

TECH TIP

ADDING A NEW BP FOR USE IN A SHELL ORACLE PRIMAVERA UNIFIER

As a Unifier administrator or developer, you may have the following questions in BP design:

- How do I add a new BP to a Project Template?
- How do I add a new BP to a Project (shell)?
- How do I Activate and make sure I can see and use the BP inside my Project (Shell)?

In today's topic, we are going to explore these items and give you recommendations on how & when to use these design features in Unifier development.

Add a BP to a Project Template

To find the Shell Template, navigate to **Company Workspace** > **Admin** mode > **Templates** > **Shells** > **Projects**

Ń	DRMcnatty		Company Works	space			
**	Partner Companies		File Edit Vie	ew Help			
	uDesigner	\oplus	🗊 New 📴 Co	opy 😅 Open 🤍 Find			
	Data Structure Setup	\oplus	Projects Templa	tes - Current View: All			
20	Access Control		7 Item(s)				Page 1
20	User Administration	\oplus	Project #	Project Name	Template Name	Status	
•	Configuration	Ð	9013	Machias to Ellicottville Pavement Rehabilit	Contractor Project Template	Inactive	
	Comgaration		PFES-1	PFES Template	PFES Template	Active	
	Standards & Libraries	\oplus	T-001	Contractor Project Template	Contractor Project Template	Active	
ി	Company Workspace	\oplus	T-002	Owner Project Template	Owner Project Template	Active	
			T-003	Owner Project Template - 3 Segment Cost	Owner Project Template - 3 segr	Active	
	Templates	Θ	T-004	Contractor Project Template - 3 Segment C	Contractor Project Template - 3 s	Active	
	Projects (Standard)	\oplus	T-123	TESTING123	TESTING123 SHELL	Active	
	Shells	Θ					
	Projects	Θ					
	Owner Project Template - 3 Segm	Θ					

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 enail 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 urge you to constact Oracle technical support consultant for assistance Open the shell template you want to add the New BP to. Within the shell type template, navigate to **Setup** > **Business Processes**

- For a new business process, you must click "New" to add the business process to the template.
 - This presumes the process has already been deployed and configured at the company level.

laccess Control		Company Workspace							
User Administration	⊕ ∩	File Edit View Help							
Configuration	\oplus	🗊 New 🖻 Open 🤍 Find	Pi New [™] Open [™] Find						
Standards & Libraries		Business Processes - Current View: All							
		14 Item(s)							
Company Workspace 🕀		Name	Status	ID					
Templates	Θ	Action Items	Active	uai					
Projects (Standard)	\oplus	Architect's Supplemental Instructions	Active	uasi					
Shells	Θ	Architect/Engineer Daily Observations	Active	uado					
		Areas	Active	uxa					
Projects	Θ	Budget Changes	Active	ubc					
Owner Project Template - 3 Segm	Θ	Budget Transfers	Active	ubt					
		Change Orders	Active	ucox					
Member Companies		Contracts	Active	ucx					
Access Control		Daily Reports	Active	udr1					
User Administration	Θ	Design Change Requests	Active	udcr					
		Design Reviews	Active	udr					
Users		Drawing Revisions	Active	uxdrwrev					
Groups		Drawing Sets	Active	uxdrwset					
·		Drawings	Active	uxdrw					
Setup \ominus		Estimates	Active	ue					
Business Process		Fund Appropriations	Active	ufa					
Dashboards		Incident Reports	Active	uir					
Dashboarus			A 10						



