

TECH TIP

CREATING AND ACCESSING A PROGRAM ORACLE PRIMAVERA UNIFIER

A program in Unifier allows multiple projects (WBS-shells) to be monitored, compared and reviewed. Examples of this could be a portfolio of projects overseen by a project manager or it could be a specific set of construction projects that make up a specific construction program. Whenever there is the need to monitor a number of projects together in Unifier a program can be used.

Benefits of the Unifier Program include:

- 1. An overall snapshot view of progress on the projects through the Program Summary. Besides the standard view there is the ability to customize this summary page with more pertinent snapshot data.
- 2. Roll up financial cost data from the projects into one program cost sheet to monitor program cost health. Additionally create budget, commits, spends and forecasting cash flow curves from this consolidated cost data.
- 3. Tracking progress of the overall program looking at the schedule data from each of the projects.
- 4. Create program-level reporting using User-Defined Reports (UDR).

For enterprise wide flexibility, projects (WBS-shells) can be selected from different shell hierarchies. Those not familiar with a shell hierarchy in Unifier, it is a representation of projects within a real-world physical or organizational structure. This hierarchy can have multiple levels with a top level shell and different sub-shells making up the levels below.

A simple shell hierarchy example could be:

Region (top shell)

- Sub-Regions (sub-shell)
 - Cities (sub-shell)
 - Assets (sub-shell)
 - Rental Buildings (sub-shell)
 - New Construction Projects (sub-shell)
 - Retail Buildings (sub-shell)
 - New Construction Projects (sub-shell)

Taking our example, there could be two shell hierarchies. One for Region Asia and the other for Region North America. There could be a management requirement to keep track of new rental building project in specific sub-regions and cities in Asia and also in

North America. This can be achieved using a program.



This tech tip will look at how to create a program and make it available for user mode access.

1. CREATE THE PROGRAM

Go to the Company Workspace > Admin Mode > Programs node. Click 'New'.



From the General tab, enter the appropriate Program Number, Program Name and Administrator (the mandatory fields). Ensure the Status is selected to Active.

General	Projects/Shells	Progress	Links				
	Program Number. PF	ROG 001	*				
	Setup Date: 11	/21/2016					
	Program Name: Pr	ogram 001			*		
	Description:						
	Administrator. Co	mpany Administrator			Select	*	
	Image:]	Browse		
		PEG/GIF & 500W x 30	0H pixels)	Remove			
	Program Category:				*		
	Status:	Active 🔍 Inactive 🤇	On-Hold				
		OK	Cancel	1			





The Projects/Shells tab is where we will select the projects required for this program. Click 'Add'.

General	Projects/Shells	Progress	Links	
Projects/Shells Mei	mbership:			
Number	Name		Status	
Add R	emove			
		ок	Cancel	
		OK		

From the pop-up Projects/Shells window select the projects. Use the <Shift> key to select multiple projects at once. Click 'Add' to return to the previous window.

General Projects	https://unifierdemo161.mlmprojectservices.com/bp/admin/pro				
Projects/Shells Membership:	🖆 Add 🛛 🔣 Close Windo	w 🤍 Find			
Number Nam	Projects/Shells - Current View: All 47 Item(s) Page 1 Display 100 ▼ Items Per Page				
	Number	Name	Status		
	P-0019	9013 Machias to Ellicottville Pave			
	P-0020	Rudy's Test 3segment Code	Active		
	P-0021	Pam's Play Project	Active		
	P-0022	Rudy's Playpen	Active		
	P-0023	Hospital Manhattan Expansion	Active		
	P-0025	Montgomery Lane Utility Relocat	Active		
	P-0026	Adolf Terrace	Active		
	P-0027	Sanders Airport Terminal 2	Active		
	P-0028	Sanders Airport Terminal 1	Active		
	P-0029	Line 333 MP 5.63	Active		
	P-0030	Bailonggang Wastewater Treatm	Active		
	P-0031	Deer Island Sewage Treatment F	Active		
Add Remove	P-0032	Interstate Highway (H-3) Expansi	Active		
	D 0022	East Crand Fork	Activo		



The selected projects are now listed in the tab. Click 'OK' to complete the creation of the program.

General	Projects/Shells	Progress	Links	
Projects/Shells M	embership:			
Number	Name		Status	
P-0026	Adolf Terrace		Active	
P-0023	Hospital Manhattan E	xpansion	Active	
P-0025	Montgomery Lane Uti	ity Relocation	Active	
P-0028	Sanders Airport Termin		Active	
P-0027	Sanders Airport Termin	nal 2	Active	
1				
Add	Remove			
		OK	Canad	
		OK	Cancel	

2. Adding Users and Group to a Program

The program is created but now the access rights must be set. It is important to remember a user that is a member of a selected shell (that is part of a program) still requires access rights to view the program.

