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PROJECT MANAGEMENT SOLUTIONS THAT *SIMPLY WORK* SINCE 1989.

WHAT'S NEW IN ORACLE PRIMAVERA UNIFIER 17.7

September 27, 2017

Rudy Ising, Director of Services and Lim Tan, Senior Solutions Architect

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	ARES PRISM	Deltek 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
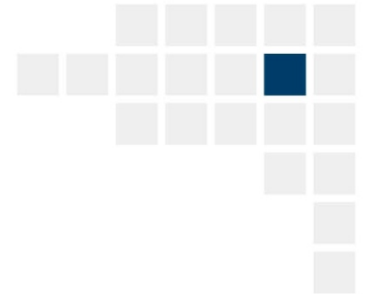
- Unifier Overview & Release Schedule
- User Interface Enhancements
- Process Related Enhancements
- System Related Enhancements
- Wish List
- Final Notes
- Live Demo/Q&A (time allowed)
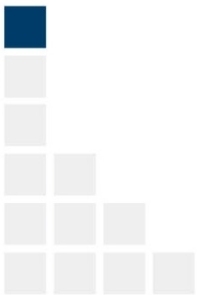
What Is Unifier?
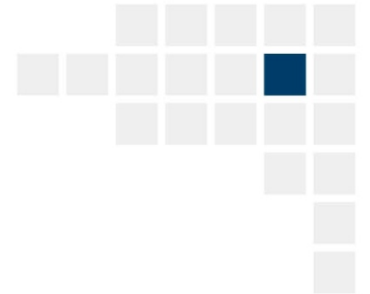
- Unifier, acquired by Oracle in 2012, is an enterprise software solution intended to manage the entire lifecycle of your projects and programs.

- 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

Unifier—An Integrated Software Solution

REMOTE PROJECT STAKEHOLDERS AND PARTICIPANTS

OWNER/CM | SCHEDULE CONTROL | COST CONTROL | DOCUMENT CONTROL | FINANCE

ORACLE APPS

P6 EPPM | UNIFIER | Financials

VIRTUAL DESKTOP SERVICE | GATEWAY | ORACLE BUSINESS INTELLIGENCE (BI)

