Oracle
Primavera Unifier
Day One Impact

Version 25
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Oracle Primavera Unifier Day One Impact

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Contents

Introduction

This document provides details about upgrades that have day-one impact to help you find the information you need more quickly.

24.12 Downloading Unifier-Wallet-Full.Zip For Apryse, Bluebeam, and Mobile Notifications

For on-premises installations, to use Apryse or Bluebeam in Unifier viewer, or to enable mobile notifications, download **Unifier-Wallet-Full.Zip**. For more information, see the *Unifier Installation Guide for On-Premises*.

24.12 Project-Level Directory Support for Android

A **Directory** tile is added to the Workspace at the project level for Unifier Mobile for Android. The Directory contains a collection/log of the project-team members and their contact information. You may view the contact information of fellow team members and send email from within the system.

If the **Hide User Profile** option is selected on the **Security** tab of **Company Properties**, basic information is hidden. If this option is not selected, but either or both of the following options are selected, the corresponding users can download and save profiles for offline use.

- **Allow company users to save user profile on mobile application**
- **Allow partner users to save user profile on mobile application**

> **Note:** Because these options have been modified since version 24.4, you must update your settings on the Security tab if you want to use them.

24.10 Migration from Oracle Business Intelligence Publisher to Oracle Analytics Server

With version 24.10, Oracle Business Intelligence Publisher is replaced with Oracle Analytics Publisher. Oracle Analytics Publisher is a component of Oracle Analytics Server. Before upgrading to version 24.10, Oracle recommends that you sign into Business Intelligence Publisher and download dashboards, analyses, and reports locally. Although information should be migrated from Business Intelligence Publisher to Oracle Analytics Server as part of the upgrade, this ensures that you have access to the previous information should the need arise.

For more information, go to ***My Oracle Support (MOS)*** (***https://support.oracle.com/portal/***) and see Doc ID ***2882003.1*** (***https://support.oracle.com/epmos/faces/DocumentDisplay?id=2882003.1***).

24.10 Collaborator User Access to Reports

In the Access Control node of User Administration, the **User-Defined** and **Custom** options under **Reports** in the **User Mode Access** section now include a **View** option. By default, this option is selected for users whenever the other options, such as Full Access, are selected. Beginning with 24.10, you can select just the **View** option, which provides Collaborator Users view-only access to UDRs and custom reports.

Although Collaborator Users might currently have the **Create Permission Based** setting enabled for reports or are members of a group that have that level of access enabled, they have not been able to view the reports. After upgrading to 24.10, the system automatically enables the **View** option after the upgrade.

If Company Users and Partner Users did *not* have specific permissions for reports prior to upgrading to 24.10, they will lose access to the **User-Defined Reports** log until the company administrator enables the View option.

Prior to upgrading to 24.10 or immediately after, review permissions for Collaborator Users to ensure that only authorized users can view pertinent information, and review permissions for other users to ensure that they have access to the User-Defined Reports log.

24.10 Multiple Base Commits with Payment Applications and SOVs

Administrators can now include more than one Base Commit BP with Payment Applications and Schedule of Values (SOVs) in projects/shells. Multiple Base Commit BPs can be added:

- Manually in an specific project/shell
- Using shell templates

  In this case, the **Payment Applications** node displays when you go to: **[Shell Template]**, select **Cost Manager**, select **Schedule of Values**, and then select **Payment Applications**
- From a shell template to a shell

  In this case, a new **<Base Commit BP name> - SOV** node displays in when you go to: **Access Control** under **Schedule of Values**, and select the **Payment Applications** node in the shell when user permissions are provided to display the existing SOV log to **Create/Update Structure**.

Users can now:

- Create multiple Base Commit records that create different payment application SOVs
- Create multiple Change Commit records that update different payment application SOVs
- Create multiple payment application records that update different payment application SOVs
- Create multiple payment application SOV structures
- View new SOV nodes that display the log of the Base Commit records that creates payment application SOV structure

  In the **User Mode Navigator** for shells, an additional node, **<Base Commit BP name> - SOV,** displays.

  For example, both nodes display:

  - **Schedule of Values** followed by **Payment Applications**
  - **<Base Commit> - SOV** (in the **User Mode Navigator** for project/shell)

  If **User Mode Navigator** is not deployed, a new node, **<Base Commit BP name> - SOV,** displays under the **Access Control** node.

  For example, both nodes display:

  - **Schedule of Values** followed by **Payment Applications**
  - **Schedule of Values** followed by **Payment Applications** followed by **<Base Commit> - SOV**

Both the logs show the same SOV structure and commit records if there is only one *active* Base Commit BP that creates a PSOV in the shell.

24.10 Task Reassignment History

Only BP records that have active tasks are displayed on the **Task Reassignment - Active User Tasks** and **Task Reassignment - Inactive User Tasks** logs. The system does not list records that have reached a Terminal Status—such as Rejected, Canceled, or Approved—whether the user is Active or Inactive.

For any active tasks that are reassigned to a different active user, the original assignee only receives tasks according to the configured Step Revisiting policy if the original assignee is still active.

24.8 Project-Level Directory Support for iOS

A **Directory** tile is added to the Workspace at the project level for Unifier Mobile for iOS. The Directory contains a collection/log of the project-team members and their contact information. You may view the contact information of fellow team members and send email from within the system.

If the **Hide User Profile** option is selected on the **Security** tab of **Company Properties**, basic information is hidden. If this option is not selected, but either or both of the following options are selected, the corresponding users can download and save profiles for offline use.

- **Allow company users to save user profile on mobile application**
- **Allow partner users to save user profile on mobile application**

> **Note:** Because these options have been modified since version 24.4, you must update your settings on the Security tab if you want to use them.

24.6 Dashboards Built on Data Cubes Reflect User Preferences

The behavior of date fields in shell dashboards now accommodates your Date Format and Time Zone selections as specified on the Region Format tab in your preferences.

The dashboard displays data that is based on the Data Cubes configured by your administrator. If the Data Cube is based on the Date Picker, which indicates the date and time that the relevant data was updated, the dashboard adjusts this information based on your date/time format preference and time zone. If the Data Cube is based on the Date Only picker, the dashboard displays only the date and adjusts it based on your date format preference.

Day 1 Impact: If you are accustomed to seeing data displayed as date-only entries in the system date format, even though the Data Cube uses the Date Picker, the information displayed in a dashboard might now include date and time information and is based on your format preference. For example, you might select "MMM/DD/YYYY" and another user might select "DD/MM/YY" as the display preference.

