ORACLE®
Primavera

Unifier Programs, Shells, and Projects User Guide
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Contents

Working with Unifier Programs, Shells, and Projects

The following explains how to work with Unifier programs, shells, and projects.

Within our documentation, some content might be specific for cloud deployments while other content is relevant for on-premises deployments. Any content that applies to only one of these deployments is labeled accordingly.

In This Section

Unifier Programs

Cost data from different projects or CBS code-based shells can be rolled up into a program. The roll up lets you view and compare member project and shell data in a cash flow worksheet or cost sheet, and in the company's base currency.

Base currency: Projects and shells can use different currencies. Unifier converts all project and shell currencies to the company's base currency and presents the rolled up data in the base currency using the earliest exchange rate defined for the period. You can create a snap shot of this data for later reference. For information about working with snapshots refer to *Unifier Managers User Guide*.

This data is reportable. For more information about user-defined reports (UDRs), refer to *Unifier General User Guide*.

Refresh: When there are changes to the program roll up, either additions or removals of projects or shells, refreshing the worksheet updates the cash flow curve.

Program membership: Program administrators determine program membership.

▶ If you are a member of a project or CBS shell that is part of a program, you may be a member of that program.
▶ You can also be a member of a program without being a member of a project or shell.

Company membership: As a Unifier user, you may be part of a sponsor company or a partner company (or possibly both).

▶ Sponsor companies can commission and administer projects or shells and programs.
▶ Partner, or member, companies (e.g., subcontractors, vendors) work with sponsor companies.

In This Section

Open a program

Open a program to access the program level functions.

To open a program

1) Go to the Program tab and switch to User mode. The Programs log opens and lists any programs to which you have access.
2) Select the program you want to see and click Open (or double-click the program).
3) In the left Navigator, select the module for which you want to see the data roll up of included projects or shells.

What you can do in a Program

Depending upon the modules your company has set up and your access permissions, the following program functions are available in the left Navigator.

▸ **Summary:** Provides a snapshot of program information for the company. You can choose the **Summary - Standard View** or customize your summary page (**Summary - User View**).

▸ **Cost Manager:** Access program-level Cost Manager functions: cost sheet and cash flow. View project and shell data in the company's base currency. Refer to *Unifier Managers User Guide* for details.

▸ **Schedule Manager:** Summarizes project or shell schedule data as it is rolled up to the program level. Refer to *Unifier Managers User Guide* for details.

▸ **Reports:** For creating and generating program-level user-defined reports. Refer to *Unifier General User Guide* for details.

Working with the Program Summary

The program summary provides a snapshot of the overall program. There are two available views:

▸ **Summary - Standard View:** System-generated summary that summarizes program information.

▸ **Summary - User View:** You can customize the program summary to display virtually any reportable project or shell related information in table or graphical format. The summary information is pulled from summary-type user defined reports or from pre-configured standard data type reports.

To access the program summary

1) Go to the **Standard Projects** tab and switch to User mode.
2) Click **Programs** in the left Navigator.
3) On the log, open a program, then click **Summary** in the left Navigator.
4) Click the **View** menu and choose **Standard** to view the **Summary - Standard View** or **User** to view the user-defined view (**Summary - User View**).

   The standard view of the program summary displays an overview of the program.

To print the program summary

1) Go to the **Standard Projects** tab and switch to User mode.
2) Click **Programs** in the left Navigator.
3) On the log, open a program, then click **Summary** in the left Navigator.

   You can print both the user view and the standard view of the program summary.
4) From the File menu, click **Print Preview**. The preview window of the summary opens.
5) Click the **Print** icon in the upper right corner of the window.

Configure a program summary

Like the project or shell summary, you can customize the information that is displayed on the Program Summary window by defining blocks.

To add reports to the user view

1) Go to the **Standard Projects** tab and switch to User mode.
2) Click **Programs** in the left Navigator.
3) On the log, open a program, then click **Summary** in the left Navigator. The Summary window opens.
4) Click the **View** menu and choose **User**.

    The initial reports included in the summary are displayed in table format. You have the option to modify how these reports display, remove them from the summary view, or add other summary reports.

5) From the Edit menu, choose one of the following:
    - ▸ **Left Column:** To add information to the left side of the window
    - ▸ **Right Column:** To add information to the right side of the window

    The Left Column Blocks or Right Column Blocks window opens.

6) Do one of the following:
    - ▸ To add a user-defined summary report, click the **Add Custom** button. The Custom Summary Block window opens. Complete the window and click **OK**.
    - ▸ To add a pre-configured, standard data type report, click the **Add Standard** button. The Standard Summary Block window opens. Complete the window and click **OK**.

    The report will be added to the Blocks window.

7) Click **Close**. The Program Summary - User View will update to include the new report.

Available program-level reports

Name	Drill down to
<BP Name> Count by Status	No drill down
<BP Name>% by Status	No drill down
<BP Name> Count by Company	No drill down
<BP Name>% by Company	No drill down
<BP Name> Count by User	No drill down
<BP Name>% by Creator User	No drill down
<BP Name> - Tasks by User	No drill down

<BP Name> - Tasks All Users	No drill down
Record Count per BP (for current user)	No drill down
Record% per BP	No drill down
Current User Task Count	No drill down
All User Task Count	No drill down

To manage blocks on the Program Summary - User View

1) Go to the **Standard Projects** tab and switch to User mode.
2) Click **Programs** in the left Navigator.
3) On the log, open a program, then click **Summary** in the left Navigator.
4) From the Edit menu, choose one of the following:

  ‣ **Left Column:** To add information to the left side of the window
  ‣ **Right Column:** To add information to the right side of the window

  The Blocks window opens. Blocks are listed in the order in which they appear on the page.
5) To move a block, select it and click **Move Up** or **Move Down**.
6) To delete a block, select it and click **Delete**.
7) To change the display type, title, or other block property, select the block and click **Open**. Make changes as necessary and click **OK**.

Unifier Shells

In Unifier, shells define your project collaboration workspace. Shells can represent whatever you want them to, for example:

▶ Capital Projects
▶ Maintenance Projects
▶ Business Portfolios
▶ Project Delivery Management

With shells, you can show project relationships and hierarchies to more accurately represent a real-world physical or organizational structure. In the following example, indentation is used to represent levels in a hierarchy:

▶ Region
  ▶ Properties
    ▪ Buildings
  ▶ Buildings
    ▪ Projects

You can create multiple templates from which you can centrally manage large numbers of shells. The shells you create can have their own business processes, cost worksheets, reports, dashboards, document repositories, and users and groups. You can organize shells into project hierarchies that allow you to pull data from a current shell and any of its subordinate shells. Working together, these features give you visibility into, and control of, your projects.

In This Section

Shell Relationships and Hierarchy

With shells, you can show project relationships and hierarchies to more accurately represent a real-world physical or organizational structure. Shell hierarchies can have as many levels as needed. For example:

- ▸ Region (shell)
  - ▸ Properties (sub-shell)
    - ▪ Buildings (sub-shell)
  - ▸ Buildings (sub-shell)
  - ▸ Projects (sub-shell)

In this simple hierarchy, the shell Region was created and named in uDesigner. The Region shell has the sub-shells Properties, Buildings, and Projects. The sub-shell Properties also has a sub-shell called Buildings. Subshell organization is configured in administration mode and managed through the shell detail form.

Single Instance and Multiple Instance Shell Types

Shells are characterized by:

- ▸ A unique system ID
- ▸ Single or multiple instance
- ▸ Generic or CBS cost code

Shell instances are copies of shell types, and have these characteristics:

- ▸ An instance of a shell type must exist before the shell type is viewable in User Mode
- ▸ Shell type single can be a root node or a tab
- ▸ Shell type multiple populate levels in a hierarchy Shells and the Cost Managers

Shells can be single or multiple instance.

Single instance: This type of shell is an anchor shell and cannot be replicated. Use this shell at the root of a hierarchy. It is seen in Unifier as a tab, at the same level as the Home page. You cannot make a template of this shell.

Multiple instance: This type of shell can be replicated. Use this shell as a building block for a hierarchy. Multiple-instance shells allow you to create more than one copy of a shell, and they support the use of templates.

Here is an example of how it could work: Your anchor shell is a single-instance shell and might be called Europe. This shell has a tab, and is the root of the hierarchy. Under this shell, you could use multiple-instance shells to create shells that represent countries, such as Holland, France, and Hungary. These building block shells can have templates, so each of these country work spaces can have the same business processes and managers, but they may have different users. The Shell Manager enables you to import and manage shells.

To access the hierarchy, click the anchor shell tab, as seen in the Tab Navigator. The shell landing page displays a mini log in which subordinate shells are listed in the shell log in the lower area of the landing page.

Shell and Cost Managers

The uDesigner configuration controls shell relationships and also determines the type of cost manager that you can use with the shell.

- **Standard Cost Manager:** Uses CBS codes and works with standard projects as well as with shells. In uDesigner, the administrator can create a shell that uses CBS costing. This shell then has the same Cost Manager as a standard project, but provides the configurability and hierarchical aspects of a shell.
- **Generic Cost Manager:** Works with generic shells only. The Generic Cost Manager supports costing for projects that are not of a fixed duration or cost. This can include facilities management projects like:
  - Leases
  - Janitorial support
  - Building maintenance
  - Landscape care
  - Interior updates to a building

The ongoing management of a building does not have a start and end, and you cannot always project the ultimate cost. With the standard Cost Manager, costs have defined start and end dates for projects that have budgets, scope, and schedules. Cost is broken down by work in the various disciplines and is managed using CBS codes.

In the Generic Cost Manager, cost is time-based, not work-based, allowing you to manage costs that do not have a finite timeline, such as facility maintenance and upgrading. You can plan for these expenses during a time period, such as a quarter or year. Each shell has its own cost manager.
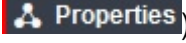
Unifier projects are similar to shells that use CBS cost codes. You can combine shells and shells that use the CBS cost codes together. You can also create a hierarchy of shells that consists of shells that use the Generic Cost Manager and those that use the standard Cost Manager (CBS cost codes).

In the Generic Cost Manager, cost is time-based, not work-based. You would use the Generic Cost Manager to work with the costs that do not have a finite time-line, such as those associated with maintaining and upgrading the building or facility. You can plan for these expenses during a time frame (such as a quarter or a year). The Generic Cost Manager enables you to track the time and corresponding budget for your ongoing facilities work. Each shell has its own cost manager. The Generic Cost Manager does not include:

- Earned value
- Cash flow
- Funding
- General Spends SOV
- Pay App SOV

Shell Landing Page (Classic View)

Once you create a shell, it is available for use. To access your shell landing page:

1) Click the shell tab to open it.

2) Switch to **User** mode.

3) From the left-hand Navigator, click your shell name (for example: [🔻 Properties]) on top.

The top section of the landing page contains the Shell Dashboard. See *Configuring a shell dashboard (My Dashboard)* (on page 23) for details on the shell dashboard, and instructions on how to configure the dashboard.

By default, the shell dashboard contains the following blocks:

▸ Image
▸ Items Requiring Your Attentions Details
▸ Links

The bottom section of the shell landing page displays a mini-log window of sub-shells that have been created under the currently selected shell.

For example, if you select the sub-shell South Bay, and then the further sub-shell Mathilda Northwest, this landing page displays.

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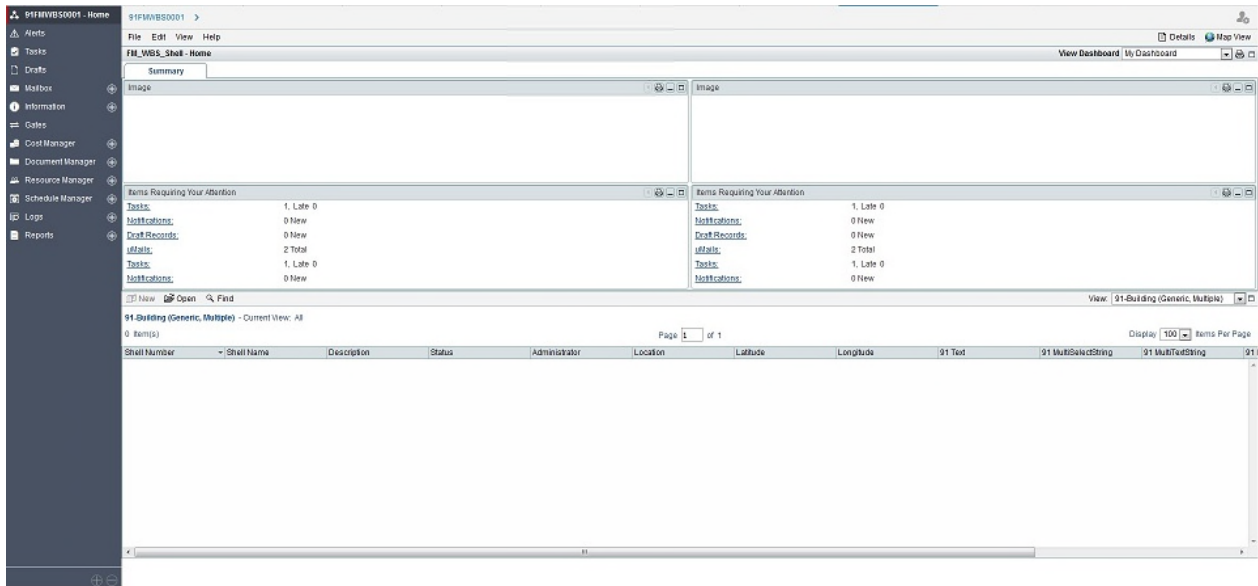
To view the shell details, as overlay. The details include: Shell Name, Shell Number, and the following tabs:

General

Currency

Options

Links

Calendar

To open the audit log, as overlay.

Shell Landing Page (Standard View)

Once you create a shell, it is available for use. To access your shell landing page:

1) Click the shell tab to open it.
2) Switch to **User** mode.
3) From the left-hand Navigator, click your shell name (for example: Properties) on top.

The top section of the landing page contains the Shell Dashboard. See **Configuring a shell dashboard (My Dashboard)** (on page 23) for details on the shell dashboard, and instructions on how to configure the dashboard.

By default, the shell dashboard contains the following blocks:

- ▶ **Tasks**
- ▶ **Notifications**
- ▶ **Mail**
- ▶ **Image**
- ▶ **Details**
- ▶ **Links**

The bottom section of the shell landing page displays a log of all sub-shells that have been created under the currently selected shell. For example, if you select the sub-shell South Bay, and then the further sub-shell Mathilda Northwest, this landing page displays.

By default, the following two tabs are displayed.

- ▶ **Summary**
- ▶ **Workspaces**

You can change the layout of the tabs, in My Dashboard or other custom dashboard.

> Example
> Block Length: 2 units

Block Height: 2 units

The following explains the various informational blocks in the Summary tab:

▶ **Tasks**

This block lists the total tasks belonging to the shell. When you click on Tasks you go to the Task log directly. You will be able to add this block in all tabs (in all dashboards) by using the data-source "Items Requiring Attention" in the Standard block. Also, you can remove the block from My Dashboard.

▶ **Notifications**

This block lists the total notifications belonging to the shell. When you click on Notifications you go to the Notifications log directly. You will be able to add this block in all tabs (in all dashboards) by using the data-source "Items Requiring Attention" in the Standard block. Also, you can remove the block from My Dashboard.

▶ **Mails**

This block lists the total mails belonging to the shell. When you click on Mails you go to the Inbox log directly. You will be able to add this block in all tabs (in all dashboards) by using the data-source "Items Requiring Attention" in the Standard block. Also, you can remove the block from My Dashboard.

▶ **Project Image**

This block displays an image, if available; otherwise, the block will be blank.

▶ **Details**

This block is displayed with either custom fields or default fields based on the configuration of the details block that is designed in uDesigner, shell manager. In the latest version of Unifier, the shell home landing page displays the custom fields; otherwise, the shell home landing page displays the default fields, only.

You can edit the details block using the pen icon or through Edit dashboard option. This capability applies to block information, or to the fields that must be displayed in the block.

▶ **Links**

If links have been added to the shell details, then those links are displayed in this block.

▶ **Sub-shell log**

This block displays the sub-shells of parent shell, based on the view that you have selected. You can hide Workspaces in other dashboards.

The user-created dashboards support all of the existing functionalities, except the sub-shell log.

You cannot delete Workspaces tab in any Dashboard.

You cannot hide the Workspaces tab in My Dashboard. As a result, you cannot deselect the Show checkbox for Workspaces.

14. User will be able to hide Workspaces Tab in all user-defined Dashboards and will be able to un-check the 'Show' checkbox for Workspaces.

Important Information

The **Tasks**, **Notification**, and **Mails** can be added or removed. Individual tiles cannot be added/removed.

The block will get displayed back, post removal, by navigating to Add Block > Standard and selecting Data Type as "Items Requiring Your Attention." When you save the Standard Block, the block will be added automatically to the dashboard.

The following explains the various informational blocks in the **Workspaces** tab:

The **Workspaces** tab is available when geo-code server details are configured in Unifier, only.

▸ If there are no geo-location present in the sub-shells, Unifier displays a map without location markers.

▸ If there is a geo-location present in the sub-shells, Unifier displays a map with location markers.

When you hover the mouse over the location markers on the map, you can see the details for the location marker based on available information.

When you right-click on the location marker, you can open the shell (for that location) in a new tab, in Unifier.

