

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		
	(J	PEG/GIF & 500W x 30	0H pixels)	Remove			
	Program Category:				•		
	Status.		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 Membership:						
Number	Name		Status			
Add R	emove					
		OK	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/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.com/bp/admin/brojectservices.				
Projects/Shells Men	nbership:	🖆 Add 🛛 🛛 Close Window 🤍 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	Active		
		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 Relocati	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 Re	emove	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 Me	Projects/Shells Membership:						
Number	Name		Status				
P-0026	Adolf Terrace		Active				
P-0023	Hospital Manhat	tan Expansion	Active				
P-0025	Montgomery Lar	ne Utility Relocation	Active				
P-0028	Sanders Airport	Terminal 1	Active				
P-0027	Sanders Airport	Terminal 2	Active				
Add							
Auu R	emove						
		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.

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User A	dmin	File Edit View Help		
	$\oplus \ominus$	🗊 New 📴 Open 🔍 Find	1	
f DRMcnatty	1	🗆 쓥 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			
laccess Control				
User Administration	\oplus			
荰 Gateway	\oplus			
Configuration	\oplus			
Standards & Libraries	\oplus			
f Company Workspace	\oplus		•	
Templates	\oplus			
Å Programs	Θ			
Program 001	Θ			
Access Control				
User Administratio	n 😔			
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.

TE New De Ope	nttps://unit	ieraemo161.mimpro	jectservices.com/	pp/admin/projecti	user/project_comp	panies_userpicker:projecti	evel=true&tarc
	Q Find		List Names from:	DRMcnatty	▼ St	how By: Users	Ψ.
E DRMcnatt	Users/Groups -	Current View: All					
	15 Item(s)			Page 1 of	f 1	Display 100 •	Items Per Page
	Employee ID	First Name	La	ast Name	Company	Title	Ass
		Ashley	Li	n	DRMcnatty		
		Jonathan	M	cNatty	DRMcnatty		
		John	Gi	bbs	DRMcnatty		
		Tom	Br	ady	DRMcnatty		
		Brian	Ci	iss	DRMcnatty		
		Fadie	M	asri	DRMcnatty		
		Cesar	He	be	DRMcnatty		
		Ben	Le	e	DRMcnatty		
		Rudy	Isi	ing	DRMcnatty		
		Pam	Po	owrie	DRMcnatty		
		Don	M	cNatty	DRMcnatty	President/CEC	
		Bill	0		DRMcnatty		
		Company	Ad	iministrator	DRMcnatty	Administrator	
		Darryl	To	wnsend	DRMcnatty		
	4	Donald D	1.4	•Natty	DPMenatty	Superintenden	+ · · ·
		,					
		Add		View Profile		Member	S
	Selected Users/	Groups					
	Name						
	John Gibbs						
							-
	•						► E
		OK		Remove	1	Cancel	1
		JK				Cancer	

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
	æ		DRMcnatty	jgibbs		John Gibbs
	₩ ₩		DRIVICITALLY	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	*
Mana	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	
	OK	Cancel	

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



Q Find		List Names from: Program 001	×	Show By: Lloore	
S THU	o 117 M	List Names nom. Frogram out		Show by. Users	
Users/Groups -	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 Brofi			
	Groups			Wend	515
Namo	Groups				
Indine John Cibbo		^			
John Gibbs					•
					-
4					•
	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 setup for. Program 001 Group						
Modules For:						
 → Administration → User Mode A → Non-naviga → M Summary → M Standar → C Standar → C Cash Flov → C Cost Shear 	n Mode Access ccess tional Nodes d View ger v et					
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:	
Standard View	
⊡ S Cash Flow	
⊡ Cost Sheet	
E- Reports	
Permission	
Create	1
Modify	A
View	I

Finally set the permissions for the User-Defined reports.

Modules For:	
E User Mode Access	
□ Non-navigational Nodes	
⊞ <mark>⊠</mark> 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.

ntractor × +
😭 🕨 Company Wor
File Edit View Help
🗊 New 🗸 🖨 Open 🗸 Error Check 😭 Deploy 🗙 Delete 🔍 Find 📝 Tag 🔹
User Mod Company Workspace V: All
3 Item(s) Page 1
Name Last Saved Last Deployed Deploy
Company 05/18/2016 02:17 PM 05/18/2016 02:18 PM Company 05/18/2016 02:18 PM Company 05/18/2016 02:18 PM Company
Project / Shell 06/23/2016 07:05 AM 06/23/2016 07:05 AM Compa
C C C C C C C C C C C C C C C C C C C

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	🖺 Paste 🛛 🚱 Resto	re 👻 🖽 Change Icon	
Program Navigator.		Available Modules a	and Business Processes:	
Program Navigator:	<	Available Modules a	and Business Processes	Pre-Defined
ОК		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 View: All					
4 Item(s)	1 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		
Alert Error check complete. No errors were found.					



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	001 × +		
Navigate To			🟠 🕨 Progra	m 001
User	Admin	File Edit View Help		
	$\oplus \ominus$	Summary - User View		
Å Program 001 - Home	2	Program Name: Program	Program Adr	ministrator: Company Administrator
k Summarv		001	•	
-		Program No PROG 001	No of Project	s/Shells: (5 Active; 0 On-Hold; 0 View-
Cost Manager	\oplus			Only; 0 Inactive)
Reports	\oplus	Business Process Records per	r BP for Current User	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				🟠 🕨 Pi	rogram 001				
User	Admin	File Edit	View Help						
	$\oplus \ominus$	🗊 New ն	🗳 Open 🗌 🔣 Properti	ies 🤍 Find					
Å Program 001 - Hon	ne	Program Cost Manager Log - Current View: All							
K Summary		1 Item(s)							
Sost Manager	A	Title		Reference No.	Date Created	Creator	Туре	 Status 	
g	\smile	Program Cos	st 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 00	01 🖸 Pro	ogram Cost Sheet - Google Ch	rome		
Navigate To	🔒 h	https://unifierdemo161.mlmprojectservices.com/bp/program/view?budg			
User Admin Fi	ile E File Edit View				
$\oplus \ominus \blacksquare$	🛾 New 📳 S	ew 📳 Save As 📑 Export 👻 📑 Import 👻 🎹 Columns 🔍 Find 🔲 Split			
A Program 001 - Home Pro	ogram Prog	Program Cost Sheet			
Summary 1	Item(s)				
	le	Project Number	Project Name		
	ogram 1	P-0023	Hospital Manhattan Expansion		
Cost Sheet	2	<u>P-0025</u>	Montgomery Lane Utility Relocation		
🖹 Reports 🛛 🕀	3	P-0026	Adolf Terrace		
	4	<u>P-0027</u>	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 × +
S 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.