24.4 User-Defined Report Formats Support XLSX

When you download a user-defined report (UDR) and select Excel for the output format, the system automatically generates and downloads the report in the Microsoft Excel .xlsx file format.

24.4 Indicate Reassigned User in Workflow Process

An **Assignee Reassignments?** field is included on the **Workflow Progress** tab. This field indicates whether assignees to the record were reassigned. It appears on new and existing records only if a reassignment occurs.

24.4 Completion of Geographic Location for a BP Record

The administrator can incorporate the automatic population of the geographic location (geolocation) for a BP. This option ensures that the current location is entered in the latitude and longitude fields by the system when the user creates a BP record using the Unifier Mobile Application. If the **Allow auto filling of the latitude and longitude upon record creation** option is not enabled but the latitude and longitude data elements (DEs) are used, the user can click **Autofill With Current Location** and use the Map icon or manually select the location.

23.10 Select Base Currency at First Sign In

As the Company Administrator, you will be prompted to select the base currency when you sign in to Unifier for the first time.

Until the base currency is selected:

- No other action can be taken in Unifier.
- No other user can sign in to Unifier or the mobile applications.

Day 1 Impact: Applies only to new company owner users.

23.10 Get BP Record

In the BP Log view, the **Records Received by Me** displays a list of records that has been only received by the signed-in user.

23.10 Remove User License Governor

The License Manager has been updated to eliminate tracking of license counts and overage counts for standard users and portal users.

As a Site Administrator (also referred to as the System Administrator):

- You can no longer set the overage count for Standard Users and Portal Users when you:

  Go to the **Company Workspace** tab and switch to **Admin mode**; in the left Navigator, select **General Administration**, select **License Manager**, click ⚙ **Settings** drop-down , select **License Terms**, and then select **General** tab.
- You can continue to define notification thresholds up to 100%.

As a Company Administrator:

- You can create any number of users without receiving warnings or notifications.
- You can review the number of **Active Named Users** for each user type under the **Current Usage** even if it exceeds the number of available licenses when you navigate to:

  Go to the **Company Workspace** tab and switch to **Admin mode**; in the left Navigator, select **General Administration**, and then select **License Manager**.
- You can review the **Event Audit Log** to track overages when the number of active users created through the user interface, import, or integration services exceeds the number of available licenses. The audit log is updated when a user's status is updated from *Inactive* to *Active* or *On hold*.

As an integration user or a Company Administrator, you can create any number of users with the Create User and Update User REST API V1 services. The REST services have been updated to exclude the `active_standard_user_overage` and `active_portal_user_overage` in the API input. You will no longer receive any errors or notifications when the number of available licenses is exceeded.

Day 1 Impact: This change affects only new users.

23.7 Standard UI Support Enhanced for Lease Business Process

The Lease business process is available in the standard UI.

In the standard UI, you can:

- Create a lease snapshot and a snapshot log.
- Access Regular Payment Schedule and Straight Line Payment Schedule.

23.4 Information Enhanced in the Default Filter View in Cash Flows

You can view the following information in the default view of the Cash Flow:

- All selected inflow and outflow curves
- All variance data such as Cost Variance and Schedule Variance
- The variance data in the graph

23.4 Redesigned Buttons For Workflow and Non-Workflow BPs

For an improved and consistent user experience:

- The buttons for **Save**, **Submit**, and **Send** business processes have been redesigned for improved clarity.
- A workflow BP has buttons for **Save Draft**, **Save**, **Submit**, **Send**, and the **More Actions** menu.
- A non-workflow BP has buttons for **Save**, **Submit**, **Send**, and the **More Actions** menu.
- A newly created non-workflow BP record has buttons for **Save, Submit**, and the **More Actions** menu.
- A non-workflow BP record that has been submitted has buttons for **Edit** and the **More Actions** menu.
- A non-workflow BP record that has been *terminated* has only the **More Actions** button.

23.4 Non-Workflow Logs Indicate Records in Edit Mode

The following features have been added for non-workflow BP logs:

- A new column has been added to indicate whether the record is in Edit mode.
- When creating or filtering views, you can use a **Show Edit records** filter to include or exclude records in Edit mode.

22.10 QBDE and Integration

Starting with the 22.10 release, Unifier will dismiss direct QBDE value updates, if:

- The "refresh" condition has not been defined, or
- The "trigger element" is not updated through input request.

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **uDesigner**, and then select **Business Processes**.
3) Open the **Asset** BP.
4) In the left Navigator, select **Integration**, and then select **Upper**.
5) In the **Upper Design** dialog box, select the **Data Elements** tab.
6) In the **Element Label** column for **Status**, the **Data Element** column should be **Status**, and the **Direction** column should be **Both.**

Existing users

If the **Direction** column value is set as **Both** or **Input** for the QBDE, Unifier will dismiss these direction values (and direct updates) and will evaluate the query conditions based on the:

- The "refresh" condition, or
- The "trigger element".

22.6 Define Number of Decimal Places for Currency Fields

Unifier administrators can specify from zero to four decimal places when defining a currency. All formulas, auto-populate, and reverse auto-populate currency elements will honor the decimal places defined for the currency. Once a currency has been defined, the "Decimal Places" field will no longer be editable.

Day 1 Impact: The existing business process records and sheets with currency amounts will be rounded off to the decimal places specified in the currency details window for the selected project/base and transactional currency. Currencies with two decimal places will not show any changes.

22.6 Decimal-Point Precision

In WBS sheets, Direct Entry or Formula Columns based on Sys Numeric logical data sources now support up to 15 decimal places of precision.

Day 1 Impact: Direct Entry columns based on a Currency Amount or Decimal Amount data definition will honor the decimal precision set in the data element properties. Columns whose data definition is based on Currency Amount will honor the decimal precision defined for the Project Currency / Base Currency.

For CMx sheets, the decimal places are not defined in column properties; instead, a column will honor the decimal precision selected in the data element properties.

