

Configure and automate processes across your enterprise with Primavera Unifier

Powerful low-code and no-code configuration tools

Every organization can benefit from industry best practice processes, reporting, and data management. Primavera Unifier includes the Unifier Accelerator base which is made up of over 125 pre-configured guided business processes and over 250 reports and dashboards built on over 25 years of implementation experience and trusted industry standards. This configuration can be used as-is and your organization can be up and running and gaining value in a matter of weeks.

Yet, we understand that organizations and projects have unique and evolving business process needs.

Fortunately, Primavera Unifier includes a powerful no-code business process designer tool, [uDesigner](#), and the recent addition of Oracle Integration Services for Unifier, which has further extended the ability to configure and automate processes within Unifier using low-code capabilities. Let's review these capabilities below.

- The no-code configuration, automation, and administration tools within Unifier enable customers and implementers to create and modify business processes, workflows, reports, dashboards, and layouts without having to rely on costly vendor provided software development resources.
- Primavera Unifier's built-in configuration tool, [uDesigner](#) can be used to create an unlimited number of business processes (BPs), including forms and workflows. Unifier administrators can also replicate existing BPs to use as a starting point, or modify any existing business processes, including BPs which are part of the Unifier Accelerator, and ones you have previously created.
- Gartner Magic Quadrant leading and FedRAMP and DISA authorized [Oracle Integration Services](#) is a low-code comprehensive integration platform enabling integration of various applications, data sources, and systems. This technology is accessible from within Unifier and included with Unifier licenses to augment and automate processes and workflows within and across projects and your organization.
- Using Unifier event-driven processes with Oracle Integration Services, data can be easily moved in real-time within Unifier and between Unifier and integrated systems. This can include data movement from within a workflow step to provide immediate and up-to-date information when needed, without having to run a report, rely on outdated information, wait for systems to synchronize, or do costly and error prone duplicate data entry.

An example would be when a change order is approved in Unifier, that information will instantly amend the corresponding PO in the ERP system, with no lag time/need to wait for a nightly update. Finance can see instantly that there is less available budget, so they know not to overcommit.

Unifier Business Processes

The Unifier Accelerator base configuration, with business processes across planning, design, procurement, and construction, is supported by Unifier's form-based workflow engine, which seamlessly kicks off the associated customer configured workflow upon form submission.

These business processes can be used as-is, modified, added to, and automated. It is hard to overstate the flexibility of Primavera Unifier's business processes, given both uDesigner, and Oracle Integration Services for Unifier, which adds even more flexibility, automation, and integration capabilities.

And don't forget that Integrations can be called with the click of a button to enable real-time data flow from within workflow steps, for example to pull in all open risk, issue and submittal statuses when submitting a monthly project status update.

Unifier Business Process Forms

Primavera Unifier forms drive the business processes within the application. Unifier business process forms are designed in a no-code environment, enabling business users to innovate quickly.

Unifier business process forms collect data and information from end users that drive the automation within Unifier. Using uDesigner, each form can have different data elements visible, editable, and required. Different forms can be assigned to each workflow step to control the information that is visible, required, editable and calculated on that step. All Unifier forms can be modified, and new forms can be designed and created by administrators with appropriate permissions.

The Contract business process in Unifier, shown below, is included in the Unifier Accelerator base configuration and includes industry best practice metadata for contract information, contract line items, and several potential workflow options with different levels of complexity, which can be modified to meet specific needs. Customer procurement and contract development processes are often well defined based on regulations, an organization's legal department, industry factors, competitive market factors, lessons learned, etc. Evaluate the Oracle Construction and Engineering best practices in Unifier Accelerator, then use uDesigner to amend the data structure and workflows to meet your business requirements.

The Contract business process below, including fully configurable header and detail fields shows an example of the flexibility of Unifier forms.

Contract

More Actions Save

Contract Line Items Change Orders Payment Applications

Use the Contract form to manage a commitment with a vendor, typically for services, and track key information about the commitment such as vendor and type of contract.

Key Information

Key information about this Contract.

Title Design Contract 338374	Vendor New Designs
Contract Number 338374	Status Approved
Amount \$31,864.00	

Description

Description and/or scope of this contract. This information may appear in any formal printouts of this contract.

Short Description
Design Contract for the Green Innovation Center Project

Detailed Description
Contract Overview:
This design contract outlines the scope of work, responsibilities, and terms of engagement between [Architectural Firm Name] (hereinafter referred to as "the Architect") and [Project Owner/Client Name] (hereinafter referred to as "the Client") for the design and development of the Green Innovation Center project.

Contract Details

Details about the contract should be entered below.

Contract Type Time and Materials	Priority High
Effective Date 01/11/2025 03:11 PM	Original Contract Completion Date 02/20/2025
Spec Section 00 72 00 General Conditions	Revised Contract Completion Date

Attachments

	Name	Upload Date
⚙	Published Attachments	
<input checked="" type="checkbox"/>	Attachment 1.pdf	01/11/2025 03:11 PM
<input checked="" type="checkbox"/>	Attachment 2.pdf	01/11/2025 03:11 PM
<input checked="" type="checkbox"/>	Bdgt Change.txt	01/11/2025 03:11 PM
<input checked="" type="checkbox"/>	Contract.txt	01/11/2025 03:11 PM
<input checked="" type="checkbox"/>	Forecast.txt	01/11/2025 03:11 PM
<input checked="" type="checkbox"/>	Fund App.txt	01/11/2025 03:11 PM

Total: 6

Image 2: Primavera Unifier Contract business process

All Unifier forms can be modified, and new forms can be designed and created by customers. Access can be managed through system permissions.