EXT APPS

TEAM MEMBER | UNIFIER MOBILE APP | OTHER CUSTOM APPLICATIONS
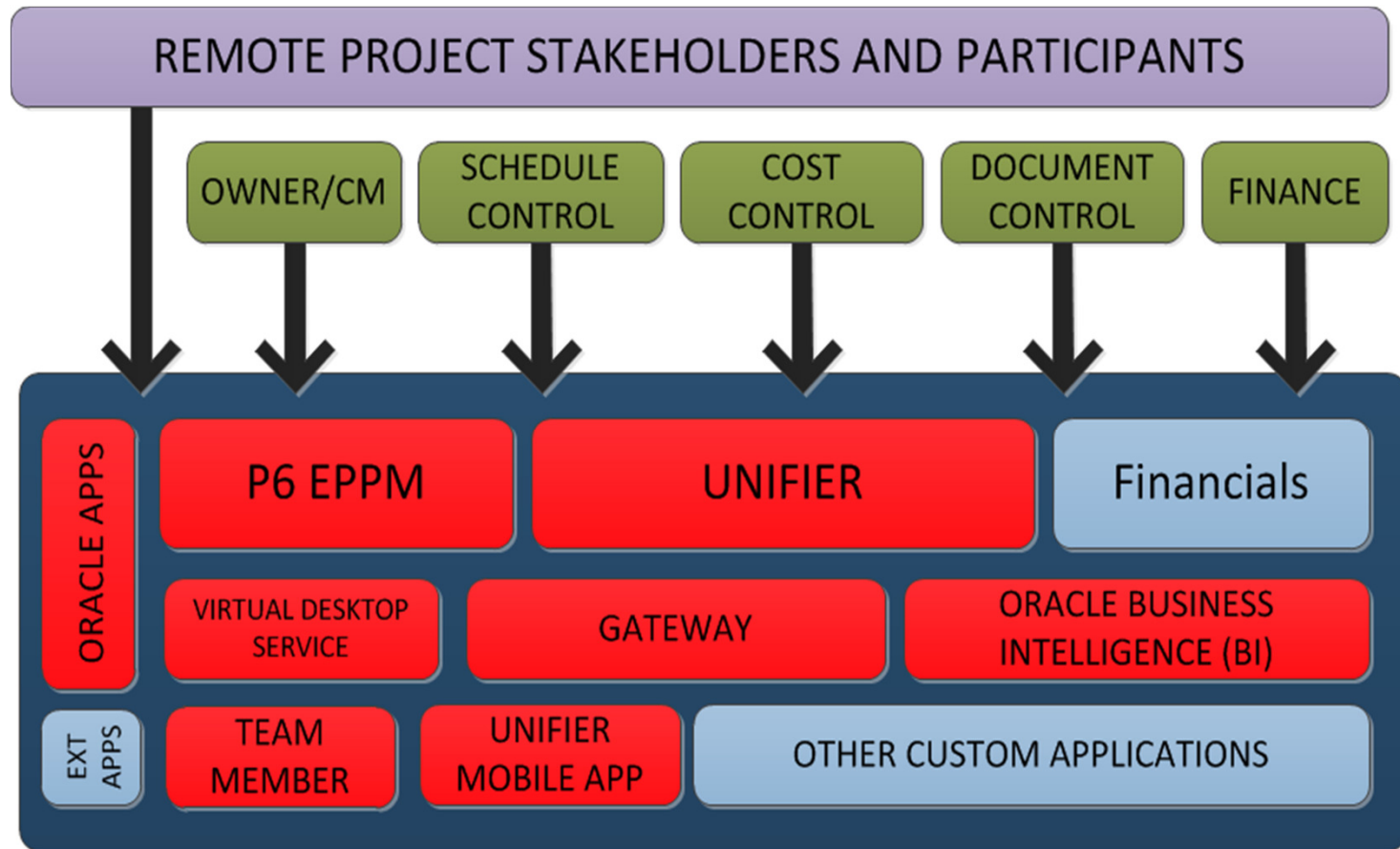
Unifier Key Features

- 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
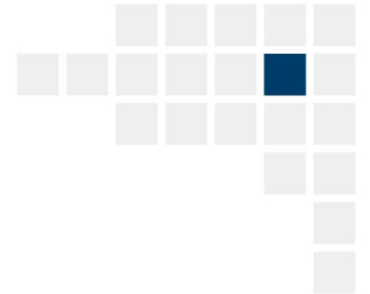
User Interface

Top Navigation

Top Navigation Browse

Tasks View Improvements

Can still view in the old view ('classic view')

Accept, Action on multiple records

Tasks—Reassign tasks

Reassign tasks in bulk for Inactive Users

Log Views

Log Views—Search

Powerful search options

Log Views—Gears and Actions

Copy, Print Transfer Ownership

Action Dropdown (multi-select)