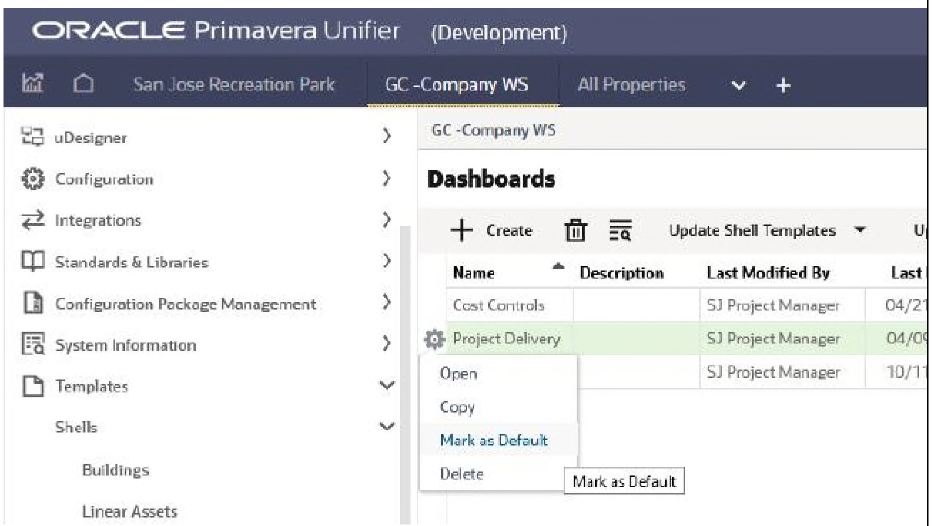
Day 1 Impact: The decimal precision set in the data element properties will be honored; direct cell entry columns based on Currency Amount or Decimal Amount data definitions will not show additional decimal formatting options.

For Planning Sheets, columns based on SYS numerical logical data source and SYS numeric data source will support 15 decimal places instead of the previous limit of 8 decimal places.

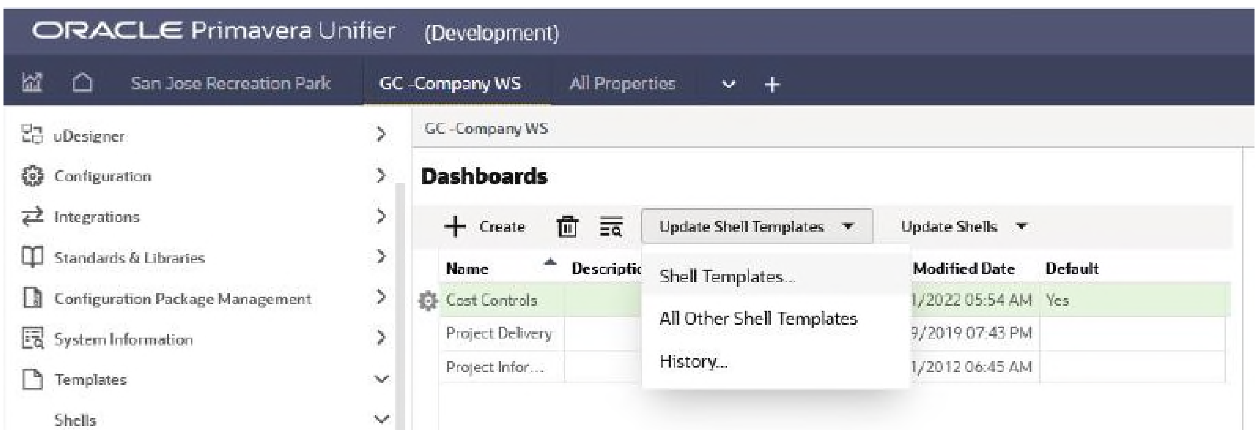
Day 1 Impact: Manual entry columns based on the Decimal Amount definition will not show additional formatting options; the decimal precision set in the data element properties will be honored.

22.5 Set and Push Default Dashboards

Administrators can set a default dashboard within shell templates. A shell template can have only one default dashboard.

Sample	Description
	There is a column titled "Default" set to "Yes" for the dashboard that was the default prior to this upgrade.

A default dashboard can be pushed to some or all shells using Update Shell Templates.



When creating a new shell – whether by copying from a Template, copying from a Shell, through a Project/Shell Creation BP, or through REST services using a Shell Template – checking the "Dashboard Setup" option will cause the default setting for the custom dashboard setup to be copied into the newly-created shell.

22.4 Links to Email Attachments

Email notifications with attachments will now include a "View in Unifier" option which will log the user into Unifier and open the associated record automatically.

22.3 Hyperlink Enhancement

Existing standard hyperlink pickers should work as expected. For non-standard URIs in the hyperlink picker, Unifier will validate the URL in a hyperlink picker every time a BP record is saved/sent to the next step in the workflow. This validation is done regardless of how the hyperlink picker is created.

- The URL is validated for acceptable format and against the allowed URIs. This closes a security loophole and ensures Unifier does not allow saving of any security-sensitive URL.
- Unifier also validates the URL every time a user clicks on the hyperlink, ensuring a secure handling of hyperlinks.

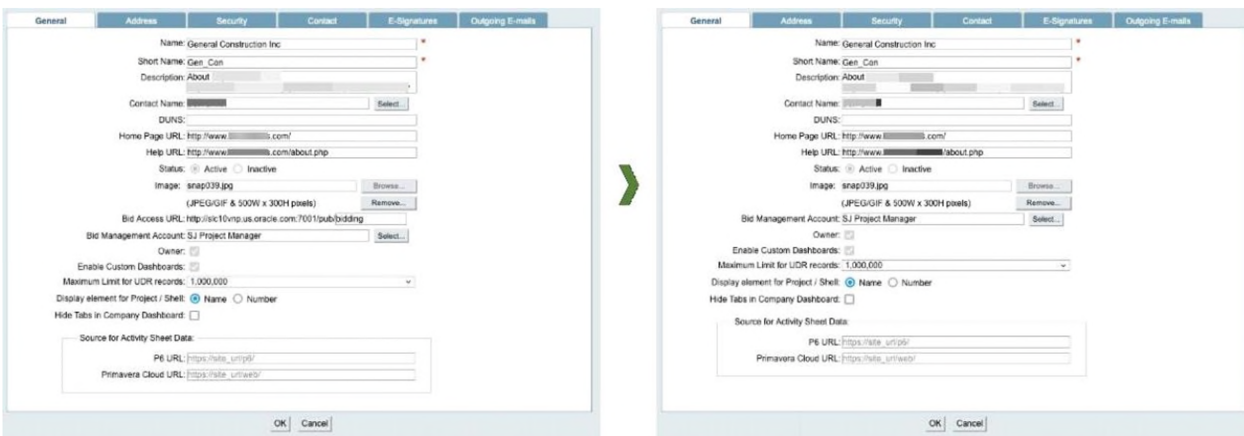
For security reasons, the URLs in a hyperlink picker should include http(s) or the allowed URIs set by the company administrator. Company administrators must ensure they include required URIs in the “Allow URIs” field of the Security tab of the Company Properties.