Click 'Open' to access the Program's administrative nodes.





By default, the user account that is assigned the Administrator will have been added as a user. If the Administrator changes during the lifetime of the Program, then that new Administrative user acct will be automatically added to the program's users if it does not already exist.

From Programs > User Administration > Users. Click 'New' to add users to this program.

Company Work	+			
Navigate To			h F Co	mpany Wor
User Ad	min	File Edit View Help		
	$\oplus \ominus$	🗊 New 🗳 Open 🔍 Find	d	
ff DRMcnatty		🖃 🏠 Users	Users - Current View: All	
license Manager		⊡	1 Item(s)	
🗇 Partner Companies			Company	Login User Name E
uDesigner	\oplus		DRMcnatty	coadmin
Data Structure Setup	\oplus			
here a control				
User Administration	\oplus			
≓ Gateway	\oplus			
Configuration	\oplus			
Standards & Libraries	\oplus			
f Company Workspace	\oplus			
Templates	\oplus			
Å Programs	Θ			
Program 001	Θ			
Access Control				
User Administration	Θ			
Users				
Groups				



From the User/Groups pop-up window select the users you wish to add. Click 'Add' to display selected users in the bottom pane.

Click 'OK' to return to the previous screen.

Users/Groups - Current 1 15 Item(s) Employee ID	View: All First Name Ashley Jonathan John Tom	Last Name Lin McNatty Gibbs	of 1 Company DRMcnatty DRMcnatty	Display 100 V Items	Per Page
	Ashley Jonathan John	Last Name Lin McNatty Gibbs	Company DRMcnatty DRMcnatty		
Employee ID	Ashley Jonathan John	Lin McNatty Gibbs	DRMcnatty DRMcnatty	Title	A
	Jonathan John	McNatty Gibbs	DRMcnatty		
	John	Gibbs			
	Tom		DRMcnatty		
		Brady	DRMcnatty		
	Brian	Criss	DRMcnatty		
	Fadie	Masri	DRMcnatty		
	Cesar	Hoe	DRMcnatty		
	Ben	Lee	DRMcnatty		
	Rudy	Ising	DRMcnatty		
	Pam	Powrie	DRMcnatty		
	Don	McNatty	DRMcnatty	President/CEO	
	Bill	0	DRMcnatty		
	Company	Administrator	DRMcnatty	Administrator	
	Darryl	Townsend	DRMcnatty		
4	Donald D	McNathy	DDMcnatty	Superintendent	

In our example we added user John Gibbs which can now be seen in the Users log.



Company Work	+					
Navigate To			🟠 🕨 Co	mpany Wor		
User	Admin	File Edit View Help				
	$\oplus \ominus$	🗊 New 🗳 Open 🔍 Fin	d			
DRMcnatty	1	🗉 🏠 Users	Users - Current View: All			
License Manager			2 Item(s)		Page 1 of 1	Display
Partner Companies			Company	Login User Name	Employee ID	 Name
uDesigner	Ð		DRMcnatty	jgibbs coadmin		John Gibbs
Data Structure Setup	⊕ ⊕		DRMcnatty	coadmin		Company Administrator
-	•					
Access Control						
User Administration	\oplus					
≓ Gateway	\oplus					
Configuration	\oplus					
Standards & Libraries	\oplus		1			
Company Workspace	\oplus		1			
Templates	\oplus					
Å Programs	Θ					
Program 001	Θ					
Access Control						
User Administrat	ion ⊖					
Users						
Groups						

A Program Administrators group is automatically created with the program's Administrator already a member. This group includes the administrative permissions.

We will add a non-administrative group for user mode access. Click 'New'.



From the General tab, enter an appropriate Group Name.



General	Members	Permissions	
Group N	ame: Program 001 Gro	up	*
	ager.		Select
Descrip	tion:		
	OK	Cancel	

We will now add the users to this group. From the Members tab click 'Add'.

General	Members	Permissions	
Group Members			
Name	C	ompany	
	Add	Remove	
	ок	Cancel	

From the Users/Groups pop-up window, select the users, click 'Add' and then click 'OK'.



Q Find		List Names from: Program 001	¥ 5	Show By: Users	
-		Figranion Figranion		bilow by. Users	
	Current View: All				
2 Item(s)		Page 1	of 1	Display 100 •	Items Per Pag
Employee ID	First Name	Last Name	Company	Title	Assi
	John	Gibbs	DRMcnatty		
	Company	Administrator	DRMcnatty		
4					۱.
	Add	View Profi			_
Selected Users/0				Methoera	
Name	Bioups	A			
John Gibbs		^			
John Gibbs					*
					-
					•
	ОК	Remove		Cancel	



The list of users selected now appears in the Members tab.

