EQUIV Technologies

What’s Changed in Unifier (25.1-25.9)

Currently Deprecated Functionality

Request for Bid Business Process – Public Bidding Only

- **Originally Deprecated:** 23.5
- **Planned Removal:** 26.4
- Customers using the RFB type of BP are not using the Public Bidding option, as it would send invitations to all Vendors. This functionality is therefore deprecated.

AutoVue

- **Originally Deprecated:** 24.10
- **Removal Date:** Not yet announced
- AutoVue is still supported and can continue to be used while deprecated. Applies to older Unifier licenses.

All SOAP Services

- **Originally Deprecated:** 23.10
- **Removal Dates:**
    - **On-Premises:** 25.12
    - **Cloud:** 26.10
    - Oracle initially planned to remove SOAP in 25.10 but extended support based on customer feedback:From 25.10, **new** cloud customers will be blocked from using SOAP.
    - Existing cloud customers can continue using SOAP until 26.10.
    - On-premises customers will lose SOAP support starting 25.12.
- Customers should migrate to REST services.

Schedule Manager

- **Originally Deprecated:** 23.5
- **Transition Timeline:**

    - **25.10:** No new Schedule Sheets can be created. Existing functionality remains for current sheets and where sheets are used as data sources (e.g., Cash Flow, Cost Sheet).
        - Schedule Manager & Resource Manager removed from uDesigner but still available in Shells/Templates.
        - "New" and "Copy" buttons removed from Schedule Manager logs.
        - New shells created via templates will **not** contain Schedule Sheets, even if they exist in the template.
    - **26.10:** All Schedule Sheets become **read-only**.
        - Functionality that updates Schedule Sheets will be removed (including API-triggered updates, Scope Manager updates, etc.).
- Oracle recommends moving to the **Activity Sheet**.

Programs

- **Originally Deprecated:** 23.5
- **Removal Timeline:**
    - Initially planned removal in 25.10.
    - Updated in 25.8 to remove in 26.4.
- Reporting within Programs was kept to give customers more time to move reports to Shells. All Program functionality – including reporting – is now deprecated.

Key Timeline at a Glance

Functionality	Deprecated Since	Removal Version (Cloud)	Removal Version (On-Prem)
RFB – Public Bidding Only	23.5	26.4	26.4
AutoVue	24.10	TBD	TBD
SOAP Services	23.10	26.10	25.12
Schedule Manager	23.5	26.10	26.10
Programs	23.5	26.4	26.4

Unifier 25.8 and Unifier 25.9

No New Features

Unifier 25.7

Integration

CMx REST Call for SOAP Replacement

REST support for new CMx records is now added, enabling the creation of records through REST services.

Unifier 25.6

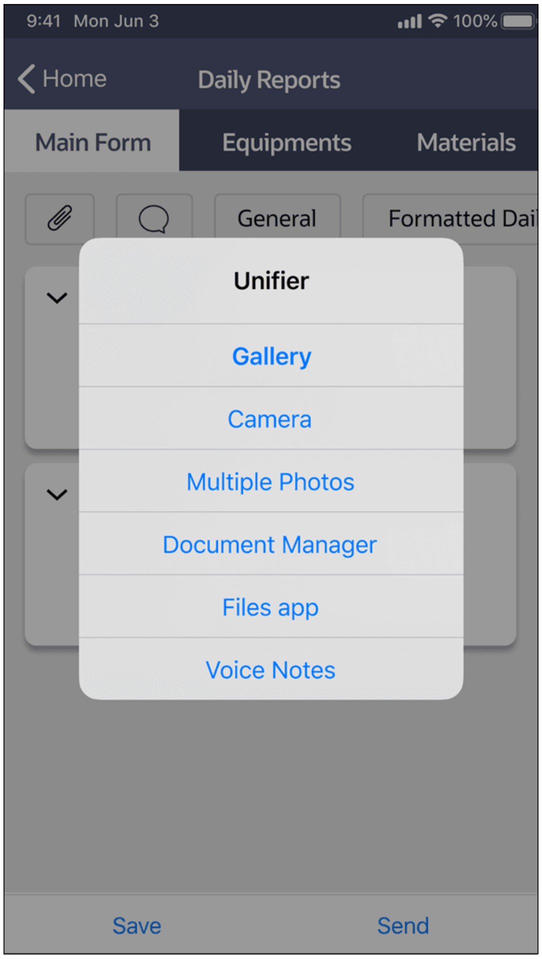
No New Features

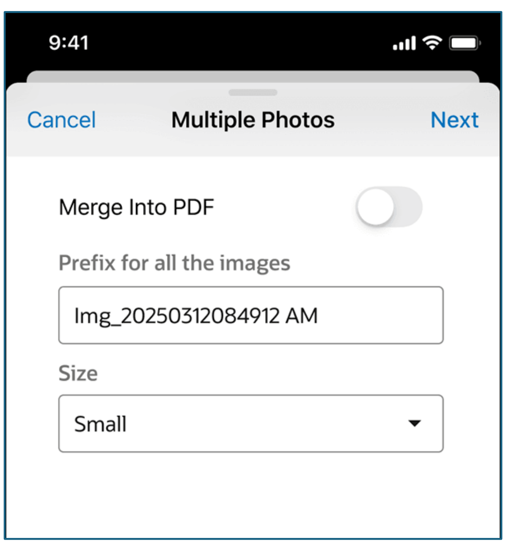
Unifier 25.5

Mobile

Multi-Image Capture and PDF Generation

Attach up to 10 images with your mobile device's camera, uploading them as individual files or a merged PDF included in a business process record. Options include a settable prefix for easy identifcation and selectable image size. In the record Attachment or Document Manager menus, select the new Multiple Photos option. This feature is available for both Android and iOS platforms.





Manually Triggered Business Process Auto-Creation

Manually trigger the auto-creation of a business process record from within the mobile app. This functionality already existed in the web app; it is now available in the mobile app as well. If the user has permission to create and update records, the system creates a record in the destination business process, and the newly created record appears with all required data fields populated correctly.