21.11 Bidder Impact

This version brings in feature enhancements with regards to the way bidders' passwords are stored and managed. The feature enhancements are in support of on-premises deployments where password management is handled by Unifier. This standardization impacts ‘username' creation for Cloud customers as explained in the relevant sections below. Customers should evaluate the information below, before upgrading.

What has changed?

- Bidders must access the bidder portal through the regular Unifier URL. The Bidder URL field in the Company Properties page has been removed.
- The old URLs will still work. If existing bidders use the old bidder portal URL, they will be redirected to the regular Unifier login URL.
- The landing page seen post-login is based on the user type in Unifier. When a user logs in and if the login username is an email address, the system will check for user type associated with the username. If the username is tied to a vendor account in the Master Vendor List, the bidder landing page will be seen.



Why was this change made?

- To meet enhanced security compliance standards
- To standardize and simplify the login process for password management and user authentication
- Ease of use – Bidders can now change their passwords on their own without having to rely on the bid package requestor

Who is affected?

- Unifier 21.11 requires unique “login usernames” across bidder users and standard users for authentication purposes

- The potential list of bidders known as Vendors, for a given company is stored in the Master Vendor List BP (Vendor) at the Company level. For bidders who are participating in a bid, the “login username” is same as the email address entered in the data element: uuu_user_id in Vendor BP at the company level
- The below table lists the possible scenarios where usernames are not unique

SCENARIO	IMPACT	RESOLUTION
Applicable to both Cloud and On-Premise customers If the same email address is used in the uuu_user_id field of multiple Vendor records of the Master Vendor List. **Existing behavior for Cloud customers** – The vendor gets created as a bidder in Primavera Administration only when the vendor is invited for the very first time through an RFB process in the Proposal Management tab. There is no change to this behavior.	The vendor that was created first as a bidder, will be able to login to the bidder portal. Example: Company Name – uuu_user_id C1_US – abc@company C1_CN – abc@company C1_UK – abc@company C1_IN – abc@company When abc@company.com logs in to Unifier, the user is a member of C1_IN and not C1_US	Ensure that the vendor emails (data element: uuu_user_id) for all vendor records are unique.

If a Standard, Collaborator or Portal user is created first and then a vendor with the same username is invited to bid for the first time. **Pre-21.11 behavior for Cloud customers –** Primavera Administration will not create a bidder. Pre-21.11, such a user could login to the bidder portal using the same login credentials through the dedicated Bidder portal URL. **Existing On-premise customers –** Unifier sends a different password that can be used to login to the bidder portal.	For Cloud and on-premise customers – Since the bidder portal has been removed, the user will always be taken to the standard Unifier landing page.	If a user needs to be able to login as a Standard, Collaborator, or Portal user as well as be able to respond to bids as a bidder, the email addresses used for login must be different. The email address used in login username field of User Properties must be different from the one used in 'uuu_user_id' field of the Vendor record.

Is there an easy way to find login usernames that are same between regular Unifier users and Vendors?

For more information, go to ***My Oracle Support (MOS)*** (***https://support.oracle.com/portal/***) and see Doc ID ***2819828.1*** (***https://support.oracle.com/epmos/faces/DocumentDisplay?id=2819828.1***).

Is there any potential solution when email address cannot be changed?

Some email servers allow aliases in the email address. As an example, both abc@company.com and abc+1@company.com may be associated with a user "abc". This user will receive emails when either of

the email address is used.

In Unifier, these are treated as two different usernames. As a result when email addresses are used as login usernames, the system will allow such logins.

Suggested action - Consult your company's IT administration to check if the above is a feasible solution.

What about issues post upgrade?

The below table lists the possible scenarios that may cause issues to the enhancement and how Unifier handles such situations:

SCENARIO	IMPACT	RESOLUTION
Creating a new vendor record with existing email address.	Once the user tries to save/submit a vendor record, Unifier checks if the entered email exists as the username for any other vendor and for any other Unifier user. If the entered email already exists, Unifier does not allow the user to save/submit the record.	User must change the email (data element: uuu_user_id) and resubmit the record.
Creating a new company user or partner user.	If an Administrator tries to create the username with an existing username (across regular users and bidder emails), Unifier checks for any duplicates and does not allow the creation of a new user.	User should ensure to use a unique username for every user.

What are the other changes?

Bidder credentials

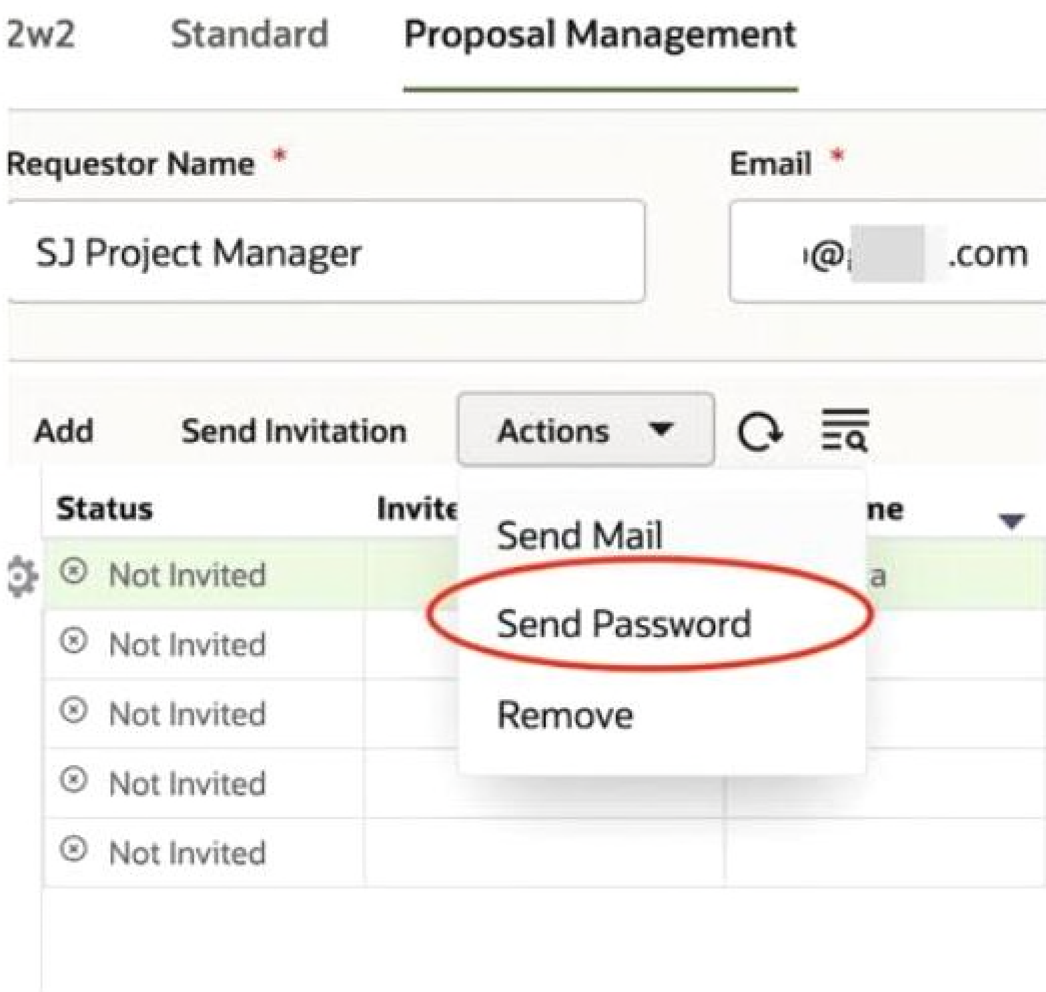
Bidders can still use the existing credentials to log in to Unifier bidder portal.

