

# TECH TIP

## TESTING A NEW BUSINESS PROCESS ORACLE PRIMAVERA UNIFIER

The following steps outline how to test a newly designed business process. From the configuration and set up, to making it available for testing in a project (shell). As a best practice, the newly designed business process will be 'pushed' to the project via a shell template.

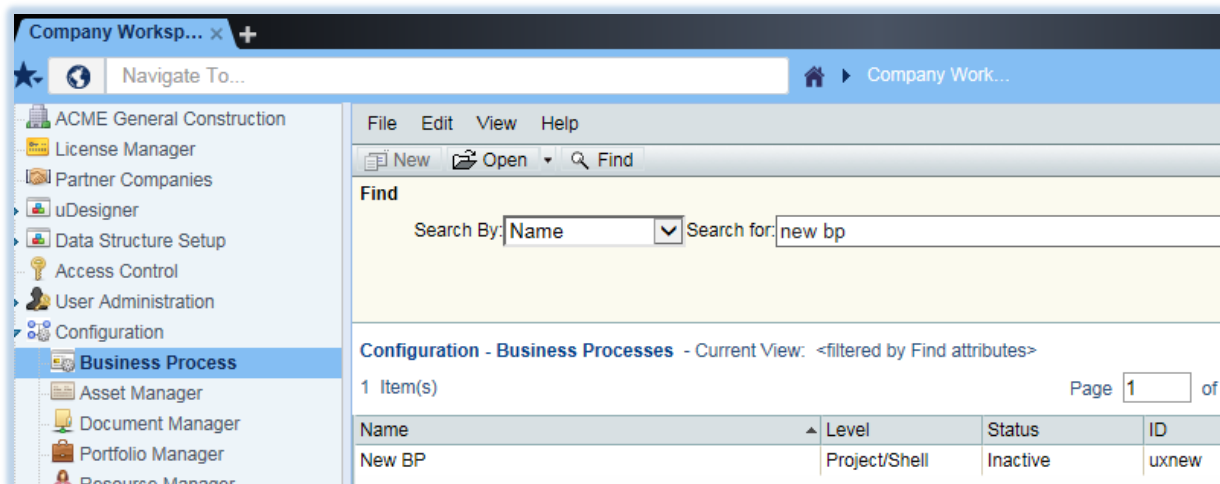
The new business process (New BP) in this example is a simple-type BP with workflow, and is already deployed.

**Designer - Business Processes** - Current View: All

47 Item(s) Page 1 of 1

Name	Owner	Status	Tag	Level	Type	Last Saved	Deployed
New BP	Company Admin	Complete		Project/Shell	Simple	05/11/2015 09:01/2015 09:01	

The New BP must be configured and activated to allow for setup and use. In the Company Workspace > Configuration node, locate and select the New BP and click 'Open'.



**Company Worksp...** x +

Navigate To...

ACME General Construction  
License Manager  
Partner Companies  
uDesigner  
Data Structure Setup  
Access Control  
User Administration  
Configuration  
**Business Process**  
Asset Manager  
Document Manager  
Portfolio Manager  
Resource Manager

File Edit View Help

New Open Find

**Find**

Search By: Name Search for: new bp

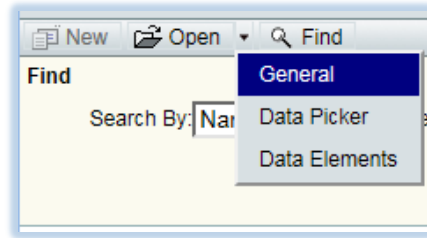
**Configuration - Business Processes** - Current View: <filtered by Find attributes>

1 Item(s) Page 1 of 1

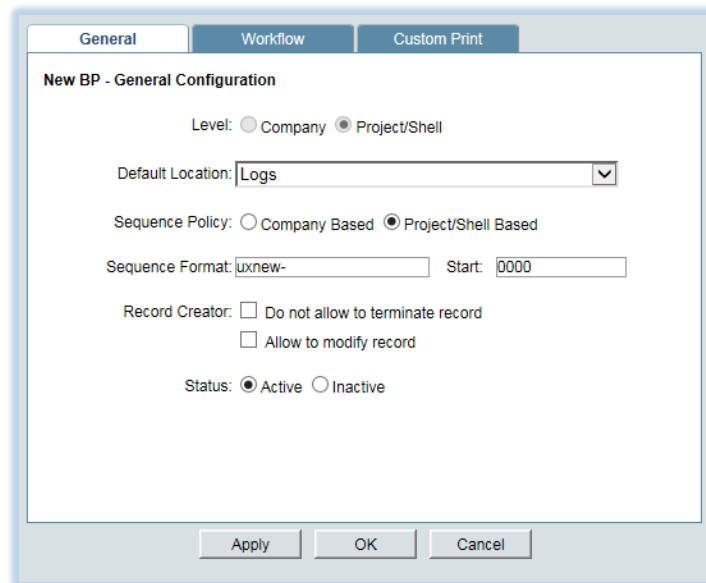
Name	Level	Status	ID
New BP	Project/Shell	Inactive	uxnew

# TESTING A NEW BUSINESS PROCESS

The New BP does not include any Data Pickers, or Auto-Sequence or Query-based Data Elements requiring configuration so only the General option needs selecting.

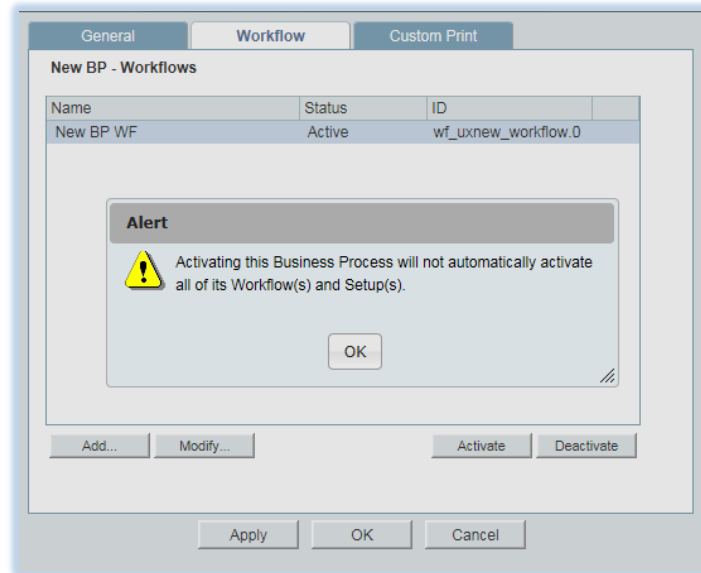


In the General tab, there are several settings that can be changed. In this example, the default settings will suffice but the General Configuration Status needs to be set to Active.

A screenshot of a dialog box titled 'New BP - General Configuration'. The dialog has three tabs: 'General', 'Workflow', and 'Custom Print'. The 'General' tab is selected. Inside the dialog, there are several settings: 'Level' with radio buttons for 'Company' and 'Project/Shell' (selected); 'Default Location' with a dropdown menu showing 'Logs'; 'Sequence Policy' with radio buttons for 'Company Based' and 'Project/Shell Based' (selected); 'Sequence Format' with a text box containing 'uxnew-' and a 'Start' field with '0000'; 'Record Creator' with two checkboxes: 'Do not allow to terminate record' (unchecked) and 'Allow to modify record' (unchecked); and 'Status' with radio buttons for 'Active' (selected) and 'Inactive'. At the bottom of the dialog are three buttons: 'Apply', 'OK', and 'Cancel'.