Unifier Business Process Workflows

In addition to being able to modify any of the over 125 pre-configured best practice business processes within the Unifier Accelerator, new forms and workflows can be created using Unifier's configuration tools. Instead of starting from scratch, you can copy an existing workflow to create a new workflow. Configuration capabilities include subsequent review cycles, and conditional routing based on defined triggers such as value or priority, and integrations leveraging Unifier's comprehensive RESTful APIs and Oracle Integration Services.

Unifier Business Process Modeling

The Unifier design tool (uDesigner) allows administrators to preview and error check designs, before deploying and testing them in a "staging environment". You can preview all the forms in the process, check them for errors, and then publish to production when you are ready.

Unifier Dashboard and Reports

The Unifier Accelerator provides 30+ prebuilt custom reports across the organization, program, and project-levels, including cashflow, task, project summary, and schedule reports. There are also hundreds of user defined reports. Users can easily modify and personalize these reports or create new reports, pulling data from across the processes and projects within Unifier. Data from systems integrated with Unifier can be brought into Unifier records to feed Unifier reports.

Automating Status Reporting Any Unifier or non-Unifier source now available

Project Status

Project Status

Key Information

Title

July 22nd 2024 Status Update

Project Phase (Manual) 01 Planning

Project % Complete 7

Project Reporting

Reporting date and overall summary of the project Status.

Project Reporting Date 07/22/2024

Project Reporting Summary

Community engagement initiatives ongoing to mitigate project disruptions.

Project Reporting Detailed Summary

Ongoing community engagement initiatives are essential to mitigating project disruptions and fostering positive relationships with stakeholders. Through transparent communication, proactive outreach, and responsiveness to community concerns, we're building trust and addressing community needs. Our commitment to community engagement enhances project acceptance, minimizes conflicts, and ensures successful project outcomes.

Project Status Summary

A summary of the information related to the below items.

Budget Status

Green: On Budget

Not Yet Submitted 22

In Progress 0

Closed 0

AI

Open Tasks

Cost Sheet

Cost Code	Code Name	Approved Estimate	Approved Initial Budget	Pending Budget Changes	Approved Budget Changes	Appn. Rate
1	100	\$1,158,028.99	\$984,912.88	\$0.00	\$0.00	
2	200	\$8,817,987.70	\$8,817,987.70	\$0.00	\$0.00	
3	300	\$1,231,141.10	\$984,912.88	\$0.00	\$0.00	
4	400	\$0.00	\$0.00	\$0.00	\$0.00	
5	500	\$0.00	\$0.00	\$0.00	\$0.00	
6	600	\$0.00	\$0.00	\$0.00	\$0.00	
7	700	\$0.00	\$0.00	\$0.00	\$0.00	
8	800	\$347,400.00	\$486,400.00	\$0.00	\$0.00	
9	900	\$1,354,252.21	\$1,231,141.10	\$0.00	\$0.00	

Master Schedule

Activity ID	Activity Name	Start	Finish	Duration	July 2022	March 2022
1	Project Start	01/03/2022 08:00 AM	01/03/2022 08:00 AM	0	0	0
2	Planning	01/03/2022 08:00 AM	01/12/2022 12:00 PM	80	0	0
3	Design	01/12/2022 12:00 PM	02/03/2022 12:00 PM	100	0	0
4	Schematic Design	02/03/2022 12:00 PM	02/03/2022 12:00 PM	100	0	0
5	Design Development	02/03/2022 12:00 PM	03/16/2022 12:00 PM	120	0	0
6	Construction Documents	03/16/2022 12:00 PM	04/09/2022 12:00 PM	120	0	0
7	Bidding	04/09/2022 12:00 PM	05/12/2022 12:00 PM	270	0	0
8	Construction	05/12/2022 12:00 PM	08/01/2022 12:00 PM	640	0	0
9	Closeout	08/01/2022 12:00 PM	08/02/2022 12:00 PM	100	0	0
10	Project Complete	08/02/2022 12:00 PM	08/02/2022 12:00 PM	0	0	0

Funding Sheet

Fund Code	Fund Name	Fund Estimate (Manual)	A. Manual Funding	B. Approved Fund Appropriation	C. Appropriated Funds (A-B)	D. Consumed Funds
1	20000-2023	GR Fund 2023	\$0.00	\$0.00	\$0.00	\$0.00
2	10000-2023	General Fund 2023	\$0.00	\$0.00	\$4,318,180.00	\$4,285,702.72
3	20000-2023	Sponsored Federal Fund...	\$0.00	\$0.00	\$560,800.00	\$556,584.77

Image 4: Primavera Unifier Project Status Dashboard

The Unifier Accelerator provides 80 prebuilt dashboards across portfolio, program, and project-levels, including projects, tasks, workflow performance, vendor management, change management, cost, field, and contingency management. Users can easily modify and personalize these dashboards or create new dashboards, pulling data from across the connected processes within Unifier.