The **My Dashboard** sub-menu (the three dots) enables you to:

▸ Access additional dashboards for the shell, if available.

▸ Edit Dashboard

To open the editing mode of the current dashboard.

▸ Details

To view the shell details, as overlay. The details include: Shell Name, Shell Number, and the following tabs:

　▸ General

　▸ Currency

　▸ Options

　▸ Links

　▸ Calendar

　▸ Integration

▸ Audit Log

To open the audit log, as overlay.

The **Workspaces** tab has the following toolbar options:

▸ View

For example, Buildings, Cities, Shells, Projects, Regions.

▸ Actions

　▸ Get Activity Sheet Data

　　　All Shells

　　　Selected Shells

　　　Filtered Shells

　　　History

　▸ Send Activity Sheet Data

　　　All Shells

Selected Shells

Filtered Shells

History

▶ Search

▶ Find on page

▶ Expand All Groups

The columns the Workspaces tab sub-shell log are not hard-coded. The fields defined in Shell Detail form (in uDesigner) are added as columns in the Sub-shell log.

▶ Name

▶ Shell Number

▶ Shell Name

▶ Description

▶ Status

▶ Administrator

▶ Location

▶ User-Defined Text

The right-hand pane displays the map that shows the regions.

Shell Navigation

You can navigate between current Shell, sub-shells, and instances through the use of:

▶ Tabs to move from one single instance Shell to another

▶ The Landing Page mini-log at the bottom of the landing page

> **Note**: You can search for instances within a Shell by using the Landing Page Log Find functionality.

▶ The View drop-down menu to filter shells by types, which are displayed in the Shell log, based on the shells defined in the hierarchy

▶ Breadcrumbs to navigate up and down the shell hierarchy

▶ A geocoded map, which allows you to click on map pins to navigate to associated shells

　▶ If a Shell does not have sub-shells, then in the **Workspaces** tab you will see the location markers (pins) for the Shell.

　▶ If a Shell has sub-shells, then in the **Workspaces** tab you will see the location markers (pins) for the sub-shells, only.

Shell Dashboard

About Shell Dashboard

From the Shell Dashboard, you can:

▶ Use the Drill-down functionality to access the Shell data

▶ Use filters on the Shell Dashboard so that all blocks in a particular dashboard can be filtered based on the same parameter

▶ Print the entire dashboard, or individual dashboard blocks

▶ Minimize and maximize the entire dashboard, or a block

▶ Use a free-form dashboard layout that gives you the ability to drag and drop dashboard blocks as an alternative to using pre-defined layout

The following explains the following topics related to Shell Dashboard:

▶ Using Custom Shell Dashboard

▶ Minimizing Shell Dashboard

▶ Expanding Shell Dashboard

▶ Printing Shell Dashboard

▶ Navigating Through Shell Block Drilldown

▶ Setting Filters on Shell Dashboard

▶ Using Drilldown

▶ Scrolling Vertical Y-axis in Shell Dashboard Graph

Using Custom Shell Dashboard

You can use a custom Shell Dashboard in your Shell instead of the default configurable Shell Dashboard. To use a custom Shell Dashboard:

1) Navigate to a shell.

2) Choose **Edit > Dashboard**.

3) Select **Use Custom Dashboard**. This selection defines the custom dashboard as your default dashboard; you will see this dashboard when you open this shell.

4) Click **Select** and browse to select the SWF file for the custom shell dashboard.

5) Click **OK**.

Minimizing Shell Dashboard

Click the minimization icon to minimize the Shell Dashboard. You can minimize the Shell Dashboard blocks individually.

Expanding Shell Dashboard

Click the expansion icon to expand the Shell Dashboard or to fill the width of the Shell Dashboard. You can expand the Shell Dashboard blocks individually.

Printing Shell Dashboard

Click the print icon to print a Shell Dashboard. You can print the Shell Dashboard blocks individually.

Navigating Through Shell Block Drilldown

Click the left-arrow icon to navigate up the Drilldown in a Shell Dashboard block.

Setting Filters on Shell Dashboard

Click the **Filters** button in the upper left-corner of the Shell Dashboard.

If there are filters defined, they will be listed, and enable you to filter the Shell Dashboard data by criteria defined in the **Edit** > **Dashboard Filters** window.

To set filters on a Shell Dashboard block:

1) Click the **Filters** button. The Filters window opens.
2) Enter the filter criteria.
3) Click **OK**.

   The data view in the block changes to reflect the filtering.
4) You can turn off the filter by clicking the red *X* associated with the displayed filter criteria. The data view for the block returns to the default, unfiltered view.

Using Drilldown

You can click on activated elements in Shell Dashboard blocks to drill into layers of data contained in the Shell.

> **Note**: The drill-down functionality is supported for charts only. Drilldown is not available for grids or tables, and Drilldown stops when a grid or table is encountered.

To drill-down into Shell Dashboard block data:

1) Click a data representation in the data block.
   For example, you can drill down into the next configured level of data for a Shell called Terminal Expansion by double clicking on that section of the chart.
2) View the next level of data. In this example, after you double click on Terminal Expansion, the next level of data displayed looks like this:
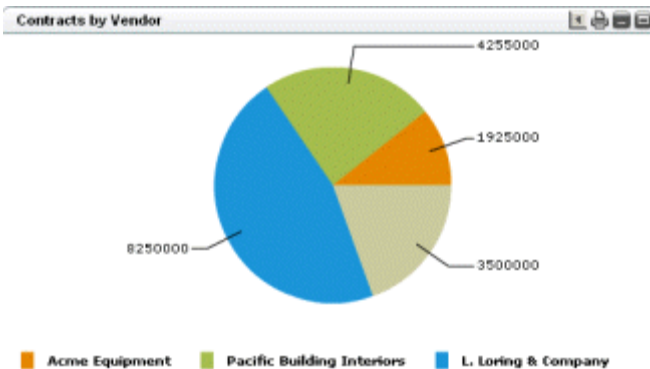
3) You can return to the original data view by clicking the left arrow icon.

Scrolling Vertical Y-axis in Shell Dashboard Graph

If there are enough records represented, you can scroll up and down the vertical y-axis of a graph using a scroll bar.

Project Shell Dashboards

Project shell dashboards display project data in an at-a-glance format. You can control the dashboard look and content and make it specific to the shell that you are working with.

Shell dashboards cannot pull data from across shell hierarchies. For example, consider two anchor tabs, one called Capital Projects, and one called Facilities. The Capital Projects dashboard can display data from all levels of the Capital Projects hierarchy; however, it cannot display Facilities data because Facilities is a separate, independent hierarchy.

Two types of dashboards are available in project shells:

Administrative dashboard

These are designed by the shell administrator and pushed via templates. Administrators with dashboard Setup permission can create multiple shell dashboards for each project shell. Users can select administrative dashboards to view from the View Dashboard drop-down list on each shell. These dashboards are maintained at the shell level and are available to any user to view, provided the user has permissions. Users cannot edit an administrative dashboard.

My Dashboard

Designed by an individual user, it is a personalized view that contains only the information the user wants to see.

> **Note**: In most cases, the Company Administrator will configure the shell dashboard for you.

Each shell dashboard has at least one tab and can have up to five tabs. The default tab name is Summary, which you can change. The default shell dashboard layout contains these four blocks:

▶ **Image** Displays the image your company administrator uploaded for the shell.
▶ **Items Requiring Your Attention**: Contains items that are generally listed on the Unifier Home page, such as tasks and messages.
▶ **Details**: Lists shell details, including shell number, shell name, administrator, and other details.
▶ **Links**: List of links configured for the shell by your company administrator.

On each tab, you can select a different layout to which you can add blocks of these types:

▶ Standard: Use this selection to view project data from, for example, business process, manager, users, and active tasks
▶ Portlet: Use this selection to view an external URL, such as a web cam, or a frequently visited web site
▶ Drilldown: Use this selection to slice and dice project-shell data. See ***Add a drilldown block to my dashboard*** (on page 25)
▶ Custom: Use this selection to view data from the current shell, subordinate shells, or both (cannot cross hierarchies)

Configuring a shell dashboard (My Dashboard)

Project shell dashboards display project data in an at-a-glance format. You can control the dashboard look and content and make it specific to the shell that you are working with.

All shells have a dashboard that the end user can configure if they have Setup permissions. The dashboard is the user's personal dashboard, with their personally configured view of shell data. My Dashboard can be configured by end users in User Mode using the Edit Dashboard window, but is often configured for each user by the Administrator. Users can select this type of dashboard to view from the View Dashboard drop-down list on each shell. This dashboard is recommended if the user wants a personalized dashboard to view data that they specifically need to see regarding the shell.

To configure a shell dashboard (My Dashboard)

1) From the shell landing page, select Edit > Dashboard. The Edit Dashboard window displays.

    There are two sections to this window: **Tab Setup** and **Source Details**. Under Tab Setup, the default first tab already has a name and layout that you can modify.

2) To change the tab, click the tab name. Change the tab name, and select a layout for the tab. You can experiment with layouts to see which one works with the information that you want to display.

3) Select the **Show** checkbox to show the tab in the dashboard.

    Under **Source Details**, you can add standard or custom blocks. Double-click to select a default standard block and modify it as needed.

    To add a standard block:

4) Click **Add** > **Standard.** You can add any number of blocks, but the dashboard displays the blocks based on the tab layout you select. See the first table below.

5) Click **OK** to save your changes and exit the Edit Standard Block window.

6) To add a custom block, click **Add** > **Custom**. See the second table below.

7) Click OK to save your changes and exit the Edit Custom Block window.

8) To add a portlet, click Add > Portlet. Enter the portlet name and the URL or IP address.

9) This allows you to add content to your dashboard from a URL address. For example, you could use this portlet to specify a webcam site to monitor activities via a live camera. You can add as many portlets as needed.

10) You can define a block that allows users to drill down into the displayed data.

> **Note**: You must add drilldown blocks if you want to use filtering on your dashboard blocks.

11) After you define the drilldown, you can also add filters.

12) To remove a block, click Remove. To reposition a block, click Move Up or Move Down.

13) Click another tab name to modify the tabs and sources for that tab. Repeat these steps for each tab until you have configured the entire dashboard to meet your needs.

14) Click Apply to save your configuration, and then click OK to close the window.

Use the following table for Standard blocks.

In this field	Do this
Source Name	Enter a source name.
Data Type	- Select a data type. The data types are: - Business Process: general business process information - Document Management: total documents - Active Task Information: Active task metrics - Users: Metrics by Company - Image: shell image - Items Requiring Your Attention: items such as tasks and messages - Details: Shell details, such as shell number and name - Links: Links configured for the shell <specific business processes> : details on selected business processes, such as record status and tasks
Report On	Select what to report on.
Block Title	Add a title for this block.
Display Type	Select the chart type.
Show Result	Choose Actual Value or Percent of Total.
Show Total	Select this checkbox to display the total.
Decimal Places	Select the number of decimal places.
Use 1000 Separator (,)	Select this checkbox to use the comma as a 1000 separator.
Negative Number Format	Select the format for negative numbers.
Currency Format	Choose None, Shell Currency, or Base Currency.

Use the following table for Custom blocks.

This item	Does this
Data Cube	Select the shell data cube definition to use. Data cubes are queries that can be defined and reused to create charts on your dashboard. Your company administrator defines the data cubes.
Show data from	Enables you to select the shells to use as data sources. You can choose: - Current Shell Only - Subshells Only - Current Shell and Sub-shells
Block Title	Add a title for this block.

Display Type	Select the chart type.
Source Grouped By	Select how the source is grouped.
Output Type	Choose either Record Count or Summary Value.
Report On	Select what to report on.
Show Result	Choose Actual Value or Percent of Total.
Show Total	Select this checkbox to display the total.
Decimal Places	Select the number of decimal places.
Use 1000 Separator (,)	Select this checkbox to use the comma as a 1000 separator.
Negative Number Format	Select the format for negative numbers.
Currency Format	Choose None, Shell Currency, or Base Currency.

Add a drilldown block to my dashboard

You can add a drilldown block that allows you to access greater levels of data detail.

For example, if a dashboard block shows a pie chart with data for two projects, called Parking Extension and Terminal Expansion, and you can double-click on Terminal Expansion to expose the vendors on that project
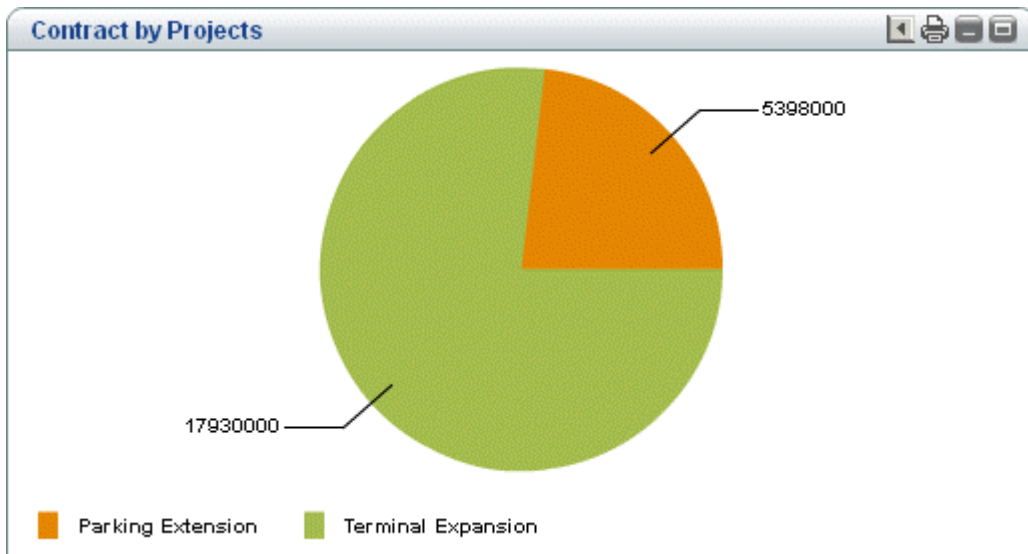
To continue the example, when you double-click on Terminal Expansion the to access the vendor information, and the amount associated with the vendors Acme Equipment, Pacific Building Interiors, and L. Loring & Company:
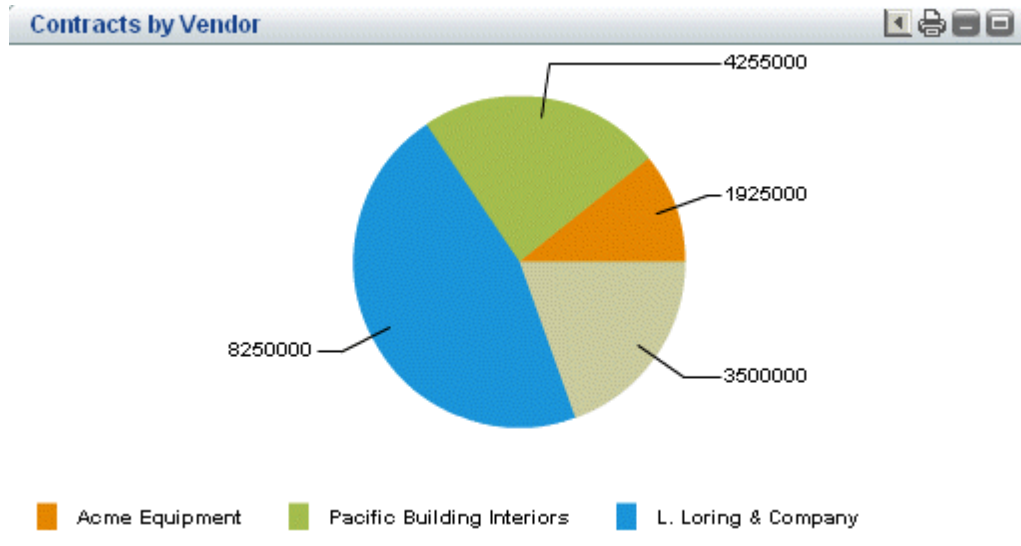
> **Note**: If you want to use filters on your dashboard blocks, you must first define a drilldown block.

To add a drilldown block to your shell dashboard

1) On the Edit Dashboard window, click **Add > Drilldown**. The Edit Drilldown Block window opens. Drilldown functionality is supported for charts only, and is not available for grids or tables. Drilldown will stop when a grid or table is encountered. See the first table below.

2) Click **Add** to add Drilldown Details. The Edit Drilldown Details window opens. See the second table below.

3) When complete, click **OK**, and click **OK** to exit the Edit Dashboard window.

This item	Does this
Data Cube	Select the data cube definition to use. Data cubes are queries that can be defined and reused to create charts on your dashboard. Your company administrator defines the data cubes.
Block Title	Add a title for this block.
Block Filter Elements	**Group By** elements from the data cube. This determines which columns from the data cube definition will be used to group data for filtering.

In this field:	Do this:
Title	Enter a title for the drilldown.

Show Data From	Select the shells to use as data sources.
Display Type	Select the type of display, for example, a bar chart.
Source Grouped By	Select the columns from the data cube definition that will be used to group data.
Output Type	Select Record Count or Summary Value.
Report On	Select the columns from the data cube to be defined as Summary.
Summary Type	Select the summary type.
Show Result	Select the type of result, for example, Actual Value.
Show Total	Select to show the totals for the data.
Decimal Places	Select the number of decimal places.
Use 1000 Separator (,)	Select to use a comma (,) as a separator.
Negative Number Format	Specify the format for negative numbers.
Currency Format	Select the currency format.