Select the New BP you want to add to your Template > Click **OK**

Company Work Lone:	sdale Pla	ce CIP Projects	Rte 242 Machia.	+	
DRMcnatty		Company Workspace			
Partner Companies		File Edit View Help			
uDesigner	Ð	🗊 New 🚔 Open 🔍 F	ind		
Data Structure Setup	\oplus	Business Processes - Cur	rent View: All		
& Access Control		44 Item(s)			
User Administration	\oplus	Name		 Status 	ID
Configuration	æ	Design Reviews	New Business Processe	es - Google Chrome —	- 🗆 🗙
		Drawing Revisions	■ https://unifierdem	no18.mlmprojectservices.cor	n/bp/admin/
Standards & Libraries	\oplus	Drawing Sets		io ionininipi ojecto ci necoleci	, op, com, m
Company Workspace	\oplus	Drawings	Select Business Proce	sses:	
Templates	Θ	Estimates	News		
		Fund Appropriations Incident Reports	Adding Project Users		
Projects (Standard)	\oplus	Initial Budget	Budget Change Orders		
Shells	Θ	Invoices	Budget Items		
Projects	Θ	Journal Entries	Change Quote Decision		
Owner Project Template - 3 Segr		Lessons Learned	Meeting Minutes 1		
	🔿	Meeting Minutes	Payment Applications to	Owner	
Member Companies		Monthly Updates	Payments from Owner Potential Changes		
Access Control		Notices to Proceed	RFI		
User Administration	æ	PO Amendments	RFI Lim		_
		Payment Applications	RFIs		
Setup	Θ	Payments	Requests For Informatio		
Bus ness Process		Potential Change Orders	Requests for Information		
Dashboards		Project Closeout	Subcontractor Requests Subcontractor Requests		
		Project Information Punch Lists	Cubcontractor requests		
Gates		Punch Lists Purchase Orders		OK Cancel	
Planning Manager		Request for Substitution			
Decourse Manager		Desugato for Dial		0 shuse	in some la



Find your new BP in the Business Processes List > Make Sure it says Status: Active

冷	Company Work Lones	dale Place	CIP Proj	ects	Rte 242 Machia	+		
â	DRMcnatty	Co	mpany Workspace					
۲	Partner Companies	File	e Edit View	Help				
	uDesigner	+ F	New 🖻 Open	Q Find				
	Data Structure Setup	🕀 🛛 Bus	iness Processes	- Current V	ew: All			
2,	Access Control	45	ltem(s)					
2,0	User Administration	+ Nar	ne				Status	ID
•	Configuration	⊕ Les	sons Learned				Active	ull
		Mee	eting Minutes				Active	umm
	Standards & Libraries	① Mor	thly Updates				Active	umu
a	Company Workspace	⊕ Not	ces to Proceed				Active	untp
		PO	Amendments				Active	upa1
U	Templates	⊖ Pay	ment Applications				Active	uxpa
	Projects (Standard)	🕀 Pay	ments				Active	up1
	Shells		ential Change Orde	ers			Active	upco
		Proj	ect Closeout				Active	upc
	Projects	\ominus Proj	ect Information				Active	upi
	Owner Project Template - 3 Segr		ch Lists				Active	up3
			chase Orders				Active	upo
	Member Companies	RFI					Active	uxmrfi
	Access Control	Rec	uest for Substitutio	n			Active	urfs
	l lass Administration	Rec	uests for Bid				Active	urfb

Note* If it does not say Status: Active but instead says **Inactive**: Navigate to Company Workspace: **Admin** mode > **Configuration** > **Business Process** > Select your New Business Process > Click **Open**



Set the Status to: Active

Set your Sequence Format: (Format that the BP's will be continually numbered in as they are created)

Business Process Log: Advanced

Enable for Mobile Application: checked (for iPhone & Tablet use)