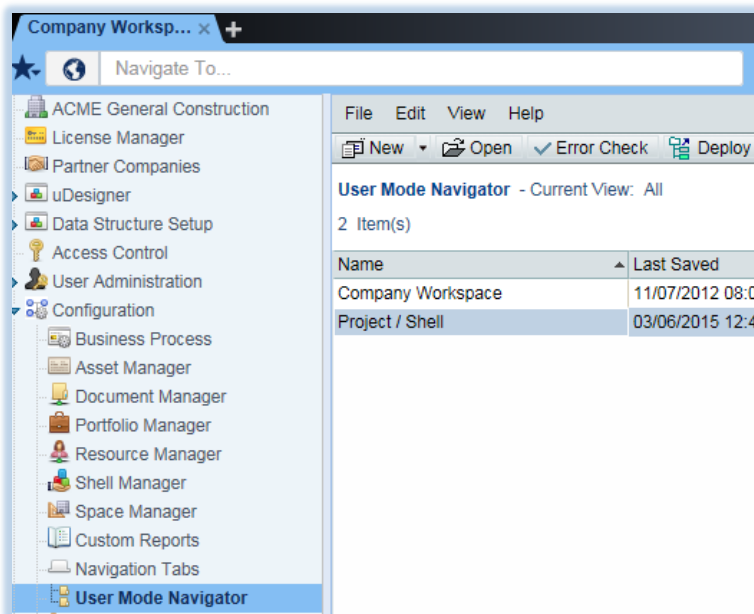
# TESTING A NEW BUSINESS PROCESS

In the Workflow Tab, the workflow also needs to be added and set to Active. Select the WF record, click the 'Activate' button and click 'OK' when prompted in the pop-up Alert window.



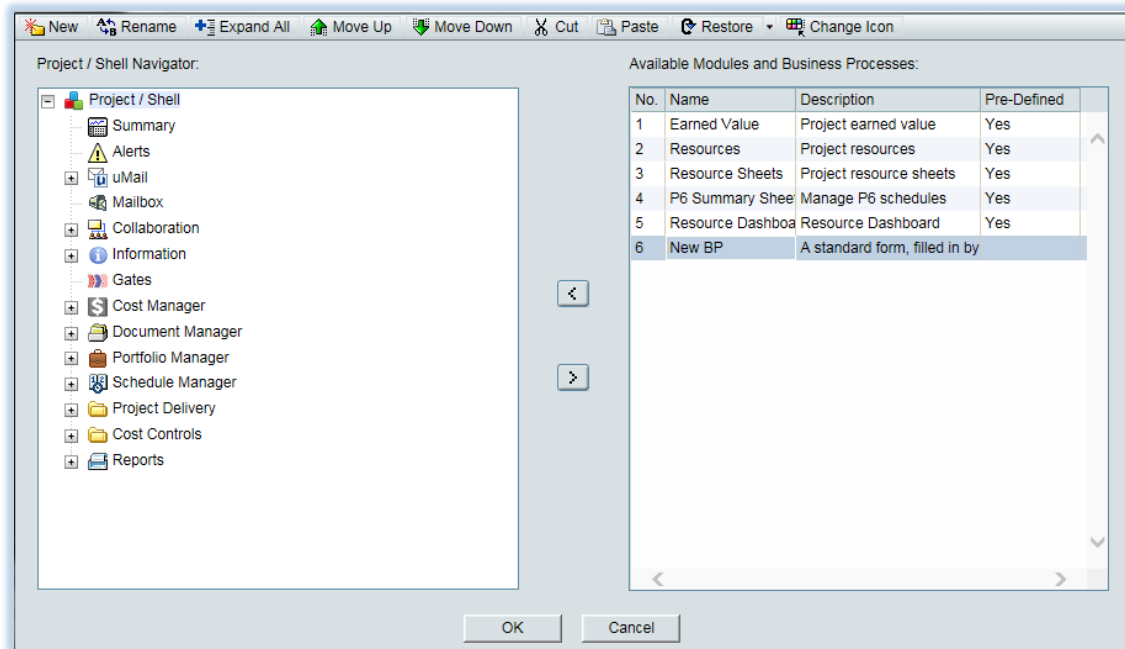
The New BP is now configured and activated.

The New BP must be made available within the User Mode Navigation of a shell. Still in the Configuration node, select the User Mode Navigator sub-node and click 'Open' or double-click the Project/Shell navigator.

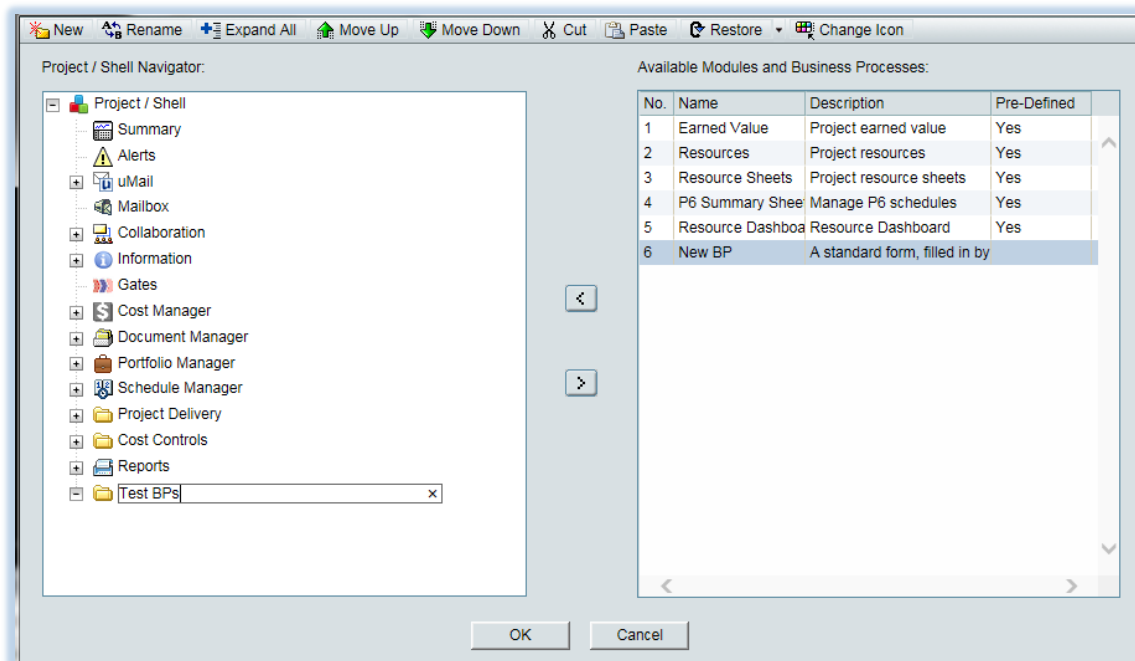


# TESTING A NEW BUSINESS PROCESS

The navigator window opens displaying the navigation structure on the left hand pane, and available modules and business processes in the right hand pane that could be included within the navigator. Since the New BP is configured and activated, it is shown in the right hand pane.