Add filtering to the drilldown block

You can add filtering on a drilldown block in your shell dashboard. You must first define the filter at the block level, and then specify that it appear on the dashboard for use.

To add filtering on a drilldown block in your shell dashboard
1) To define the drilldown at the block level, click **Select** next to Block Filter Elements on the Edit Drilldown Block window.
2) Select the data elements from the data cube that you want to use as filters.
3) Click **OK** to exit the Edit Drilldown Block window.
4) On the Edit Dashboard window, click the **Filters** button to add filters at the dashboard level. The Configure Filters window opens.
5) Click **Add**. The Add Filter window opens.
6) Enter the filter name.
7) Select the filter you want to use on the dashboard block.
8) Click **OK**, and then click **OK** to exit the Configure Filters window.

Optimizing Shell Dashboard Performance

You can sometimes improve shell dashboard display performance by following a few guidelines. Shell Dashboard performance can depend on how many dashboard blocks are defined and the volume of data retrieved by the dashboard query.

Here are some tips to improve shell dashboard performance:

▶ Reduce the number of dashboard blocks, if possible.
▶ Define conditions for SQL filtering to return less data.
▶ Do not check **Show Total** when you configure dashboard blocks.
▶ Do not select **Percent** for **Show Result**.

View dashboards

Users with Configure User Dashboard permissions can configure and maintain a shell dashboard. This user-configured dashboard is listed as My Dashboard in the View Dashboard drop-down list. This menu can also list shell dashboards that were configured by the Administrator.

For example, the Administrator can create separate shell instance dashboards to serve various business groups that are using shells in a single instance. For example, the Administrator can create these types of shell instance dashboards for a shell instance called Building 100:

This dashboard	To serve this business group
Operations Dashboard	Operations and Management groups
Technical Services Dashboard	Technical Support and Services group
Lease Management Dashboard	Vice President of Leasing Services and his reports

With permissions, you can view the dashboards provided by the Administrator, but you cannot modify them.

To view dashboards

1) Navigate to a shell.
2) Select a dashboard from the **View Dashboard** drop-down list. Any dashboard that you have configured for yourself is called My Dashboard.
3) You can select dashboard in the **View Dashboard** drop-down list to which you have **View** permission. The last dashboard that you view will display the next time you sign in to Unifier.

Expand the Shell Log on the Landing Page

You can expand the shell log (the bottom area of the shell landing page) by clicking the rectangle next to the View drop-down list.

About Shell Statuses

Your shell can have one of four statuses.

▶ **Active**: A live, in-progress shell.

▸ **On-Hold**: The initial shell status. On-hold shells appear on the shells log. Shell administration functionality is available to shell administrators for setup and maintenance for users with permissions to perform that function. Users cannot create records in a shell that is On-Hold. If a user attempts to access a shell that is On-Hold, the system displays an alert message stating that the shell is On-Hold.

▸ **View-Only**: View-Only shells can be viewed, printed, exported, and included in reports. You cannot modify any data in View-Only shells. This allows you to view past shells without allowing changes to these shells. If a shell in a shell hierarchy changes to View-Only, you can still navigate up and down the shell hierarchy, and can create sub-shells in the hierarchy under the View-Only shell.

▸ **Inactive**: Used to suspend shell usage. Inactive shells are visible to Administrators, but not to end users. Only System and Shell Administrators (users with Modify Status rights) can reactivate the project.

> **Note**: If automatic status update is enabled on a shell, the status of the shell can change from Active to an inactive status (On-Hold, View-Only, Inactive). The change of status is set up by the Administrator, and is based on defined triggering conditions. For example, if a shell is close to exceeding its funding, it might make sense to put it On-Hold while funding matters are discussed. Your shell administrator must manually change the status back to Active when you are ready to restart the project.

The Shell Administrator will receive email notification when the status of a shell changes. The change of shell status could occur due to a manual change, bulk update, through Web Services or a CSV file, or through automatic update.

Working with Shells

A shell allows users to collaborate on and coordinate the execution of a project.

> **Note**: User access and permission levels for all functions are controlled by the company administrator. Contact your company administrator if you have questions regarding access.

Open a Shell

Open a shell to access the shell functions.

To access shells

From your user home page, click a shell tab.

When you click a shell tab, the shell landing page displays. From the shell log, you can access the various sub-shells listed.

To open a shell

Select a shell from the shell log and click **Open**. When you open the shell, the Navigator expands, providing access to shell-level features and business processes.

To find a shell

Since shell hierarchies can be extensive, Unifier provides a Find feature to help you locate a specific shell.

1) Click the anchor shell tab that contains the shell you want to locate.

   The shell dashboard appears, and a "mini log" of sub-shells appears at the bottom of the window.

2) From the **View** drop-down list on the mini log, select the sub-shell you want to search.

3) Click the **Find** button.

   To accommodate the Find operation, Unifier collapses the dashboard to show only the mini log, and displays a Find window.

   On the Find window, you can search for shells using a geocode search or you can search for shells using search *operators* on shell information. Operators such as "contains" or "is not empty" can help you narrow the search for the shell.

   ‣ To search using a geocode, enter an address, latitude, longitude, or radius

   ‣ To search on shell information using operators:

   a. Choose the operator you want to use on the field, such as "equals," "does not contain," or "is empty."

   b. Enter the value the field should contain.

4) Click **Search** (or press **Enter**). Unifier displays all the shells that meet the search criteria you entered.

   If you choose to, you can cancel the find operation by clicking **[Cancel Filter]** or the **x** icon in the upper-right corner of the window. Unifier will restore the mini log to its unfiltered state.

5) When you have finished using the Find feature, click the **Restore** button to return the dashboard to normal view.

Auto-Create Projects or Shells

Unifier provides a type of business process that will create new shells (and standard Projects) from the upper form of the BP or from BP line items. The data necessary to create shells/projects is provided by this BP. In addition to creating a new shell, this type of business process can also be designed so that you can choose the managers and employees who should be automatically assigned to the shell when it is created.

> **Note**: In order for auto-creation to occur correctly, be sure you understand the hierarchy of the shells in your company. This is important for placing the shell in the correct position in the hierarchy as well as choosing the correct template with which to build it. If the template is not the correct one, the creation will not succeed.

You can use the **Project/Shell Creation** business process to create shells and projects from the project or shell templates set up for this purpose in Unifier. Templates provide shells or projects with the name, number, location, and status for each new project or shell, as well as any included images and phase definitions. If the template includes links, the new shell landing page will display these links. If designed and configured to do so, the template will automatically assign a manager and employees to the shell/project.

Working with Planning Items

If a Planning Item Picker has been included on this business process, you can link new projects/shells with planning items. Instead of linking a planning item to a project in the Planning Manager, this BP will automatically create the link when the project/shell is created, and data will begin to roll up to the Planning Sheet from the business processes in this project.

To auto-create a single shell or project

Auto-creation of a single shell or a project, only requires that you complete an upper form.

1) Navigate to the level (such as Company Workspace or a shell) where the auto-creation business process resides.
2) In the Navigator, select the business process then on the right pane, click **New**. The business process opens.
3) Enter a name and number for the new shell and select an administrator for the shell.
4) Specify where the shell should reside in the hierarchy by choosing a shell location as follows:
   a. Click the **Select** button. A shell picker opens, showing the tabs of all the current anchor shells.
   b. On the shell picker, click the anchor shell under which the new shell should reside. If the new shell should reside under a sub-shell, double-click the sub-shell.

   The sub-shell may contain other sub-shells. You can navigate to them by clicking the **View** drop-down (located in right corner) and selecting the sub-shell from the list.
5) Specify the template that should be used to create the shell as follows:
   a. Click the **Select** button. The Shell Template picker opens, showing a list of the templates that have been designed for the shell type this BP will create.
   b. Select the template and click the **Select** button. The name of the template appears in the field on the form.
6) Specify the shell status, such as **Active** or **On-Hold**.

   When the shell is created, this is the status it will be assigned.
7) Specify the BP status.

   When this status reaches this BP's designated "terminal" status, it will automatically create the new shell or project and assign it the status you specified in step **6**.

> **Note**: If you do not specify a status, Unifier will assign a status of **Inactive** to the shell and you will have to manually change the status to make the shell active.

8) Complete any other fields that have been included on the form.
9) Click **Finish Editing**.

When the business process reaches its terminal status, it will create a new shell/project using the template you specified on the BP form, and the new shell/project should appear in the hierarchy in its appropriate place.

To auto-create multiple shells or projects

To auto-create multiple shells or projects, you need to fill out an upper form, and create line items for each shell/project you want to create. Unifier will use each line item to create a separate shell/project.

1) Navigate to the level (such as Company Workspace or a shell) where the auto-creation business process resides.
2) In the Navigator, select the business process and on the right pane, click **New**. The business process opens.
3) Complete the upper form fields, including the status of the business process.
4) Click the **Add** button at the bottom of the window and choose **Detail Line Item**. A Line Item window opens.
5) Enter a name, number, and description for the new shell and select an administrator for the shell.
6) Specify where the shell should reside in the hierarchy by choosing a shell location as follows:
   a. Click the **Select** button. A shell picker opens, showing the tabs of all the current anchor shells. For example:
   b. On the shell picker, click the anchor shell under which the new shell should reside. If the new shell should reside under a sub-shell, double-click the sub-shell.

   The sub-shell may contain other sub-shells. You can navigate to them by clicking the **View** button and selecting the sub-shell from the list.
7) Specify the template that should be used to create the shell as follows:
   a. Click the **Select** button. The Shell Template picker opens, showing a list of the templates that have been designed for the shell type this BP will create.
   b. Select the template and click the **Select** button. The name of the template appears in the field on the form.
8) Specify the shell status, such as **Active** or **On-Hold**.

   When the shell is created, this is the status it will be assigned.

> **Note**: If you give the shell a status of **Inactive**, child shells cannot be created.

9) Specify the line item status.

This is the status at which the line item should be to create a new shell/project. When the line item reaches the status you specify here, Unifier will automatically create the new shell or project and assign it the status you specified in step **8**.

10) Complete any other fields that have been included on the form.

11) Click **Finish Editing**.

When the business process reaches its terminal status, and the line item status reaches the status you specified in step **9**, Unifier will create a new shell/project using the template you specified, and the new shell/project should appear in the hierarchy in its appropriate place.

Working with Shell Features

The Navigator displays the shell-related features that you have permission to access (Shell > **User** mode). Depending on the modules that your company has set up and your access permissions, the following shell functions that are typically available.

> **Note**: Company administrators can configure the Navigator to better suit business needs, such as creating nodes to store business process records.

Function	Description
Alerts	You can access the following information regarding the alerts: ▸ Alert Title ▸ Current Value ▸ Trigger Value ▸ Status You can create customized alerts for a condition or event.
Tasks	Not available for View-Only and Inactive shells. Lists: ▸ Current business process tasks that have been assigned to you. ▸ Business process tasks that you have been copied on. You can use the View option to display tasks: ▸ Received in last 7 days ▸ Received in last 30 days ▸ Group by Business Process ▸ Group by Origin ▸ Late Tasks You can use the View option to create new view (Create New View) and manage the existing views (Manage Views).

Drafts	Not available for View-Only and Inactive shells. Lists: ‣ Draft copies that you have saved. You can access the following information regarding the drafts: ‣ Attachments ‣ Business Process ‣ Record Number ‣ Title ‣ Last Saved ‣ Discussion (Classic View only) The right-hand pane of the Drafts log has the following tabs, which provide additional information about a selected draft item: ‣ Record Details ‣ Workflow Progress ‣ Attachments

Mailbox	Has the following sub-nodes:
	‣ Drafts
	‣ Inbox
	‣ Notifications (Notifications are available for View-Only shells, but you cannot add general comments.)
	‣ Sent Items
	‣ Project Mailbox
	   ‣ Inbox
	   ‣ Custom folder
	‣ Deleted Items
	See ***Additional Information about Using the Shell Mailbox*** (on page 42) for details.
	Mailbox has two functions:
	1) An internal email feature that allows Unifier shell team members to communicate with each other and maintain a record of the communications. For shells with View-Only status, Mailbox is available for viewing, but you cannot send, edit or delete messages.
	2) The repository that collects external emails related to the shell. These emails can come from shell users or from external users who do not use Unifier. From the Mailbox, users can forward the emails to appropriate members, flag them for review, and reply to them. In addition, these external emails can be linked to business process records.

Information	Lists the shell directory (Directory) and general BP information.
Gates	Displays phase and gates information and enables manual or automatic advancement of phases.

Configurable Modules	Lists the configurable modules that have been created to work with your shells.
Cost Manager	Lists shell-level cost manager functions such as: ▶ Cash Flow ▶ Cost Sheet ▶ Earned Value ▶ Funding ▶ Schedule of Values
Document Manager	Allows for collaboration, revision control, or markups of: ▶ Documents: Shell documents ▶ Unpublished Documents
Resource Manager	Allows access to: ▶ Resource Dashboard ▶ Resources ▶ Resource Sheets
Schedule Manager	Allows access to: ▶ Schedule Sheets
Logs	Allows access to the shell business processes.
Reports	Allows access to user-defined reports.

Auditing Shell Changes

The shell audit log lists the actions that have been taken on a specific shell. The Audit log captures changes that have been made to the fields on the shell's attribute form.

To view an Audit log

From the **View** menu of the shell record, click **Audit Log**. The Audit Log window opens, listing each event that was taken on the shell's attribute form. The date and time stamp of each event reflect users' current time zone as set in their User Preferences.

To view audit details

From the Audit Log window, double-click a listed event to view the audit record detail, which details the action taken. The details also include the user's current time zone for reference.

To print a business process Audit log

1) On the Audit Log window, click the **Print** button. A PDF file is created.
2) Do one of the following:

▸ Click **Open** to open the file in Adobe Acrobat Reader. From the Reader window, you can view, save, or print the file.

▸ Click **Save**. In the Save As window, navigate to the location in which you want to save the PDF file. Open the file in Adobe Acrobat Reader and choose **File > Print** to print.

Add an Image

If an Image picker is available to your shell, forms display the image name and a box to hold the uploaded image. An Image picker can be added to all forms, except for those in the Cost Manager, Generic Cost Manager, Schedule Manager, and Document Manager.

You can change the image by replacing it with another uploaded image. Images display as HTML or PDF formats in printed forms as well as in print preview.

> **Note**: The image name is based on the data element name provided in uDesigner.

To add an image

1) Click **Upload Images** in the toolbar at the top of the form.
2) Browse for the image to upload and click **OK**.
3) Click **OK**.

> **Note**: Unifier displays the image online, but it is not available for printing. Also, images do not appear in UDRs or email notifications.

For information about translating Email Notifications refer to *Unifier General User Guide* for details.

Managing Shell Alerts

You can create customized alerts for a specific condition or event. For example, you could set up an alert that sends you an email letting if a fund amount on the funding sheet has reached a certain level.

Alerts are created by creating an Alert-type user-defined report.

To create an alert

1) Create an Alert report in user-defined reports.
2) Open a shell and click **Alerts** in the Navigator. The Alerts log opens.
3) Click **New**. The Alert window opens.
4) Complete the window as described in the table below.
5) Click **OK** to close the Alert window.

In this field	Do this
Report Name	Click the **Select** button. The list of user-defined alert reports for the shell opens. Select a report from the list and click the **Open** button.You can also click the **Find** button and enter search

	criteria to locate a specific report.
	Note: Reports that are already used to create an alert are shown with a checkmark. You can create more than one alert for each report.
Description	Populated automatically with the report description, if one exists.
Alert Title	Appears as the title of the alert in the log and on the alert sent. By default, the field shows the report name, but you can change the name.
Frequency	How often you want the alert to be sent when the trigger condition is met:
	Never: Alerts are not sent.
	Hourly: Sent every hour, at about 20 minutes past the hour.
	Daily: Daily at about 2:20 a.m.
	Weekly: Sent on Mondays at about 2:20 a.m.
	Monthly: Sent on the first day of the month, about 2:20 a.m.
	Times might vary. The times are based on the Unifier server used. Unifier servers operate on Pacific Standard Time.
	Note: If you choose a frequency other than never, you must specify a method and message.
Method	Select one or both of the methods to be notified of the alert. For email, the address in your user profile is used).
Message	Type a message that you want included in the alert. Remember that this is an alert that only you see, so enter as much or as little detail as you need.

To edit alerts

1) Open a shell and click **Alerts** in the Navigator. The Alerts log opens.
2) Select an alert and click **Open**. The Alert window opens.
3) Make changes to the alert as needed and click **OK**.

To delete an alert

Open a shell and click **Alerts** in the Navigator. The Alerts log opens. Select an alert and click **Delete**.

Working with Mailbox (Shells)

The *shell* **Mailbox** is an internal Unifier email feature that allows Unifier *shell team members* to communicate with each other and maintain a record of the communications. The *shell* **Mailbox** interface is similar to common email programs such as Microsoft Outlook. The *shell* **Mailbox** supports file attachments and emails can be *sent* between *shell team members* and to external email addresses.

> **Note**: The external email cannot be sent directly to the *shell* **Mailbox**.

A copy of every mailbox communication is saved in a central folder controlled by the *shell administrator*. These communications become part of the *shell* record. The *shell* or company administrators must grant users permission to access the *shell* **Mailbox** folder.