冷	Company Work	Hollomans Bra	in	CIP Projects (E	Rte 242 Machia	+				
â	DRMcnatty		Com	pany Workspace						
1	Partner Companies		File	Edit View Help						
	uDesigner	\oplus	J N	ew 😰 Open 🔍 Find						
	Data Structure Setup	\oplus	Confi	guration - RFI - Current V	ew: All					
2,	Access Control		1 Iter	n(s)						Page 1
40	User Administration	\oplus	Name		▲ Leve		Status		ID	
۵	Configuration	Θ	RFI			ect/Shell	Active		uxmrfi	
	Business Process	Θ		onfiguration - RFI - Google				-		×
	RFI	θ		https://unifierdemo18.r	nImprojectservices.com/l	op/admin/	/bp/config/pr	ocess/	edit?cla	ss
	Log Views			General	Workflow Custor	n Print				
	Portfolio Manager		RI	FI - General Configuration						
	Resource Manager			Lev	el: O Company Project/S	Shell				
	Shell Manager			Default Locatio				_		
	Space Manager			Default Locatio	n: Logs			•		
	Custom Templates			Sequence Polic	y: 🔍 Company Based 🔎 P	roject/Shell	Based			
	Navigation Tabs			Sequence Forma	it: RFI-	Start:	0000			
	User Mode Navigator			Business Process Lo	g: O Standard Advance	d				
	Landing Page				_					
	Standards & Libraries	\oplus		Record Create	 Do not allow to termina Allow to modify record 					
â	Company Workspace	\oplus		Otati						
	Templates	\oplus		Statu	s: Active					
4	Programs			Enable for Mobile Applicatio	n: 🕑					•
4	Company Sponsored Projects (Standard) 🕀			Apply OK	Car	ncel			



Under the Workflow Tab > Click Add and select the WF for the BP you want to add > Click on Activate > and click on Apply > OK Note* (Now your BP and WF is active in the system and configured at the company level)

C	DRACLE Primavera	Jnifier (Devel	opmen	t)						
冷	Company Work Hol	lomans Bran	С	IP Projects (E	Rte 242 Machia	+				
á	DRMcnatty	c	ompany \	Norkspace						
10	Partner Companies	Fi	le Edit	View Help						
	uDesigner	⊕ 	New (🗃 Open 🔍 Find						
	Data Structure Setup	e co	onfigurati	on - RFI - Current Vie	ew: All					
2,	Access Control	1	ltem(s)					Page 1	of 1	
2,0	User Administration	$\mathbf{\Psi}$	ime		▲	Level	Status	ID		
۵	Configuration			Configuration - RFI	L - Google Chrome	Proiect/Shell	Active	uxmrfi	- 0	×
	Business Process	\ominus			demo18.mlmprojects	envices.com/b	n/admin/hn/confic	/process/edit?clas		
	RFI	Θ			_	7		process/edit: clas	s=000p_id=200	
	Log Views			General RFI - Workflows	Workflow	Custom	Print			
	Portfolio Manager									. 11
	Resource Manager			Name RFI WF	Stat) rf uxmrfi workflow.0			
	Shell Manager									112
	Space Manager									111
	Custom Templates									111
	Navigation Tabs									111
	User Mode Navigator									111
	Landing Page									111
	Standards & Libraries	\oplus								111
đ	Company Workspace	\oplus								111
	Templates	\oplus								
4	Programs			Add	Modify			Activate	Deactivate	
4	Company Sponsored Projects (Stan	idard) 🕀						1		
-						Apply	OK Cano	el		



Navigate back to your **Company Workspace** in Unifier > navigate to **Admin** mode > **Templates** > **Shells** > **Projects** > Open your **Template Type** > **Setup** > **Business Process** > Find your new Active BP in the Business Processes List > Click **Open** > **Workflow Setup** > **New**