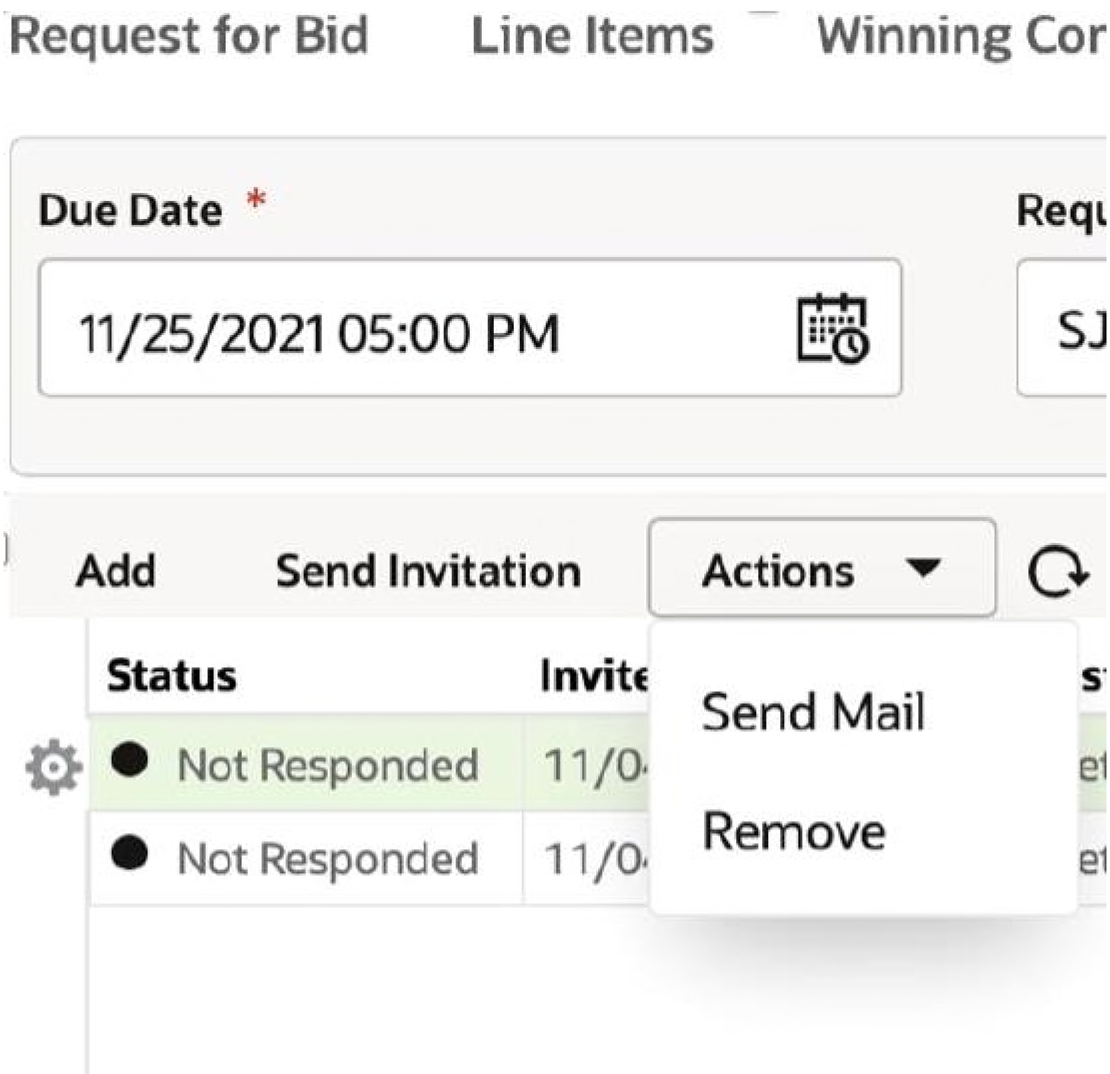
Send Password Functionality (Applicable only for on-premises and not for Cloud customers)

With 21.11, bidders will be allowed to manage passwords by themselves.