In the source business process record, the BP Creator data element can display a hyperlink to the newly created record. This feature is available for both Android and iOS platforms.

Unifier 25.4

Visualization

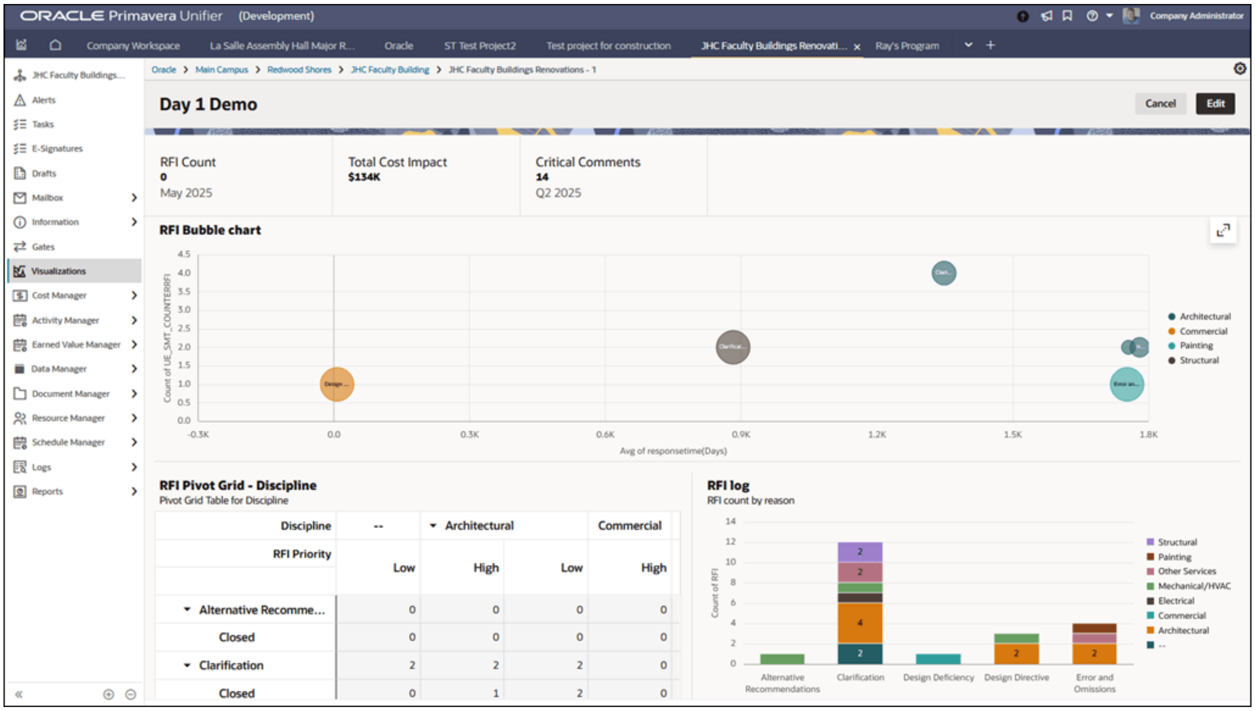
Data Visualization in Unifier

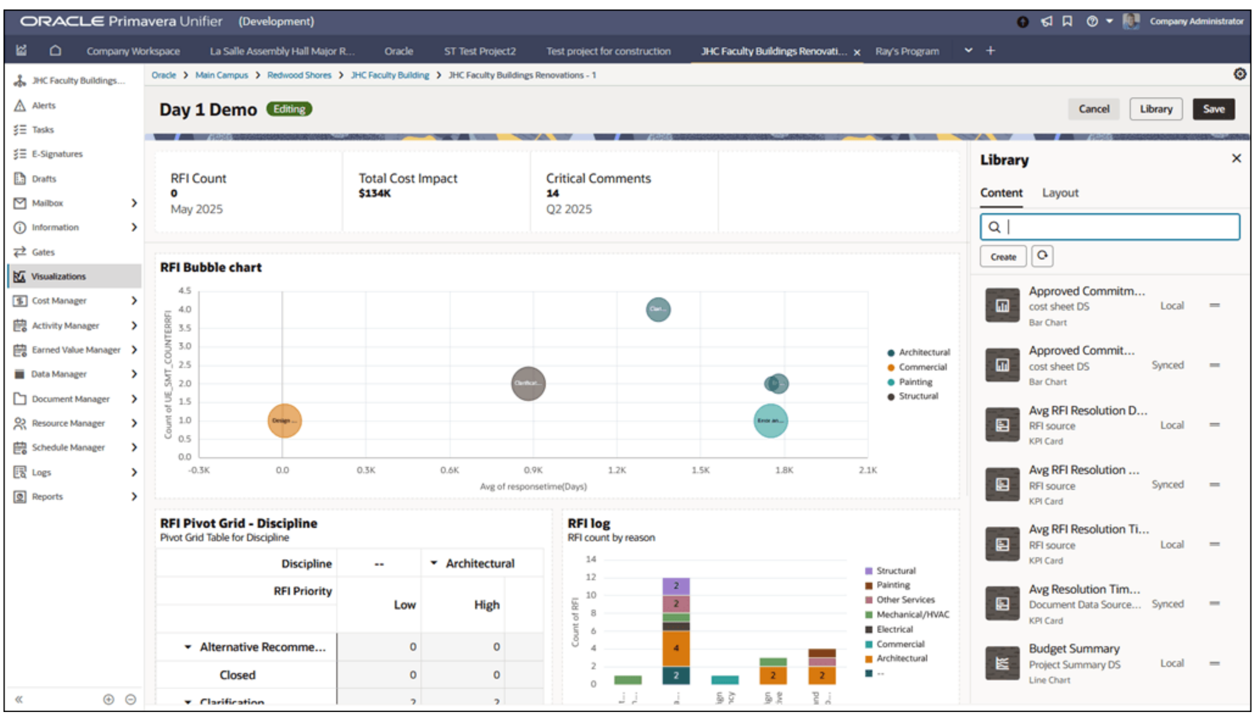
Visualizations provide a dynamic way to view critical information and key insights from data sources derived from business processes and data views.

