unifierdemo161.mlmprojectservices.com/bp/spasov/view?docid=0&recordid=131&pref...

File Edit View Action

Save Expand Collapse Find Split Export Close Window

Schedule of Values: Summary Payment Applications

Record: CON-000001

Item #	Ref	WBS Code	Description	Unit Cost	Demolition
000010	1		Coordinate Construction	1	
000010.00010	1.1	010400OH	Coordinate Construction	1	
000020	2		Demolition	1	
000020.00010	2.1	02050SC	Demolition	1	
000030			Excavation	1	
000030.00010	3.1	02100SC	Excavation	1	
000040	4		Utilities, Earthwork, & Paving	1	
000040.00010	4.1	02700VN	Utilities, Earthwork, & Paving	1	
000050	5		Concrete	1	
000050.00010	5.1	03300SC	Concrete	1	
000060	6		Unit Masonry	1	
000060.00010	6.1	04200SC	Unit Masonry	1	
000070	7		Steel Joist	1	
000070.00010	7.1	05210SC	Steel Joist	1	
000080	8		Metal Roof Decking	1	
000080.00010	8.1	05310SC	Metal Roof Decking	1	
000090	9		Metal Floor Decking	1	
000090.00010	9.1	05320SC	Metal Floor Decking	1	
000100	10		Metal Fabrication	1	
000100.00010	10.1	05500SC	Metal Fabrication	1	
000110	11		Carpentry - Miscellaneous	1	
000110.00010	11.1	06000SC	Carpentry - Miscellaneous	1	
Total:				\$755,000.00	

Double click to edit. Valid values: 00000 to 99999.
Format: Line <Item# label> Costed Line <Item# label>

Record has been closed

Line Items

Current View: All

21 Item(s)

No.	Description
001	Coordinate Co
002	Demolition
003	Excavation
004	Utilities, Earth
005	Concrete
006	Unit Masonry

Find

Attachments (0)

on Currency

Items Per Page

\$755,000.00

SOV now can
sort by item #

SOV Enhancements

ORACLE PRIMAVERA Unifier (Development) Company Administrator Sign Out

Company Workspace

File Edit View Help

New Copy Open Properties Find Delete Preview Link Elements

Forms - C

4 Item(s)

Name

AF 01-Init

AF 02-Rev

AF 03

VF 01

Form Design - Google Chrome

Secure | https://unifierdemo161.mlmpojectservices.com/bp/sys/studio/form/bp_form/edit?pkid=827&form=form

General Options

Select Actions:

Attachments to overall record

☒ Add Attachments ☒ Remove Attachments

Line Items

☒ Hide current tab

☒ Allow Add/Remove line items

☒ Allow attachments to line items

☒ Allow Modification of line item

☒ Allow viewing of Costed line items

☒ Allow Modification of Costed line items

☐ Total the Cost Breakdown values to the line item

☐ Costed line item total must be equal to the line item total

Additional

☒ Allow linking uMail

Funding Options

☐ Allow to view funding information

☐ Allow Fund Assignment

Attachment Source

New setting options for SOV

SOV Enhancements

ORACLE PRIMAVERA Unifier (Development)

Company Work... Hospital Manhat... XCEL Hardened...

Hospital Manhattan E... ABC Contractor > Hospital Manhatta...

File Edit View

New

Drafts - Current View: All

15 Item(s)

Type

Payment Applications/Grid View - Payment Items - Google Chrome

Secure | https://unifierdemo161.mlmprojectservices.com/bp/studio/bp/cost/opengrid?pref=ucx&unit_p