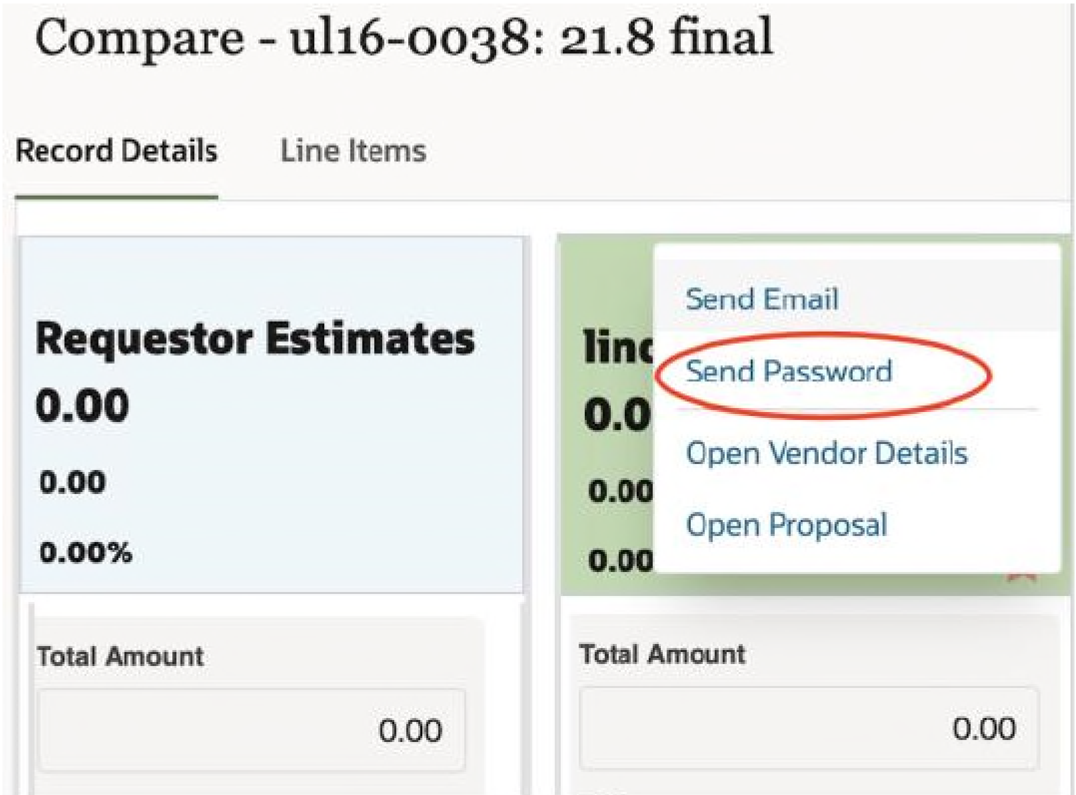
Since bidders can now reset their own passwords, bid package requestors (RFB record owners) need not send passwords to bidder users. Hence, Send Password functionality will be removed from these places in RFB record: Proposal Management tab-Action menu options and in the Record Details tab of the Comparison sheet.

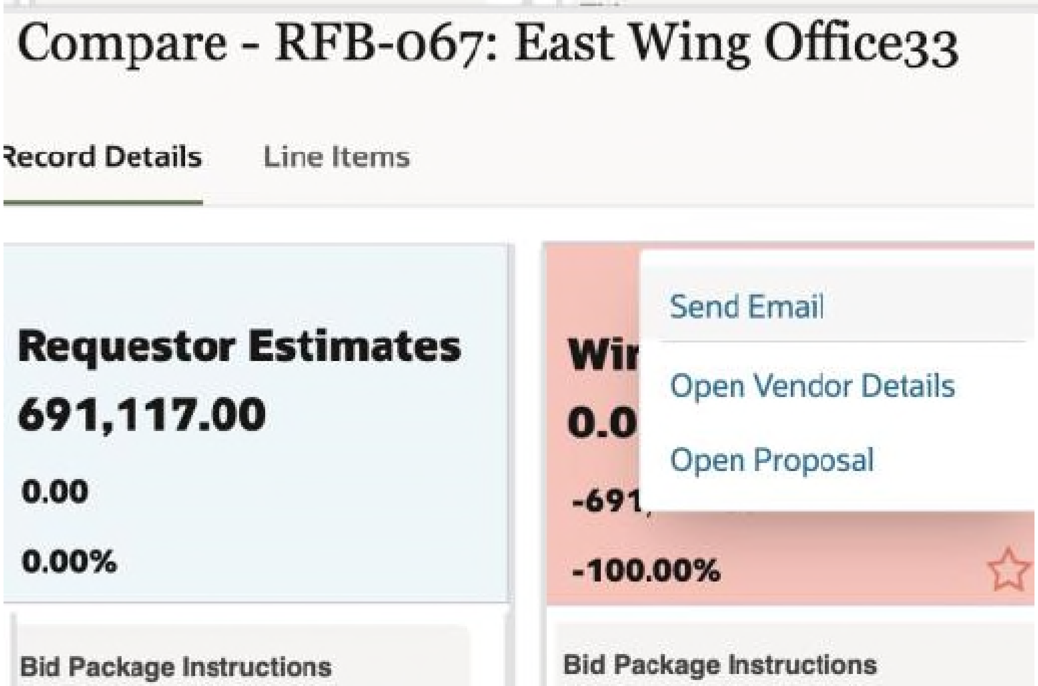
Send password: Pre-21.11 on left and Post 21.11 on the right


2w2
Standard
Proposal Management
Requestor Name *
Email *
SJ Project Manager
Add
Send Invitation
Actions
Status
Send Mail
Send Password
Remove
Not Invited
Not Invited
Not Invited
Not Invited
Not Invited



Comparison Sheet: Pre-21.11 on left and Post 21.11 on the right


Compare - ul16-0038: 21.8 final
Record Details
Line Items
Requestor Estimates
0.00
0.00
0.00%
Send Email
Send Password
Open Vendor Details
Open Proposal
Total Amount
0.00
Total Amount
0.00


Compare - RFB-067: East Wing Office33
Record Details
Line Items
Requestor Estimates
691,117.00
0.00
0.00%
Send Email
Open Vendor Details
Open Proposal
-100.00%
Bid Package Instructions
Bid Package Instructions

21.7 Redwood Theme

Redwood Theme for Unifier: User Interaction & Interface Changes

Redwood is the name of Oracle's next-generation product and communication design, user experience platform, and brand design system. It is more than Oracle applications adopting new branding, color, style, and typography; through a user-centric approach, Oracle is continually making improvements to every task, flow, and interaction.