Depending on permissions, users can view all messages or only those in which they participated (sent or received). Permission can also be granted to deleted items in the *shell* **Mailbox** folder. Once deleted, the communications are not recoverable.

> **Note**: Users who sent or received the deleted message may still retain copies of these messages in their own **Inbox** or **Sent** folder.

For additional information see *Home Page (Mailbox)*.

Access Mailbox

The *shell* **Mailbox** feature is *shell-specific*, and the full functionality is accessed at the *shell* level. A *cross-shell* listing of your **Inbox** can also be accessed in the **Mailbox** node on the **Home** page. See *Home Page (Mailbox)* for additional information.

To access Mailbox from a shell

1) Open a shell (**User** mode)
2) In the Navigator, click **Mailbox**. The **Mailbox** folders expand.
   - **Drafts:** Displays Mailbox messages that you have drafted but not yet sent.
   - **Inbox:** Displays messages sent to you.
   - **Notifications:** Displays your notifications.
   - **Sent Items:** Displays messages that you have sent.
   - **Project Mailbox:** Stores copies of all Mailbox messages sent between *shell team members*. Access to this folder must be granted through permission settings.

     The **Project Mailbox** supports additional email addresses such that emails can be directly sent to those email addresses. The additional email addresses are available as additional folders along with the default project inbox. You can move emails between the inbox and the additional folders.
   - **Deleted Items:** Displays items that you have deleted from one of the other folders.

To view all your Mailbox messages across shells

1) Go to the **Home** page. See *Home Page (Mailbox)* for additional information.
2) In the left Navigator, click **Mailbox**. All messages residing in all shell Mailbox Inbox and Sent folders are listed.
3) To open a listed message, select it from the list and click **Open**.

To search for a specific Mailbox message across shells

1) Click the **Home** page. See *Home Page (Mailbox)* for additional information.

2) In the left Navigator, click **Mailbox**. All messages residing in all shell Mailbox Inbox and Sent folders are listed.

3) Click the **Find** button.

4) Enter search criteria in the **Subject Containing** or **Message Containing** fields in the upper portion of the log window.

5) Click **Search**. The log lists the messages meeting the search criteria entered.

Send and Receive Mailbox Messages

Mailbox functionality is similar to common email programs. You can attach files, format text, flag the message, compose and save a draft of your response without sending it, and preview your message in a browser. You can correspond with your Unifier shell team members through uMail, and use Mailbox to send messages to external email addresses. External email users cannot send email directly to Mailbox.

To send a Mailbox message

1) Access Mailbox and select any Mailbox folder.

2) Click **New**. A message window opens.

3) Choose the recipients of the Mailbox message by doing any of the following:

   ‣ Click **To**. The User/Group picker opens displaying shell users. Select the recipients from the Select Users list and click **Add**. Click **OK** to close the picker.

   ‣ To send a copy to another recipient, click **Cc**, and then choose the recipients from the User/Group picker.

   ‣ To send a copy to an external email address, enter the address in the **External Cc** field. Separate multiple addresses with a semicolon (;). The recipient sees Unifier Notification in the From field and cannot reply directly.

   ‣ To send a blind copy (bcc), click the **View** menu and select **Bcc Fields**. The Bcc button and External Bcc field become available on the Mailbox message window.

4) Type the subject of the message in the **Subject** field.

5) Type the body of the message in the text field.

> **Note**: To attach files, format the text, flag a message for follow up, compose and save a draft of your message without sending it, or preview your message in a browser, see the following procedures.

6) Click **Send** to send the message.

To view or respond to a Mailbox message

1) Double-click a message to view it. The message opens.

2) To respond to the message, do one of the following:

   ‣ To send a reply to the sender, click **Reply**.

   ‣ To send a reply to the sender and other recipients of the original message, click **Reply to All**.

   ‣ To forward the message to another recipient, click **Forward**. File attachments remain with forwarded messages.

3) Type your response and click **Send**.

To attach files to a Mailbox message

1) Open the Mailbox message.
2) Click **Attach** and choose one of the following:
   ▸ To attach the file from your local system, select **My Computer**. The procedure is the same as uploading files to the Document Manager.
   ▸ To attach documents from the Document Manager, select **Primavera Unifier Folder**. The window opens, displaying the shell documents files and folders. Select the files and folders to attach and click **OK**.

   > **Note**: When attaching a folder, the contents of the folder are attached in a flat list. You cannot attach documents with duplicate file names.

3) Click **OK** to add the file, and the click **OK** to close the General Comments window.

You can also send a copy of a completed BP form directly while working in the BP form. Unifier automatically creates a PDF copy to send via Mailbox.

To flag a Mailbox message for follow-up

1) Open an existing message, or create a new message.
   If you want to flag a message that you are replying to or forwarding, then open the message, and click **Reply**, **Reply All** or **Forward**.
2) Click the **Flag for Follow-Up** button. The Flag for Follow-Up window opens.
3) In the **Flag to** field, choose an action, such as "call," or "for your information."
4) Click **OK**. The flag text appears at the top of the message. A red flag symbol will also display next to the message in the log. (You may need to refresh the log to see the flag.)
5) If this is an existing message that you are flagging for yourself, you can simply close the message. If you are sending the message to someone else, add the recipients and send the message.

To remove a Mailbox flag

Click the **Flag for Follow up** button, and then click **Clear Flag**.

To format Mailbox text

1) Open the Mailbox message.
2) Select the text that you want to format in the body of the message.
3) On the Formatting toolbar, choose the formatting to apply to the text.

To spell check Mailbox message text

1) When you are finished composing a Mailbox message, click the **Spelling** button on the toolbar of the message. The body text of the message is checked.
2) Make spelling corrections as necessary and click **OK**.

To print a Mailbox message

1) Open the Mailbox message.
2) Click the **Print** button.

To print several Mailbox messages from the Mailbox log

1) Navigate to a Mailbox log.
2) Select several Mailbox records that you want to print.
3) Click the **Print** button.

To search for a Mailbox message

1) In the Navigator, click a Mailbox folder.
2) From the toolbar, click the **Find** button. The Find box expands above the log.
3) Do any of the following:
   ‣ To search by the recipient (To field), click the **Select** button and choose the user from the User/Group picker.
   ‣ To search by subject, enter a word or phrase in the **Subject Containing** field. You can use partial entries.
   ‣ To search by message content, enter a word or phrase in **Message Containing**.
   ‣ Further refine the search by choosing **Read** or **Unread**.
4) Click **Search**. The messages meeting your search criteria are listed in the log.

To delete Mailbox messages

1) Do one of the following:
   ‣ From a Mailbox log, select the message and click **Delete**.
   ‣ From within a Mailbox message, click **Delete** on the toolbar.
   The message is moved to the shell Deleted Items folder.
2) To permanently delete a message, select it from the Deleted Items folder and click **Delete**. Click **Yes** to confirm.

Link Mailbox Messages to Business Process Records

You can link *shell* mailbox messages directly to BP records using the Linked Mailbox link at the bottom of the BP form.

> **Note**: This option is available only in BPs that have been set up to accommodate linked Mailbox messages. Attaching messages or viewing attachments depends on your Mailbox permissions.

To view a list of BP records to which a message is linked

1) Open the message.
2) If the message is linked to a BP record, the upper portion of the message displays the following:
   This message and any future replies are linked to records. Show list
3) Click the **Show list** link to view the list of BP records to which the message is linked.

Additional Information about Using the Shell Mailbox

External emails are important communications that need to be included in shells. Such emails can come from *shell members* or from external users who do not use Unifier.

> **Note**: To use any of the mailbox features, you must have permissions.

These email communications (and any attachments) are collected in a central repository for the *shell*, called the **Inbox** (**Mailbox** > **Project Mailbox** > **Inbox**) so that *shell* users can use them in managing and documenting the *shell*. Once such emails reside in the **Inbox**, the *shell* users can view them, forward them to appropriate members, flag them for review, and reply to them. In addition, the *shell* users can link these emails to business process records.

> **Note**: The external emails that have been blind carbon-copied (Bcc'd) are not collected by the **Inbox**.

Creating additional folders

1) Go to your shell/project (**User** mode).
2) Click **Mailbox** to expand.
3) Click **Project Mailbox** to expand.
4) Click **Inbox** to open the Inbox log.

   If you have the **View** permission for **Inbox** sub-node, then you can view all folders under the **Inbox** sub-node.

5) On the toolbar, click the folder icon to open the **Folders** window.

   You can see the folder icon only if you have the **Create/Manager Folders** permission.

6) Click the plus icon to open a new row.
7) Under the **Name** column, double-click the empty cell and enter a name for the new folder.
   - This field cannot be empty.
   - The maximum character length is 250.
   - You cannot use a name that already exists.
8) Under the **Email Address Code** column, double-click the empty cell and enter a code.
   - This field cannot be empty.
   - The maximum character length is 120.
   - You cannot use a code that already exists.
9) Click **OK**.

Your newly created folder appears in the existing list of folders below the **Inbox** node. The positioning of the folders below the **Inbox** node is according to the ordering of rows in **Folders** window. You can drag and drop rows in the **Folders** window in order to reorder the folder position in the navigator, on the left.

> **Note**: You can reorder more than one folder at the same time.

In addition, you can double-click into any cell of the grid of an existing folder, in the **Folders** window, and edit the folder properties (**Name**, **Email Address Code**).

The email address is calculated by the system according to the **Project Email Pattern** that is defined in **Unifier Configurator**. As a result:

▶ When the **Project Email Pattern**, in the **Unifier Configurator**, is configured to be the *prefix*, the email address of the folder will be: <Email Address Code for the folder>-<project email id>. For example, if the **Email Address Code** of a folder is "construction," and the project email id is"bostonGenHospital-slc05kuz@internal-mail.oracle.com," then the folder email address will be "construction-bostonGenHospital-slc05kuz@internal-mail.oracle.com."

▶ When the **Project Email Pattern** is configured to be the *suffix*, the email address of the folder will be such that the **Email Address Code** gets appended to the very end of the project email id. For example, if the **Email Address Code** of a folder is "construction," and the project email id is "slc05kuz+bostonGenHospital@internal-mail.oracle.com," the folder email address will be "slc05kuz+bostonGenHospital+construction@internal-mail.oracle.com."

When a user sends an email to the email address of a folder, that email automatically lands inside the correct folder. Additionally, if the user specifies an incorrect value of the **Email Address Code**, and the rest of the project/shell email address is correct, then that email automatically shows up in the **Inbox** sub-node under the **Project Mailbox** parent sub-node.

The toolbar options for the new folder (below the Email Address) is the same as the toolbar options for the **Inbox** sub-node. The actions **Move** and **Folder** are visible based on permissions.

The options **View**, **Edit View**, **Refresh**, **Search and Find on Page** are the same as in **Inbox** sub-node.

The log layout listing the emails for a new folder is the same as for **Inbox** sub-node. Similar to **Inbox** sub-node, the user has the ability to move one or more emails from one folder to another using the right-click option > **Move** or using the **Move** option.

By default, **Inbox** is available under **Project Mailbox** (Project/Shell > **User** mode > **Mailbox** > **Project Mailbox** > **Inbox**). You have ability to select **Inbox**, move it to the "Available Modules and Business Processes" section and then move it back below any other parent node in the "Selected Modules and Business Processes" section.

When you move **Inbox** to the right section, the parent node **Project Mailbox** will disappear.

When you move **Inbox** from the right to the left section below a new parent node, then Unifier inserts the **Project Mailbox** node as the direct parent node of **Inbox**. For example, if the original hierarchy was Folder A > Project Mailbox > Inbox, and the user moves the Inbox to the right section, and then moves it back to the left section below Folder B, then Unifier displays the hierarchy as Folder B > Project Mailbox > Inbox. In other words, the Inbox always resides below the Project Mailbox.

You can send an email to unifier Project/Shell users giving them information about the additional email address of a Project/Shell. The email is a system-generated message with the following elements:

Header: Email Address(es) for <project/shell number> - <project/shell name>

Subject: Email Address(es) for <project/shell number> - <project/shell name>

Body (text): This email is to inform you that a Unifier Mailbox has been setup for <project/shell number in bold chars> - <project/shell name in bold chars>

You must use the following general format for the email address: <project/shell email id>

If the Project/Shell contains additional folders, the following text between two forward slashes //:

```
//To send messages, including file attachments to specific folders, use
the following email address(es):
1. <Folder 1 name>: <Folder 1 email address>
2. <Folder 2 name>: <Folder 2 email address>
3. <Folder 3 name>: <Folder 3 email address>
... <and so on>
//
```

> **Note**: If there are no additional folders, this text must not be contained in the email body.

The email is a system-generated message.

All emails received, or existing emails in the **Project Mailbox**, are in the **Inbox** node below the **Project Mailbox** parent sub-node.

To open the *Shell* Mailbox

1) Open your *shell.*
2) In the Navigator, click to expand the **Mailbox** node (**Project Mailbox** > **Inbox**). The right pane displays a log of the contents of the **Inbox**.

To open an email

On the **Inbox** log, double-click the email. Unifier opens the email. If there are attachments, the email will display an **Attachments (n)** link. To open an attachment, click the link and double-click the attachment on the list that appears.

To flag an email for follow-up

1) Open the email.
2) Click the **Flag for Follow-Up** button. Unifier opens the Flag for Follow-Up window.
3) In the **Flag to** field, choose the action you want for this email, such as "call," or "for your information."
4) Click the **Reply** button to reply to the email, or click the **Forward** button to forward the email on to someone.

   When the recipient opens the message, the specific flag remark is shown across the top of the message.

> **Note**: To remove the flag, click the **Flag for Follow up** button, and then click **Clear Flag.**

To move an email from one folder to another folder

1) Go to **Inbox** and click the email that you want to move.
2) Click **Actions** drop-down list and click to select **Move**. This opens the Move window.

Alternatively, you can click the gear menu and select **Move**.

3) In the Move window click to select the folder that you want to move the email into and click **OK**.

The **Move** option is available only if more than one folder (including the **Inbox**) exists below the **Project Mailbox** parent sub-node, and you have the permission to view the **Inbox**.

To create a folder

1) Go to **Inbox** and click the folder icon.
2) In the Folders window click the plus option to open a row on the grid.
3) Double-click on each cell of this new row, under **Name** and **Email Address Code** columns, and enter the values.
4) When finished, click **OK**.
5) Ensure that you see the new folder under the **Project Mailbox** parent sub-node, below the **Inbox** sub-node.

You can create new folders only if you have the permission to "Create/Manage" folders for the **Project Mailbox**.

You can change the order of the folders by moving the rows in the Folders window.

The order of folders arrangement below the Inbox node, in left-hand navigator, is according to the order of rows in the Folders window. The Inbox sub-node is always the top folder and directly below the Project Mailbox parent sub-node.

To delete a folder

1) Go to **Inbox** and click the folder icon.
2) In the Folders window click to select the row of the folder that you want to delete.
3) Click the trash-can icon and click **OK**.

To reply to an email

1) Open the email and click the **Reply** button.

   Unifier displays the addressee's email address in the **External To** field. You can add additional external addresses in this field, separated by semi-colons (;).
2) (Optional) To add email addresses to the Cc line, click the **Cc** button. The User/Group Picker opens.
   a. Select the user(s) you wish to add to the message and click **Add**. The names appear in the Selected Users area at the bottom of the window.
   b. Click **OK**.
3) (Optional) To attach a file to the reply, click the **Attach** button and choose **My Computer** or **Primavera Unifier Folder**.
   a. In the window that opens, select the file you want to attach, or browse your computer's directories to locate the file to attach.
   b. Click **OK**. Unifier attaches the file to your reply.
4) Enter your reply and click **Send**.

   Unifier sends the email to the persons you specified.

> **Note**: Once you reply to an external email, the communication will become part of Unifier mailbox system. To see your reply, or any other communication regarding this email after this point, look for it in the **Inbox** sub-node of the Navigator. Any reply you made to the email will appear in the **Sent Items** sub-node of the **Mailbox** node. Any email you forwarded will also appear in the **Sent Items** sub-node of the **Mailbox** node.

Any reply you made to the email will appear in the **Sent Items** node of Mailbox.

Any email you forwarded will also appear in the **Sent Items** node of Mailbox.

To forward an email

1) Open the email and click the **Forward** button. A forward email window opens.
2) Click the **To** (and optionally, the **Cc**) button. The User/Group Picker opens.
3) Select the user(s) to whom you wish to forward the message and click **Add**. The names appear in the Selected Users area at the bottom of the window.
4) (Optional) To forward the email to external users, enter their addresses in the **External Cc** field, separated by semi-colons (;).
5) Click **OK**. Unifier forwards the email to the persons you specified.

To delete an email

On the Mailbox log, select the email and click the **Delete** button. To delete multiple emails, hold down the **Ctrl** key on your keyboard and select the emails.

To print an email

On the Mailbox log, select the email and click the **Print** button. To print multiple emails, hold down the **Ctrl** key on your keyboard and select the emails.

To find a specific email

1) On the Mailbox log, click the **Find** button. Unifier opens a Find window at the top of the log.
2) Enter the search criteria.
    ▸ To search for an email from a specific person, enter the person's email address in the **From** field.
    ▸ To search for an email with a specific subject line, enter the subject line in the **Subjectcontaining** field.