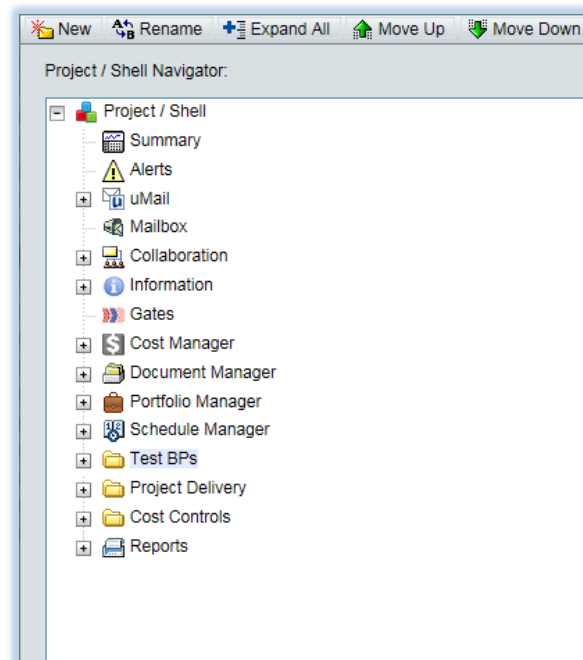


To keep this New BP separate from the other existing BP's, a new folder will be created by clicking on the 'New' button. This new folder can be named something appropriate. In this example it is named 'Test BPs'.

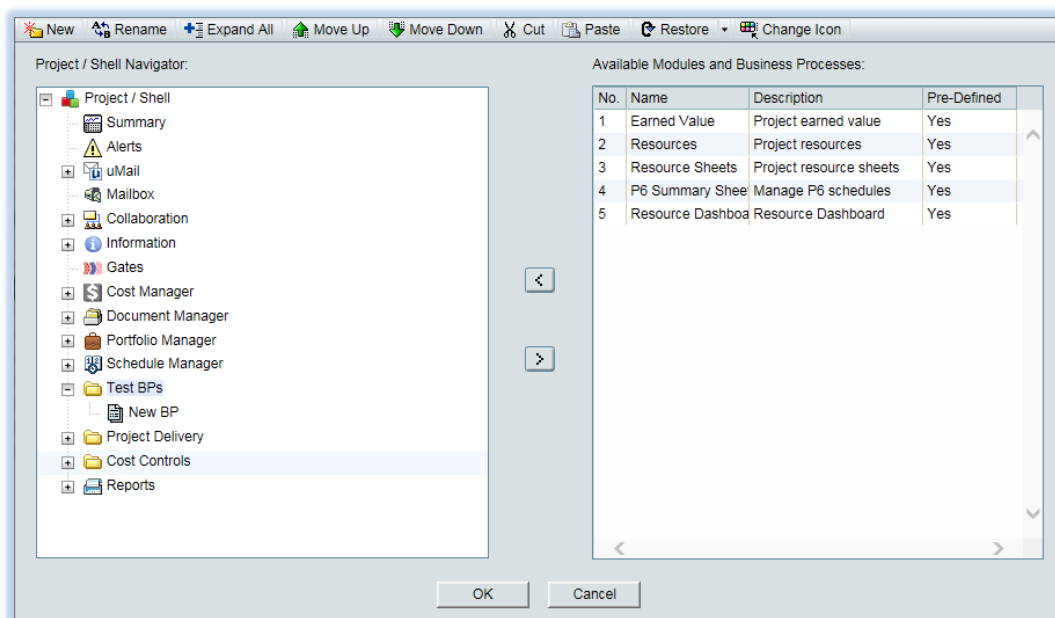


# TESTING A NEW BUSINESS PROCESS

This folder will be positioned above the existing BP folders using the 'Move Up' button and moving up three positions.

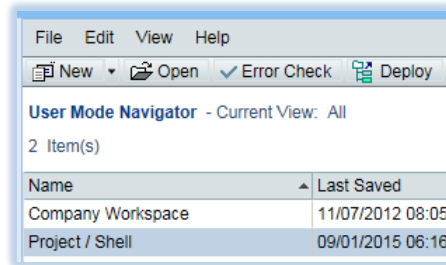


With the 'Test BPs' folder and the New BP selected from each pane, the New BP is moved into the folder by clicking on the left arrow icon. Click 'OK' when completed.

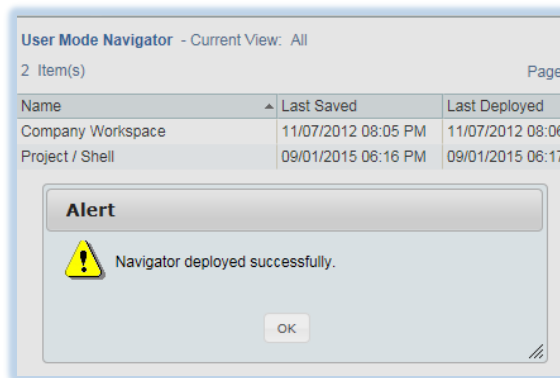


# TESTING A NEW BUSINESS PROCESS

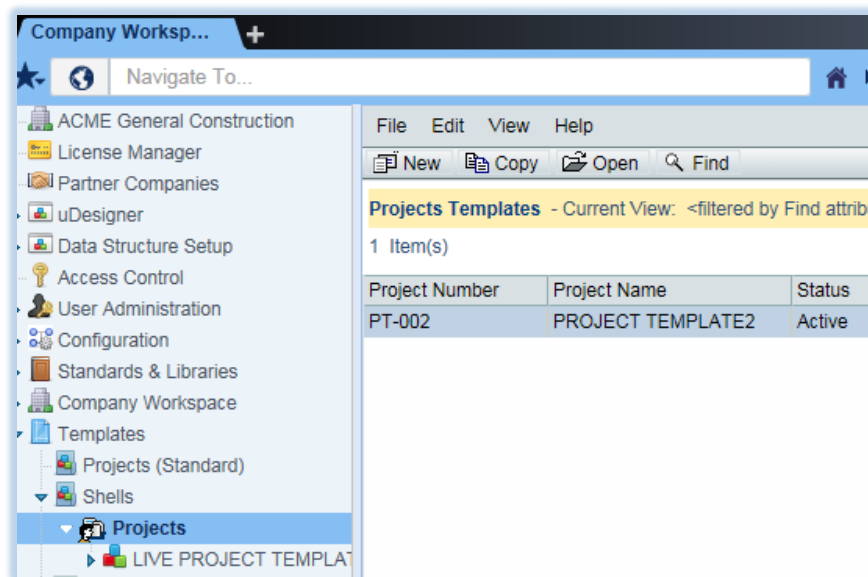
The User Mode Navigator for Project/Shell needs to be deployed for the new change to be reflected. Click 'Deploy' with the Project/Shell navigator selected.



Click 'OK' on the Alert window. The Project/Shell User Mode Navigator is now deployed with the New BP.

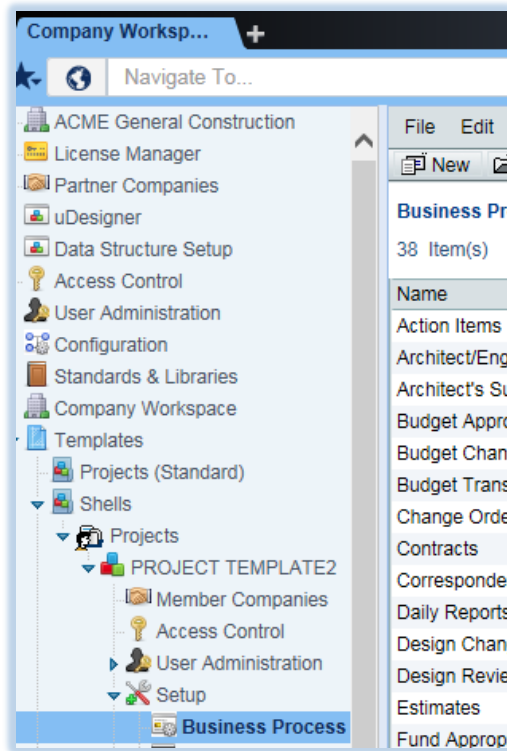


The New BP must now be included in the shell template. In Company Workspace > Templates > Shells > Projects node, select the shell template to be used and click 'Open' or double-click the record. The template this example uses is a copy of the default shell template.

