

S Primavera Unifier: uDesigner

Construction and engineering

DURATION

2 Days

MODULES

22 Lectures

COURSE CODE

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Course Overview

This virtual course enables you to use the uDesigner tool to design business processes, attribute forms, and shells. Includes access to live software to complete exercises.

What You Will Learn

- Oracle Unifier uDesigner – Modular Course Structure
- SECTION I: Navigation and Interface

Module 1: Navigation and Sign-In

- Topics
- Sign In Procedures (OIM/OAM Enabled & Disabled)
- Home Page and Navigation Tabs
- Unifier's Tab Model and Tab
- Navigation: Switch to a Location / Add a Tab / Location
- Mode Navigation and Design Workspaces
- Signing In to Unifier
- Tab and Mode Navigation
- Lesson Review
- Learning Objectives
- Sign in to Unifier in different environments
- Navigate the Unifier interface efficiently
- Understand tabs, modes, and workspaces
- SECTION II: Design and Development Concepts

Module 2: Design and Development Concepts

- Topics
- Unifier Server Types
- Design Versions

- Design and Development Cycle (Top-Down & Bottom-Up)
- Identifying Business Needs and Engaging Design Teams
- Defining Unifier Objects and Components
- Assigning Design Permissions
- Design & Development Best Practices
- Lesson Review
- Learning Objectives
- Understand the Unifier design and development lifecycle
- Define and design Unifier objects
- Apply best practices for design and permissions

Module 3: Creating Data Structures

- Topics
- Data Structures Overview
- Data Definitions and Data Elements
- Creating and Editing Basic Data Definitions
- Creating and Editing Data Elements
- Supplemental Data Examples
- Lesson Review
- Learning Objectives
- Create and manage data structures and elements
- Edit and maintain data definitions in Unifier

Module 4: Record Statuses

- Topics
- Record Status Concepts
- Record Status Assignment (Workflow & Non-Workflow)
- Creating Record Statuses
- Sorting Record Status Order
- Lesson Review
- Learning Objectives
- Define record statuses and assign them to workflows
- Maintain record status sequences and orders
- SECTION III: Shells and Forms

Module 5: Shells

- Topics
- Shell Terminology and Attribute Forms
- Shell Types and Data Structures
- Mandatory and Required Data Elements
- Form Composition and Compare Form Design
- Creating Single-Instance Generic Shells
- Adding Blocks and Data Elements to Detail Forms
- Running the Error Check

- Lesson Review
- Learning Objectives
- Create and configure shells
- Add and manage forms and data elements
- Perform error checks on shell designs

Module 6: User Attributes Form

- Topics
- User Attributes Form Concepts
- Defining User Attribute Sub-Nodes and Logs
- User Data Pickers, Auto-Population, and Filter Assignees
- Integrating Company Users and User Picker
- Lesson Review
- Learning Objectives
- Design user attribute forms and logs
- Configure auto-population and filters for users
- SECTION IV: Business Process Design

Module 7: Business Process Creation

- Topics
- Business Process (BP) Creation Methods
- Simple-Type and Single Record BP
- BP Properties (Statuses, Options, Additional Tabs)
- Notify Additional Users
- Creating Upper Forms, Blocks, and Data Elements
- Completing a Business Process
- Lesson Review
- Learning Objectives
- Create and configure simple and single-record BPs
- Design upper forms and data element blocks

Module 8: Reusing Forms

- Topics
- Ways to Reuse Forms
- Upper Form Templates and Copying Forms
- Copying BPs and Templates
- Linking, Updating, Unlinking, and Deleting Templates
- Lesson Review
- Learning Objectives
- Reuse and template forms effectively
- Maintain upper form templates and linked business processes

Module 9: Line Item-Type Business Processes

- Topics

- Non-Workflow Line Item BPs
- Workflow Line Item BPs (e.g., Meeting Minutes)
- Using Upper Forms, Detail Forms, Item Logs
- Multiple Tabs Support and Standard Log
- Workflow Diagrams
- Lesson Review
- Learning Objectives
- Create and manage line item-type BPs with and without workflow
- Design forms, logs, and multi-tab structures