Save Split Find Close Window

Payment Applications/Payment Items - Current View: All

Row	Ref.	Change Order #	Commit Short Description	Co	Quantity this Period	Cost
1	1	0	Coordinate Construction	Unit C	200	
2	2	0	Demolition	Unit C	0	
3	3	0	Excavation	Unit C	0	
4	4	0	Utilities, Earthwork, & Paving	Unit C	0	
5	5	0	Concrete	Unit C	0	\$0.00
6	6	0	Unit Masonry	Unit C	0	\$0.00
7	7	0	Steel Joist	Unit C	0	\$0.00
8	8	0	Metal Roof Decking	Unit C	0	\$0.00
9	9	0	Metal Floor Decking	Unit C	0	\$0.00
10	10	0	Metal Fabrication	Unit C	0	\$0.00
11	11	0	Carpentry - Miscellaneous	Unit C	0	\$0.00
12	12	0	Bituminous Dampproofing	Unit C	0	\$0.00
13	13	0	Insulation	Unit C	0	\$0.00
14	14	0	Hospital Equipment	Unit C	0	\$0.00
15	15	0	Mechanical	Unit C	0	\$0.00
16	16	0	Piping System	Unit C	0	\$0.00
17	17	0	Plumbing	Unit C	0	\$0.00
18	18	0	HVAC	Unit C	0	\$0.00
19	19	0	Electrical System	Unit C	0	\$0.00
20	20	0	Security System	Unit C	0	\$0.00
21	21	0	CONTINGENCY	Unit C	0	\$0.00
Total:					200	\$60,000.00

General

Action Details

Submit

To...

Cc...

Send For:

Line Items

Current View: All

0 Item(s)

No. Description

Add

Attachments (0)

Pay app grid view—Summary Line items view

SOV Enhancements

Oracle PRIMAVERA Unifier (Development) Company Administrator Sign Out

Company Work... Hospital Manhat... XCEL Hardened...

Hospital Manhattan E... Alerts Mailbox Task Manager Tasks Drafts Information Document Manager Documents Unpublished Docum... Financial Transactions Estimates Budget Commitments Requests for Bid Contracts Notices to Proceed Contracts - SOV Payment Applicati... Work Releases Purchase Orders Payments and Jou... Risks & Issues Change Management Financial Reporting

Payment Applications/Grid View - Payment Items - Google Chrome

Secure https://unifierdemo161.mlmprojectservices.com/bp/studio/bp/cost/opengrid?pref=ucx&unit_price_check=29&from...=true&

Payment Applications/Payment Items - Current View: All

Row	Ref.	Order #	Commit Short Description	Quantity this Period	Other Amount this Period	Requested This Period
1	-1	0	Coordinate Construction	0	\$0.00	
2	1.1	0 1	Demolition	1000	\$0.00	\$300,000
3	2	0	Excavation	0	\$0.00	
4	2.1	0 1	Utilities, Earthwork, & Paving	0	\$0.00	
5	3	0	Concrete	0	\$0.00	
6	3.1	0 1	Steel Joist	0	\$0.00	
7	4	0	Metal Roof Decking	0	\$0.00	
8	4.1	0 1	Metal Floor Decking	0	\$0.00	
9	5	0	Metal Fabrication	0	\$0.00	
10	5.1	0 1	Carpentry - Miscellaneous	0	\$0.00	
11	6	0		0	\$0.00	
12	6.1	0 1		0	\$0.00	
13	7	0		0	\$0.00	
14	7.1	0 1		0	\$0.00	
15	8	0		0	\$0.00	
16	8.1	0 1		0	\$0.00	
17	9	0		0	\$0.00	
18	9.1	0 1		0	\$0.00	
19	10	0		0	\$0.00	
20	10.1	0 1		0	\$0.00	
21	11	0		0	\$0.00	
22	11.1	0 1		0	\$0.00	
Total:			0	0	\$0.00	

Pay app grid—view summary and costed line items available

SOV Enhancements

Pay app grid—mismatch feature

Row	Ref.	Change Order #	Commit Short Description	Other Amount this Period	Requested This Period	Stored Materials Ar
1	1	0	Coordinate Construction	\$0.00	\$0.00	
2	1.1	0	1	\$0.00	\$0.00	
3	2	0	Demolition	\$0.00	\$0.00	
4	2.1	0	1	\$0.00	\$0.00	
5	3	0	Excavation	\$0.00	\$0.00	
6	3.1	0	1	\$0.00	\$0.00	
7	4	0	Utilities, Earthwork, & Paving Un	\$100,000.00	\$100,000.00	
8	4.1	0	1	\$100,000.00	\$100,000.00	
9	5	0	Concrete	\$0.00	\$0.00	
		0	1	\$100,000.00	\$100,000.00	
		0	Unit Masonry	\$300,000.00	\$300,000.00	
		0	1	\$0.00	\$0.00	
	6.1	0	1	\$0.00	\$0.00	
13	7	0	Steel Joist	\$0.00	\$0.00	
14	7.1	0	1	\$400,000.00	\$400,000.00	
15	8	0	Metal Roof Decking	\$300,000.00	\$300,000.00	
16	8.1	0	1	\$0.00	\$0.00	
17	9	0	Metal Floor Decking	\$0.00	\$0.00	
18	9.1	0	1	\$200,950.00	\$200,950.00	
19	10	0	Metal Fabrication	\$0.00	\$0.00	
20	10.1	0	1	\$0.00	\$0.00	
21	11	0	Carpentry - Miscellaneous	\$0.00	\$0.00	
22	11.1	0	1	\$0.00	\$0.00	
Total:				\$700,000.00	\$700,000.00	