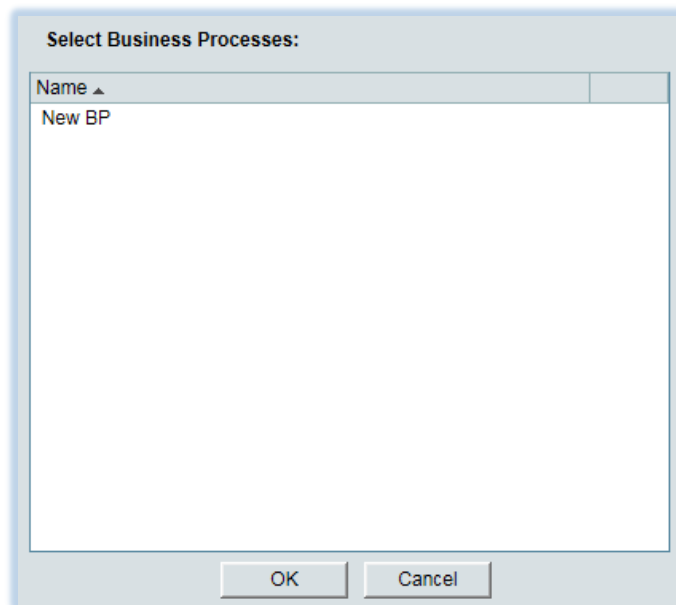


# TESTING A NEW BUSINESS PROCESS

The shell template sub-nodes will now be displayed. Select the Setup > Business Process sub-node and click 'New'.

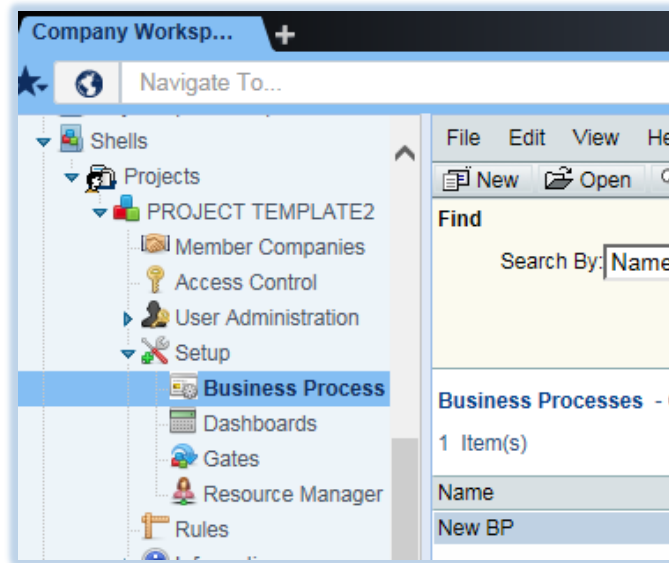


In the pop-up window select the New BP and click 'OK'.

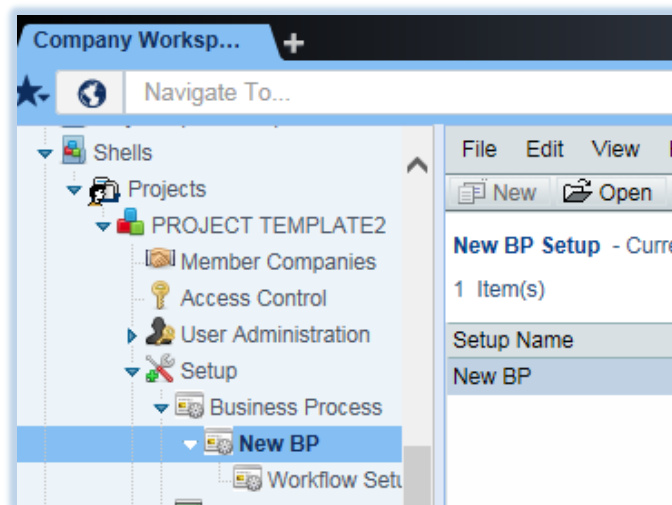


# TESTING A NEW BUSINESS PROCESS

The New BP will now be in the list of available BP's for this shell template. Find the New BP and click 'Open' or double-click the record.



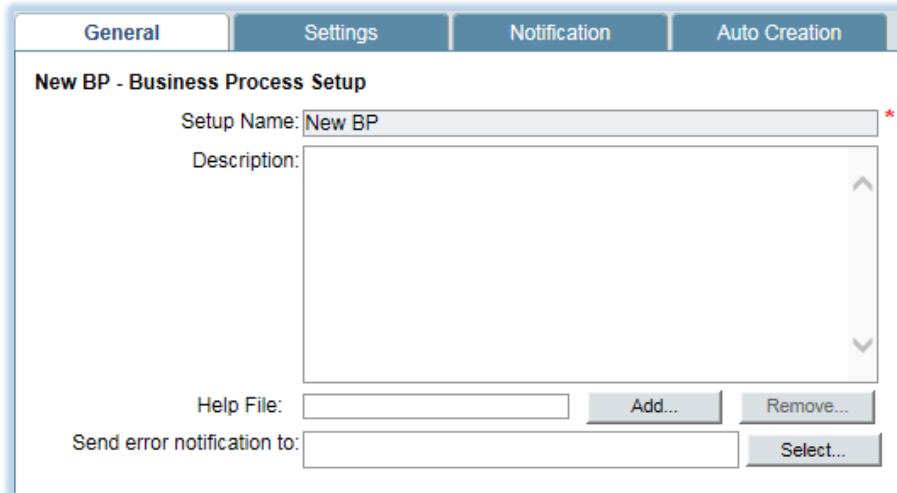
A New BP sub-node will display including a Workflow Setup sub-node. In the New BP sub-node click 'Open' or double-click the record.





## TESTING A NEW BUSINESS PROCESS

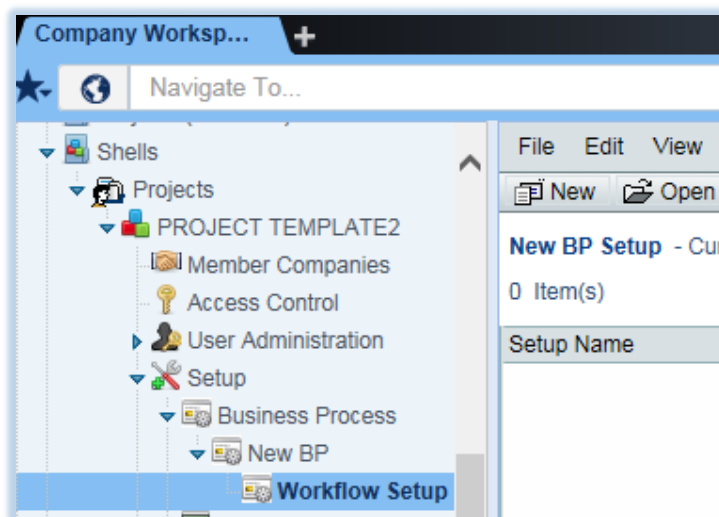
This New BP does not require a custom help file; any user assigned for error notification; any record editors; automatic email notifications on record modifications or any bp auto-creation functionality, so these tabs will be left as their defaults.