Setting up visualizations is a multi-step process:

- Data sources: Create and manage Data Sources using Line Item Business Processes or Data Views.
- Build a content library using a variety of visualization types: Bar chart, line & area charts, pie chart, bubble chart, KPI card, pivot grid, and table.
- Configure visualizations in shells or shell templates using different layout options to organize content effectively.
- Optionally assign a location for viewing visualizations from different locations in User mode.
- Provide access to shell users and groups based on project needs.

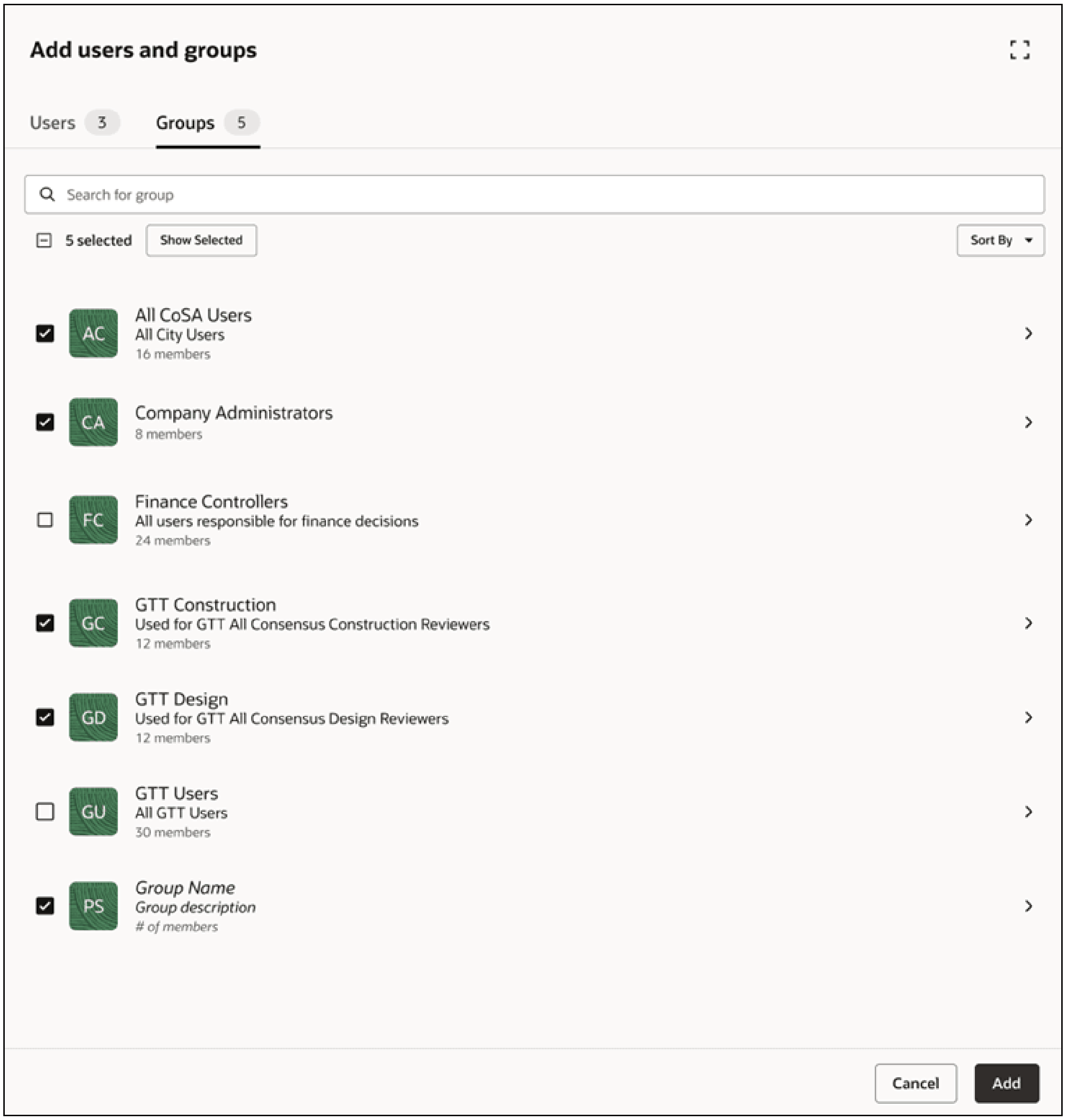
This feature enables project teams to analyze data visually and make informed decisions using customizable, data-driven insights.





