

Primavera Unifier: Reports and Dashboards

Course Outline

1 : Navigation

- Navigation
- Review Questions
- Activity 1-1 Signing In to Unifier
- Activity 1-2 Tab and Mode Navigation

2 : User-Defined Report Templates

- User-Defined Report Templates
- Review Questions
- Activity 2-1 Creating a Report Template

3 : Tabular Reports

- Tabular Reports
- Data Elements Tab
- Query Tab
- Report Layout
- Shells Tab
- Review Questions
- Activity 3-1 Defining the General Tab of a Tabular Report Template
- Activity 3-2 Adding Data Elements
- Activity 3-3 Defining a Query
- Activity 3-4 Configuring the Layout
- Activity 3-5 Completing Shells and Schedule Tabs

4 : Cross Tab Reports

- Cross Tab Reports
- Review Questions
- Activity 4-1 Creating a Cross Tab Report Template

5 : Alert Reports

- Alert Reports
- Review Questions
- Activity 5-1 Creating an Alert Report Template

6 : Copying and Editing Reports

- Copying and Editing Reports
- Review Questions
- Activity 6-1 Copying the Alert Report Template

7 : Embed Report Templates in Shell Template

- Embed Report Templates in Shell Template
- Review Questions
- Activity 7-1 Embedding Report Templates

8 : Updating Shells

- Updating Shells
- Review Questions
- Activity 8-1 Updating UDRs in Shells

9 : Scheduling User Defined Reports

- Scheduling User Defined Reports
- Review Questions
- Activity 9-1 Defining Report Schedules in Shells

10 : Company Level Reports

- Company Level Reports
- Review Questions
- Activity 10- 1 Adding UDRs to the Company

11 : Running Reports

- Running Reports
- Run UDRs at Company or Shell Level
- Viewing Saved Results
- Activity 11- 1 Running UDRs in Templates
- Activity 11- 2 Running Company-Level Reports
- Activity 11- 3 Viewing Saved Results

12 : Configuring Alerts

- Configuring Alerts
- Review Questions
- Activity 12-1 Configuring Alerts

13 : Shell Dashboards

- Shell Dashboards
- Review Questions
- Activity 13-1 Configuring the Shell Dashboard

14 : Creating Data Cubes

- Creating Data Cubes
- Review Questions
- Activity 14-1 Creating a Data Cube

- Activity 14-2 Modifying a Data Cube
- Activity 14-3 Assigning Permissions for Data Cubes

15 : Create Dashboards from Data Cubes

- Create Dashboards from Data Cubes
- Adding a Drilldown Block
- Review Questions
- Activity 15-1 Adding a Custom Block
- Activity 15-2 Adding a Drilldown Block

16 : Updating Shell Dashboards

- Updating Shell Dashboards
- Review Questions
- Activity 16- 1 Updating Shell Dashboards

17 : Data Views

- Data Views
- Examining Data Views
- Data Views and UDRs
- Review Questions
- Activity 17 -1 Examining Data Views
- Activity 17 -2 Creating a Data Cube from Data View
- Activity 17 -3 Creating UDR from Data View

18 : Custom Reports

- Custom Reports
- Custom Reports Permissions
- Running Custom Reports
- Review Questions
- Activity 18-1 Configuring Custom Reports
- Activity 18-2 Assigning Permissions to Custom Reports
- Activity 18-3 Running Custom Reports

19 : System Reports

- System Reports
- Review Questions
- Activity 19-1 Running System Usage Reports

20 : Audit Report

- Audit Report
- Review Questions
- Activity 20-1 Running System Audit Report

21 : Custom Dashboards via Primavera Analytics

- Custom Dashboards via Primavera Analytics
- Launching Analytics from Shell Dashboard
- Review Questions
- Activity 21-1 Data Mapping in Analytics Node
- Activity 21-2 Configuring Shell Dashboard Analytics Block