General	Members	Permissions	
Group Members			
Name		Company	
John Gibbs		DRMcnatty	
Company Administra	tor	DRMcnatty	
	Add	Remove	
	OK	Cancel	

Permissions for the program as a best practice will be set within the group permissions. Since this will be for non-admin users, we ignore adding permissions from the Administration Mode Access node and set them within the User Mode Access.

In this example we shall set permissions for the Program's Summary dashboard, Cost Sheet and User-Defined reports.

Set permissions for the Summary dashboard as shown below.

General	Members	Permissions	
Module permission se	tup for: Program 001 G	roup	
Modules For:			
 → Administration → User Mode A → Non-naviga → Summary - M Standar → Cost Manag - S Cash Flow → Cost Short 	ccess tional Nodes d View ger v		
Permission			
View	Ø		
Copy Permissions			
	ок	Cancel	



Next set permissions for the Program's Cost Sheet as shown below. Select View only if the users should have read-only access.

Modules For.		
□ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □		
⊡-K Standard View		
E Gost Manager		
⊡ ③ Cash Flow		
⊡ Cost Sheet		
E- Reports		
Permission		
Create		
Modify		
View	A	

Finally set the permissions for the User-Defined reports.

Modules For:	
⊡ ☐ Administration Mode Access	
E User Mode Access	
□ Non-navigational Nodes	
⊡ 🔽 Summary	
🗄 🚅 Cost Manager	
⊡ Ē Reports	
⊡ User-Defined	
Permission	
Create	1
Full Access	-



3. MAKE PROGRAM AVAILABLE IN USER MODE

If this is the first program created in Unifier it will not be available automatically. Just like Company Workspace, Home or Project/Shells, Programs will need its own User Mode Navigator.

From Company Workspace > Admin Mode > Configuration > User Mode Navigator, click 'New' > 'Program' from the menu.

Company Work	ABC Cont	ractor ×	+			
S Navigate To				🟠 🕨 Com	pany Wor	
User	Admin	File Edit	View Help			
	$\oplus \ominus$			heck 😤 Deploy 🗙	Delete 🔍 Find 📝	Tag 🔹
f DRMcnatty	1	User Mod	Home Company Workspace	v: All		
license Manager		3 Item(s)	Program		Page 1	c
Partner Companies		Name	Project / Shell	Last Saved	Last Deployed	Deploy
uDesigner	æ	Company Home			05/18/2016 02:18 PM 12/10/2015 10:19 PM	Compa
Ŭ	-	Project / She	1		06/23/2016 07:05 AM	
Data Structure Setur	• ①					
Access Control						
User Administration	\oplus					
≓ Gateway	\oplus					
Configuration	Θ					
Business Process						
Portfolio Manager						
Resource Manage	er					
Shell Manager						
Space Manager						
Custom Prints and	l Reports					
Navigation Tabs						
User Mode Navig	ator					
Landing Page						

The following window will appear. All possible available modules to use within the program navigator have automatically been included. If required the main nodes Cost Manager, Schedule Manager and Reports can be renamed to something more appropriate.



Click 'OK' to return.

🍋 New 🛯 🏠 Rename 🛛 🕂 Expand All 🛛 🏠 Move Up 🛛 😻 Move Down	∦ Cut	强 Paste 🛛 🚱 Resto	re 👻 🌐 Change Icon	
Program Navigator:		Available Modules a	nd Business Processes:	
Program Navigator.	<	Available Modules a	Description	Pre-Defined
OK		Cancel		

Click "Error Check' to ensure no errors have been found in the navigator. Click 'OK'.

🗊 New 👻 🚰 Open 🗸 Error Check 📲 Deploy 🗙 Delete 🔍 Find 📝 Tag 🔹					
User Mode Navigator - Current Vie	User Mode Navigator - Current View: All				
4 Item(s)	Item(s) Page 1 of 1				
Name	Last Saved Last Deployed Deployed By				
Company Workspace	05/18/2016 02:17 PM	05/18/2016 02:18 PM	Company Administrator		
Home	12/10/2015 10:19 PM	12/10/2015 10:19 PM	Company Administrator		
Program	11/21/2016 03:17 PM	11/21/2016 03:18 PM	Company Administrator		
Project / Shell	06/23/2016 07:05 AM	06/23/2016 07:05 AM	Company Administrator		
	Error check complete.	No errors were found.			
	(ОК	li.		



The final and key step to making this navigator available in User Mode is to deploy it. Click 'Deploy'.