Manage Visualization Access - User/Group Picker

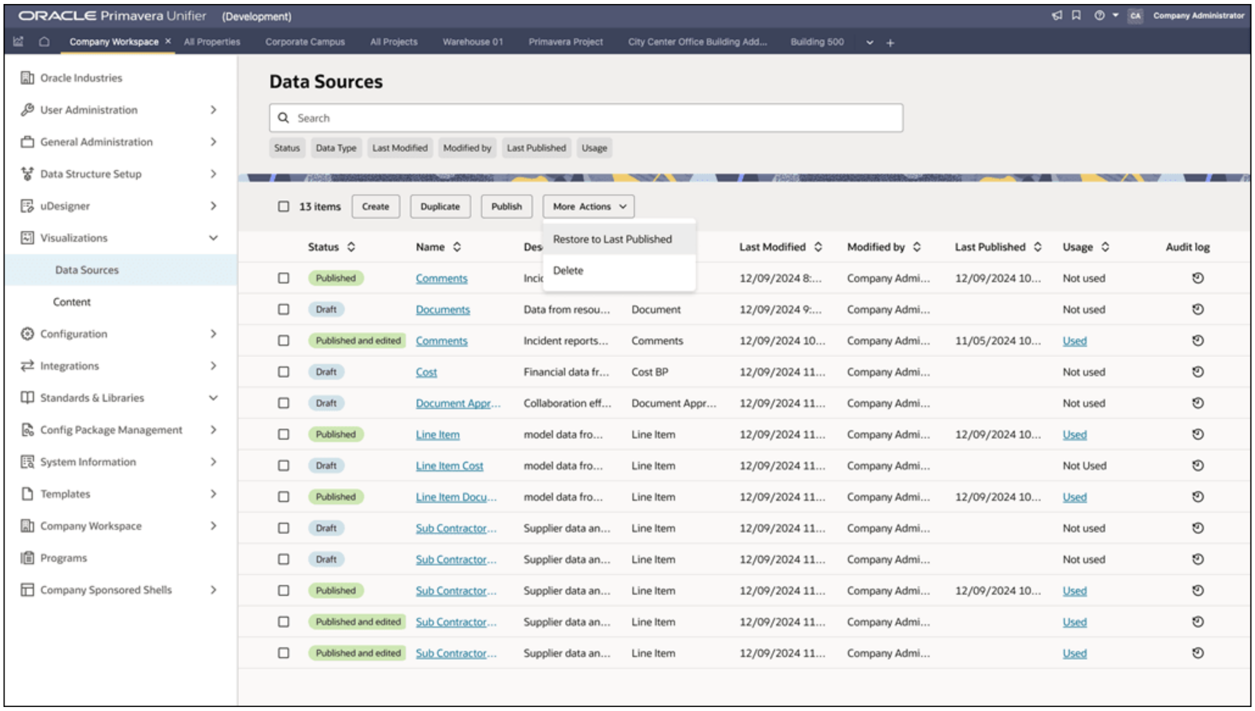
There is a new interface when adding a user or group in the Permissions page of a data visualization at the project level. While in a project, switch to Admin mode, select Setup, and then Visualizations. From the Action menu, select Permissions, and then select Add User or Group. Choose either Users or Groups and add them using the checkboxes.



Data Sources for Visualizations

Create data sources based on existing data views and line item business processes that do not have special pickers.

View the Data Sources log in the new Visualization navigation node in the Company Workspace.