The screenshot shows a dialog box titled "New BP - Business Process Setup" with four tabs: "General", "Settings", "Notification", and "Auto Creation". The "General" tab is selected. It contains the following fields and controls:

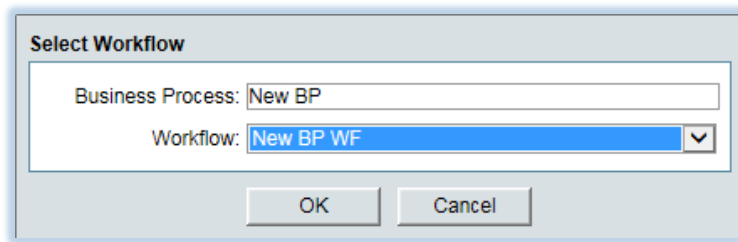
- Setup Name:** A text box containing "New BP" with a red asterisk indicating a required field.
- Description:** A large, empty text area.
- Help File:** A text box with "Add..." and "Remove..." buttons.
- Send error notification to:** A text box with a "Select..." button.

The New BP will require workflow setup. Select the Workflow Setup sub-node for this BP and click 'New'.



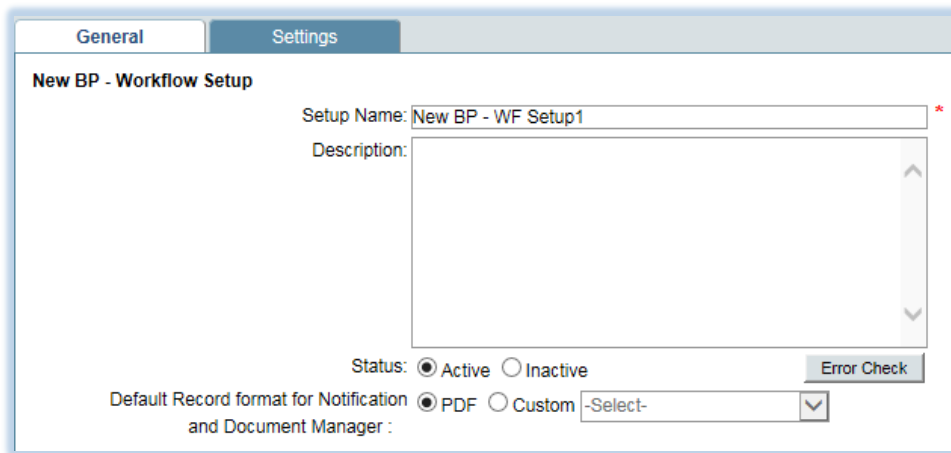
## TESTING A NEW BUSINESS PROCESS

Select the workflow that was activated during the configuration steps and click 'OK'.



A dialog box titled "Select Workflow". It contains two input fields: "Business Process:" with the text "New BP" and "Workflow:" with a dropdown menu showing "New BP WF". At the bottom are "OK" and "Cancel" buttons.

In the General Tab, give this workflow setup a name and change the Status to Active.



A dialog box titled "New BP - Workflow Setup" with two tabs: "General" and "Settings". The "General" tab is active. It contains the following fields and controls:

- Setup Name:** A text field containing "New BP - WF Setup1" with a red asterisk to its right.
- Description:** A large text area.
- Status:** Two radio buttons, "Active" (selected) and "Inactive".
- Default Record format for Notification and Document Manager :** Two radio buttons, "PDF" (selected) and "Custom", followed by a dropdown menu showing "-Select-".
- Error Check:** A button.

# TESTING A NEW BUSINESS PROCESS

For this example, workflow settings will be kept as the defaults, however there will be a requirement to assign Assignees at each step. In the Settings tab, the left pane has sub-nodes for each step in the workflow.

The screenshot shows the 'Settings' tab of a 'Workflow Configuration' window. On the left, a tree view under 'New BP WF' lists 'Creation', 'Approval', 'Revision', and 'End'. The main area is divided into three sections: 'Workflow Settings', 'Phases', and 'Additional Information'. 'Workflow Settings' includes 'Enable Workflow Duration' (radio buttons for No/Yes), 'Workflow Duration' (input field and dropdown), and 'Override Workflow Due Date' (radio buttons for No/Yes). 'Phases' has 'Allowed in all phases' (selected) and 'Allow only in phases' (radio buttons), followed by a 'Phases' table with 'Add...' and 'Remove...' buttons. 'Additional Information' has a 'Notify users or groups on workflow completion:' label with a text input and a 'Select...' button.

Selecting Creation step first, assign an appropriate Assignee for testing. This could be specific User(s) or Group(s). In this example, the Company Admin will be selected throughout. From the 'Select' drop down list select 'User Picker'.

This screenshot shows the 'Step Configuration' and 'Assignees' section of the 'Workflow Configuration' window. The 'Step' section has 'Step Name' (set to 'Creation'), a 'Description' dropdown, 'Duration' (input and dropdown), and three 'Override' options (Task Due Date, Assignees to Decline Task, Step for Integration) each with radio buttons for No/Yes. The 'Assignees' section includes 'Assignment Policy' (dropdown), 'Assignees' (text input with 'Company Administrator' and a 'Select...' button), 'Additional conditions to filter assignees' (checkbox), 'Allow Cc:' (radio buttons for No/Yes/Preassigned/Preassigned and Allow Add Cc), 'Allow Add Assignees:' (radio buttons for No/Yes), and 'Allow Add Cc:' (radio buttons for No/Yes). Each of the last three sections has a corresponding 'Select...' button.

# TESTING A NEW BUSINESS PROCESS

Select the appropriate User(s) or Group(s) and click Add, and then OK.

The screenshot shows a 'Users/Groups' selection dialog box. At the top, there is a search bar with 'Find' and a dropdown for 'List Names from:' set to 'PROJECT TEMPLATE2'. To the right is a 'Show By:' dropdown set to 'Users/Groups'. Below this, it says 'Users/Groups - Current View: All'. There is a table with 13 items. The first column is 'Name' and the second is 'Company'. The 'Company Administrator' is highlighted. Below the table are buttons for 'Add', 'View Profile', and 'Members'. At the bottom, there is a 'Selected Users/Groups' section with a list containing 'Company Administrator'. At the very bottom are 'OK', 'Remove', and 'Cancel' buttons.

Name	Company
Brian Criss	ACME General Construction
Chris Atkinson	The Design Group
Company Administrator	ACME General Construction
Craig Olsen	ACME General Construction
Don McNatty	ACME General Construction
John Ross	ACME General Construction
Jonathan McNatty	ACME General Construction
Michael Stull	Philadelphia County
Philip Owens	ACME General Construction
Rudy Ising	ACME General Construction
Steve Johnson	ACME General Construction
Steve Powers	ACME General Construction
Tom Wood	Aviation Consultants

Creation Step now has Company Admin as an Assignee.

The screenshot shows the 'Workflow Configuration' dialog box, 'Settings' tab. On the left is a tree view with 'New BP WF' expanded, showing 'Creation', 'Approval', 'Revision', and 'End'. The 'Creation' step is selected. The main area is titled 'Step Configuration'. It has a 'Step' section with 'Step Name' set to 'Creation' and a 'Description' field. Below that is a 'Duration' field with a dropdown set to 'Day'. There are three radio button options: 'Override Task Due Date' (No), 'Allow Assignees to Decline Task' (No), and 'Enable Step for Integration' (No). Below this is an 'Assignees' section. It has an 'Assignment Policy' dropdown set to 'Preassigned'. The 'Assignees' field contains 'Company Administrator' with a 'Select...' button. There is an 'Additional conditions to filter assignees' field with a 'Define...' button. Below that are three radio button options: 'Allow Cc' (No), 'Allow Add Assignees' (No), and 'Allow Add Cc' (No). Each has a corresponding 'Select...' button.