Print Multiple Records

Print multiple records

Log Views—Layouts
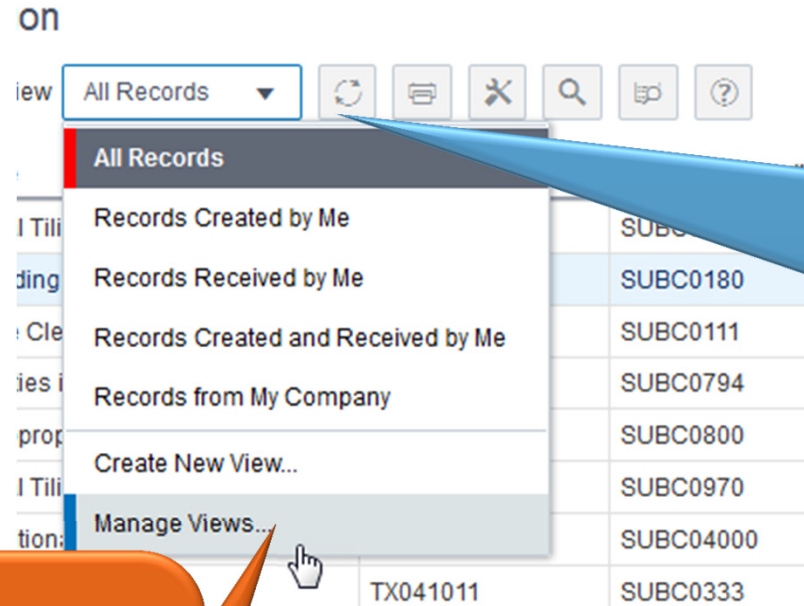
Layout options

Saved Layouts
Edit Layouts

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

Log Layouts

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

Layouts:
Select Columns
Filters
Group By
Sort By

Workflow Action Relocated

Workflow action selection relocated next to "Send" button

Line items save add another

Save and add another option on Line Items—time saver

View mode item scrolling instead of closing each to open next

Design Enhancements

SOV Enhancements

SOV now can sort by item #

SOV Enhancements

SOV Enhancements

SOV Enhancements

Pay app grid—view summary and costed line items available

SOV Enhancements

Pay app grid—mismatch feature

Document Type BP Multiple Tabs

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

Document Type BP Multiple Tabs

Document Type BP—added QBT (Query Based Tab)

Document Type Options

Now can REQUIRE upload of attachment to submit.

Document Manager

Improved view

Document Manager—Create BP option

Document Manager

Document Manager—Open

Standard document viewer (no Java)

Portfolio Manager Monthly Breakdown

Option to Display monthly breakdown of actuals
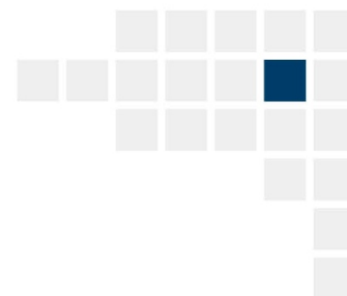
Unifier Mobile
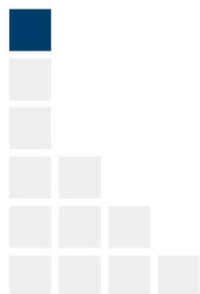
Unifier Mobile

- 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.
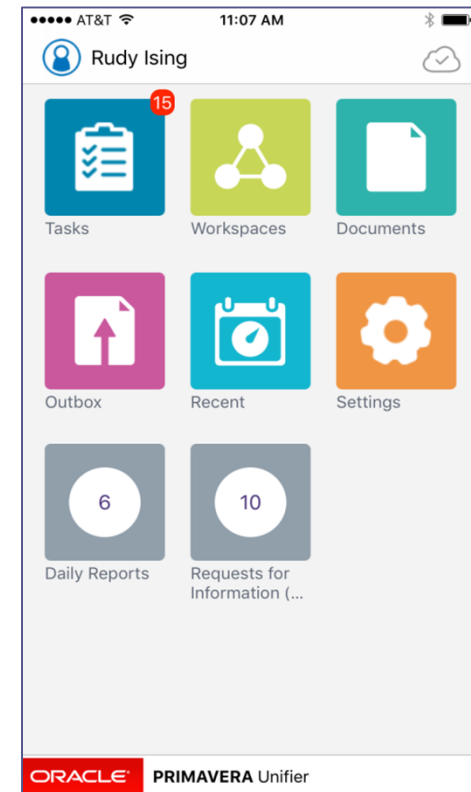
Unifier Mobile
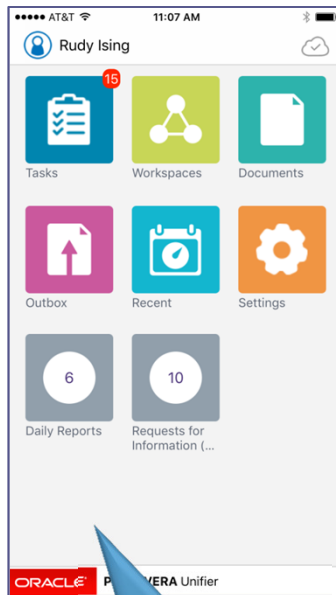
Simple powerful navigation
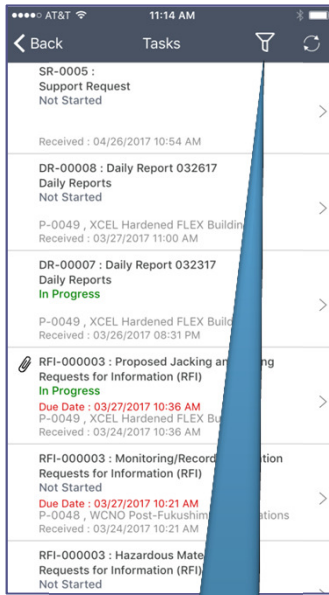
User Task List; filter for easy find