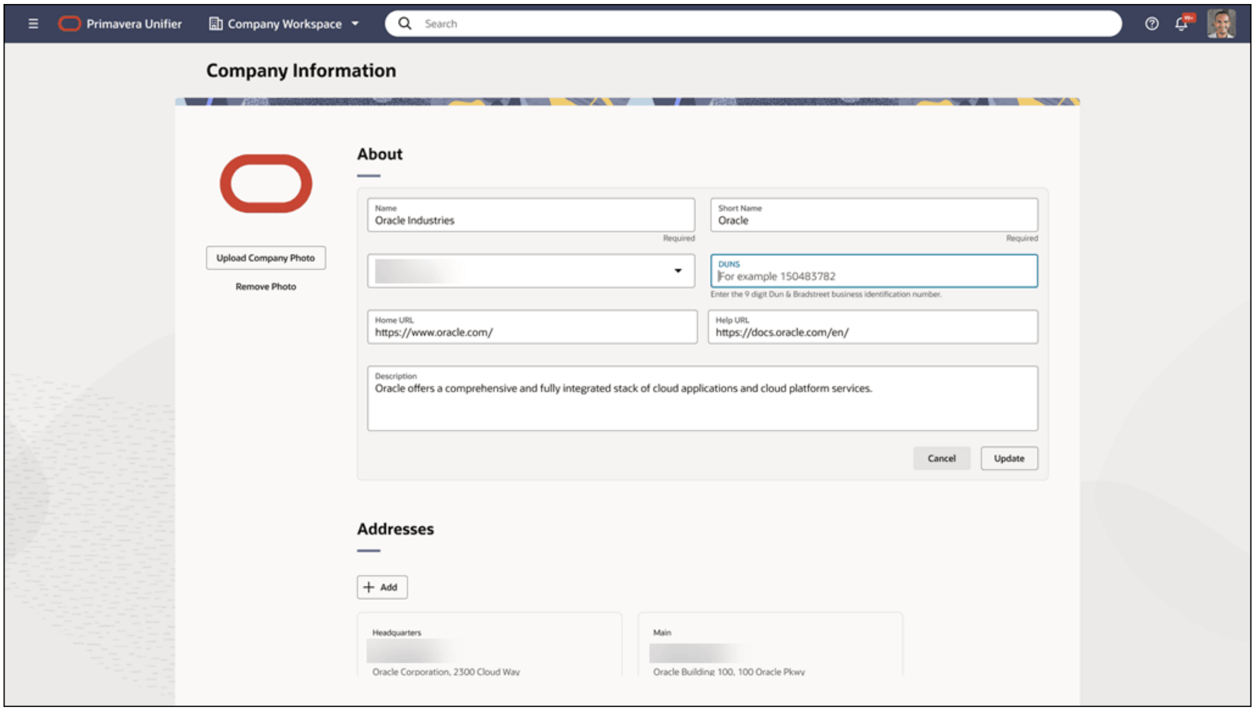


User Interface

Owner Company User Interface Upgraded

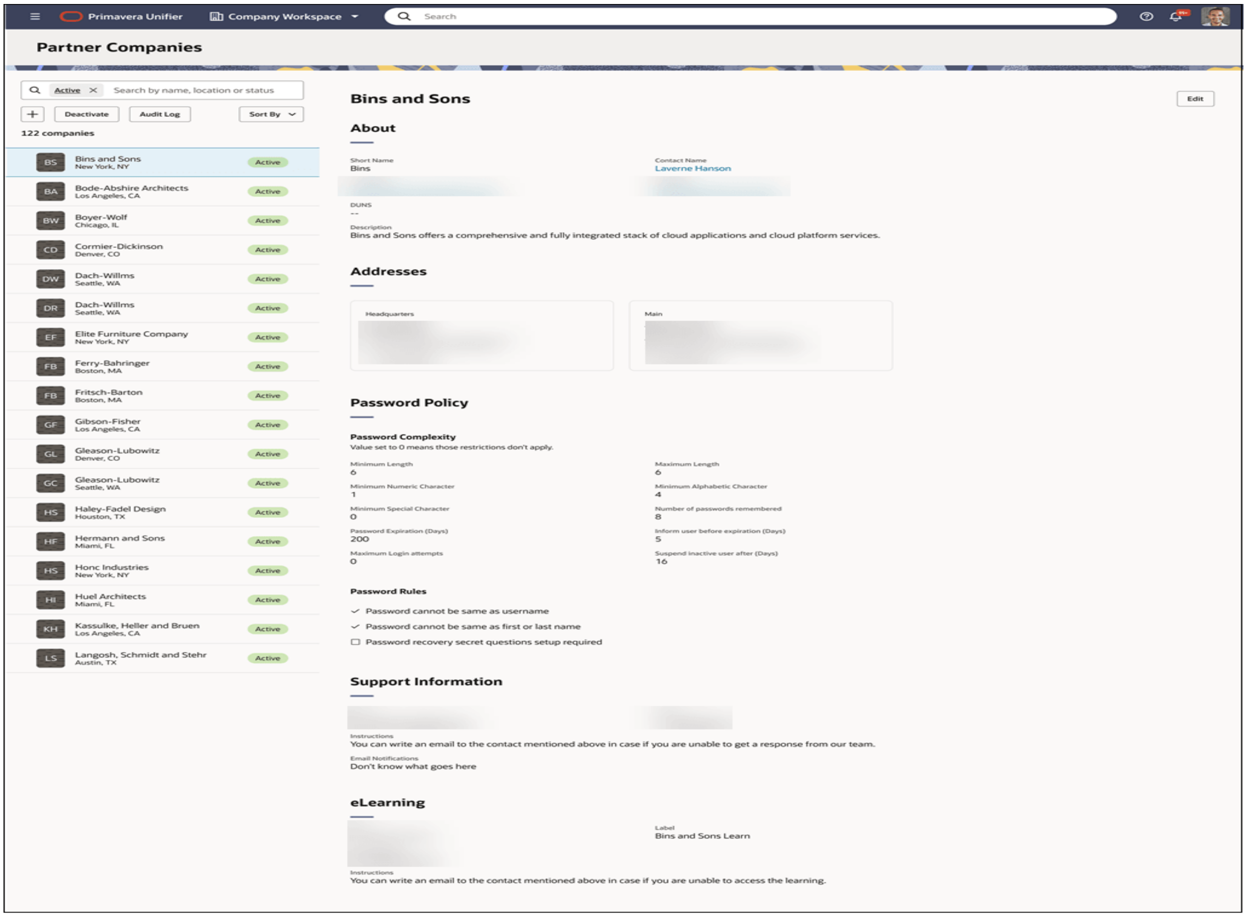
The user interface for Company Attributes is upgraded. Click on the company name in the Company Workspace to display the Company Information page, where you can view basic company information. Select the Company Settings node to edit/update company details.

In Access Control, the Company Properties module is replaced with two new modules titled Company Information and Company Settings.



Partner and Member Companies User Interfaces Upgraded

The user interfaces for Partner Companies and Member Companies are upgraded. All prior functionality remains, but appearances are changed to provide an improved user experience.



Changes to E-Signatures

All instances of Adobe Sign are changed to Acrobat Sign to align with Adobe's rebranding.

Access control to e-signatures is moved from the Company Settings to the Integrations node, where there are separate nodes for Acrobat Sign and DocuSign.

General Configuration Hides All to Modify Record for Non-Workflow Business Processes

In the General tab of a business process configuration window, the checkbox that enables or disables Allow to modify record is now hidden for non-workflow business processes. This avoids a situation where an administrator might check that box for a non-workflow business process without realizing that it is not applicable to such BPs.

Request for Bid

RFB Mail Notification Details

Outgoing and incoming bid request emails now contain predefined data elements above the message, allowing both requestor and bidder to more easily identify the context of the email. Outgoing emails from the requestor to the bidder include record number and title. Incoming emails from the bidder to the requestor include record number, title, project number, project name, bidder company, bidder first name, bidder last name, and bidder email address.

RFB Custom Email Notification Subject Lines

RFB email subject lines can be configured by an administrator for notifications, including login information, bid information, and due date changes. This enhancement supports multiple languages. It enables quicker reading of the nature and source of the email, along with any actions that may be required.

Improvements to RFB Mail Log

The Proposal Management mail tab within an RFB business process is enhanced with the following features:

- The log includes the name of the vendor company with which the invitee is associated.
- A find on page function is included.
- Unread messages are now displayed in bold text.