    You can enter partial addresses or words in any of these fields. Unifier will display all the emails that match the partial information you entered.

    To search for an email with some specific content in the message, enter that content in the **Messagecontaining** field.
3) Click **Search** (or press **Enter**).

    Unifier will display the emails that match the criteria you entered. It will also identify the criteria by which you have searched the list in the "**Current View: filtered by**" line above the list.

You can filter the available email items based on the folders that are present in **Project Mailbox**.

1) From the **Project Mailbox**, in the **Linked Mail** tab, click **Add**.
2) In the **Add from Project Mailbox** window, click the **Mailbox Folder** drop-down list.
3) Select from the list of the folders present for the **Project Mailbox**. The default value is **Inbox**. The list under **Available Items** block displays the emails in the folder that you had selected from the **Mailbox Folder** drop-down list.

Collaborating with Team Members

Unifier helps you to collaborate with your fellow team members through business processes.

View shell information

Shell information consists of the directory and the general information node. The Information node in the Navigator has two subnodes:

▸ General is a log of general information BP records.
▸ Directory is a list of shell team members

General records originate as single-record BPs—only one record exists per shell. The General log is useful for shell-specific information that only needs to be documented on a single form. You can use it to easily categorize and find big-picture shell information. An example is general shell data or descriptions.

To access shell information

1) Open a shell
2) In the Navigator, choose **Information > General**. The log displays the available records.
3) To open a record, select it and click **Open**.

To view the shell directory

1) Open a shell.
2) In the Navigator, choose **Information > Directory**. The Directory log opens, listing the shell team members and their contact information.

Contact shell team members

You can view the contact information of team members, and send them email or Mailbox from within Unifier. If there are many team members, you can use the search function to find a particular member.

To find a shell team member

1) Open the shell Directory and click **Find**.
2) Choose which information to search by in the **Search By** selection list (for example, first name).
3) Enter search criteria in the **Search for** field (for example, enter all or part of the first name), and click the **Search** button.

To view a team member's user profile

1) In the Directory, select the user from the list and click **Open**. The View User Profile window opens.

2) In the **Contact Information** selection list at the top of the window, choose one of the following:

> ▸ **Current** *shell name*: Displays contact information specific to the current shell, such as the onsite address or cell phone.
> ▸ **Company Contact Information**: This is the member's company contact information.

To send an email using an external email program

Do one of the following:

▸ In the Directory, select a team member's name and click **Send email**.
▸ In the team member's User Profile window, click the email address.

An email dialog box using your default email program (for example, Microsoft Outlook) opens. The To: field is populated automatically with the member's email address. Email sent through your external email program is not saved as part of the Primavera Unifier shell record.

Auto-Population and Reverse Auto-Population in Shells

Fields on a business process in a child shell can be setup in uDesigner to auto-populate from the attribute form of the current shell or any parent shell, or to auto-populate from the upper form of a single-record non-workflow business process under any parent shell. Also, a field on a shell attribute form can be setup to auto-populate from the attribute form of any parent shell, or from the upper form of a single-record business process under any parent shell.

For example, a bank can have multiple banking centers. When a new banking center is commissioned, then a project shell can be used to manage the construction details of the banking center. A Work Order business process, which is created under the project shell contains details including physical characteristics from the Site shell. In this example, that includes the building color, which is auto-populated to the Work Order business process so that the building is painted the correct color.
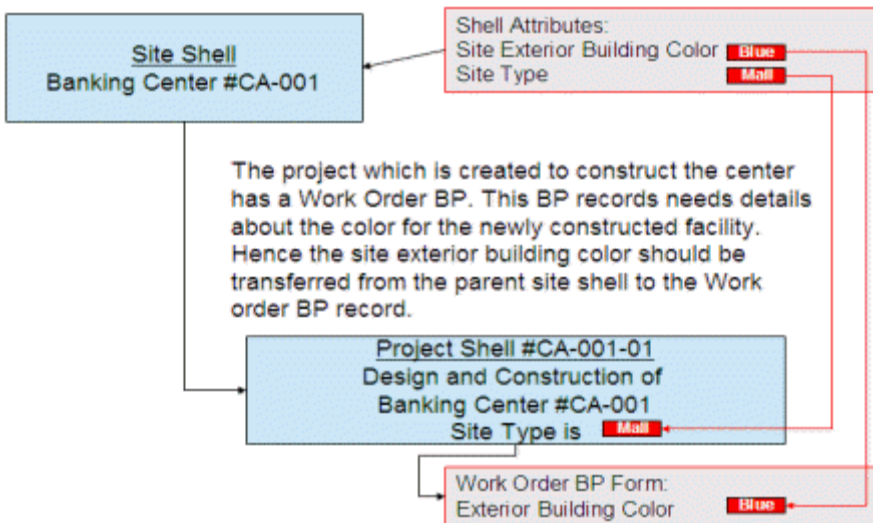
> **Note**: If a shell is moved to a new place in the shell hierarchy, fields that are auto-populated for that shell retain the values that were populated when the shell was initially created. Auto-population does not reoccur when a shell is moved in the shell hierarchy.

Reverse auto-population in shells

Certain data elements support reverse auto-population. These are specified in uDesigner. Reverse auto-population means that some values can be automatically updated when other values are modified in a BP form or shell attribute form.

> **Note**: Reverse auto-population does not occur for shells with View-Only status.

Depending on the set up in uDesigner, reverse auto-population can occur in these instances:

▸ Changes to the data elements in a child shell's attribute form can result in changes to the attribute form of any parent shell in the shell hierarchy
▸ Changes to data elements in a BP detail form under a child shell can result in changes to the current shell attribute form or any parent shell attribute form in the shell hierarchy

For example, When a new banking center is commissioned then a shell instance is used to construct the banking center. The parent shell needs to be updated with data from the Attribute forms of the child shell and from BPs within the child shell.

Also, data stored in a Code and Records-based Manager (such as a Parts Manager) may change based on company-level or project/shell-level BPs, and those changes need to reverse auto-populate back to the attribute form.
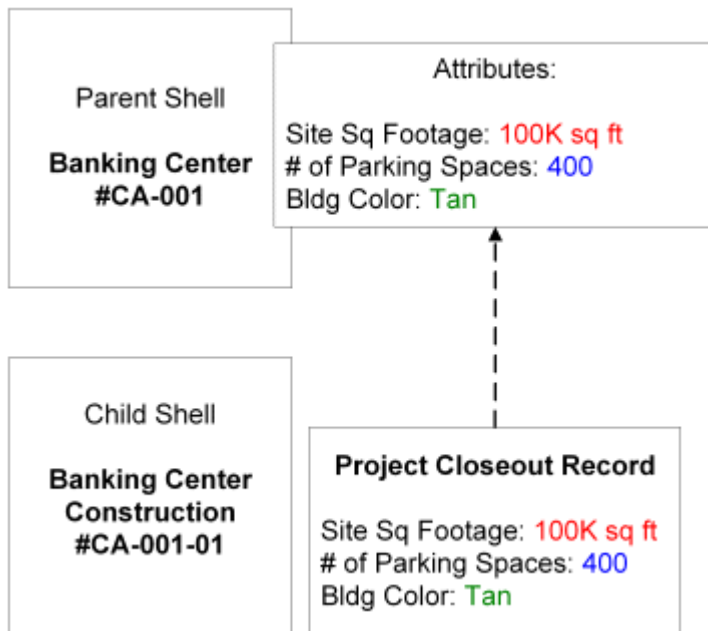
Financial Period in Shell

Depending on the financial period selected at the Shell level, when the user tries to create a scenario under Portfolio Manager, the user will see the list of projects with the same financial period present in the respective Shell options, only.

If the user has selected a financial period at the Shell level, then the selected option overrides the financial period coming from Portfolio Manager by way of configuration.

The same selected financial period will also be used under Cash Flow curves, for the time scale of the financial period type.

The user is able to change the financial periods when there are no cashflows associated with that financial period.

Accordingly, when the Cash Flow is refreshed, it uses the new period structure.

If the user selects a period from the period picker, in the Shell details window, then the selected period will be used across Cash Flow curves (if time scale type is financial period) and Portfolio Manager.

Working with Gates and Phases

Gates allow you to assess the quality and integrity of a shell throughout its life cycle. A series of gate conditions are defined and tracked for each phase of the shell. Each gate condition is evaluated against the shell data and is marked complete if the conditions are met. When all the conditions are met, the shell moves to the next phase either automatically or manually, based on the configuration.

Phases and gate conditions are configured in the Gates Setup in Administration Mode.

You can use the Gates dashboard when working with shells to do the following:

- ▸ Monitor the progress of phases
- ▸ View phase conditions and their definitions
- ▸ Run a gates process
- ▸ Manually override a gate condition
- ▸ Manually advance a phase

View gate condition details

To access the Gates dashboard

1) In User Mode, open a shell.
2) In the Navigator, click **Gates**. The Gates dashboard opens.
3) Do one of the following:
   - ▸ Select a phase and click the **Edit** button on the toolbar. Click the **View** button below the Gate Condition pane. The Edit button is available if the gates setup is active.
   - ▸ Double-click a gate condition in the Gate Condition pane.

The Edit Gate Condition window opens. This is a view-only window. The General tab displays the data type associated with the gate condition. The Query tab displays the data element and trigger condition for this gate condition.

Validate gate conditions manually

You can manually validate conditions, which is the same validation that is performed during scheduled runs. The dashboard is updated to show any changes to the gates conditions.

> **Note**: Your Administrator can configure that Gates conditions are validated on each Gates run.

To manually run gates

In the Gates dashboard, click the **Refresh** button.

If a gate condition is met, it is marked as complete. If all gates conditions are have been met for a shell phase, and Automatic Advancement is set, the shell phase advances to the next phase.

Edit phase details

To edit phase details

1) In the Gates consoles, select a phase and click the **Edit** button. The Edit Phase Detail window opens.
2) Do any of the following:
   ▸ Mark a gate condition as complete by selecting the **Complete** checkbox next to it.
   ▸ Mark a completed gate condition as not complete by deselecting the **Complete** checkbox.
   ▸ Select and view gate condition details.
   ▸ Add or view general comments.

This item	Does this
Gates Condition list	Displays the gates conditions that must be met for the selected phase.
Complete checkbox	Select the checkbox to flag the gate condition as complete.
Ignore Condition checkbox	Select the checkbox to override the gate condition requirement for this phase.
View button	Click **View** to open the view-only Edit Report window. The General tab displays the data type associated with the gate condition. The Query tab displays the data element and trigger condition for this gate condition.
General Comments	Click the button to add or view general comments associated with this phase.

Add/View	

Advance a shell to the next phase

After the gate conditions have been met for a phase, you can manually advance a shell to the next phase.

To advance to the next phase

1) In the **Gates** console, click the **Advance to Next Phase** button.

2) In the confirmation window, click **Yes**.

3) The system validates whether all gates conditions have been met for that phase. If all gates conditions are complete, the shell advances to the next phase. If any gate conditions have not been met, you can do the following:

   ‣ Manually mark a gate condition as complete.

   ‣ Select the **Ignore Condition** checkbox to override the gate condition requirements. See *Edit phase details* (on page 51).

   ‣ Select the phase and click the **Edit** button to view details about the phase and gate conditions to determine what needs to be done to meet the condition.

Return to a previous phase

You can return to a previously completed phase and make it the current phase.

To return to a previously completed phase

1) Select the phase to reset as the current phase.

2) Do one of the following:

   ‣ Select a gate condition and edit it so that it is no longer complete.

   ‣ Add a new condition so that the completed phase is no longer complete.

Add or view phase comments

To add comments in a phase

1) In the **Gates** console, select the phase and click the **Edit** button. The Edit Phase Detail window opens.

2) Click the General Comments **Add/View** button. The General Comments window opens.

3) Enter comments in the Text Comments window and click **OK**.

> **Note**: After you have saved a comment, it cannot be edited or deleted.

To view comments for a phase

‣ In the **Gates** console, click the General Comments **View** button at the bottom of the window. The General Comments window opens displaying existing comments.

‣ In the **Gates** console, select the shell phase and click the **Edit** button. Click the General Comments **Add/View** button. The General comments window opens.

Monitoring Gates

You can view results from prior scheduled gates runs.

To view gate runs

1) In the Gates console, click the **Saved Gates Runs** button. The Saved Gates Runs window opens.
2) Select a gate run from the list and click **Open**. The results are available in a PDF file. PDF file names include the date and time of the gate run.
3) Choose to view or save the PDF file and click **OK**.

The audit log captures Ignore Condition flags and general comments.

To view the gate audit log

In the Gates console, select **View > Audit Log**.

Integrating Activity Sheet for Multiple Shells

Notes:

- Permission for "Get / Set Activity Sheet Data" from Shell log are configured in Unifier Admin Mode while permissions to take these action from within a Shell (User mode) are given at Unifier User mode level.
- The options listed here are not available from the User mode of the Shell log (CBS type Shell) window menu toolbar.

To integrate multiple Shell instances with P6, switch to the Admin mode, go to a CBS type Shell and from the Shell log window perform any of the following operations:

To get an activity sheet data:

1) Click **File** from the menu.
2) Select **Get Activity Sheet Data**.
3) Select one of the following choices:
    a. All Shells
    b. Selected Shells
    c. Filtered Shells
    d. History

To send an activity sheet data:

1) Click **File** from the menu.
2) Select **Send Activity Sheet Data**.
3) Select one of the following choices:
    a. All Shells
    b. Selected Shells

    c. Filtered Shells

    d. History

When in Admin mode, the following options are available in the CBS type Shell (in the Shell log window) toolbar:

▶ Get Activity Sheet Data

▶ Send Activity Sheet Data

The following explains the options above in details:

▶ **Get Activity Sheet Data** > **All Shells**

    You can select this option without having to select a Shell from the log.

▶ **Get Activity Sheet Data** > **Selected Shells**

    You can select this option only when you select at least one Shell instance from the log.

▶ **Get Activity Sheet Data** > **Filtered Shells**

    You can select this option after filtering Shells by using the Find option in the Shell log.

▶ **Get Activity Sheet Data** > **History**

    Similar to the History option in other Unifier modules, you can select this option to view the history of a "Pull" action to see whether a request has been submitted successfully, or not.

▶ **Send Activity Sheet Data** > **All Shells**

    You can select this option without having to select a Shell from the log.

▶ **Send Activity Sheet Data** > **Selected Shells**

    You can select this option only when you select at least one Shell instance from the log.

▶ **Send Activity Sheet Data** > **Filtered Shells**

    You can select this option after filtering Shells by using the Find option in the Shell log.

▶ **Send Activity Sheet Data** > **History**

    Similar to the History option in other Unifier modules, you can select this option to view the history of a "Pull" action to see whether a request has been submitted successfully, or not.

> **Note**: Each time you initiate a "Get" data or a "Send" data action, the systems displays a confirmation message. Click OK on the message window to exit.

Working with Multiple Document Manager Attribute Forms

Within the Shell Details, you can select which attributes forms to use for the Document Manager, for both folders and documents.

From the **Options** tab, you can define which attribute form (**Document Manager Attribute Form**) to use for the document/folder. Once you define the form, the corresponding Document form value is displayed in the Document properties (**Document Manager Attribute Form Used**).

▶ By default, the attribute form (marked as system-defined in **Document Manager**) can be selected, and the corresponding document attribute form is used to determine the DMS structure.

▸ Only the active DM configuration forms are available for selection.

▸ If you decide to change the attribute form for an existing shell, Unifier displays a message.

If you change the attribute forms that are being used (which results in user views within the **Document Manager** containing fields that are no longer in the attribute form), then Unifier:

▸ Removes the fields from the view

▸ The related field columns will no longer be seen.

For Columns that are added in the user view due to change in attribute form, the information is retrieved, if it exists.

In case a previous active **Document Manager** configuration (in a shell) is marked as *inactive*, the DMS structure keeps that attribute form structure. When you open the shell details, the **Document Manager Attribute** is defaulted to system-defined attribute form because the previous configuration has been marked as inactive. The **Document Manager Attribute Form User** will show the previous DM attribute form that is kept by the shell. If you click **OK**, Unifier displays a message, informing you of this change.

In case if a previous active **Document Manager** configuration (in a shell) is *deleted* because the associate folder attribute form was deleted, the DMS structure is defaulted to the system-defined attribute form of a supported DMS structure for the shells. When you open the shell details, the **Document Manager Attribute** is defaulted to system-defined attribute form because the previous configuration has been deleted. The **Document Manager Attribute Form Used** will show the system defined DM attribute form that is kept by the shell. If you click **OK**, Unifier displays a message, informing you of this change.

Unifier Projects

A project is a "collaboration space" that allows project users to collaborate on and coordinate the execution of a project. Related projects can be grouped together under a program. If you are a member of a project that is part of a program, you may be a member of that program.

As a Unifier user, you may be part of a sponsor company or a partner company (or possibly both). Sponsor companies can commission and administer projects and programs. Partner, or member, companies (e.g., subcontractors and vendors) work with sponsor companies to complete projects.

> **Note**: User access and permission levels for all functions are controlled by the Company Administrator. Contact your Company Administrator if you have questions regarding access.

Within Unifier, a shell is a construct that contains sub-shells. Shells are like standard projects, but offer more functionality and flexibility in terms of how you work with them in Unifier.

> **Note**: Your Administrator can migrate standard projects to CBS shells.