# TESTING A NEW BUSINESS PROCESS

Repeat with the other steps (End step not required).

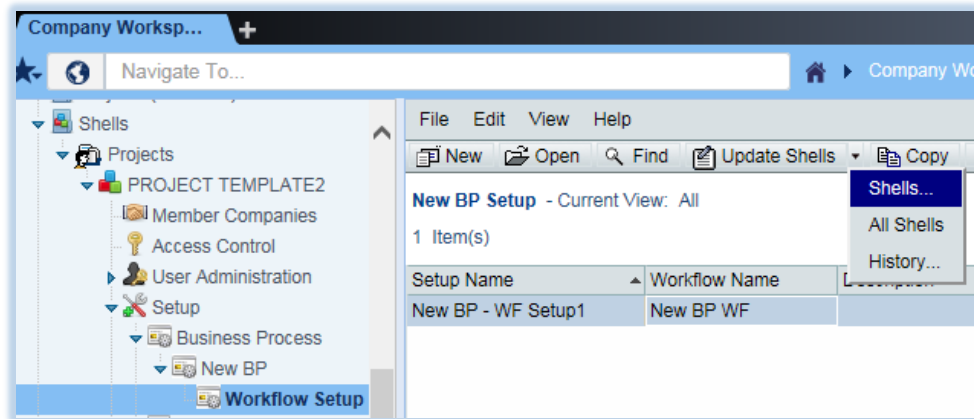
The screenshot shows the 'Workflow Configuration' dialog box with the 'Settings' tab selected. On the left, a tree view shows the workflow steps: 'New BP WF', 'Creation', 'Approval' (selected), 'Revision', and 'End'. The main area is titled 'Step Configuration' and contains two sections: 'Step' and 'Assignees'.  
**Step Configuration:**  
- Step Name: 'Approval'  
- Description: (empty text box)  
- Duration: (empty text box) 'Day'  
- Override Task Due Date: ☒ No ☐ Yes  
- Allow Assignees to Decline Task: ☒ No ☐ Yes  
- Enable Step for Integration: ☒ No ☐ Yes  
**Assignees:**  
- Assignment Policy: 'User Select'  
- Assignees: 'Company Administrator' (with a 'Select...' button)  
- Additional conditions to filter assignees: (empty text box) (with a 'Define...' button)  
- Allow Cc: ☒ No ☐ Yes ☐ Preassigned ☐ Preassigned and Allow Add Cc  
- (empty text box) (with a 'Select...' button)  
- Allow Add Assignees: ☒ No ☐ Yes  
- (empty text box) (with a 'Select...' button)  
- Allow Add Cc: ☒ No ☐ Yes  
- (empty text box) (with a 'Select...' button)

Click OK once all steps have Assignees.

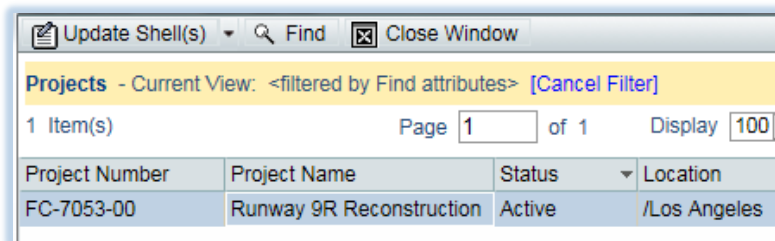
This screenshot is identical to the previous one, but the 'Revision' step is selected in the left-hand tree view. The configuration details in the main area are the same, but the 'Step Name' field now displays 'Revision'. The 'Assignees' section remains unchanged.

# TESTING A NEW BUSINESS PROCESS

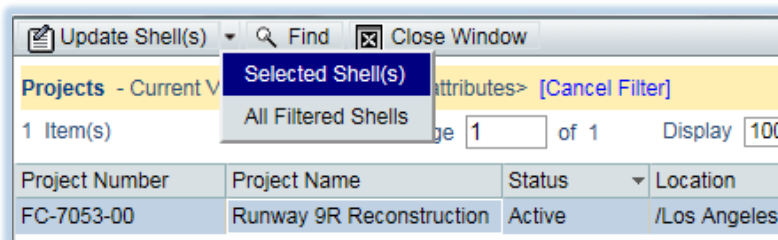
The New BP set up is ready to be “pushed” to the testing project. Still in the Workflow Setup sub-node, select ‘Shells...’ from the ‘Update Shells’ drop down list.



Select the appropriate project from Projects pop-up window.

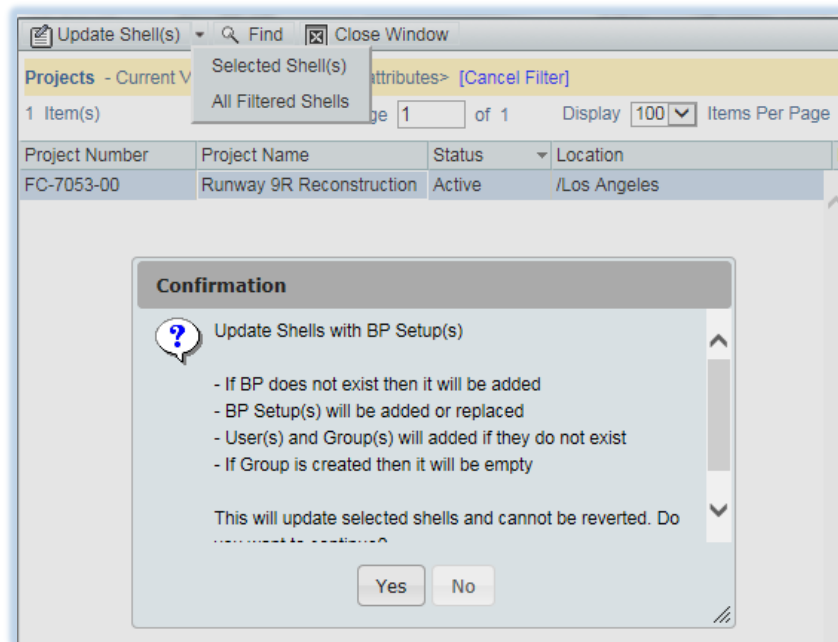


Select ‘Selected Shell(s)’ from the ‘Update Shells’ drop down list.

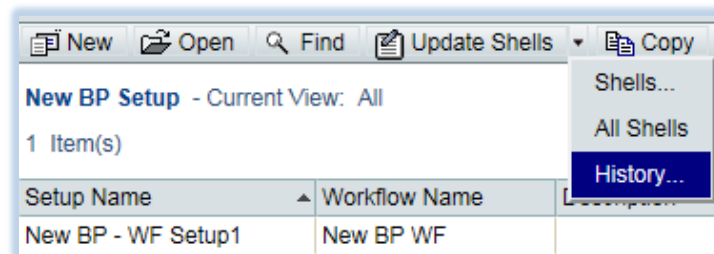


# TESTING A NEW BUSINESS PROCESS

Click 'Yes' on the Confirmation pop-up window.



To confirm the update has been successful, select 'History...' from the 'Update Shells' drop down list.