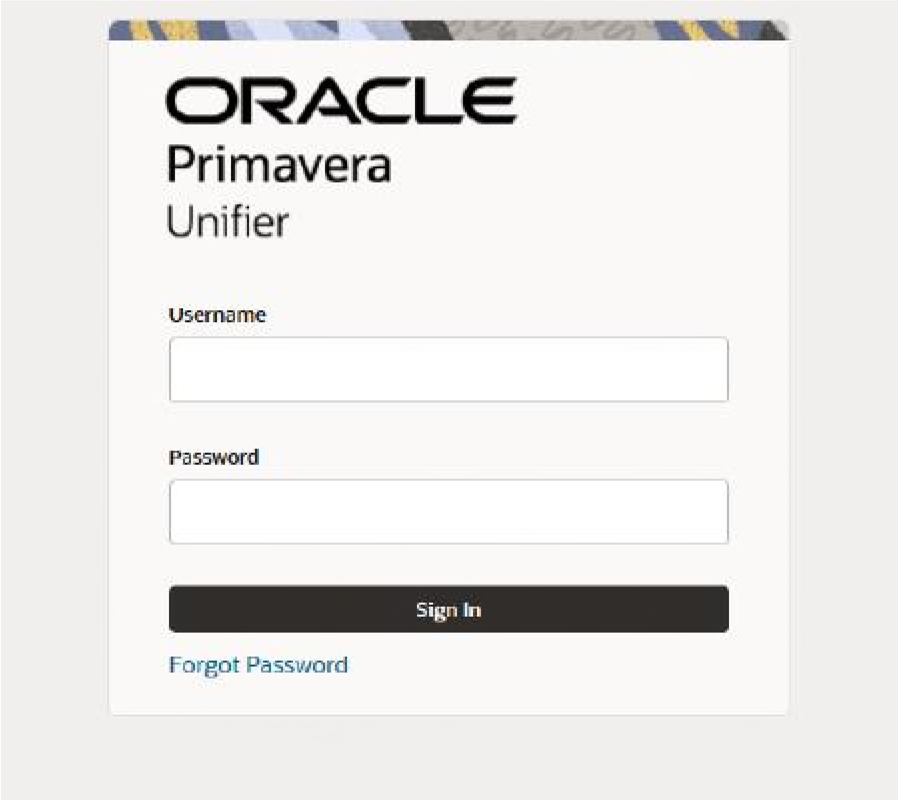
From version 21.7 onward, Unifier will use the Oracle JavaScript Extension Toolkit (Oracle JET). As a result of using Oracle JET 10.1.1:

1) OJET components used to build user interface screens are implemented as-is,
2) No changes are made to the native component behavior, and
3) Most components will provide keyboard navigation.

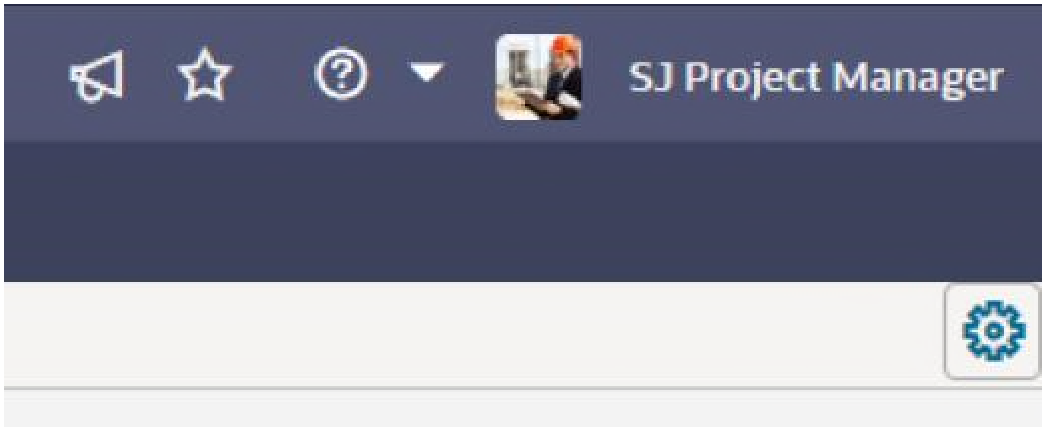
User interface screens in Unifier User mode that use OJET have undergone changes, primarily in colors, icons, and the font.

Here are highlights of the changes between the current version of Unifier and previous versions.

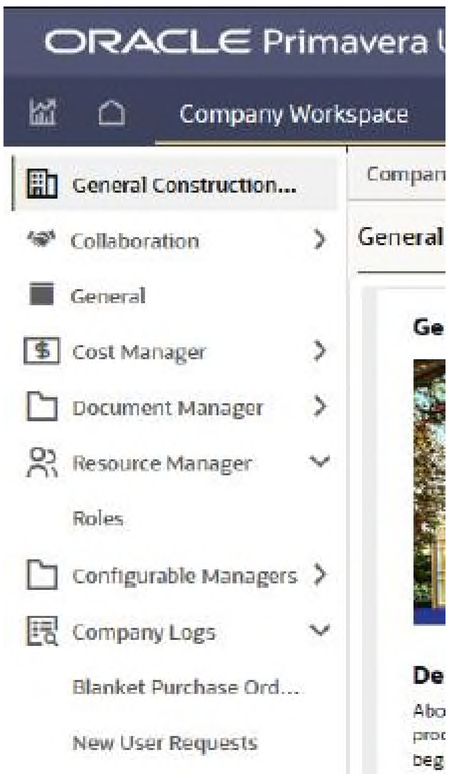
- The login screen has been updated.



- The admin mode switch is now a cog with a square outline when it is enabled.



- The left Navigator now uses single-angle brackets to show or hide sub-nodes.

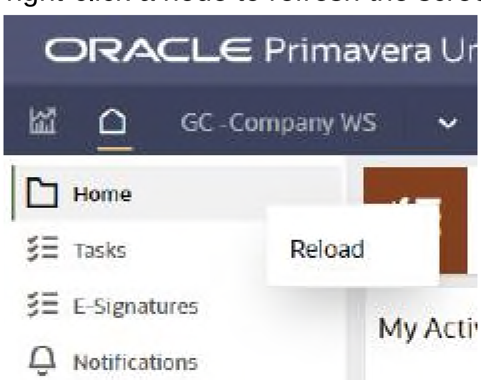


- Icons in the left Navigator have been updated.

- In a new tab, a scroll bar is displayed when you hover over a long list.

- Within toolbars, a multi-row arrangement is replaced by a single-angle bracket indicating there are more tools to use.

- When a log pane is narrow, the bottom information strip can be scrolled left and right.
- In previous versions of Unifier, each node in the left Navigator was a hyperlink. Now, right-click a node to refresh the screen and reload the log data.



- When you want to act as a proxy user, the list of available users is shown in-line, rather than to the left of the user menu.

- When there is a submenu—such as within an Actions item menu—the arrow has moved closer to the text label.
- In Date and Date/Time fields, the options to select "Today" and "Now" are no longer available.
- For quick searches, there is no separate search field. Instead, clear the word "Select" and then begin typing any sequence of letters.
- The word "Select" no longer appears in lists of values within pull-down fields.
- To clear the value in a pull-down field, highlight it and then press delete or backspace, followed by “enter” or a tab.
- When entering text, a required field has a label at its bottom-right corner; when you begin entering text, a character limit may be displayed.
- For a field that uses a picker, both the Selection and Clear buttons are no longer inside the field area; they are now outside the field, to the right.