Shells allow users to manage different modules. Projects are also shells that are pre-defined in Unifier. The Shell Manager allows shell types to be defined in uDesigner. Administrators can later create one or more instances under each shell type in Unifier. Each instance can have its own business process, cost manager, reporting module, or other modules as needed.

In This Section

Open a project

Open a project to access the project functions and its tabs (see below.) Projects are listed on the Standard Projects tab. For details on navigation, refer to *Unifier General User Guide*.

> **Note**: Your company may have configured the navigation so that the labels on the navigation tabs across the top or nodes on the left Navigator may differ from the default labels discussed here.

To access your projects

Go to the **Standard Projects** tab and switch to User mode. The Project log opens, listing all of the projects to which you have access. The log shows:

 ▸ **Number:** The number assigned to the project.
 ▸ **Project Name:** The name of the project.
 ▸ **Company Name:** The sponsoring company for the project. This may be your own company or another company for which your company is a partner company in the project.
 ▸ **Status:** The status of the project.
 ▸ **Asset Name:** If the project has been associated with a company asset, the asset will be listed in this column.

Refer to *Unifier Programs, Shells, and Projects User Guide* for details.

To open a project

Select a project from the Projects log and click **Open**. The project home page opens, providing an overview of the project.

When you open the project home page, the Navigator expands, providing access to project-level features and business processes.

What you can do in a Project

The Navigator displays the project-related Unifier features that you have permission to access. Depending upon the modules your company has set up and your access permissions, the following project functions are available in the Navigator.

The list below shows the default Navigator appearance. Your navigator may differ, but the basic functionality will be the same. The company administrators can configure the **User** mode Navigator (**Company Workspace** > **Admin** mode > **Configuration** > **User Mode Navigator**) to better suit business needs. For example, your company administrator can create additional nodes to store business process records, renaming some of the nodes mentioned below, an so forth.

Based on the deployment of your user mode navigators, Unifier displays the **Tasks**, **Notifications**, and **Drafts** nodes in the respective Company Workspace and Project/Shell (**User** mode). The following table provides short description about the default Navigator nodes (Company Workspace and Project/Shell).

Node	Description
Summary	The Project Summary provides a snapshot of the overall project. You can use the **Summary - Standard View** or customize your own summary

Node	Description
	page (**Summary - User View**). Refer to *Unifier Programs, Shells, and Projects User Guide* for details.
Alerts	You can create customized alerts to alert you to a condition or event in Unifier that you specify. Refer to *Unifier Programs, Shells, and Projects User Guide* for details.
E-Signatures	When a Send for E-Signature action is taken, and one or more documents are sent to Unifier users (Internal users), then an entry is made in the E-Signatures node to enable the user to act on the E-Signatures task.
Tasks	Not available for View-Only projects. Lists current business process tasks that have been assigned to you. Refer to *Unifier General User Guide* for details.
Notifications	Available for View-Only project, but you cannot add general comments.
Drafts	Not available for View-Only projects. Lists the drafts of the business processes.
Mailbox	An internal Unifier email feature that allows Unifier project team members to communicate with each other and maintain a record of the communications. For projects with View-Only or Inactive status, Mailbox is available for viewing, but you cannot send, edit or delete messages. The Mailbox is also the repository that collects external emails (and attachments) related to the project. These emails can come from project members or from external users who do not use Unifier. From the Mailbox, project users can forward the emails to appropriate members, flag them for review, and reply to them. In addition, these external emails can be linked to business process records. Refer to Unifier Programs, Shells, and Projects User Guide for details.
Information	In a project, this node has two sub-nodes: **Directory** and **General**. The **Directory** node lists the project team members. The **General** node lists the simple-type business processes. Refer to *Unifier Programs, Shells, and Projects User Guide* for details.
Gates	Displays project phase and gates information, and enables manual or automatic advancement of project phases. Refer to *Unifier Programs, Shells, and Projects User Guide* for details.
General	In a company, it lists the simple-type business processes. Refer to *Unifier Business Processes User Guide* for details.
Asset Manager	In a company, it lists assets. Refer to *Unifier Managers User Guide* for details.

Node	Description
Configurable Modules	Provides a flexible coding structures that allow you to analyze your data. The Configurable Modules node behaves like any other module in the Unifier, and you can have up to 25 Configurable Managers. Refer to *Unifier Managers User Guide* for details.
Data Manager	A collection of BP logs storing project-level business processes not stored in project logs.
Cost Manager	Access project-level Cost Manager functions (cash flow, cost sheet, earned value, funding, schedule of values). Refer to *Unifier Managers User Guide* for details.
Document Manager	Repository of project documents, allowing collaboration, revision control, markups, and so forth. Refer to *Unifier Managers User Guide* for details.
Planning Manager	In a company, it enables you to create, organize, manage, and update all company or project/shell planning initiatives from conception to completion. Refer to *Unifier Managers User Guide* for details.
Resource Manager	Manage staff resources and role information. Refer to *Unifier Managers User Guide* for details.
Schedule Manager	Manage project schedules, and import other related schedule files. Refer to *Unifier Managers User Guide* for details.
Logs	Primary storage of transaction and other project business processes of the project. Refer to *Unifier General User Guide* for details.
Company Logs	Primary storage of transaction and other project business processes of the company. Refer to *Unifier General User Guide* for details.
Reports	Access to system and user-defined reports. Refer to *Unifier General User Guide* for details.

About Project Statuses

Your project can have one of four statuses:

▶ **Active**: A live, in-progress project.
▶ **On-Hold**: The initial project status. On-Hold projects are listed on the projects log, but you cannot work with them.
▶ **View-Only**: View-Only projects can be viewed, printed, exported, and included in reports. You cannot modify any data in View-Only projects. This allows you to view past projects without allowing changes to these projects.
▶ **Inactive**: Used to suspend project usage. Inactive projects are visible to Administrators, but not to end users. Only System and Project Administrators (users with Modify Status rights) can reactivate the project.

> **Note**: If automatic status update is enabled on a project, the status of the project can change from Active to an inactive status (On-Hold, View-Only, Inactive). The change of status is set up by the Administrator, and is based on defined triggering conditions. For example, if a project is close to exceeding its funding, it might make sense to put it On-Hold while funding matters are discussed. Your project administrator must manually change the status back to Active when you are ready to restart the project.

The Project Administrator will receive email notification when the status of a project changes. The change of project status could occur due to a manual change, bulk update, through Web Services or a CSV file, or through automatic update.

Working with the Project Summary

The project summary provides a snapshot of the overall project. You can configure what information is displayed in your project summary. There are two available views of the project summary:

Summary - Standard View: The standard view of the project summary displays an overview of the project:

- ▸ Project name and number, project administrator, and the number of people on the project.
- ▸ Project schedule data, including schedule tracking information.
- ▸ Cost data relative to expenses incurred on the project to date from the project cost sheet. Total amounts are displayed and rounded to the nearest integer. "Invalid" displays for any entry that contains an invalid entry in a Cost Manager formula.
- ▸ Current tasks and their progress.
- ▸ Project-level business process records. Click a business process on the list to display the number of records that exist for that business process.
- ▸ From the **View By** selection list, choose **Status** (displays the total number of project records for each business process and the current status) or **Originating Company** (displays the total number of project records originated per company, listed by company short name; applicable if your partner companies can create business processes for the project).

Summary - User View: You can customize the project summary to display virtually any reportable project-related information in table or graphical format. The summary information is pulled from summary-type, user-defined reports or from preconfigured standard data-type reports.

You can drill down to the respective log window by clicking a hyperlink from a summary report block.

To access the project summary

1) Open a project and click **Summary** in the Navigator.

2) Click the **View** menu, and choose **Standard** to view the standard view or **User** to view the user-defined view.

3) Click a link to jump directly to the respective log window.

To print a project summary

1) Open a project and click **Summary** in the Navigator. You can print both the user view and the standard view.

2) From the File menu, click **Print Preview**. The preview window of the summary opens.

3) Click the **Print** icon in the upper right corner of the window.

Configure your Project Summary

To help you keep track of the information that is most useful to you, you can customize the information that is displayed in the Project Summary window. Each part of the summary page is called a block. The data shown in a block can be in table form, a bar graph, or a pie chart. The summary page displays blocks on the right or the left.

You can add, edit, view, or delete summary reports as described below. You can customize how the summary report data is arranged in the Project Summary window, including displaying it on the left or right column, arranging the order of the display, and displaying the information as a table, bar chart, or pie chart.

The data that is displayed in this view is generated from summary-type, user-defined reports. Each block represents one report.

> **Note**: Unifier displays the **Tasks**, **Notifications**, and **Drafts** nodes, in the respective Company Workspace and Project/Shell, based on the deployment of your user mode navigators.

Available project-level standard reports

Name	Drill down to	Default
<BP Name> Count by Status	BP Log	
<BP Name>% by Status	BP Log	
<BP Name> Count by Company	BP Log	
<BP Name>% by Company	BP Log	
<BP Name> Count by User	BP Log	
<BP Name>% by Creator User	BP Log	
<BP Name> - Tasks by User	Project > Tasks	

Name	Drill down to	Default
<BP Name> - Tasks All Users	Project > Tasks	
Record Count per BP (for current user)	BP Log based on which BP link was clicked	Yes
Record% per BP	BP Log based on which BP link was clicked	
All Users (by company)	Project > Project Information > Project Directory	
Logged in Users (by company)	Project > Project Information > Project Directory	Yes
Current User Task Count	Project > Tasks	Yes
All User Task Count	No drill down	
Total Documents	Drill down to Document Manager	Yes

To add reports to the user view

1) Create summary-type reports that include the information that you want to display in the summary. For details about user-defined data types refer to *Unifier General User Guide*.

2) Open a project and click **Summary** in the Navigator. The Summary window opens.

3) Click the **View** menu and choose **User**.

   The initial reports included in the summary are displayed in table format. You have the option to modify how these reports display, remove them from the summary view, or add other summary reports.

4) From the **Edit** menu, choose one of the following:

   ▸ **Left Column**: To add information to the left side of the window

   ▸ **Right Column**: To add information to the right side of the window

   The Left Column Blocks or Right Column Blocks window opens.

5) Do one of the following:

   ▸ To add a user-defined summary report, click **Add Custom**. The Custom Summary Block window opens. Complete the window and click **OK**.

   ▸ To add a pre-configured, standard data-type report, click **Add Standard**. The Standard Summary Block window opens. Complete the window and click **OK**.

6) Use the information in the first table below to complete the fields in the Add Custom window.

7) Use the information in the second table below to complete the fields in the Add Standard window.

8) Click **Close**. The Project Summary - User View window will update to include the new report.

In this field	Do this
Report Name	Click the Select button. The User-Defined Reports window opens, listing the available summary reports. Select a report from the list, and click the Open button. (If the list is long, you may click the Find button and enter search criteria to help locate a specific report.) Note: Note: Reports that are already used in the summary page are shown with a check mark. You can use a report more than once. For example, you might want to include the same report in both table and pie chart formats.
Description	This is populated automatically with the report description, if one exists.
Block Title	This will appear over the data on the summary page. By default, the field will show the report name, but is editable.
Display Type	Choose to show the data as a bar chart, pie chart, or table format.
Show Result	Choose one of the following: ▶ **Actual Value:** Shows the actual value of what is being reported (number of records for a particular BP type, etc.). ▶ **Percent distribution of total:** Calculates the value as a percentage of the total (the percentage of total records to which a BP type corresponds, etc.).
Show Total	Select this checkbox if you want to display the total value of the data. This will vary, depending on what data is used in the report. For example, it may include the total number of records, total currency amount, etc.

In this field	Do this	
Report Name	This field will auto-populate with the selection from the Report On field.	
Data Type	Choose a standard data type to add to the summary. Choices include:	
	Business Process Document Management	Active Task Information Users List of project business processes
Report On	The selection list is dependent on what is chosen from Data Type. Choose from the selection list. The Report Name field will auto-populate with the standard report.	
Block Title	This will appear over the data on the summary page. By default, the field will show the report name, but is editable.	
Display Type	Choose to show the data as a bar chart, pie chart, or table format.	

Show Result	Choose one of the following: ▸ **Actual Value:** Shows the actual value of what is being reported (number of records for a particular BP type, etc.). ▸ **Percent distribution of total:** Calculates the value as a percentage of the total (the percentage of total records to which a BP type corresponds, etc.).
Show Total	Select this checkbox if you want to display the total value of the data. This will vary, depending on what data is used in the report. For example, it may include the total number of records, total currency amount, etc.

To move or delete blocks on the Project Summary - User View

1) Open the Project Summary - User View.
2) From the Edit menu, choose one of the following:
   ▸ **Left Column:** To add information to the left side of the window
   ▸ **Right Column:** To add information to the right side of the window
   The Blocks window opens. Blocks are listed in the order in which they appear on the page.
3) To move a block, select it and click **Move Up** or **Move Down**.
4) To delete a block, select it and click **Delete**.

To change the display type, title, or other block property

Select the block and click **Open**. Make changes as necessary and click **OK**.

Managing Project Alerts

You can create customized alerts to alert you to a condition or event in Unifier that you specify. For example, you might set up an alert that will send you an email or Mailbox message letting you know that a fund amount on the funding sheet has reached a certain level.

Alerts are created by creating an alert-type user-defined report.

To create an alert

1) Create an alert report in user-defined reports. For more information about user-defined report data types refer to *Unifier General User Guide*.
2) Open a project and click **Alerts** on the Navigator. The Alerts log opens.
3) Click **New**. The Alert window opens. Complete the window as described in the table below.
4) Click **OK** to close the Alert window.

In this field:	Do this:
Report Name	Click the Select button. The list of user-defined alert reports for the project opens. Select a report from the list, and click the Open button. (If the list is long, you may click the Find button and enter search criteria to help locate a specific report.) Note: Reports that are already used to create an alert are

In this field:	Do this:
	shown with a check mark. You can create more than one alert for each report.
Description	This is populated automatically with the report description, if one exists.
Alert Title	This will appear as the title of the alert in the log and on the alert sent. By default, the field will show the report name, but this is editable.
Frequency	Choose the frequency that you want the alert to be sent when the trigger condition is met: Never: Alerts will not be sent. Hourly: Alerts will be sent every hour, at about 20 minutes past the hour. Daily: Alerts will be sent daily at about 2:20 a.m. Weekly: Alerts will be sent on Mondays at about 2:20 a.m. Monthly: Alerts will be sent on the first day of the month, about 2:20 a.m. Times may vary somewhat. The times noted above refer to server time, that is, the time according to the Unifier server being used. (Unifier servers operate on Pacific Standard Time.). Note: If you choose any frequency other than Never, you must specify a method and message.
Method	You may select one or both of the following methods to be notified of the alert: Email (the email on your user profile will be used) or Mailbox.
Message	Type a message that you want to be included in the alert. Remember that this is an alert that only you will see, so enter as much or as little detail as you need.

To edit alerts

1) Open a project and click **Alerts** on the Navigator. The Alerts log opens.
2) Select an alert and click **Open**. The Alert window opens.
3) Make changes to the alert as needed and click **OK**.

To delete an alert

Open a project and click **Alerts** on the Navigator. The Alerts log opens. Select an alert and click **Delete**.

Working with Mailbox (Projects)

The *project* **Mailbox** is an internal Unifier email feature that allows Unifier *project team members* to communicate with each other and maintain a record of the communications. The *project* **Mailbox** interface is similar in functionality to common email programs such as Microsoft Outlook. The *project* **Mailbox** supports file attachments and emails can be sent between *project team members* and to external email addresses.

> **Note**: The external email cannot be sent directly to the *project* **Mailbox**.

A copy of every mailbox communication is saved in a central folder controlled by the *project administrator*. These communications become part of the *project* record. The *project* or company administrators must grant users permission to access the *project* **Mailbox** folder.

Depending on permissions, users can view all messages or only those in which they participated (sent or received). Permission can also be granted to delete items in the *project* **Mailbox** folder. Once deleted, the communications are not recoverable.

> **Note**: Users who sent or received the deleted message may still retain copies of these messages in their own **Inbox** or **Sent** folder.

For additional information see *Home Page (Mailbox)*.

You can link the messages in the *project* **Mailbox** to specific business process records. See Linking Mailbox Messages to a Record for more information.

View and find Mailbox Messages

The Mailbox feature is project-specific, and the full functionality is accessed at the project level. A cross-project listing of your Inbox and Sent items can also be accessed in the Mailbox node directly under Home.

To access project Mailbox

1) Open a project and switch to User mode.
2) Click **Mailbox** in the left Navigator. The Mailbox folders expand:
   - **Drafts:** Displays Mailbox messages that you have drafted but not yet sent.
   - **Inbox:** Displays messages sent to you.
   - **Sent Items:** Displays messages that you have sent.
   - **Deleted Items:** Displays items that you have deleted from one of the other folders.
   - **Project Mailbox :** Stores copies of all Mailbox messages sent between project team members. Access to this folder must be granted through permission settings.

To view all of your Mailbox messages across projects

1) Go to the Home page.
2) Click **Mailbox** in the left Navigator. All messages residing in all project Mailbox Inbox and Sent folders are listed.
3) To open a listed message, select it from the list and click **Open**. You will be directed to the Project Mailbox Inbox or Sent folder containing the message, and the message will open.