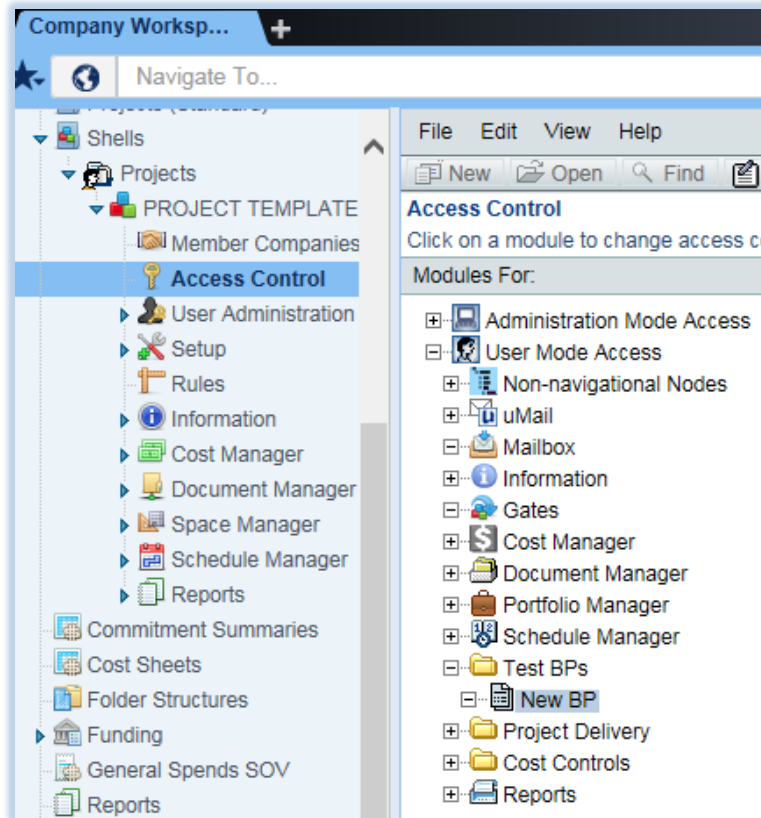
The Status will display Finished on completion.

History					
Requestor	Shells	Submit Date	Start Date	End Date	Status
Company Administrator	User Selected	09/02/2015	09/02/2015	09/02/2015	Finished

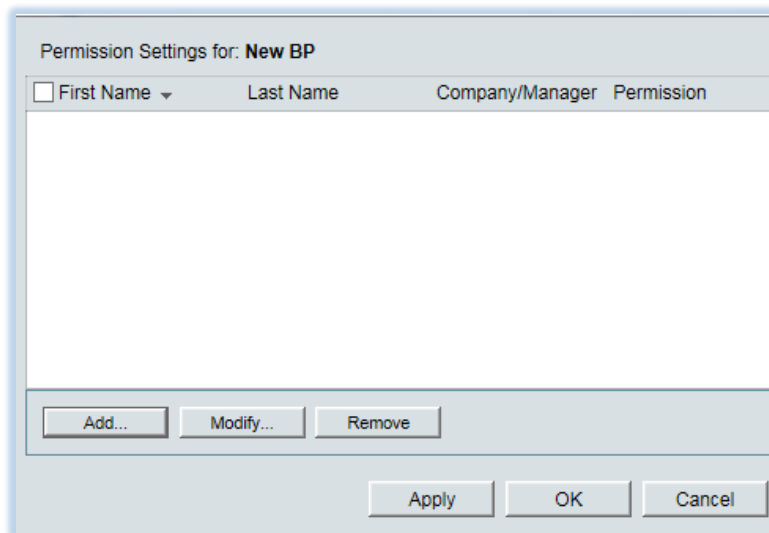
It is important that the testing User has the correct permissions already set to view and work in the Project (shell). Since this example uses a copy of the default shell template set up, a new test user could be added to the appropriate pre-defined Groups and 'pushed' to the test project.

# TESTING A NEW BUSINESS PROCESS

The New BP now needs specific permissions to be set to allow it to be used within the test project for the testing User. Back in the Templates node > Shells > Projects > *project template* sub-node, select Access Control. Select the User Mode Access node and select the New BP from 'Test BPs' folder.



A Permission Settings pop-up window will display. Click 'Add'.





## TESTING A NEW BUSINESS PROCESS

Click the 'Add Users/Groups' and select the appropriate User(s) or Group(s). This example uses Company Admin.

Select all Permissions Settings apart from Modify Step Assignment, Hide Record Audit Log and Hide Task Statuses. Click OK.

Permissions Setting for: **New BP**

**Select Users/Groups**

First Name ▲	Last Name	Company/Manager
Company	Administrator	ACME General Construction

Add Users/Groups

**Permission Settings:**

- ☒ Modify Record Ownership
- ☒ Terminate Work Flow
- ☐ Modify Step Assignment
- ☒ View All Records
- ☒ View Company Records
- ☒ View User Records
- ☒ View Hidden Comments
- ☐ Hide Record Audit Log
- ☐ Hide Task Statuses
- ☒ Allow Bulk Edit

OK Cancel

The initial window will now display the User(s) or Group(s) that have been assigned permissions for this New BP.

Permission Settings for: **New BP**

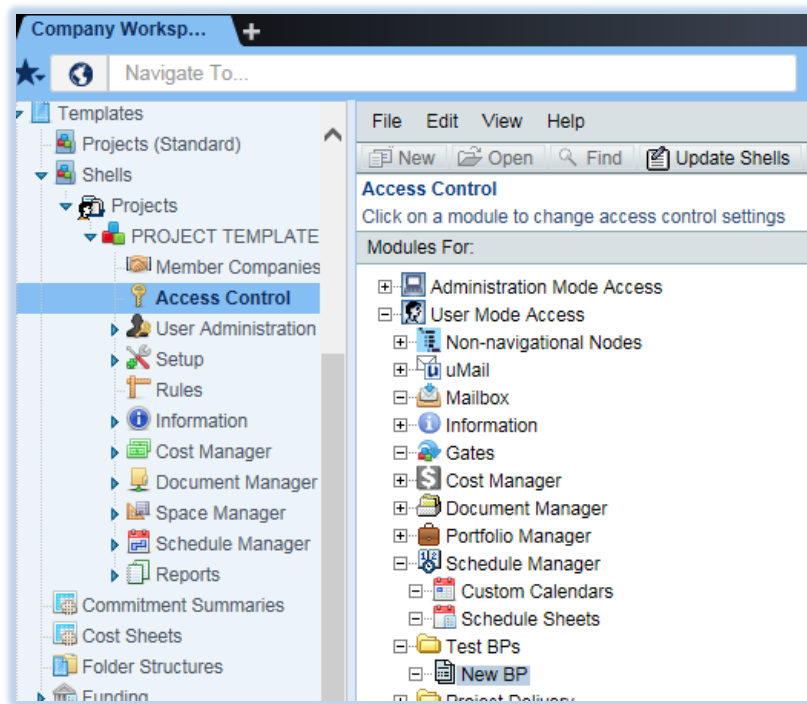
<input type="checkbox"/> First Name ▲	Last Name	Company/Manager	Permission
<input type="checkbox"/> Company	Administrator	ACME General Construction	Modify Record Ownership/Terminate Work Flow/V...