冷	Company Work	onesdale Place	CIP Projects	Rte 242 Mac	chia	+
	Access Control		npany Workspace Edit View Help			
*	User Administration	⊕ ∩		🗙 Delete 🏻 🕅 L	Indate She	lls 🔻 🗈 Copy 📑
۵	Configuration	⊕ <mark>–</mark>			puare one	13 de 00py de
	Standards & Libraries	⊕ 0 Ite	Setup - Current View: All			
đ	Company Workspace	\oplus		0 N	Description	
D	Templates	Θ	J	flow Name	Description	
	Projects (Standard)	\oplus	elect Workflow - Google Chro		_	
	Shells	\ominus	https://unifierdemo18.ml	mprojectservice	es.com/bp	/admin/bp/
	Projects		ct Workflow			
	Owner Project Template - 3	Segm⊖	Business Process: RFI			
	Member Companies		Workflow: RFI WF			
	Access Control		ок	Cancel	1	
	User Administration	\oplus				
	Setup	Θ				
	Business Process	\ominus				
	RFI	\ominus				
	Workflow Setup					

Select the Workflow You Just Activated from the Dropdown Menu > Click **OK** Under **General Tab**: Give the Setup Name (usually the Name of the BP) > you can give a **Description** (usually relates to the business context) Status: **Active**

冷	Lonesdale Plac	е	Company Work	Hollomans Bran	CIP Projects	Rte 242 Machia
4	Hollomans Branch Sto		🖸 Workflow Setup - Goo	ogle Chrome		
**	Member Companies		https://unifierden	no18.mlmprojectservices.c	om/bp/admin/bp/setup/	wf_config_structure?workflow
2,	Access Control		General	Settings		
2,0	User Administration	\oplus	RFI - Workflow Setup			
∗	Setup	Θ		Setup Name: RFI		*
	Business Process	Θ		Description:		
	RFI	Θ				
	Workflow Setu	p				
	Dashboards					
	Planning Manager					
	Resource Manager			Status: 🖲 A	ctive 🔘 Inactive	Error Check
÷	Rules			d format for Notification	DF Custom Select-	Ŧ



Settings Tab:

On the **Settings** Tab > Next Walk Through Each Step of the workflow and assign assignees (users or groups; *recommended use groups) at each step in the WF > then Click **Apply** > **OK**

渝	Company Work	Lonesdale Place	e CIP Projects	Rte 242 Machia	+	User/Group Picker - Google	Chrome		- 0
2 0 Ar	ccess Control	Ψ	Company Workspace					s com/bp/admin/bp/step/assig	nees/userpicker?usersFromGroup=-
	ser Administration	⊕ •	Workflow Setup - Google Chro	me		Q Find	1 A A	Owner Project Template - 3 Sr	
	onfiguration	⊕ ⊕	https://unifierdemo18.ml	mprojectservices.com/k	op/admin/bp/setup/w	Users/Groups - Current View:	All		
	andards & Libraries	⊕ ⊕	General Se	ettings		11 Item(s)		Page 1 of 1	Display 100 T Items I
	ompany Workspace	⊕ I	Workflow Configuration			Name All Project Users		 Manager Name 	
	mplates	\oplus	B-ST RELWE			All Project Users Architects / Engineers			
	Projects (Standard)	⊕	- Creation	Step Configurat	tion	Customer			
	Shells	\oplus	E DC E RE/OE Review	Step		Discipline Leads Document Controllers			
	Projects		E- Review		Step Name: Creatio Description:	Project Administrators			
		θ	DC Final Review RE/OE Final Review			Project Coordinators			
	Owner Project Templat		E-= End		Duration:	Project Manager			
	Member Companies			Overrid	le Task Due Date: No	Add		View Profile	Members
	Access Control			Allow Assignee	s to Decline Task: No	Selected Users/Groups			
	User Administration	Ψ.		Enable St	ep for Integration: No			^	
	Setup	θ		Assignees		Project Administrators			
	Business Process	Ŭ,		Assign	ment Policy: Preassigned	ок		Remove	Cancel
		θ			Assignees: Project Admi		Select		
	Workflow Se	etup					Define		
	Dashboards				Allow CC: No Y Add Cc	es Preassigned Preassigne	ed and Allow		
	Gates						Select		
	Planning Manager						Define		
	Resource Manage	er		Allow Add	d Assignees: No Y	es			
	Rules			111	1		Select		
	Information			Auch					
		$\oplus \ominus$		Apply	ок (Cancel			