To search for a specific Mailbox message across projects

1) Go to the Home page.
2) Click **Mailbox** in the left Navigator. All messages residing in all project Mailbox Inbox and Sent folders are listed.
3) Click the **Find** button.
4) Enter search criteria in the Subject Containing or Message Containing fields in the upper portion of the log window.
5) Click **Search**. The log will list the messages meeting the search criteria entered.

Send and Receive Mailbox Messages

Mailbox functionality is similar to common email programs. In Mailbox, you can attach files, format text, flag the message, compose and save a draft of your response without sending it, and preview your message in a browser.

You can correspond with your Unifier project team members through Mailbox, and send Mailbox to external email addresses. External email users cannot send email directly to Mailbox.

> **Note**: Mailbox messages can be linked directly to related business process records. For information about linking mailbox messages to a record refer to the *Unifier Business Processes User Guide*.

To send a Mailbox message

1) Open a project and switch to User mode.
2) Select any Mailbox folder.
3) Click **New**. A message window opens.
4) Choose the recipients of the Mailbox message by doing any of the following:
   ‣ Click **To** to select the primary recipients. The User/Group picker opens displaying project users. Select recipients from the **Select Users** list, and click **Add**. Click **OK** to close the picker.
   ‣ To send a copy to another recipient, click **Cc**, and choose the recipients from the User/Group picker.
   ‣ To send a copy to an external email address, enter the address in the External Cc field. Separate multiple external addresses with a semicolon (;). The recipient will see Unifier Notification in the From field, and will not be able to reply directly.
   ‣ To send a blind copy (Bcc), click the **View** menu and select **Bcc Fields**. The Bcc button and External Bcc field become available on the Mailbox message window.
5) Type the subject of the message in the Subject field.
6) Type the body of the message in the text field.
7) Click **Send** to send the message.

To view or respond to a Mailbox message

1) Access Mailbox by doing one of the following:

▷ Open a project and switch to User mode. In the left Navigator, select the **Mailbox Inbox** folder. The Inbox lists all messages that have been sent to you. Unread messages are shown in bold text.

▷ Go to the Home page. In the left Navigator, click **Mailbox**. All sent and received Mailbox messages across projects are listed. Unread messages are in bold text.

2) Double-click on a message to view it. The message opens.

3) To respond to the message, do one of the following:

▷ To send a reply to the sender, click **Reply**.

▷ To send a reply to the sender and other recipients of the original message, click **Reply to All**.

▷ To forward the message to another recipient, click **Forward**.

> **Note**: Any file attachments will remain on forwarded messages.

4) Type your response and click **Send**.

To attach files to a Mailbox message

1) Open the Mailbox message.

2) Click **Attach** and choose one of the following:

▷ **My Computer:** Attaches the file from your local system. The procedure is the same as for uploading files to the Document Manager.

▷ **Primavera Unifier Folder:** Attaches documents from the Document Manager. The window opens, displaying the Project Documents files and folders. Select the files and folders to attach and click **OK**.

> **Note**: Folders are not attached. The contents of selected folders are attached in a flat list. Documents with duplicate file names will not attach.

3) Click **OK** to add the file, and click **OK** to close the General Comments window.

To flag a Mailbox message for follow-up

1) Open an existing message, or create a new message.

   If you want to flag a message that you are replying to or forwarding, then open the message, and click **Reply**, **Reply All** or **Forward**.

1) Click the **Flag for Follow-Up** button. The Flag for Follow-Up window opens.

2) In the **Flag to** field, choose an action, such as "call," or "for your information."

3) Click **OK**. The flag text appears at the top of the message. A red flag symbol will also display next to the message in the log. (You may need to refresh the log to see the flag.)

4) If this is an existing message that you are flagging for yourself, you can simply close the message. If you are sending the message to someone else, add the recipients and send the message.

To remove a Mailbox flag

Click the **Flag for Follow up** button, and then click **Clear Flag**.

To format Mailbox text

1) Open the Mailbox message.
2) Select the text you want to format within the body of the message.
3) On the Formatting toolbar, choose the formatting to apply to the text.

To spell check Mailbox text

1) When you are finished composing a Mailbox message, click the **Spelling** button on the toolbar of the message. The body text of the message is checked.
2) Make spelling corrections as necessary and click **OK**.

To print a Mailbox message

1) Open the Mailbox message.
2) Click the **Print** button.

To print several Mailbox messages from the Mailbox log

1) Navigate to a Mailbox log.
2) Select the Mailbox records that you want to print.
3) Click the **Print** button.

To search for a Mailbox message

1) In the Navigator, click on one of the Mailbox folders.
2) From the toolbar, click the **Find** button. The Find box expands above the log.
3) Do any of the following:
   ‣ To search by the recipient (To field), click the **Select** button and choose the user from the User/Group picker.
   ‣ To search by subject, enter a word or phrase in the **Subject Containing** field (partial entries are acceptable).
   ‣ To search by message content, enter a word or phrase in **Message Containing**.
   ‣ You can further refine the search by clicking the Items that are: drop-down list and choosing Read or Unread.
4) Click **Search**. The messages meeting your search criteria will be listed in the log.

To delete Mailbox messages

1) Do one of the following:
   ‣ From a Mailbox log, select the message and click **Delete**.
   ‣ From within a Mailbox message, click **Delete** on the toolbar.
   The message is moved to the project's Deleted Items folder.
2) To permanently delete a message, select it from the Deleted Items folder and click **Delete**. Click **Yes** to confirm that you are permanently deleting the message.

> **Note**: When you delete a message from your account, a copy of the message remains in the central project record: the Project Mailbox folder. Messages deleted from the Project Mailbox folder are

permanently deleted.

Link Mailbox Messages to Business Process Records

Mailbox messages can be linked directly to BP records through the Linked Mailbox link at the bottom of the BP form. For information about linking mailbox messages to a record refer to the *Unifier Business Processes User Guide*.

> **Note**: This option is available only in BPs that have been set up to accommodate linked Mailbox messages. The ability to attach messages or view attached messages depends on the user's Mailbox View permissions. Reply, reply all, and forward messages sent from a linked Mailbox will also be automatically linked to the BP.

To view the list of BP records to which a Mailbox message is linked

1) Open the Mailbox message.

    If the message is linked to a BP record, the upper portion of the message will display the following:

    "This Mailbox and any future replies are linked to records. Show list" (where Show list is a hyperlink).

2) Click on the **Show list** hyperlink to view the list of BP records to which the Mailbox is linked.

Additional Information about Using the Project Mailbox

External emails are important communications that need to be included in projects. Such emails can come from *project members* or from external users who do not use Unifier.

> **Note**: To use any of the mailbox features, you must have permissions.

These email communications (and any attachments) are collected in a central repository for the *project*, called the **Inbox**   (**Mailbox** > **Project Mailbox** > **Inbox**) so that *project* members can use them in managing and documenting the *project*. Once such emails reside in the **Inbox** , the *project* users can view them, forward them to appropriate members, flag them for review, and reply to them. In addition, the *project* users can link these emails to business process records.

> **Note**: The external emails that have been blind carbon-copied (Bcc'd) are not collected by the **Inbox**.

Creating additional folders

1) Go to your shell/project (**User** mode).
2) Click **Mailbox** to expand.
3) Click **Project Mailbox** to expand.
4) Click **Inbox** to open the Inbox log.

    If you have the **View** permission for **Inbox** sub-node, then you can view all folders under the **Inbox** sub-node.

5) On the toolbar, click the folder icon to open the **Folders** window.

You can see the folder icon only if you have the **Create/Manager Folders** permission.

6) Click the plus icon to open a new row.

7) Under the **Name** column, double-click the empty cell and enter a name for the new folder.

   ▸ This field cannot be empty.

   ▸ The maximum character length is 250.

   ▸ You cannot use a name that already exists.

8) Under the **Email Address Code** column, double-click the empty cell and enter a code.

   ▸ This field cannot be empty.

   ▸ The maximum character length is 120.

   ▸ You cannot use a code that already exists.

9) Click **OK**.

Your newly created folder appears in the existing list of folders below the **Inbox** node. The positioning of the folders below the **Inbox** node is according to the ordering of rows in **Folders** window. You can drag and drop rows in the **Folders** window in order to reorder the folder position in the navigator, on the left.

> **Note**: You can reorder more than one folder at the same time.

In addition, you can double-click into any cell of the grid of an existing folder, in the **Folders** window, and edit the folder properties (**Name**, **Email Address Code**).

The email address is calculated by the system according to the **Project Email Pattern** that is defined in **Unifier Configurator**. As a result:

▸ When the **Project Email Pattern**, in the **Unifier Configurator**, is configured to be the *prefix*, the email address of the folder will be: <Email Address Code for the folder>-<project email id>. For example, if the **Email Address Code** of a folder is "construction," and the project email id is"bostonGenHospital-slc05kuz@internal-mail.oracle.com," then the folder email address will be "construction-bostonGenHospital-slc05kuz@internal-mail.oracle.com."

▸ When the **Project Email Pattern** is configured to be the *suffix*, the email address of the folder will be such that the **Email Address Code** gets appended to the very end of the project email id. For example, if the **Email Address Code** of a folder is "construction," and the project email id is "slc05kuz+bostonGenHospital@internal-mail.oracle.com," the folder email address will be "slc05kuz+bostonGenHospital+construction@internal-mail.oracle.com."

When a user sends an email to the email address of a folder, that email automatically lands inside the correct folder. Additionally, if the user specifies an incorrect value of the **Email Address Code**, and the rest of the project/shell email address is correct, then that email automatically shows up in the **Inbox** sub-node under the **Project Mailbox** parent sub-node.

The toolbar options for the new folder (below the Email Address) is the same as the toolbar options for the **Inbox** sub-node. The actions **Move** and **Folder** are visible based on permissions.

The options **View**, **Edit View**, **Refresh**, **Search and Find on Page** are the same as in **Inbox** sub-node.

The log layout listing the emails for a new folder is the same as for **Inbox** sub-node. Similar to **Inbox** sub-node, the user has the ability to move one or more emails from one folder to another using the right-click option > **Move** or using the **Move** option.

By default, **Inbox** is available under **Project Mailbox** (Project/Shell > **User** mode > **Mailbox** > **Project Mailbox** > **Inbox**). You have ability to select **Inbox**, move it to the "Available Modules and Business Processes" section and then move it back below any other parent node in the "Selected Modules and Business Processes" section.

When you move **Inbox** to the right section, the parent node **Project Mailbox** will disappear.

When you move **Inbox** from the right to the left section below a new parent node, then Unifier inserts the **Project Mailbox** node as the direct parent node of **Inbox**. For example, if the original hierarchy was Folder A > Project Mailbox > Inbox, and the user moves the Inbox to the right section, and then moves it back to the left section below Folder B, then Unifier displays the hierarchy as Folder B > Project Mailbox > Inbox. In other words, the Inbox always resides below the Project Mailbox.

You can send an email to unifier Project/Shell users giving them information about the additional email address of a Project/Shell. The email is a system-generated message with the following elements:

Header: Email Address(es) for <project/shell number> - <project/shell name>

Subject: Email Address(es) for <project/shell number> - <project/shell name>

Body (text): This email is to inform you that a Unifier Mailbox has been setup for <project/shell number in bold chars> - <project/shell name in bold chars>

You must use the following general format for the email address: <project/shell email id>

If the Project/Shell contains additional folders, the following text between two forward slashes //:

```
//To send messages, including file attachments to specific folders, use
the following email address(es):
1. <Folder 1 name>: <Folder 1 email address>
2. <Folder 2 name>: <Folder 2 email address>
3. <Folder 3 name>: <Folder 3 email address>
... <and so on>
//
```

> **Note**: If there are no additional folders, this text must not be contained in the email body.

The email is a system-generated message.

All emails received, or existing emails in the **Project Mailbox**, are in the **Inbox** node below the **Project Mailbox** parent sub-node.

To open the *Project* Mailbox

1) Open your *project*.
2) In the Navigator, click to expand the **Mailbox** node (**Project Mailbox** > **Inbox**). The right pane displays a log of the contents of the **Inbox**.

To open an email

On the **Inbox** log, double-click the email. Unifier opens the email. If there are attachments, the email will display an **Attachments (n)** link. To open an attachment, click the link and double-click the attachment on the list that appears.

To flag an email for follow-up

1) Open the email.
2) Click the **Flag for Follow-Up** button. Unifier opens the Flag for Follow-Up window.
3) In the **Flag to** field, choose the action you want for this email, such as "call," or "for your information."
4) Click the **Reply** button to reply to the email, or click the **Forward** button to forward the email on to someone.

    When the recipient opens the message, the specific flag remark is shown across the top of the message.

    > **Note**: To remove the flag, click the **Flag for Follow-Up** button, and then click **Clear Flag**.

To move an email from one folder to another folder

1) Go to **Inbox** and click the email that you want to move.
2) Click **Actions** drop-down list and click to select **Move**. This opens the Move window.

    Alternatively, you can click the gear menu and select **Move**.
3) In the Move window click to select the folder that you want to move the email into and click **OK**.

The **Move** option is available only if more than one folder (including the **Inbox**) exists below the **Project Mailbox** parent sub-node, and you have the permission to view the **Inbox**.

To create a folder

1) Go to **Inbox** and click the folder icon.
2) In the Folders window click the plus option to open a row on the grid.
3) Double-click on each cell of this new row, under **Name** and **Email Address Code** columns, and enter the values.
4) When finished, click **OK**.
5) Ensure that you see the new folder under the **Project Mailbox** parent sub-node, below the **Inbox** sub-node.

You can create new folders only if you have the permission to "Create/Manage" folders for the **Project Mailbox**.

You can change the order of the folders by moving the rows in the Folders window.

The order of folders arrangement below the Inbox node, in left-hand navigator, is according to the order of rows in the Folders window. The Inbox sub-node is always the top folder and directly below the Project Mailbox parent sub-node.

To delete a folder

1) Go to **Inbox** and click the folder icon.
2) In the Folders window click to select the row of the folder that you want to delete.
3) Click the trash-can icon and click **OK**.

To reply to an email

1) Open the email and click the **Reply** button.

    Unifier displays the addressee's email address in the **External To** field. You can add additional external addresses in this field, separated by semi-colons (;).

2) (Optional) To add email addresses to the Cc line, click the **Cc** button. The User/Group Picker opens.

    a. Select the user(s) you wish to add to the message and click Add. The names appear in the Selected Users area at the bottom of the window.

    b. Click **OK**.

3) (Optional) To attach a file to the reply, click the **Attach** button and choose **My Computer** or **Primavera Unifier Folder**.

    a. In the window that opens, select the file you want to attack, or browse your computer directories to locate the files to attach.

    b. Click **OK**. Unifier attaches the file to your reply.

4) Enter your reply and click **Send**.

    Unifier sends the email to the persons you specified.

> **Note**: Once you reply to an external email, the communication will become part of Unifier mailbox system. To see your reply, or any other communication regarding this email after this point, look for it in the **Inbox** sub-node of the Navigator. Any reply you made to the email will appear in the **Sent Items** sub-node of the **Mailbox** node. Any email you forwarded will also appear in the **Sent Items** sub-node of the **Mailbox** node.

To forward an email

1) Open the email.
2) To forward the email, click the **Forward** button. A forward email window opens.
3) Click the **To** (and optionally, the **Cc**) button. The User/Group Picker opens.
4) Select the user(s) to whom you wish to forward the message and click **Add**. The names appear in the Selected Users area at the bottom of the window.
5) (Optional) To forward the email to external users, enter their addresses in the **External Cc** field, separated by semi-colons (;).
6) Click **OK**. Unifier forwards the email to the persons you specified.

To delete an email

On the Mailbox log, select the email and click the **Delete** button. To delete multiple emails, hold down the **Ctrl** key on your keyboard and select the emails.

To print an email

On the Mailbox log, select the email and click the **Print** button. To print multiple emails, hold down the **Ctrl** key on your keyboard and select the emails.

To find a specific email

1) On the Mailbox log, click the **Find** button. Unifier opens a Find window at the top of the log.
2) Enter the search criteria.

> ▸ To search for an email from a specific person, enter the person's email address in the **From** field.

> ▸ To search for an email with a specific subject line, enter the subject line in the **Subjectcontaining** field.

You can enter partial addresses or words in any of these fields. Unifier will display all the emails that match the partial information you entered.

To search for an email with some specific content in the message, enter that content in the **Messagecontaining** field.

3) Click **Search** (or press **Enter**).

Unifier will display the emails that match the criteria you entered. It will also identify the criteria by which you have searched the list in the "**Current View: filtered by**" line above the list.

Distributing the Project Mailbox Email Address to Users

Usually, your Unifier Administrator distributes the email address of the Project Mailbox to all project participants, both within and outside of Unifier. You can also distribute this email address to other users you consider appropriate for the project.

Ensure that you notify your Administrator of these new users. The Administrator must add the new email addresses to the approved email list for the project; otherwise, the Project Mailbox will not accept emails from these users.

The Administrator can define the project email address in order to create a more meaningful name that is related to the project.

To distribute the Project Mailbox email address

Open the project home page and click the link shown for Email Address.

When an external user replies to a notification email:

▸ The address field of the form is automatically set to display the email address of the project.
▸ The reply email is captured in the project mailbox.

Working with Tasks, Notifications, and Drafts Nodes

When you are part of a business process workflow, or have been invited to participate in a discussion group (Classic View only) within a business process, you are assigned a task.