4. Accessing the Program

The program is accessed from the search bar. Start typing in the name of the program and it will appear in the Matched Locations bar. Select the program.





The program main window is displayed.

Home × P	rogran	n 001 × +	
Navigate To		👚 🕨 Program 001	
User Admin		File Edit View Help	
6	$\Theta \Theta$	🗊 New 🔁 Open 🔍 Find	
Å Program 001 - Home		Program 001 - Home	
🕰 Summary			
🚅 Cost Manager	\oplus		
Reports	\oplus		
			Links
		Program Number: PROG 001	
		Location: <u>Multiple</u>	
		Email Address:	
		Description	

The user mode access we had set up was for Summary, Cost Manager and User-Defined Reports.

In User Mode selecting the Summary node displays the default standard view.

Home	× Program	n 001 × +		
Navigate To			🟠 🕨 Progra	m 001
User	Admin $\oplus \ominus$	File Edit View Help Summary - User View		
Å Program 001 - Hon	ne	Program Name: Program	Program Adr	ministrator: Company Administrator
🖸 Summary		001	-	
🚅 Cost Manager	\oplus	Program No. PROG 001	NO OF Project	s/Shells: (5 Active; 0 On-Hold; 0 View- Only; 0 Inactive)
Reports	\oplus	Business Process Records per B		Task Information By BP of Current User
		Action Items:	0	
		Areas:	0	
		Budget Change Orders:	1	
		Budget Items:	1	
		Change Orders:	0	
		Contracts:	2	
		Daily Reports:	0	
		Design Change Requests:	0	
		Design Reviews:	0	
		Drawing Revisions:	0	
		Drawing Sets:	0	
		Drawings:	0	
		Estimates:	0	
		Incident Reports:	0	
		Invoices:	0	



Selecting the Cost Manager > Cost Sheet node will show the Program's Cost Sheet. This has automatically been created. Click 'Open'.

Home	× Progran	n 001 × -	+						
Navigate To				🟠 🕨 P	rogram 001				
User	Admin	File Edit '	View Help						
	$\oplus \ominus$	🗊 New 🖻	Open 🛛 🐘 Properti	es 🤍 Find					
Å Program 001 - Hon	ne	Program Cost Manager Log - Current View: All							
K Summary		1 Item(s)							
ne Cost Manager	θ	Title		Reference No.	Date Created	Creator	Туре	▲ Status	
, in the second s	\smile	Program Cost	t Sheet		11/21/2016	Company Admini	Cost Sheet	Active	-
Cost Sheet									
Reports	\oplus								

The shells we selected during program creation are listed in the cost sheet.

Home × Program 001 Program Cost Sheet - Google Chrome						
Navigate To		_		nttps://unifierdemo161.	mlmprojectservices.com/bp/program/view?budg	
User	Admin	File Ed	File	Edit View		
	$\oplus \ominus$	🗊 New	📳 Save As 📄 Export 🚽 📑 Import 🚽 🎹 Columns 🔍 Find 🔲 Split			
Å Program 001 - Home		Program	Pro	gram Cost Sheet		
K Summary		1 Item(s				
B 0	~	Title		Project Number	Project Name	
Sost Manager	Θ	Program	1	P-0023	Hospital Manhattan Expansion	
Cost Sheet			2	P-0025	Montgomery Lane Utility Relocation	
Reports	Ð		3	P-0026	Adolf Terrace	
			4	P-0027	Sanders Airport Terminal 2	
			5	P-0028	Sanders Airport Terminal 1	



Selecting Reports > User-Defined displays the program reports log. Users can create their program UDRs here.

Program 001 ×	ABC Con	tractor × +
Navigate To		👚 🕨 Program 001
User	Admin	File Edit View Help
	$\oplus \ominus$	🗊 New 🗈 Copy 👻 Open 🔮 Edit 🗙 Delete 🤍 Find 📳 Saved Results
Å Program 001 - Home		User-Defined Reports - Current View: All
K Summary		0 Item(s) Page 1 of 1
🚅 Cost Manager	Θ	Name Description Data Type Report Type Owner
Cash Flow		Create a new report - Google Chrome
Cost Sheet		https://unifierdemo161.mlmprojectservices.com/bp/sys/report/new/init?type=prc
🙆 Schedule Manager	\oplus	Create User-defined Report
Reports	Θ	Data Type: -Select One-
User-Defined		Element: Report Type: Tabular Cross Tab Summary Alert
		OK Cancel

In summary, we have identified all the steps required to create and provide access to a program and its functionality which includes:

- 1. Summary Dashboard page.
- 2. Rolled up program cost sheet data and cash flow curves.
- 3. Summarized schedule data.
- 4. Program-level reporting.