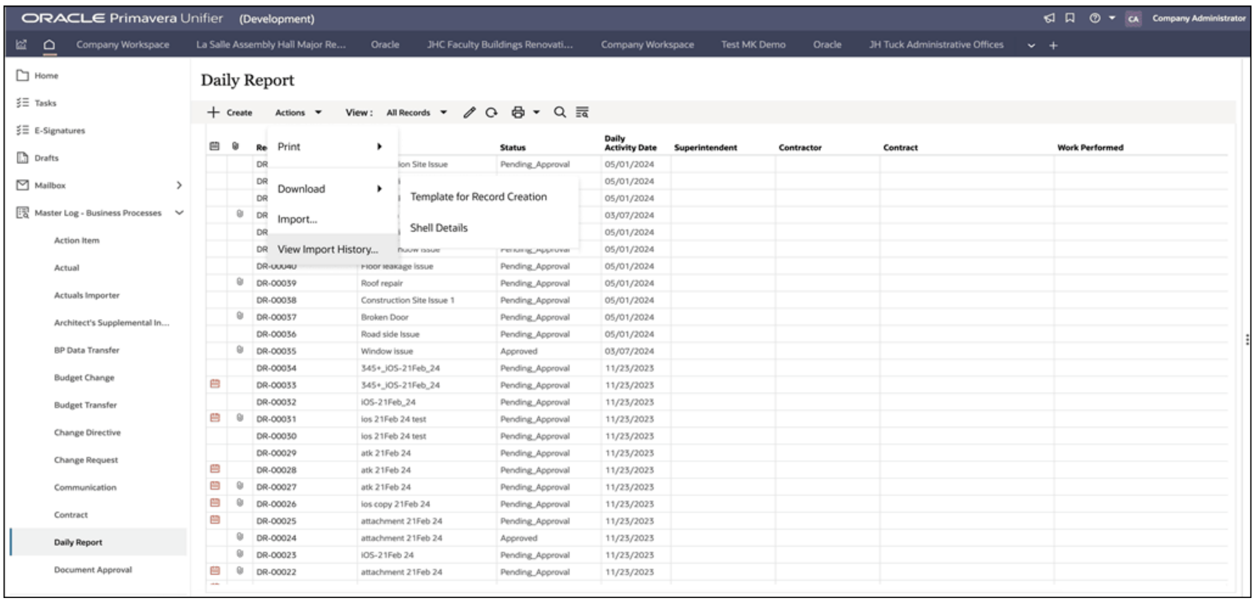
Phone Number Optional in RFB Proposal Management

In the Proposal Management tab of a Request for Bid, the phone number is no longer a required field. When the phone number is omitted, the phone number field will not be included in the Bid Invitation email notification.

Import / Export

Import Records Across Projects - CBS Cost Business Process

Use an Excel spreadsheet import to create business process records across shells in CBS Cost BPs in the Master Log. Export a template to create business process records across projects. Download details of all the shells in the company so that you can use shell details, such as Shell Number and Shell Name when entering data across projects.

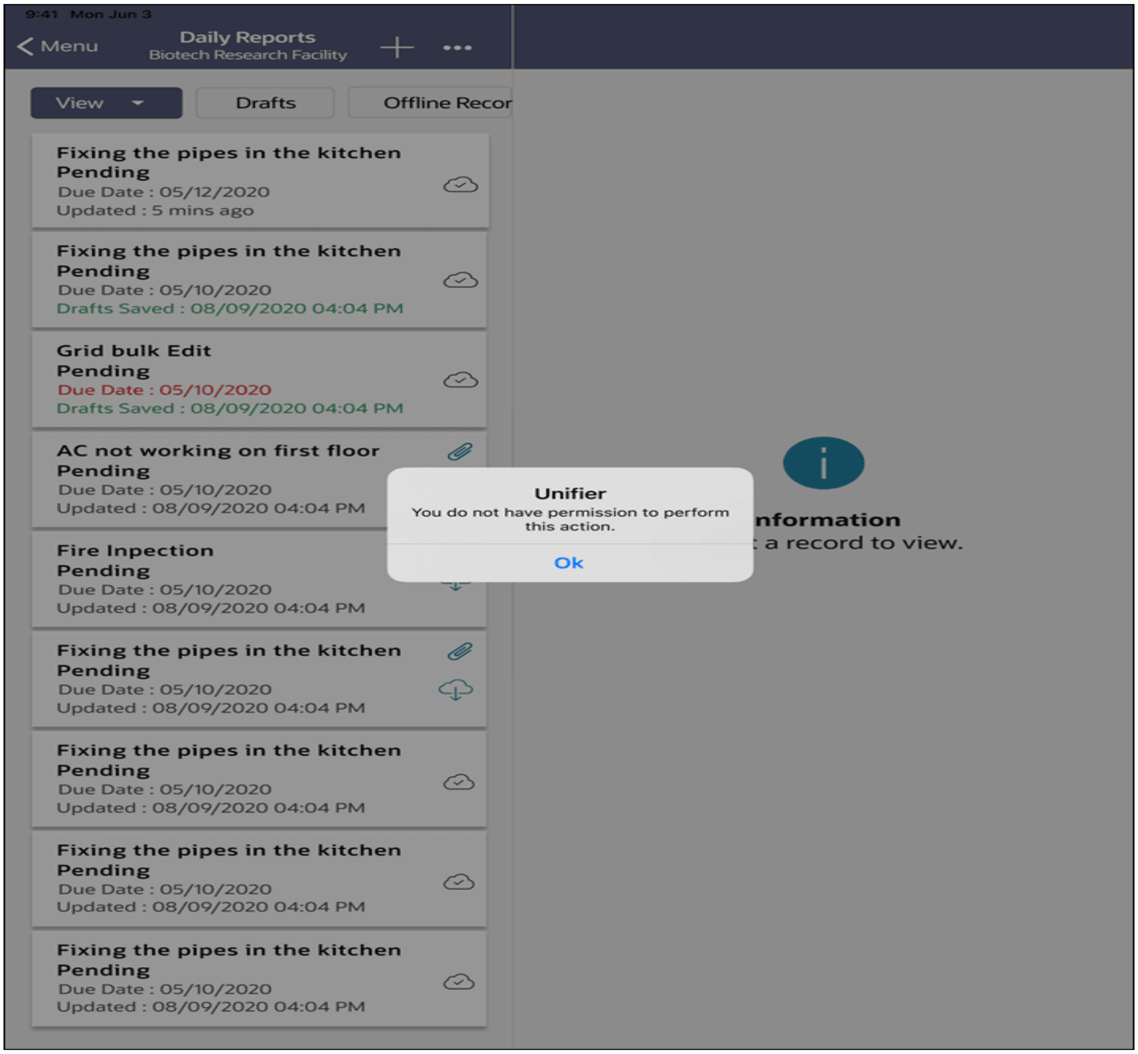


Permissions

Permission for Business Process Record Copy

A control setting to Disable Record Copy for specific business processes is now provided for both the Unifier web app and the mobile app.

A user who attempts to copy a BP contrary to permissions will see an alert and the operation will be canceled.