Module 10: Conditional Routing

- Topics
- Conditional Routing Concepts and Limitations
- Resolving Actions and Deleting Conditions
- Adding Conditional Routing to a Workflow
- Lesson Review
- Learning Objectives
- Configure conditional routing within workflows
- Manage rules, actions, and limitations

Module 11: Formulas

- Topics
- Formula Types (Numeric, Text, Date)
- Design Considerations
- Adding Numeric, Text, and Date Calculations to Forms
- Lesson Review
- Learning Objectives
- Create formulas for calculations and data validation
- Apply formulas to forms and business processes

Module 12: Validation

- Topics
- Validation Concepts and Design Considerations
- Adding Validation to BPs
- Lesson Review
- Learning Objectives
- Implement validation rules for forms and business processes

Module 13: Auto-Publish to Document Manager

- Topics
- Auto-Publish Functionality and BP Types
- Publishing Attachments to DM
- Auto-Publish Paths and Properties
- Defining Auto-Publish for Records and Attachments

- Lesson Review
- Learning Objectives
- Configure auto-publish to DM
- Define rules for publishing attachments and records

Module 14: Workflow Actions via Email

- Topics
- Workflow Actions via Email Concepts
- Email Response Requirements and Validation
- Defining Email Notification Elements
- Lesson Review
- Learning Objectives
- Configure workflow email notifications and response settings

Module 15: Auto-Sequencing

- Topics
- Auto-Sequencing Concepts and Properties
- Configuring and Formatting Auto-Sequence Elements
- Creating Auto-Sequence Elements
- Lesson Review
- Learning Objectives
- Configure auto-sequencing for BP and data elements
- Manage sequencing properties and elements

Module 16: Consolidation

- Topics
- Consolidation Concepts and Restrictions
- Defining Consolidation in BPs
- Lesson Review
- Learning Objectives
- Implement consolidation for line item and other BPs
- Apply restrictions and best practices

Module 17: Auto-Population

- Topics
- Auto-Population Concepts and Sources
- Mapping Data Sources
- Auto-Population Restrictions
- Auto-Populate from Single-Record BPs, DM Forms, Constant Values
- Lesson Review
- Learning Objectives
- Configure auto-population for data elements and BPs
- Map sources to destinations accurately

Module 18: Linked Elements

- Topics
- Linked Elements Concepts and Restrictions
- Best Practices for Shells and BPs
- Creating Linked Elements in Shells and BPs
- Lesson Review
- Learning Objectives
- Configure linked elements to enforce relationships
- Apply best practices in shell and BP design

Module 19: Integration

- Topics
- Integration Concepts and Runtime Examples
- Building and Adding Integration to BPs
- Lesson Review
- Learning Objectives
- Implement integration between BPs and external systems
- Apply integration in runtime scenarios

Module 20: uDesigner Versioning

- Topics
- Version Concepts and Restore Options
- Restoring Previous Versions and Snapshots
- Saving and Using Snapshots
- Lesson Review
- Learning Objectives
- Manage design versions and snapshots
- Restore previous versions for design consistency

Module 21: Deploy Designs

- Topics
- Deploying BPs, Attribute Forms, and Shells
- Deploy Permissions
- Configuration Package Management
- Lesson Review
- Learning Objectives
- Deploy designs across the Unifier environment
- Manage configuration packages and permissions

Module 22: Business Process Types

- Topics
- BP Types, Sub-Types, and Classifications
- Document-Type, Cost-Type, Text-Type, RFB, and Project/Shell Creation

- Importing BPs as XML
- Lesson Review
- Learning Objectives
- Identify and configure various BP types
- Apply appropriate BP templates and import processes
- Capstone
- Case Study – Part 2: Practical application of all modules

Review of uDesigner Fundamentals: Login, Navigation, Design Cycle, Data Structures, Shells, BPs, Workflow, Integration, Versioning, Deployment