Next in your **Company Workspace** in Unifier > navigate to **Admin** mode > **Templates** > **Shells** > **Projects** > Open your **Template Type** > Access Control > **Under User Mode Access** > Navigate to your Business Process Node(name) > **Click on the BP and give the applicable Groups** the Permissions to see/ create the new Business Process > Click **OK** > **Apply** > **OK**

	Company Work	Lonesdale Pla	ce CIP Projects	Rte 242 Machia	+		Permission/Access Cont	rol - Google Chrome	- 0	×
20	Access Control		Company Workspace				https://unifierdemo	o18.mlmprojectser	vices.com/bp/ad	d
4 0	User Administration	⊕ (File Edit View Help				Permissions Setting for: Select Users/Groups	RFI		
٠	Configuration		I New I Open Q Fin Access Control	d 🐒 Update Shells 🖺 Acc	cess information		First Name	Last Name	Company/Manag	jer
	Standards & Libraries		Click on a module to change a	 Module Permission Settings 	- Google Chrome		Project Administrators			
1	Company Workspace		Modules For:		mlmprojectservices.com/bp/adm	nin/nermission/aetl				
	Templates		E-A Projects (Standard)		initiprojectoci vices.com/ op/ dan	inv permission, get				
	Projects (Standard)		Member Companies Access Control	Permission Settings for: RFI	Name Company/Manager	Permission				
	Shells		E & User Administration		Name Company/Manager	remission				
	Projects		⊞-X Setup ⊟-1 Rules							
	Owner Project Template -	- 3 Segm ⊖	E LUSer Mode Access					Add Users/Groups		
	Member Companies						Permission Settings:			
	Access Control						Modify Record Owner	ship		
	User Administration	\oplus	E- Document Manager				Terminate Work Flow			- 8
	Setup						 Modify Step Assignme View All Records 	ent		1
	Business Process		🗉 🕒 Change Manageme	Add Modify	Remove		View Company Rec	ords		- 8
	RFI					_	View User Record			1
	Workflow Setup		E Submittal Manager		Apply OK	Cancel	Hide Record Audit Loo			- 8
	Dashboards		⊟- ■ RFI Manager				Hide Task Statuses	5		
	Gates		E-B RFI				Allow Bulk Edit			
	Planning Manager		■ ■ Requests for Info ■ ■ Request for Subs					OK Cance	H	



Updating your Projects (Shells) with Changes

Next, you will need to push these changes you've made to your projects.

Under Workflow Setup > Click on Update Shells and choose one of the following:

Company Work	Lonesdale Place	CIP Projects	Rte 242 M	Aachia	+			
f DRMcnatty	Co	mpany Workspace						
 Partner Companies 	Fil	e Edit View Help						
uDesigner	+	New 🗃 Open 🔍 Fin	d 🗙 Delete [Update Shells		Copy	From 🝷 📑 Impor	t
Data Structure Setup		Setup - Current View: All	-		Shells			
2 Access Control	1 1	tem(s)			All Shells History		Page 1	of 1
User Administration			Vorkflow Name	Description	History	Status	Workflow Id	Auto Creation
Configuration		F	FIWF			Active	wf_uxmrfi_workfl	¢
Standards & Libraries	\oplus							
f Company Workspace	\oplus							
Templates	\ominus							
Projects (Standard)	\oplus							
Shells	\ominus							
Projects	\ominus							
Owner Project Templa	ite - 3 Segm ⊖							
Member Companie	s							
Access Control								
User Administration	\oplus							
Setup	\ominus							
Business Proces	s 😔							
RFI	Θ							
Workflow S	etup							

Click Shells, Or All Shells option to select one or more shells to update.