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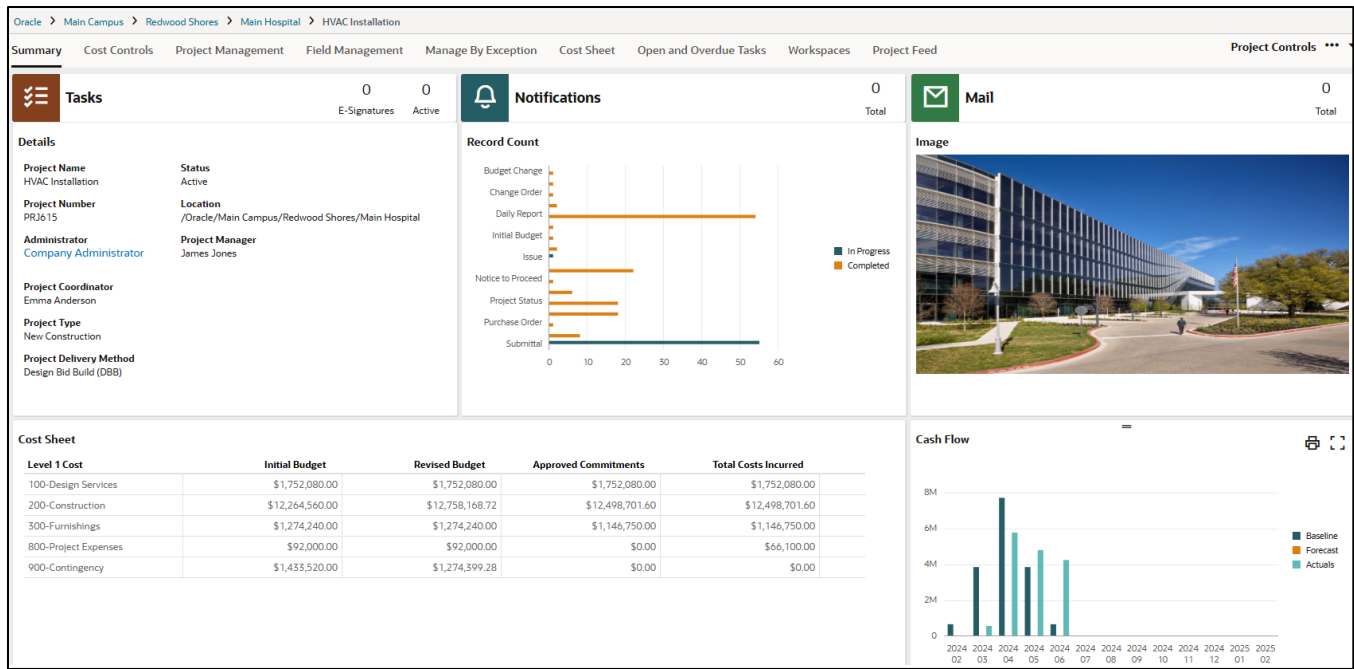


Image 5: Primavera Unifier Project Controls Dashboard

Oracle Integration Services for Unifier

When it comes to increasing the value of business processes within Unifier, Oracle Integration Services for Unifier plays an important role. Oracle Integration Services technology extends the configuration capabilities of uDesigner and is included with Unifier licenses. It provides >100 prebuilt, intelligent, wizard-driven, enterprise adapters. Adapters support integrations between common ERP systems, EAM solutions, collaboration tools, and other Oracle products including Aconex, Oracle Primavera Cloud and Primavera P6 EPPM scheduling and resource management solutions, in addition to Unifier. Oracle Integration Services enables customers to easily extend processes and access and move data from anywhere within Unifier. Examples include: moving information from project to project, setting-up automatic notifications triggered by events to gain early warnings, or pulling public daily weather data into construction site daily reports.

Ease of integrations

All of Primavera Unifier’s APIs are included with the Unifier license and are available to customers, partners, and consultants at no additional cost. All Unifier APIs are RESTful, providing a fast, flexible, scalable, and easy to develop experience based on industry standards. Because Unifier APIs are standards-based, the APIs can be leveraged with virtually any other system, including direct point to point, customer provided middleware platforms, Oracle Integration Services, Oracle Construction and Engineering’s Project Integration Framework (PIF), as well as third-party middleware. Unifier also supports data import and export, ensuring you have access to your data in usable formats.

In addition to Unifier’s numerous and mature APIs, Oracle Integration Services for Unifier enables event-based integrations based on actions within Unifier. Using prebuilt adapters, Oracle Integration for Unifier connects business applications 4-10X faster in comparison with traditional integration coding, which typically involves complex coding and developer resources to design, build and maintain. Numerous free Oracle Integration Services recipes are accessible for download from the [Oracle Integration marketplace](#).

Oracle’s own consulting services and our extensive partner network are available to provide any needed configuration and integration services.

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