Document Type BP Multiple Tabs

The screenshot displays the Oracle Primavera Unifier web application interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier (Development)', and a user profile for 'Company Administrator' with a 'Sign Out' link. The left sidebar contains a list of application modules, with 'Design Reviews' highlighted. The main content area shows a 'Design Reviews' window with a 'General' tab selected. This tab displays project details: Project Number (P-0023), Project Name (Hospital Manhattan Expansion), Title (Design Review Phase I #6111), Reference ID (DRMC9000), Record No. (DESR-00002), Creator (Company Administrator), Creation Date (09/22/2013), and Due Date. Below the general information is an 'Action Details' section with a 'Send For' dropdown and a 'Workflow Progress' link. A blue callout bubble points to the 'Line Items' tab, which is currently active. This tab shows a table of reviewer notes. The table has columns for 'No.', 'Reviewer Name', and 'Comments'. One item is listed: '001' by 'John Gibbs'. The table is paginated to show 1 item of 1 total. At the bottom of the window, there are links for 'Linked Records (0)', 'General Comments', and 'Linked Mail (0)'. A blue callout bubble on the right side of the screenshot contains the text: 'Document Type BP—multiple tab support (Line Item here)'.

Document Type BP—multiple tab support (Line Item here)

Document Type BP Multiple Tabs

ORACLE PRIMAVERA Unifier (Development) Company Administrator

Company Work... Hospital Manhat... +

Hospital Manhattan Exp... ABC Contractor >

File Edit View

New Cop

Design Reviews - C

2 Item(s)

Record #

DESR-00002

DESR-00001

Design Reviews - Design Review Phase I #6111 - Project No. P-0023 - Google Chrome

Secure | https://unifierdemo161.mlmprojectservices.com/bp/studio/bp/log/open?srcid=28&model=udr&fromcostlog=1.

File Edit View Actions Help

Workflow Actions -Select- Send Save Spelling... Discussion Review Close Window

Design Review Design Reviews

General

Project Number: P-0023 Record No.: DESR-00002

Project Name: Hospital Manhattan Expansion Creator: Company Administrator

Title: Design Review Phase I #6111 * Creation Date: 09/22/2017 00:00

Reference ID: DRMC9000 Due Date: 09/29/2017

Contract Reference: CON-000001 Status: Pending

Action Details

(Click here to view latest content)

To...

Cc...

Send For:

Task Note

View Progress

Line Items Reviewer Notes (Line Item) Transmittals (QBT)

Current View: All

1 Item(s) Page 1 of 1 Display 100 Items Per Page

Record #	Title	Contract Ref	Specification Section	Status
TRN-00001	Transmittal GH9927A	CON-000001		Pending

New Copy Find

Linked Records (0) General Comments Linked Mail (0)

Document Type BP—added QBT (Query Based Tab)

Document Type Options

Form Design - Mozilla Firefox

https://unifierdemo161.mlmprojectservices.com/bp/sys/studio/form/bp_form/edit?pkid=457&form=form¤t_design_id=form&design_name=AF 01-Initiate Re

General Options

Select Actions:

Line Items

- ☐ Hide current tab
- ☒ Add/Copy Line Items
- ☒ Remove Line Items
- ☒ Allow Modification of Line Item, except when status is: Select...
- ☒ Allow Line Item Status to be modified
- ☒ Add Attachments
- ☒ Remove Attachments
- ☒ Append Line Item Folder Structure to Auto Publish Path
- ☐ Make Attachment to a Line Item mandatory
- ☒ Allow comments
- ☐ Allow marking of...

Additional

- ☒ Allow linking uMail

Attachment Source

- ☒ Unifier Folders
- ☒ My Computer

Close

Now can
REQUIRE upload
of attachment
to submit.