- Selecting the "All Shells" would update all projects, and this would ONLY be used if all projects have the exact same setups.
- Select only the shells (projects) you want to update. Use the "Find" to filter the list or use Ctrl-click to select multiple.
- If you have multiple templates for your projects, this is important to select ONLY the shells that should be updated. It's **Very** important that you update only the type that you're modifying.



Now in your Project(shell) that you pushed the updates to > in Unifier Navigate to **User Mode** > Navigate to your Business Process Node(name) > Click on **Create** > and Verify you can Create your Newly Added BP for use in your Project (Shell)

徻	Lonesdale Place	Company W	rk Hollomans Bran CIP Proje	pjects Rte 242 Machia +
4	Hollomans Branch Sto	CIP Projects (E	Create New RFI - Project No. P-0052) - Google Chro	rome – 🗆 X
▲	Alerts	RFI	https://unifierdemo18.mlmprojectservices.c	
	Mailbox 🕀	REI	File Edit View Actions Help	0
	Task Manager 🛛 \ominus	+ Create	Workflow Actions Submit	📓 Save 🗳 Spelling 🌒 Add Attachment 👻 😰 Discussion 🛛 Close Window
	Tasks	🗐 🖉 Co	📲 RFI	RFI
	Drafts		General	
0	Information 🕀		Project Number:	Record No.:
	Document Manager 🛛 🕀		Project Name:	Submitted By: Select
Ê	Portfolio Manager 🛛 🕀		Contractor RFI #:	* Creation Date:
3	Financial Transactions 🕀		Title:	* Due Date:
2	Financial Reporting 🛛 🕀		Action Details	
	Submittal Manager 🛛 🕀		Submit	
×	RFI Manager 🛛 🕀		To	Cask Notes:
	RFI		Cc	
	Requests for Informa		Send For: DC	
$\overline{\mathbf{O}}$	Schedule Manager 🛛 🕀		Reviewers	
23	Communication & Fo 🕀		Current View: All	
Ø	Ongoing Reporting 🛛 🕀		0 Item(s)	Page 1 of 1 Display 100 V Items Per Page
	Reports 🕀		No Short Description Reviewer Name As	Assigned Reviewed Status Comments
			💣 Add 🛛 🗈 Copy 🔺 📑 Import 🗍 😁 Re	temove Grid Q Find

Update a BP Setup in a Project

As outlined in the above section, the best practice method for managing BP changes and setups is to use the Shell Templates and then update individual project shells from the template.

If you are using Groups throughout your design, then the only additional setup at the project level would be to manage and make sure that the appropriate users are in the correct groups at the project level.

However, if there are BP variations needed from project to project, opening the project, and selecting Admin > Setup > Business Processes will display all the BP's setup in that project. Selecting a BP design here allows you to open and further configure the workflow setup if needed.

Selecting a BP design here allows you to open and further configure the workflow setup if needed.

Examples:

- If the step duration requirement is different than what is defined in the template, it can be changed here. This change ONLY affects the project (shell) you are updating.
- If you are not using groups but assigning users in the workflow or BP setup, you may need to edit these based on personnel assigned to that project. Not recommended, but this is an option if that is how you've configured your setups.
- Also, if any of the General properties in a workflow bp change, these changes must be made in each project (shell) if the change is made after creating the shell.



Notes and Cautions

- If you are adding a BP to a template, when you update the shells this BP will be added to those projects with the setup you have configured in your template.
- Best practice in these setups would be to use Groups in your setups wherever possible and not individual users. If the groups in your BP setup are not already in the project(s), they'll be created, and you then will need to be sure that the appropriate users are assigned to those groups. If the group already exists and you're sharing it with other BP designs, then the group permissions will be updated for that group.
- When selecting what shells to update, it's important to update only the correct shells. If you update the wrong shell type (if you have multiple shell templates) you'll improperly update that shell with BP's that shouldn't be there.

Summary

Using Unifier's Shell Templates are the most efficient way to manage BP designs being updated in projects as long as you understand some of the aspects of their use and impacts, they have on your projects.