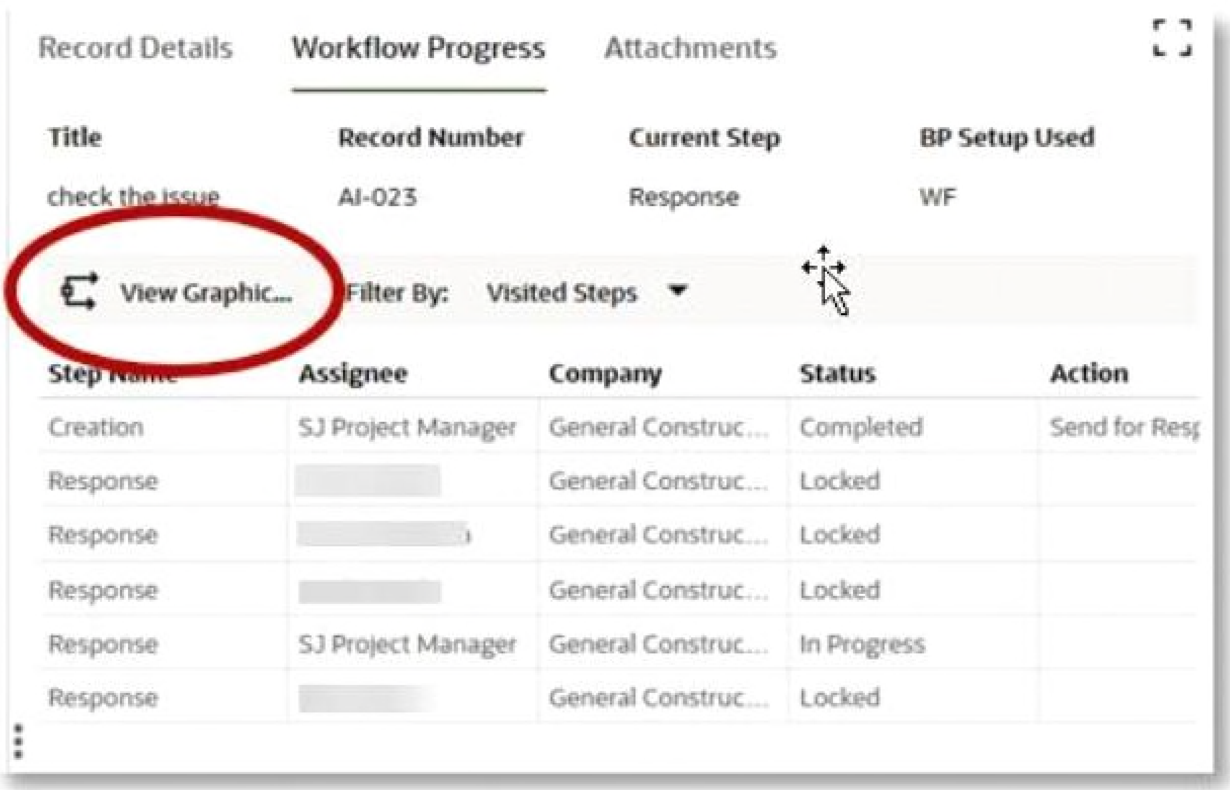
- For fields that include BP manual auto-creation, the "Create" and "Clear" buttons are outside the value area.

- The Comments area associated with a BP record is differently styled.

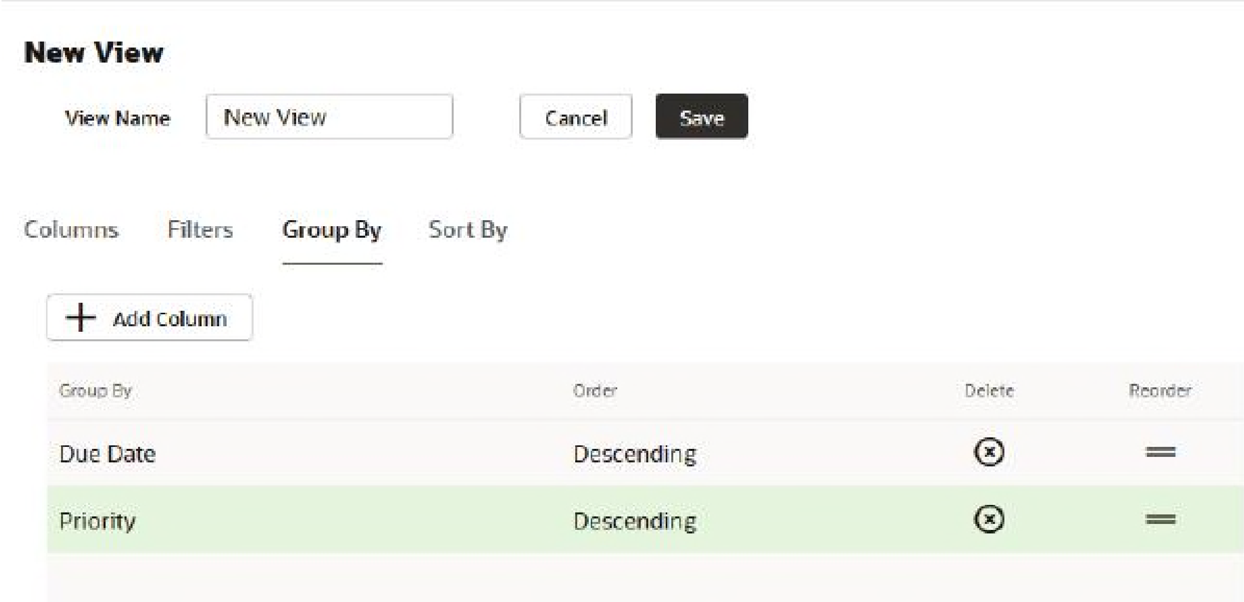
- The "Search" and "Find on Page" text actions are now represented by icon buttons in the same location.

- The appearance of read-only fields has been changed.
- Icons for common actions have been updated.

- Action buttons are inactive until a record is selected
- In User and Group pickers, the appearance of the Group indicator has changed.
- The location of the View Graphic button in the Workflow Progress tab has changed. It is now just above the progress log, above the Step Name.



- When editing or creating a new View, the Group By and Sort By tabs now use a table structure. The *gear menu* has been replaced with a single Add Column button. Controls to delete or reorder criteria are included in the table itself.



- In the Document Manager, Search now includes a separate drop-down list for the category to search within.