Document Manager

ORACLE PRIMAVERA Unifier (Development) Rudy Ising Sign Out

Company Work... XYZ Owner ABC-001 Retail ...

ABC Contractor > ABC-001 Retail S...

Documents

Documents > Project Documents > General Project Information > Scope of Work

Create Actions View All

Name	Ref	BP	Size	Creation Date	Owner
Scope of Work				04/12/2016 10:39...	Compa
1620735.xls			287 KB	09/21/2017 08:16...	Rudy Is
1620747-1620747.pdf			202 KB	09/21/2017 08:16...	Rudy Is
1620749-1620749.pdf			223 KB	09/21/2017 08:16...	Rudy Is

Properties Revisions References Linked Records Audit Log Permissions

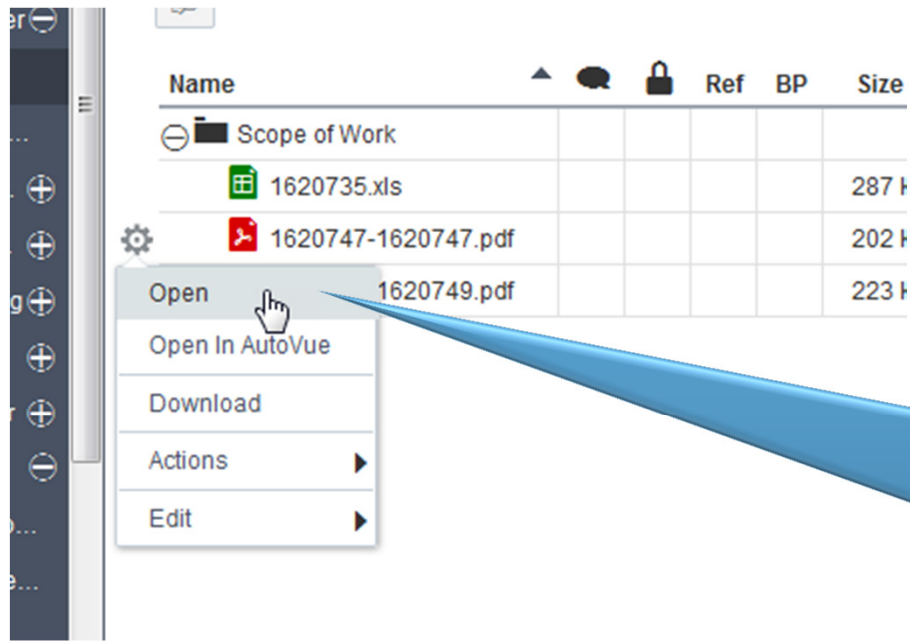
Name	Ref	BP	Pub. No.	Upload Date
Find			Find	Find
1620735.xls			1	09/21/2017 08:16 PM

