

Primavera Unifier: Administration

Construction and engineering

DURATION

4 Days

MODULES

24 Lectures

COURSE CODE

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Course Overview

This course is appropriate for Oracle Cloud deployments.
Subscription : Data Management Learning Subscription

What You Will Learn

- Oracle Unifier Fundamentals – Modular Course Structure
- SECTION I: Navigation and Administration

Module 1: Navigation

- Topics
- Sign In Procedures
- OIM/OAM Enabled
- OIM/OAM Disabled
- Home Page and Navigation Tabs
- Unifier's Tab Model and Tab
- Navigation: Switch Locations, Add Tabs/Locations
- Mode Navigation
- Signing In to Unifier
- Tab and Mode Navigation
- Learning Objectives
- Sign in to Unifier using different authentication methods
- Navigate tabs, modes, and locations
- Understand Unifier's tab model and content structure

Module 2: Administration Overview

- Topics
- Administration Levels
- Key Terminology
- Site Administration Role

- Company Administration Role
- Program Administration Role
- Shell Administration Role
- Learning Objectives
- Understand administration hierarchy in Unifier

Describe roles and responsibilities for site, company, program, and shell administration

Module 3: Company Relationship Management

- Topics
- Company Types
- Role of Partner Companies
- Owner-Partner Company Relationship
- Owner-Partner-Member Company Relationship
- Creating Partner Companies
- Learning Objectives
- Manage partner and member companies
- Define relationships between owner, partner, and member companies

Module 4: Company User Administration

- Topics
- Terminology: User & Group
- User Administration with OIM/OAM
- User Attributes Form
- Creating a New User (Manual & CSV Import)
- Entering User Information: General, Security, Groups, Permissions, Proxy
- Viewing User Information (Projects/Shells & Programs Tabs)
- Creation via Web Services
- Creating Partner Users
- Exceeding License Limits
- Learning Objectives
- Create and manage users manually, via CSV, and web services
- Assign user attributes and permissions
- Handle user licensing limits

Module 5: Company Group Administration

- Topics
- Groups Concept
- User/Group Permissions Concept
- Managing Company-Level Groups
- Creating Company-Level Groups
- Learning Objectives
- Create and manage groups
- Assign permissions at the company level

Module 6: Company Permissions Management

- Topics
- Permissions-Based Security
- Permission Categories and Levels
- Permissions to Maintain Unifier and Access Modules
- Assigning Permissions to Groups and Users
- Viewing Access Information Reports
- Learning Objectives
- Understand permission types and levels
- Assign and manage permissions for groups and users
- SECTION II: Data Structure and Design

Module 7: Data Structure Setup

- Topics
- Terminology: Module & Manager
- Viewing System Modules and Data Elements
- Adding and Importing/Exporting Data Definition Values
- Reordering and Adding Multi-Select Values
- Viewing Text Type Data Definitions
- Accessing ER Views
- Learning Objectives
- Define modules and managers
- Manage data elements and definitions
- Import/export and reorder data values

Module 8: Design and Development Cycle

- Topics
- Design Versions
- Unifier Server Types
- Design and Development Cycle Overview
- Business Process Configuration Checklist
- Shell Configuration Checklist
- Learning Objectives
- Understand the Unifier design and development lifecycle
- Prepare checklists for business process and shell configuration

Module 9: Business Process Configuration

- Topics
- Configuration Purpose and Concept
- Logs: Default and Standard Views
- Master Log Concepts
- Configuring Business Processes
- Learning Objectives

- Configure business processes and logs
- Understand master logs and standard vs. classic views

Module 10: Shell Manager Configuration

- Topics
- Shell Overview and Types
- Shell Hierarchy and Hierarchical Rules
- Configuring Shells
- Learning Objectives
- Configure shells and understand shell hierarchy rules

Module 11: User Mode Navigator Configuration

- Topics

Terminology: User Mode Navigator, Grouping Node, Actionable Node, Leaf/Child Node