Add... Modify... Remove

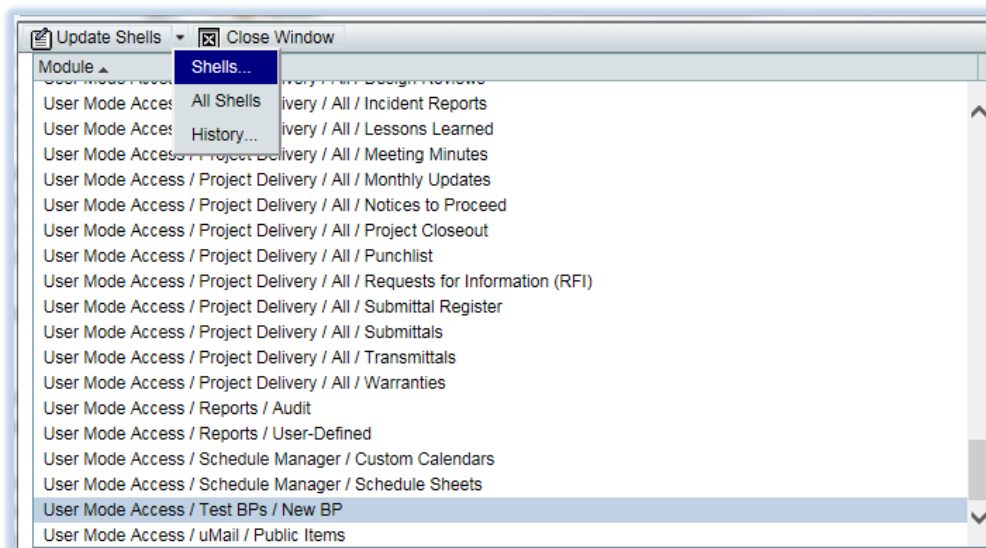
Apply OK Cancel

# TESTING A NEW BUSINESS PROCESS

These permissions need to be “pushed” to the test project. From the Access Control node click ‘Update Shells’ button.

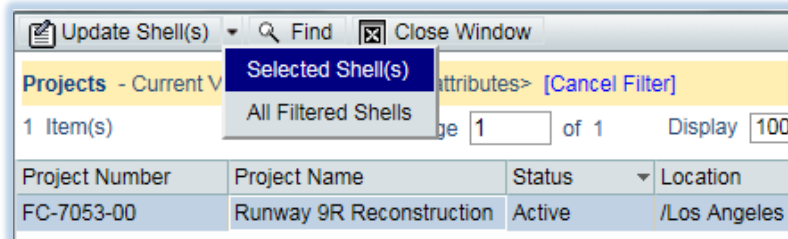


Scroll down to User Mode Access / Test BPs / New BP and select ‘Shells...’ from the ‘Update Shells’ drop down list.

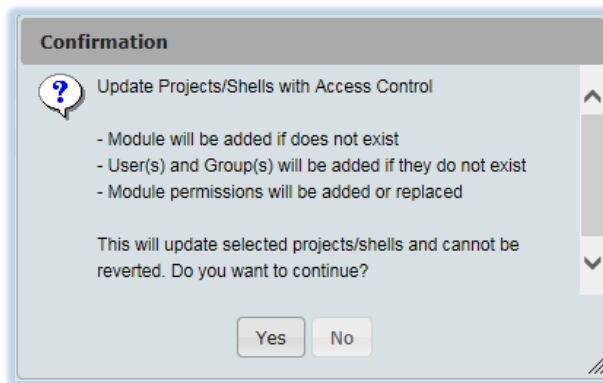


# TESTING A NEW BUSINESS PROCESS

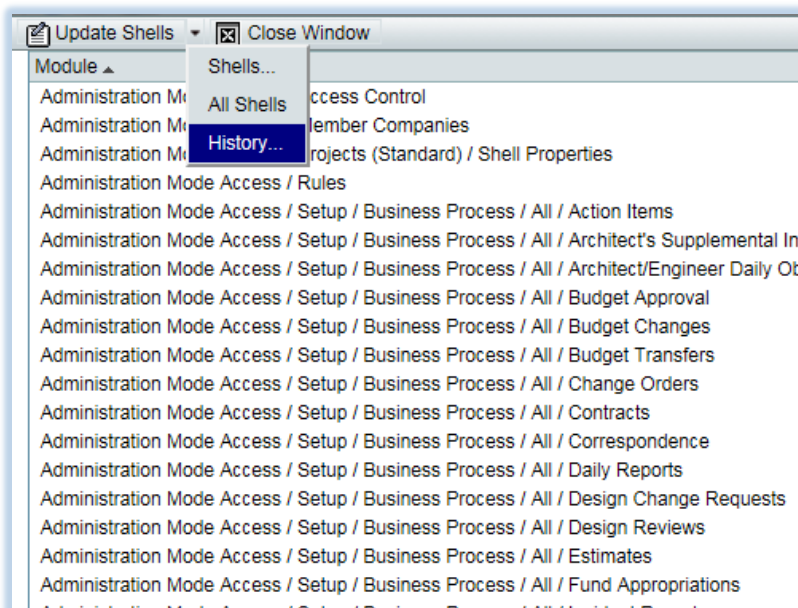
Select the test project and select 'Selected Shell(s)' from 'Update Shells'. Click 'Yes' from the Confirmation pop-up window.



Click Yes on the Confirmation pop-up window.

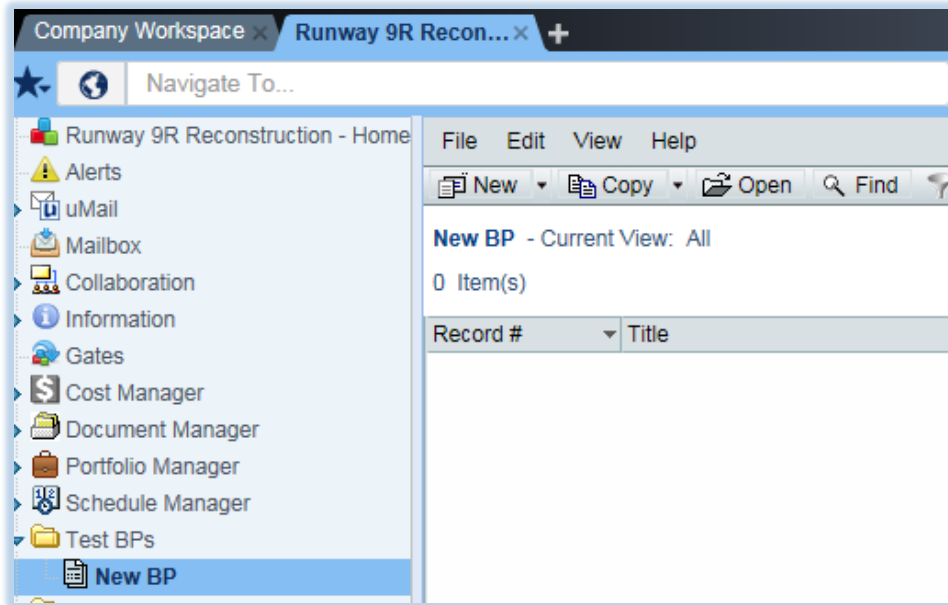


To confirm the update has been successful, select 'History...' from the 'Update Shells' drop down list.



# TESTING A NEW BUSINESS PROCESS

The New BP is correctly configured, set up and permissions assigned. Locate the test project and select the New BP from the Test Bps folder node. Click 'New'.



The New BP record form displays and is now ready to for testing through its workflow.

A screenshot of the 'New BP' record form. The form is divided into several sections: 'General', 'New BP', 'Summary', and 'Action Details'. The 'General' section contains fields for 'Record Number', 'Title', 'Project Number', 'Project Name', 'Creator' (set to 'Company Administrator'), 'Creation Date', 'Due Date', 'Status', and 'Contract Reference'. The 'New BP' section contains dropdown menus for 'Year', 'Month', 'Schedule Status', and 'Budget Status'. The 'Summary' section contains a 'Summary' text area. The 'Action Details' section contains a 'Create New New BP' button, 'To...' and 'Cc...' email fields, and a 'Send For' field. At the bottom, there are links for 'Attachments (0)', 'Linked Records (0)', 'General Comments', and 'Linked Mail (0)'. The 'Workflow Actions' dropdown is set to '-Select-'.