Properties and Details window

Total Files: 3

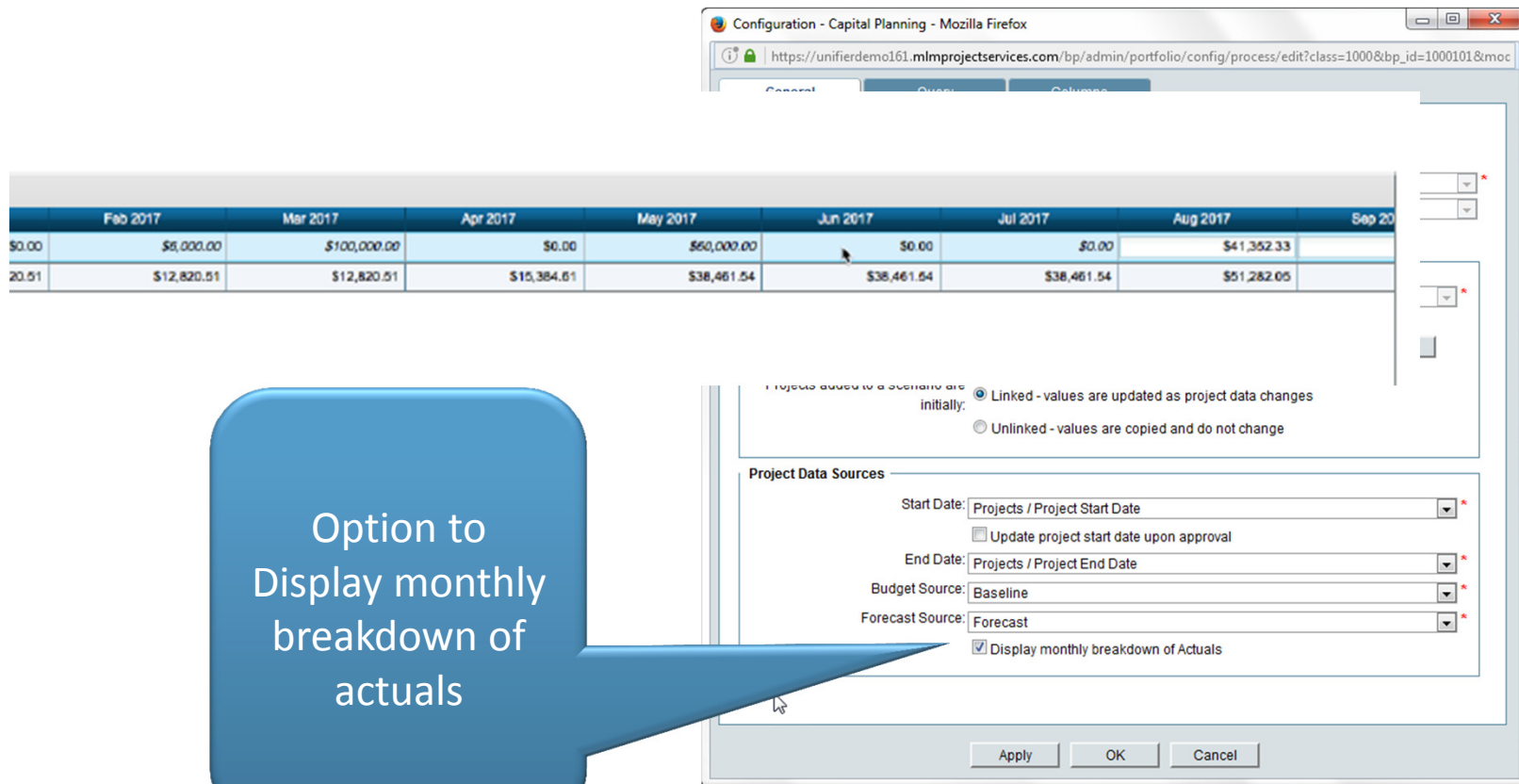
https://unifierdemo161.mlmpjctservices.com/bp/mod/dm/doc/home?_uref=uuu753:navigator-3#

Document Manager—Open



Standard
document
viewer (no Java)

Portfolio Manager Monthly Breakdown



The screenshot displays the 'Configuration - Capital Planning' window in Mozilla Firefox. The main table shows monthly breakdowns for various projects. A blue callout box points to the 'Display monthly breakdown of Actuals' checkbox in the 'Project Data Sources' section, which is currently checked.

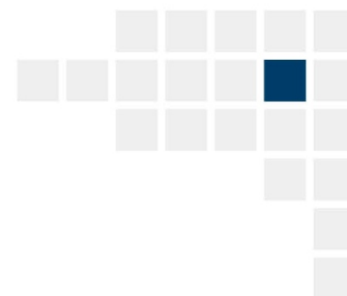
	Feb 2017	Mar 2017	Apr 2017	May 2017	Jun 2017	Jul 2017	Aug 2017	Sep 2017
\$0.00	\$6,000.00	\$100,000.00	\$0.00	\$60,000.00	\$0.00	\$0.00	\$41,362.33	
20.51	\$12,820.51	\$12,820.51	\$15,384.61	\$38,461.54	\$38,461.54	\$38,461.54	\$51,282.05	

Project Data Sources Configuration:

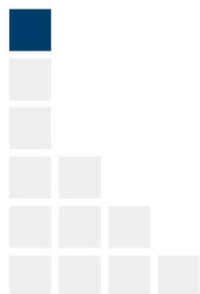
- Linked - values are updated as project data changes (selected)
- Unlinked - values are copied and do not change
- Start Date: Projects / Project Start Date
- Update project start date upon approval (unchecked)
- End Date: Projects / Project End Date
- Budget Source: Baseline
- Forecast Source: Forecast
- Display monthly breakdown of Actuals (checked)