▸ **Tasks** are business processes that you are involved with and are in process.

‣ **Notifications** are business processes that you have been sent a copy but do not need to take action.

‣ **Drafts** are business processes that you have worked on and saved but have not yet sent.

You can access your tasks, notifications, and drafts in the following locations:

‣ Home page

Go Home page > click the nodes (**Tasks, Notifications, Drafts**) to open > from the log, click to open one of the items that required your attention, or you want to work with.

‣ Company Workspace

Go to **Company Workspace** > **User** mode > click the nodes   (**Tasks, Notifications, Drafts**) to open > from the log, click to open one of the items that required your attention, or you want to work with.

‣ Project/Shell

Go to your Project/Shell > **User** mode > click the nodes (**Tasks, Notifications, Drafts**) to open > from the log, click to open one of the items that required your attention, or you want to work with.

Working with your Project Information

You can access your project information from the **Information** node of that project: Your project > **User** mode > **Information**.

The **Information** node as two sub-nodes that each provide more details about the project as explained below:

‣ **Directory**
‣ **General**

Directory

Contains a collection/log of the project-team members. and their contact information.

> **Note**: A printed version of the Project Directory can be generated using user-defined reports.

To find a project team member:

1) Click the **Directory** sub-node to open and click **Find**.
2) Select which information to search by, in the **Search By** selection list, for example, First Name.
3) Enter search criteria in the **Search for** field, for example, enter all or part of the first name.
4) Click **Search**.

You may view the contact information of fellow team members and even send email or Mailbox from within Unifier.

To view a team member's user profile:

1) In the Project Directory, select the user from the list and click **Open**. The View User Profile window opens.

> **Note**: If a User Attribute design has been deployed from uDesigner by your Administrator, the content of this profile can vary.

2) In the Contact Information selection list at the top of the window, choose one of the following:

▶ **Current Project:** Displays contact information specific to the current project, such as an on-site address or cell phone.

▶ **Company Contact Information:** This is the member's company contact information.

To send an email using an external email program:

Do one of the following:

▶ In the Project Directory, select a team member's name and click **Send email**.

▶ From the User Profile window, click the email address.

This will open an email dialog box using your default email program (for example, Microsoft Outlook). The To: field will be populated automatically with the member's email address. Email sent through your external email program will not be saved as part of the Unifier project record.

> **Note**: You may also contact a team member using Mailbox.

General

Contains a collection/log of the general information business process records that may have been added to the project. Refer to *Unifier General User Guide* for details..

The listed BP records originate as single-record business processes. In other words, only one BP record exists for each BP, per project. The **General** log is useful for project-specific information that only needs to be documented on a single form. It is a way to easily categorize, and find, big-picture project information, for example, the overall project data or descriptions.

To open a record, select it and click **Open**.

Working with Gates

Gates provides a structure to assess the quality and integrity of a project throughout its life cycle.

Gates are, in essence, acceptance reviews following which a project can advance to the next phase in the project life cycle. For each phase of the project, a series of gate conditions are defined and tracked. Each gate condition is evaluated against actual project data and is marked complete if conditions are met. Once all conditions are complete, the project moves to the next phase either automatically or manually, based on the configuration.

Phases and gate conditions are configured in the Gates Setup in Administration Mode.

View the Gates dashboard

The Gates dashboard allows you to:

▶ Monitor the progress of project phases

▶ View phase conditions and their definitions

▸ Run a gates process

▸ Manually override gate conditions

▸ Manually advance a project phase

To access Gates

1) Open the project and switch to User mode.

2) Click **Gates** in the left Navigator. The Gates dashboard opens.

View gate condition details

To view gate condition details

1) Open the Gates dashboard.

2) Do one of the following:

▸ Select a project phase and click the **Edit** button on the toolbar. Click the **View** button directly below the **Gate Conditions** pane. (The Edit button is available if the gates setup is active.)

▸ Double-click a listed gate condition in the **Gate Conditions** pane of the dashboard (or select the gate condition and click the **View** button).

The Edit Gate Condition window opens. This is a view-only window. The **General** tab displays the data type associated with the gate condition. The **Query** tab displays the data element and trigger condition for this gate condition.

Validate gate conditions manually (refresh)

You can manually validate conditions, which is the same validation that is performed during scheduled runs. The dashboard is updated to show any changes to the gates conditions.

> **Note**: Your Administrator can configure that Gates conditions are validated on each Gates run.

To manually run gates

1) Open the Gates dashboard.

2) Click the **Refresh** button.

If a gate condition is met, the gate condition is marked as Complete. If all gate conditions are found to have been met for a project phase (and if Automatic Advancement is **Yes**), then the project phase will advance to the next phase.

Edit phase details

To edit phase details

1) Open the Gates console.

2) Select a project phase and click the **Edit** button. The Edit Phase Detail window opens.

3) Use the information in the following table to complete the window.

This item	Does this
Gates Condition list	Displays the gate conditions that must be met for the selected phase.
Complete checkbox	Select the checkbox to manually flag the gate condition as complete.
Ignore Condition checkbox	Select the checkbox to override the gate condition requirement for this phase.
View button	Click the **View** button under the Gate Conditions list. The Edit Report window opens. This is a view-only window. The **General** tab displays the data type associated with the gate condition. The **Query** tab displays the data element and trigger condition for this gate condition.
General Comments Add/View	Click the button to add or view general comments associated with this project phase.

Advance to the next phase

After the gate conditions have been met for the current phase, you can manually advance a project to the next phase.

To advance the phase to the next phase

1) Open the **Gates** console.
2) Click the **Advance to Next Phase** button.
3) A confirmation window opens asking you to confirm the phase advancement. Click **Yes** to confirm.

   The system will validate whether all gate conditions have been met for that phase. If all gate conditions for that phase are complete, the phase can advance to the next phase. If all of the gate conditions have not been met, you can:

   ‣ Manually mark a gate condition as complete.
   ‣ Click the **Ignore Condition** checkbox to override the gate condition requirements.
   ‣ Select the phase and click the **Edit** button to view details about the phase and gate conditions, and therefore determine what needs to be done to meet the gate condition.

Return to a previous phase

To return to a previously completed phase and set it as the current phase:

1) Select the phase to reset as the current phase.
2) Do one of the following:

- ▶ Select a gate condition and edit it so that it is no longer complete.
- ▶ Add a new condition so that the completed phase is no longer complete.

Add or view general comments

To add general comments in a project phase

1) In the **Gates** console, select the project phase and click the **Edit** button. The Edit Phase Detail window opens.
2) Click the **Add/View** button. The General Comments window opens.
3) Enter any comments in the **Text Comment** pane and click **OK**. Once you save a comment, it cannot be edited or deleted.

To view existing general comments on a project phase

Do one of the following:

- ▶ In the **Gates** console, click the **View** button at the bottom of the screen. The General Comments window opens displaying existing comments.
- ▶ In the **Gates** console, select the project phase and click the **Edit** button. Click the **Add/View** button. The General Comments window opens. You can view existing comments or add a new one.

View saved Gates runs

You can view results from prior scheduled gates runs.

To view saved gates runs

1) Open the Gates console.
2) Click the **Saved Gates Runs** button. The Saved Gates Runs window opens.
3) Select a saved gates run from the list and click **Open**. Results are available in a PDF file. PDF file names include the date and time of the gates run.
4) Choose to view or save the PDF file and click **OK**.

View the Gates audit log

To view the Gates audit log:

1) Open the Gates console.
2) Click the **View** menu and choose **Audit Log**.

    The audit log captures Ignore Condition flags and general comments.

Working with E-Signatures

Internal user

When a **Send for E-Signature** action is taken, and one or more documents are sent to Unifier users (**Internal users**), then an entry is made in the **E-Signatures** node to enable the user to act on the **E-Signatures** task.

The internal users are able to act on the E-Sign task from the:

▶ E-Signatures node.
▶ Email sent out to them from Unifier (if this is configured in the User Preferences > Email Subscription' settings).

When sending out an E-Signature request, for internal users, the To field in 'Send for E-Signature' window enables you to type-ahead user or group. You can select one or more users or groups and send E-signature request.

In the User Preferences > Email Subscriptions tab, use the E-signature Requests option to enable an internal signee to receive email notification for the E-Signature request created in the E-Signatures node. When you select the E-signature Requests option in the User Preferences, then Unifier sends an email to the user when an E-Signature request is created for that user in the E-Signatures node at company, project, or shell.

When you select send Notification in Single Daily Digest, and there are notifications relating to the E-Signature Requests, then the single digest email to the recipient will contain the E-Signature message along with other messages in the email. The header section (where hyperlinks to each message within the digest are mentioned) contains the hyperlink to the E-Signature message with the text: <Document Name> is sent to you for review and sign.

> **Note**: You do not have the option to send the document as an attachment in the email notification.

External user

When a **Send for E-Signature** action is taken, and one or more documents are sent to non-Unifier users (**External users**), the entity that provides electronic signature technology (DocuSign or AdobeSign) sends an email to each assignee (one email per document). The non-Unifier users can go to the Document Manger log, select a document, and click the **Sign** option from the gear icon to sign the document. This action launches the entity that provides electronic signature technology (DocuSign or AdobeSign) and enables you to conduct a self-sign.

The external users are *unable* to act on the E-Sign task from the email sent out from AdobeSign or DocuSign.

When sending out an E-Signature request, for external users, the question-mark icon in the External field of the Send for E-Signature window informs the external user to enter multiple email addresses separated by commas or semi-colons and click Send for E-Signature.

If the external user enters an invalid email address, then:

▶ Unifier logs the signee's E-Signature status as Failed, in the E-Signature log. Unifier enables the user to mouse-over the status (Failed) and see the reason for failure, for example: Mailbox unavailable. Alternatively, the user can also click the gear icon option Reason for Failure and see the reason, for example: Mailbox unavailable.
▶ If there are only external signees in an E-Sign request, and all of the email addresses of the external signees are invalid, then the status of the E-Sign request will be set as Failed in:
  ▶ Document Manager log
  ▶ Attachments tab for BP Upper form, or detail form
  ▶ Attachments Review tab

If any of the recipients (external or internal) in the E-Sign request is a valid one, then the status of the E-Sign request is based on the status of the valid signees. Unifier ignores the failed signee.

Proxy user

A proxy user can see all of the E-Signature features (E-Signatures Node, E-Signature Status column in DM, Send for E-Signature/Self-sign actions, etc.) as they can be seen by the original user. If the proxy takes any of the E-Signature actions (Self-sign or Sign an E-Signature request from the E-Signatures node), then:

The grid in the E-Sign Log displays one more column at the very end (Proxy User). The name of the proxy user is captured in the this column (similar to the 'Proxy User' column within the Audit log of a business process log). Note that this column shows up in the grid only if there has been a proxy action by at least one signee within an E-signature request.

The Signee column shows the original signee's name; however, the exclamation-mark icon (at the end of this column) will indicate whether the signature action has been taken by a proxy, or not. Hovering at this icon displays: Signed by Proxy User: <Proxy User Name>

The Proxy User action options are available where E-Sign log can be seen (E-Signatures node, DM, BP attachments tab).

> **Note**: The Proxy users can see the E-Signature count on the Company, Shell, and Project home landing pages.

Project landing page

Similar to the Company and Shell home landing pages, the project landing page shows the count of pending E-Signatures in the Items Requiring Your Attention section. The count can be seen below the Tasks count as: E-Signatures: <xx> Pending.

> **Note**: The count is shown only if the E-Signatures are enabled for the project.

Internationalization

The user's language preferences in Unifier is used when the E-Signature requests are sent out to external users by way of AdobeSign or DocuSign. For example, if a user's preferred language for Unifier is Chinese, then the E-Signature email request that is sent out to an external signee by way of AdobeSign or DocuSign will be in Chinese.

E-Signatures Log

To access the **E-Signatures** log, go to your project and click **E-Signatures** node on the left-hand navigator.

The **E-Signatures** log has the following tools, options and columns:

E-Signatures log toolbar

Field	Description
View	The function is similar to the View option available in several other logs in

	Unifier. The options are: ▸ **All** ▸ **Group By Status** ▸ **Create New View** ▸ **Manage Views**
Edit View	The function is similar to the Edit View option available in several other logs in Unifier. You can use this option to edit the current view (Active View).
Delete	Select one or more tasks and delete. You cannot delete incomplete tasks (tasks with **Status** set as **In-Progress**). If you delete an completed task, then E-signatures log (in Document Manager and within a BP record) displays the Status.
Print	The function is similar to the Print option available in several other logs in Unifier. The options are: ▸ **Print** ▸ **Export to CSV** ▸ **Export to Excel**
Search	Click to open the Search window at the bottom of the page. You can search inside all of the columns available in the **E-Signatures** log.
Find on Page	The function is similar to the Find on Page option available in several other logs in Unifier.

E-Signatures log columns

Column	Description
Name	The name of the document that has been sent for E-Signature. The column displays the file-type (extension) along with the name. **Note**: Since DocuSign converts all files to .pdf, the extension will always be .pdf in this column.
From	The name of the Unifier user who initiated the **Send for E-Signature** action (from the Document Manager or from within a BP record).
Status	The status of the E-Signature task: **In-Progress**: When assignee has not yet taken any action on the signature task. The default Status of any E-Signature task. **Completed**: When assignee opens the E-Signature task through DocuSign, and clicks **Continue** in the resulting window. The system populates the DocuSign fields, available on the left, (Signature, Initial, Date Signed, Name, First Name, Last Name, etc.). Assignee clicks **Finish** at the top to complete the signing. **Declined**: When assignee opens the E-Signature task and selects the option **Decline to Sign**.

	Recalled: The E-Signature task for all signers who have not yet completed the E-Signing process are recalled. If an E-Signature task has been created by way of **Send for E-Signature** action (from the Document Manager), sent to multiple signers, and at least one signer declined the task, or If an E-Signature task has been created by way of **Send for E-Signature** action (from within a BP record) and that BP record reaches a **Terminal** status. In such cases, when a user opens a task, Unifier displays an alert indicating that the Status is set to **Recalled**, and the **Completion Date** is set to the date when the task was recalled.
Subject	The subject of the **Send for E-Signature** message.
Document Location	If the document was sent for signature from the Document Manager, then this column displays the Document location in the Document Manager, for example: ... `/Field Reports/Action Items`. If the document was sent for signature from a BP record, then this column displays the BP record number.
Received Date	The date when the **Send for E-Signature** task was received by the assignee. The default sort for this column is **Received Date** with latest received task at the top.
Completion Date	The date when the E-Signature task reaches a **Terminal** state (Status = Completed, Declined, Recalled).

E-Signatures log right-hand pane

When you open the **E-Signatures** log, the top row item is selected by default, and the **E-Signatures** log right-hand pane displays the following tabs:

Tab	Description
Preview	Displays a preview of the document that has been sent for signature. If the E-Signature task is in either of following statuses, this pane displays a preview of the original document that was sent for E-signature: ▸ In-Progress ▸ Declined ▸ Recalled If the E-Signature task is in a **Completed** status, then this pane displays a preview of the signed document.

E-Sign log	Displays a list of all internal and external users to whom a given document (from the Document Manager or from within a BP record) was sent for signature through the **Send for E-Signature**.
	The toolbar options enable you to:
	Print: Print documents
	Download: To download the latest signed signed copy of the document.
	The columns are:
	Signer: The name of the user who must sign, or has signed, the document. If an internal user, then the cell contains the user's first and last names. If an external user, then the cell contains the user's email address.
	Sign Status: The e-signature status of the document for the signer. It can be: Delivered, Completed, Declined, or Recalled.
	Initiated Date: The date when the document was sent for e-signature. This can be the date that an action was initiated by an internal user using the **Sign** option from the gear icon.
	Completion Date: The date when the e-signature task has reached a **Terminal** state (Status = Completed, Declined, Reassigned, Recalled). If a signer (internal or external) declines an e-signature task, you can see the reason by clicking the signer's entry and opening the Reason for Decline block at the bottom of the tab.
Messag e	Displays the message sent by the sender, when sending the document for signature through the **Send for E-Signature**.

E-Signature Log (declining an E-Signature)

If a signee declines an E-signature request, then the E-Signature log captures the E-Signature status as Declined. When the E-Signature Status = Declined, then the tooltip (triggered by placing the pointer on the status), or the gear icon options, displays the reason for decline.

When you select an E-Signature request from the **E-Signatures** node, you can see the **E-Signatures** log in the right-hand pane (E-Sign Log). The log contains the:

▸ Message which was sent out a the time of sending the E-Signature request
▸ A log of all e-signature requests statuses.

When you move the mouse over a row in the **E-Signatures** log, the gear icon appears and enables you to perform the following on a task:

▸ **Sign**: Enables you to open the document and sign or do other reviews.
▸ **Delete**: Enables you to delete a task. You cannot delete an incomplete task (In-Progress, Deferred, or FaxPending).

When you double-click on a row in the **E-Signatures** log, the sent document opens in the entity that provides electronic signature technology (DocuSign or AdobeSign). Follow the prompts and when done click **Finish** to close the application (DocuSign or AdobeSign).

After you finish signing a document, the **E-Signatures** log gets updated and the status changes to: **Completed**. At this stage, Unifier updates the **E-Signatures** log of the module (Document Manager or BP record) where the document was sent from and changes the status to: **Completed**. This update process applies to the **Completion Date**, also.

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