Action indicators

Data entry + photo/video + audio narration

Dictate input fields

P6 Integration Changes

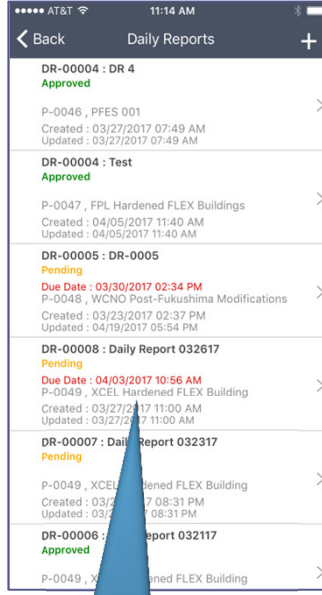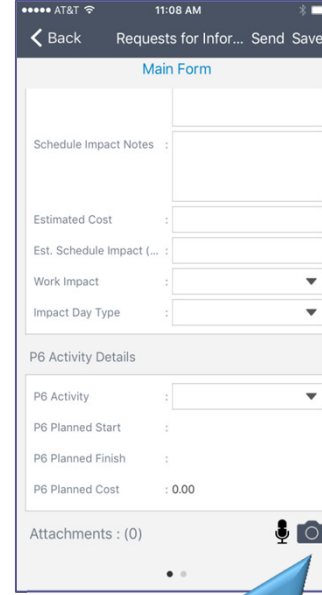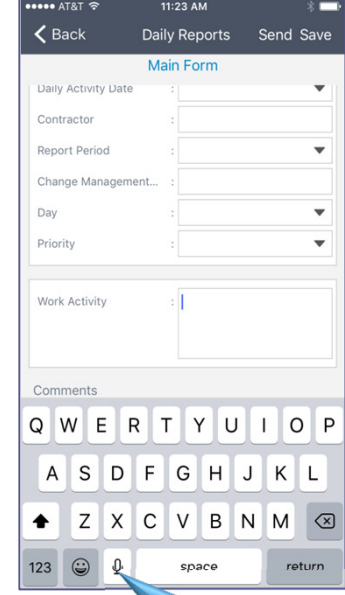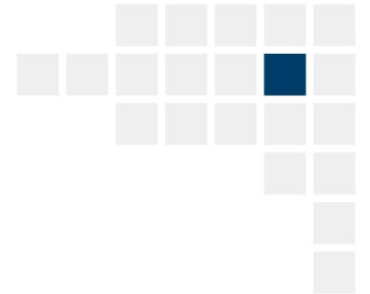# Activity Sheet Support for Cost Codes

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

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

Configuration Packages—New

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

Server Options

Now options to set servers as:

DEV
TEST
PROD

Development and Test servers clearly displayed in UI—no more mistaking which server you're on

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.
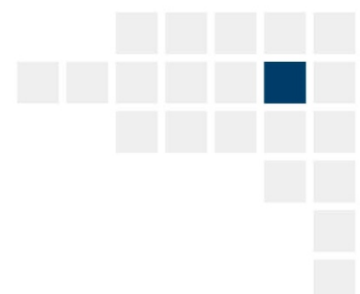
LIVE DEMO
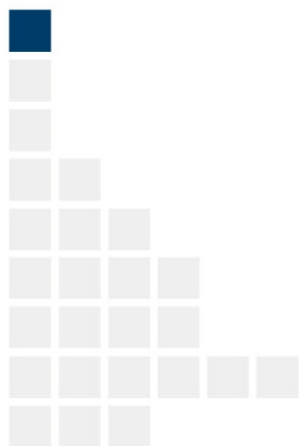
Questions & Comments

- 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

DRMcNatty Monthly e-newsletter

the loop

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