Buttons: Apply, OK, Cancel

Option to
Display monthly
breakdown of
actuals

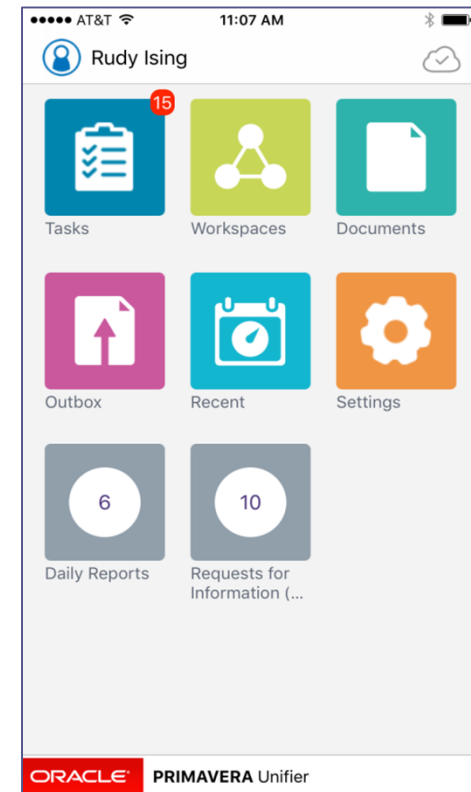


Unifier Mobile

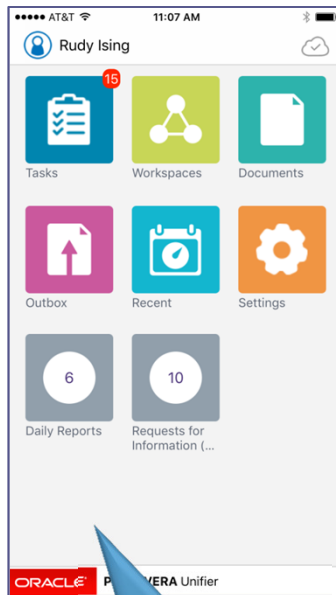


Unifier Mobile

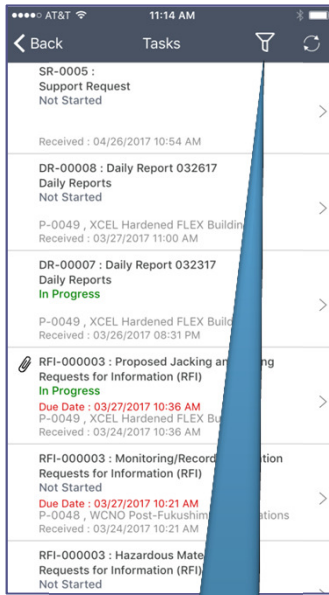
- Unifier Mobile App for iOS
- English language only, Android planned.
- Online/offline functionality (auto-syncs when connected).
- Respond to assigned Tasks.
- View business processes in your projects.
- Create new business process records.
- RFI's, Daily Reports, Change Orders... *including Approvals...*
- Take photos and attach images or videos to business processes.
- Most business processes can be enabled for mobile use.