- Concepts and Permissions
- Design Considerations
- Configuring and Deploying User Mode Navigator
- Restoring System Defaults
- Learning Objectives
- Configure and deploy user mode navigator
- Understand node types and permissions

Module 12: Company-Level Non-Workflow BP Setup

- Topics
- Business Process Setup Overview
- Loading and Configuring Vendors and Suppliers BP
- Learning Objectives
- Configure company-level non-workflow business processes

Module 13: Shell Templates

- Topics
- Template Concepts and Types
- Shell Templates and Components
- Differences Between Components
- Best Practices
- Assigning Shell Permissions
- Creating Facilities Template
- Adding/Removing Member Companies and Users
- Creating Shell Template Groups
- Learning Objectives
- Create and manage shell templates
- Assign permissions and configure member companies and users

Module 14: Business Process Setup in Shell Templates

- Topics
- Setup Concepts
- BP Setup Maintenance
- Assigning Setup Permissions
- Loading Business Processes
- General Setup for Action Items
- Learning Objectives
- Configure business processes within shell templates
- Assign setup permissions

Module 15: Workflow Setup

- Topics
- Workflow Concepts
- Workflow Steps: Action Items Creation, Response, Review, End Step
- Email Validation and Responses
- Transmittals Setup
- Project Meeting Minutes Workflow
- Single-Record BP Setup
- Learning Objectives
- Configure workflow steps and email integration
- Setup transmittals and meeting minute workflows

Module 16: Business Process Setup - Conditional Routing

- Topics
- Conditional Routing Overview and Example
- Configuring Conditional Routing
- Setting Up RFIs BP
- Learning Objectives
- Configure conditional routing for business processes
- Set up RFIs and other conditional BPs

Module 17: Folder Structure Template

- Topics
- Stand-Alone Templates
- Folder Structure Purpose
- Creating Folder Structure Templates
- Learning Objectives
- Create and configure folder structure templates

Module 18: Embedding Templates

- Topics

- Purpose and Methods
- DM Properties and Permissions
- Embedding Folder Structure Templates
- Assigning Folder Permissions
- Learning Objectives
- Embed templates and assign permissions
- Configure folder properties

Module 19: Copying Shell Templates

- Topics
- Copying Shells or Templates
- Selecting Modules
- Copying Facilities Template
- Learning Objectives
- Copy shell templates and apply to multiple instances

Module 20: Creating a Single-Shell Instance

- Topics
- Single-Shell Instance Creation Method
- Configuring Tabs and Functionality
- Editing and Adding Functionality
- Learning Objectives
- Create and configure single-shell instances
- Add or edit functionality

Module 21: Creating Multiple-Shell Instances

- Topics
- Multiple Instance Creation Methods
- Naming and Numbering Instances
- Shell Status and Location Picker
- Options, Links, Calendar Tabs
- Copying Shell Templates vs. Shell
- Viewing Shells in User Mode
- Learning Objectives
- Create and manage multiple-shell instances
- Configure status, options, links, and calendars

Module 22: Updating Shells

- Topics
- Terminology and Purpose
- Shell Template Update Capabilities
- Rules for Updating Users, Groups, Access Control
- Push Updates to All Shells
- Learning Objectives

- Update shell templates and users
- Apply access control updates to multiple shells

Module 23: Configuration Package Management

- Topics
- Design and Development Cycle Review
- Configuration Package Overview
- Server Restrictions
- Package Management and Checklist
- Performing Error Checks and Dynamic Resolution
- Creating Component Lists and Packages
- Importing Packages and User Mapping
- Impact Analysis Reports
- Learning Objectives
- Manage configuration packages
- Perform error checks and import packages efficiently
- Conduct impact analysis

Module 24: Case Study - Routing Meeting Minutes

- Topics
- Applying Unifier Concepts to a Real-World Scenario
- Learning Objectives
- Practice setup, workflow, and routing in a case study