Reports

Enable Permission-Based Filtering in Custom Reports

The following parameters will be available for all custom prints and reports:

- uuu_p_userid
- uuu_p_userCompanyID

For effective use, apply these parameters within an external data model, allowing them to be used directly in the data query.

More Descriptive File Names for Exported User-Defined Reports

When you export a user-defined report from a project, the file name will include the project number and report title. A UDR exported from the company workspace shows only the report title.

Shell Management

Exclude Inactive Template Options on Shell Creation

When creating a new shell or shell template using the From Template or From Shell option, Unifier will omit inactive templates.

Shell Status Defaults to Active

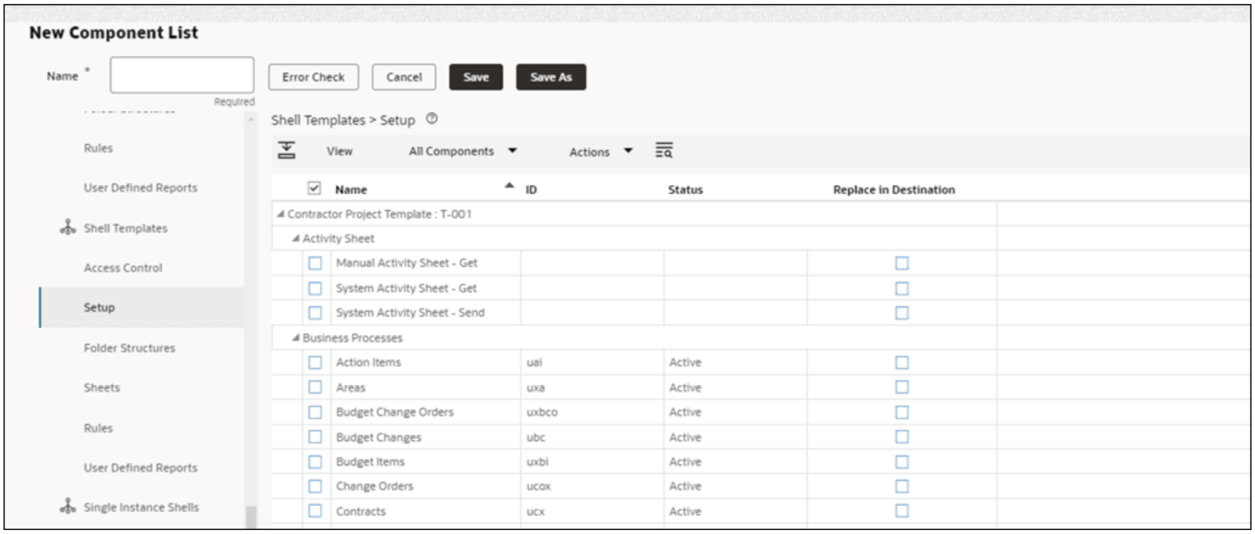
The default status of a newly created shell is Active, rather than On-Hold. This default value applies regardless of how the shell is created – via the user interface, REST API, or through the Project Request BP.

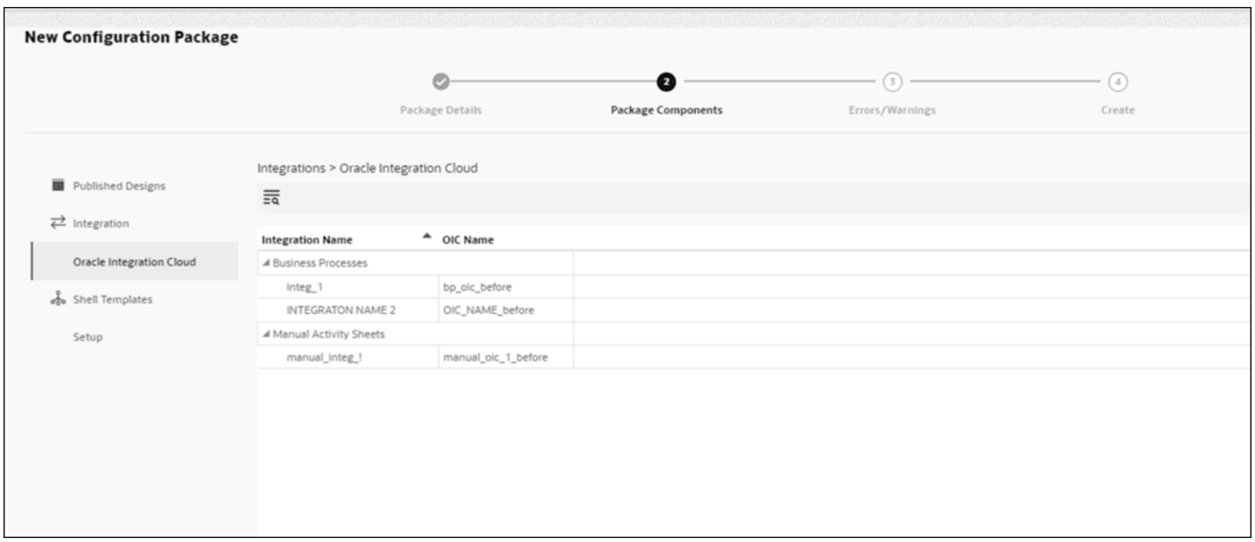
The default value is over-ridden only if the status field has been set by the user or if the status is specified in the copy_from_shell_template for REST API copying.

Integration

Configuration Package Enhancements

A Component List can now include the Activity Sheet Setup as well as OIC Configuration - Recipes. A resulting Configuration Package will also include these objects, as well as OIC Integration Setup and Record Properties.





Retrieve SOV Data via REST API

You can now use REST API services to get data for General Spends, Payment Applications, and Summary Payment Applications SOV. This replaces GetSOV SOAP WebServices.

Task Reassignment via REST API

Reassign record tasks for both active and inactive users in either a shell or the company workspace using REST API. A failed reassignment attempt will return an error message. This reassignment requires that the record is not in the initiation step, does not have a complete status, and is neither closed nor terminated.