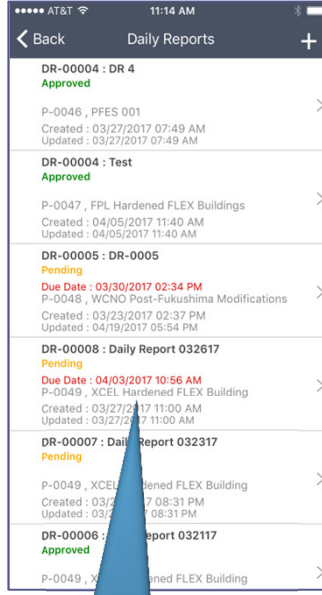
Unifier Mobile



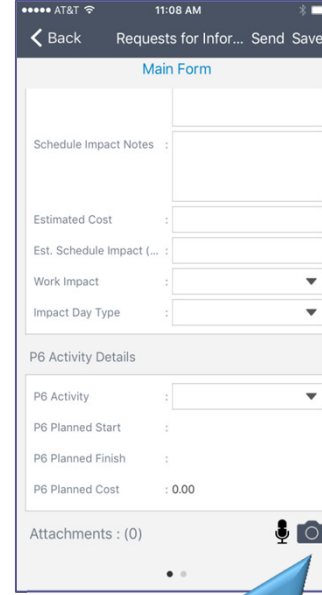
Simple
powerful
navigation



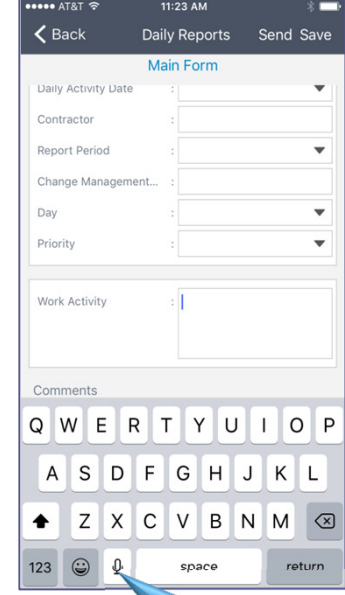
User Task
List; filter
for easy find



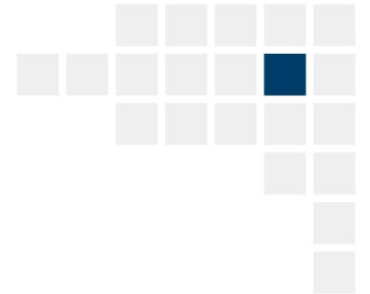
Action
indicators



Data entry +
photo/video +
audio narration



Dictate
input fields



P6 Integration Changes



Activity Sheet Support for Cost Codes

The screenshot shows the 'Form Designer - Detail Form - Mozilla Firefox' window. The 'Activities' tab is selected, and the 'Pre-Defined Attributes' block is visible. The 'Cost Code' field is highlighted in the list of attributes. The 'Element Properties' dialog is open, showing the following details for the 'Cost Code' field:

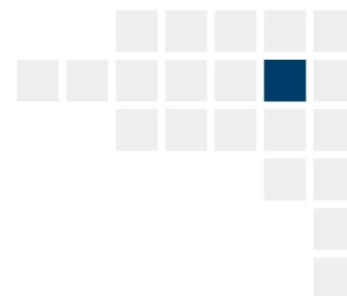
Element Properties	
Name:	blitemID
Label:	Cost Code
Type:	Custom Data Element
Data Definition:	WBS Picker
Access:	Editable
Block:	pre-defined attributes
Data Entry:	Manual
Formula:	
Auto-Populate Source:	
Source Element:	

Activity Sheet
now supports a
cost code picker.

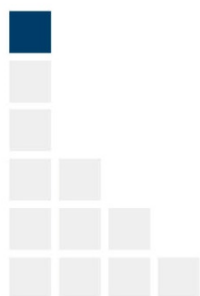
Activity Sheet Support for Cost Codes

- When user selects P6 Activity in BP line item it will retrieve the cost code as assigned in P6.

Note: P6 integration still allows only one cost code per activity (not multiple cost codes for one activity.)



System Enhancements



Configuration Packages—Old

Designer - Business Processes - Current View: All

89 Item(s) Page

ID	Name	Owner	Status	Tag	Level
uai	Action Items	OOTB Admin	Draft	Production	Project/Shell
uxai	Action Items OTTOWA	OOTB Admin	Complete		Project/Shell
uado	Architect/Engineer		Complete	Production	Project/Shell
uasi	Architect's Sup				Project/Shell
ubpo	Blanket Purch				Company
uxssp	BP Request				Company

Before Unifier 17, needed to tag individual objects in the module itself

Designer - Business Processes - Current View: All

9 Item(s) Page

ID	Name	Owner	Status	Tag	Level
us_		OOTB Admin	Complete	Production	Company
us_		OOTB Admin	Complete		Company
us_xch		OOTB Admin	Complete		Company
us_xdi	Districts	OOTB Admin	Draft		Company
us_xga	Generic Assets	OOTB Admin	Draft		Company
us_xlon	London	OOTB Admin	Complete		Company
us_xla	Los Angeles	OOTB Admin	Complete		Company
us_xnyc	New York	OOTB Admin	Complete		Company
us_p	Projects	OOTB Admin	Complete	Production	Company

Configuration Packages—New

Oracle PRIMAVERA Unifier (Development) Proxy for Rudy Ising Sign Out

Company Work...

