Primavera Unifier: Administration

Course Outline

1 : Navigation

- Navigation: Summary
- Activity 1-1: Signing in to Unifier
- Activity 1-2: Tab and Mode Navigation

2 : Administration Overview

- Administration Overview

3 : Company Relationship Management

- Company Relationship Management: Summary
- Activity 3-1: Creating Partner Companies

4 : Company User Administration

- Company User Administration: Summary
- Activity 4-1: Creating a New User Manually
- Activity 4-2: Entering User Information - General Tab
- Activity 4-3: Entering User Information - Security Tab
- Activity 4-4: Entering User Information - Groups Tab
- Activity 4-5: Entering User Information - Permissions Tab
- Activity 4-6: Viewing User Information - Projects/Shells and Programs Tabs
- Activity 4-7: Entering User Information - Proxy Tab
- Activity 4-8: Adding Company Users - CSV File Import
- Activity 4-9: Creating Partner Users

5 : Company Group Administration

- Company Group Administration: Summary
- Activity 5-1: Creating Company-level Groups

6 : Company Permissions Management

- Company Permissions Management: Summary
- Activity 6-1: Assigning Permissions to Groups
- Activity 6-2: Assigning Permissions to Users
- Activity 6-3: Assigning Permissions via Access Control
- Activity 6-4: Viewing the Access Information Report

7 : Data Structure Setup

- Data Structure Setup: Summary
- Activity 7-1: Viewing System Modules
- Activity 7-2: Viewing Data Elements

- Activity 7-3: Adding Data Definition Values
- Activity 7-4: Downloading Resource Files
- Activity 7-5: Importing/Exporting Values
- Activity 7-6: Adding Values to Multi-Select Input
- Activity 7-7: Viewing Text Type Data Definitions
- Activity 7-8: Exporting Data Definitions
- Activity 7-9: Accessing ER Views

8 : Design and Development Cycle

- Design and Development Cycle

9 : Business Process Configuration

- Business Process Configuration: Summary
- Activity 9-1: Configuring Business Processes

10 : Shell Manager Configuration

- Shell Manager Configuration: Summary
- Activity 10-1: Configuring Shells

11 : User Mode Navigator Configuration

- User Mode Navigator Configuration: Summary
- Activity 11-1: Configuring User Mode Navigator
- Activity 11-2: Deploying User Mode Navigator
- Activity 11-3: Restoring System Default

12 : Company-Level Non-Workflow BP Setup

- Company-Level Non-Workflow BP Setup: Summary
- Activity 12-1: Loading the Vendors and Suppliers BP
- Activity 12-2: Setting Up Vendors and Suppliers BP

13 : Shell Templates

- Shell Templates: Summary
- Activity 13-1: Assigning Shell Permissions
- Activity 13-2: Creating the Facilities Template
- Activity 13-3: Adding Member Companies
- Activity 13-4: Removing Member Companies
- Activity 13-5: Adding Users to Shell Template
- Activity 13-6: Creating Shell Template Groups

14 : Business Process Setup in Shell Templates

- Business Process Setup in Shell Templates: Summary

- Activity 14-1: Assigning Setup Permissions
- Activity 14-2: Loading Business Processes
- Activity 14-3: Action Items - General Setup

15 : Workflow Setup

- Workflow Setup: Summary
- Activity 15-1: Action Items Creation Step
- Activity 15-2: Action Items Response Step
- Activity 15-3: Action Items Review Step
- Activity 15-4: Action Items End Step
- Activity 15-5: Transmittals Setup
- Activity 15-6: Project Meeting Minutes General Setup
- Activity 15-7: Project Meeting Minutes Workflow Setup

16 : Business Process Setup - Conditional Routing

- Business Process Setup - Conditional Routing: Summary
- Activity 16-1: Setting Up the RFIs BP

17 : Folder Structure Template

- Folder Structure Template: Summary
- Activity 17-1: Creating a Folder Structure Template

18 : Embedding Templates

- Embedding Templates: Summary
- Activity 18-1: Embedding the Folder Structure Template
- Activity 18-2: Setting Folder Properties and Options
- Activity 18-3: Assigning Folder Permissions

19 : Copying Shell Templates

- Copying Shell Templates: Summary
- Activity 19-1: Copying the Facilities Template

20 : Creating a Single-Shell Instance

- Creating a Single-Shell Instance: Summary
- Activity 20-1: Creating a Single-Shell Instance
- Activity 20-2: Editing a Single-Shell Instance

21 : Creating Multiple-Shell Instances

- Creating Multiple-Shell Instances: Summary
- Activity 21-1: Creating Multiple-Shell Instances
- Activity 21-2: Viewing Shells in User Mode

22 : Updating Shells

- Updating Shells: Summary
- Activity 22-1: Pushing a Group to All Shells
- Activity 22-2: Pushing a User to All Shells
- Activity 22-3: Updating Access Control to Shells

23 : Configuration Package Management

- Configuration Package Management: Summary
- Activity 23-1: Creating a Component List

24 : Case Study - Routing Meeting Minutes

- Case Study - Routing Meeting Minutes