The integration user requires Business Process Services settings of Full Access and Update.

Delete Document Manager Files via REST API

You can now delete files in the Document Manager via REST API call. This functionality mirrors what is available from the Unifier browser application user interface.

Documents

Bluebeam Cloud Migration - Day 1 Impact

Because Studio Prime integrations are approaching EOL, we have migrated to Bluebeam Cloud.

- For existing users who have enable Bluebeam, the 25.4 update will point the Unifier environment to a new Bluebeam client ID.
- Users performing any Bluebeam operations in Unifier will be required to re-consent to OAuth Scopes with new Authentication/consent dialog pages.

If Virus Scan is enabled in the environment, Unifier will check files for infections before adding them to a Bluebeam session. Infected files and those pending scanning will not be added. A user attempting to download a file which is pending for scan will see an alert and a confirmation dialog.

Cash Flow

Manual Row Enhancement for Cash Flows

Manual override in curves now offer the ability to distribute unused or overspent actuals to forecast from prior periods. This functionality exists for profile based rows in curves and will be extended to manual override rows. It avoids situations where unassigned costs appear each month on the curve because exact forecast amount was not spent.

Define Cash Flows at Intermediate Summary CBS Levels

Create a cash flow based on intermediate Summary CBS levels when a cost structure has multiple CBS levels. This functionality extends to cash flows created through the API as well as those in shell templates. The intermediate Summary CBS level cashflow can be included with a configuration package or add-on package when it is added to a shell template.

Unifier 25.3

Mobile

Unifier Viewer for Android

Unifier for the Android platform now supports the following file formats:

pdf, doc, docx, docm, dot, dotx, dotm, xls, xlsx, xlsm, xlt, ppt, pptx, pptm, pot, pps, jpg, jpeg, png, jfif, tif, xlsb, xltx, xltm, potx, potm, ppsx, ppsm, vsd, vsdx, pub, dwg, dwf, dxf, dgn, svg, bmp, wmf, emf, gif, jp2, jpc, rtf, odt, ods, odp, html, msg, eml, txt, and csv.

These document types can be opened with or without markups.

Unifier 25.2

Integration

Microsoft 365 Integration

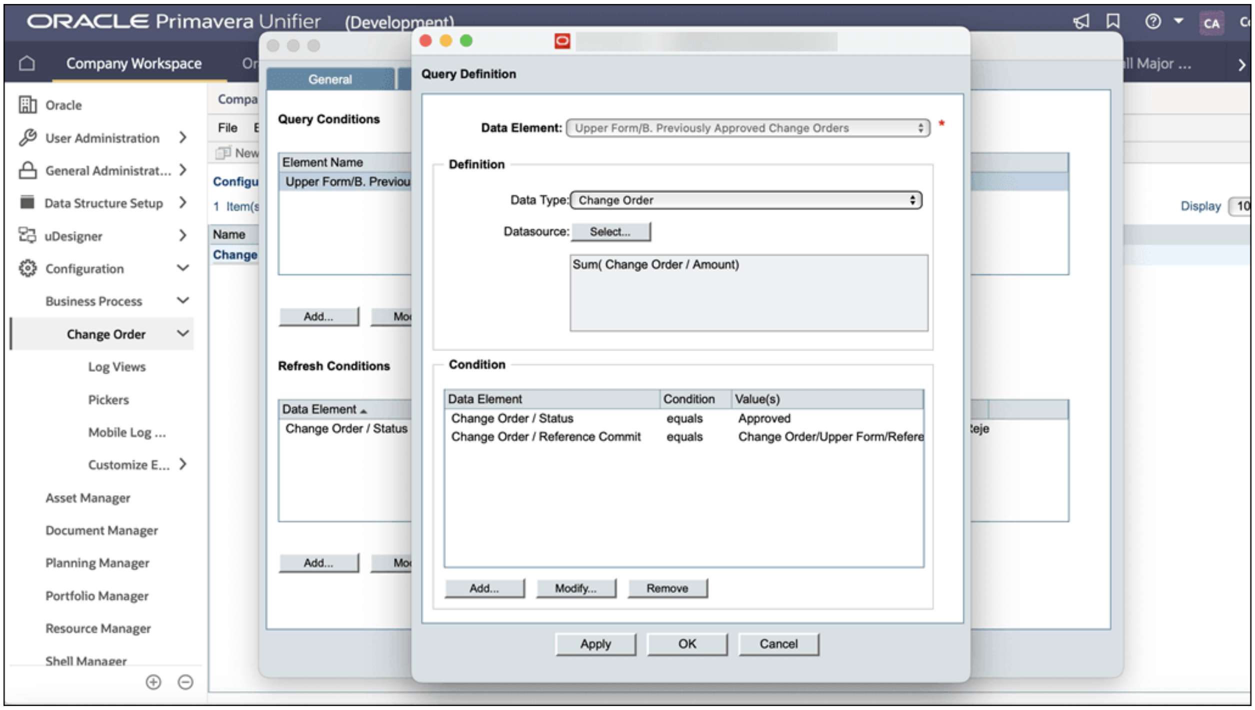
An administrator can now control whether Microsoft 365 is available to edit documents directly from within the Document Manager and business processes.

A check-box labeled Enable Microsoft 365 Integration can be set in the General tab of the Company Properties window.

Mobile

Query-Based Data Elements for Mobile Apps

Query-based data elements are now available in the Unifier app for both Android and iOS. Functionality is identical to that of the Unifier web app. View/access/manage data in QBDEs based on configured query conditions, and see the value calculated when a reference picker trigger element is updated from a query-based tab.



Unifier 25.1

Mobile

Download User Profile to Device Contacts from a Project Directory

Download the profiles of selected contacts from a Project Directory directly to a device's contact list. This requires that an administrator set appropriate permissions. Navigate to a workspace's Project Directory and tap the download icon at the upper right corner. A notification provides confirmation of success.