DRMcNatty Company Workspace

New Component List

Name * Error Check Save Save as Cancel

- Designs
 - Data Structure Setup
 - Basic Data Definitions
 - Cost Code Data Definitions
 - Data Cube Definitions
 - Data Views
 - Dynamic Data Sets
 - Company Access Control
 - Configuration
 - Designs
 - Custom Templates
 - User Mode Navigator
 - Stamps
 - Portal Landing Page
 - Company Workspace
 - Setup
 - Rules
 - Auto Update Status Setup
 - User Defined Reports
 - Company Templates
 - Cash Flow

Designs ?

<input checked="" type="checkbox"/>	Name	Design ID	Status	Level	Type	Published Version
<input type="checkbox"/>	Business Processes					
<input type="checkbox"/>	Cost Manager					
<input type="checkbox"/>	Document Manager					
<input type="checkbox"/>	Portfolio Manager					
<input type="checkbox"/>	Resource Manager					
<input type="checkbox"/>	Schedule Manager					
<input type="checkbox"/>	Activity Attribute Form	standard_sch...				
<input type="checkbox"/>	Activity Sheet	standard_p6a...	Draft			
<input type="checkbox"/>	Resource Activity Form	standard_sch...	Complete			
<input type="checkbox"/>	Shell Manager					
<input type="checkbox"/>	User Administration					

Total: 86

In Unifier 17, tag all objects in one consolidated "Components List"

Server Options

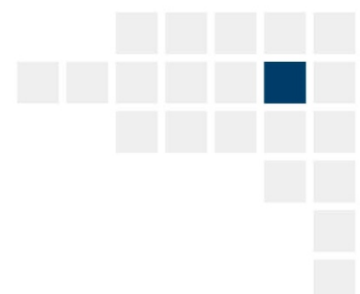
The screenshot displays the Oracle Primavera Unifier (Development) interface. At the top, there are tabs for 'General', 'Repository', 'Database', and 'Email'. Below these, a dropdown menu is open, showing options: '-- SELECT --', 'DEVELOPMENT', '✓ TEST' (which is selected), and 'PRODUCTION'. A blue callout bubble points to this menu with the text: 'Now options to set servers as: DEV TEST PROD'. Another blue callout bubble points to the 'TEST' option with the text: 'Development and Test servers clearly displayed in UI—no more mistaking which server you're on'. The main interface area shows a sidebar with navigation links like 'Company Work...', 'XCEL Hardened...', 'Company Workspace', 'DRMcNatty - Home', 'Summary', 'Collaboration', 'General', 'Test Manager', 'Document Manager', 'Company Documents', 'Unpublished Docu...', and 'Source Manager'. The main content area is titled 'Company Documents' and includes a 'Create' dropdown, 'Actions' dropdown, and a list of documents with columns for 'Name' and 'All'.

Wish List

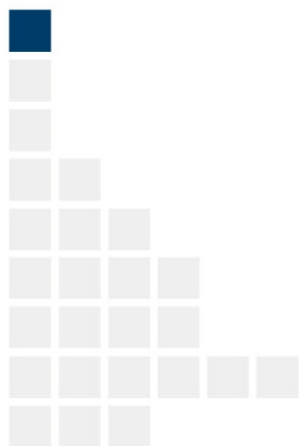
- Some items on my wish list:
 - Save Layouts as Global OR User
 - Dollar totals in log views
 - Cost sheet drill down to document edit
 - Global search
 - Android app (on the roadmap!)
 - Multiple Cost Codes per P6 Activity
 - Better shell dashboards including drill down capability
 - Project data archival from Unifier
 - Delete vs. Inactive/Terminate

Last Thoughts

- Enhancements in this version greatly improve the user experience—layouts alone are great value.
- Expectations that user views will further improve in future versions.
- Still requires diligence and discipline when implementing.
- Well rounded functionality across multiple components of projects.



LIVE DEMO



Questions & Comments

- All questions are gathered into a master sheet, answered and distributed to all registrants as well as posted on our website.
- Answers are based on our own experiences using the various software products covered in this webinar.

Thank you for participating

Contact - contact@drmcnatty.com

Upcoming Events



**2nd Annual AACE
Region 5 Symposium
November 3 - 4, 2017
The Woodlands, TX**



February 8-11, 2018
Hyatt Regency Indian Wells Resort & Spa
Indian Wells, CA



contact information: info@westernwinterworkshop.com

DRMcNatty Monthly e-newsletter



Keeping you in the loop on the latest news,
events and upcoming webinars.

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