

PROJECT TEAM

Oracle Unifier Business Process User Guide



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1. Business Process Overview

Shell Level	Project Level
Workflow	No
Connected BPs	Shell Request Shell Access Request
Partner Access	No

1.1 Understanding Project Team

The Project Team Business Process (BP) will be used to represent all project team members within Project-level shells and indicate specific roles (user groups) associated with each team members. All requests for project and group membership from users who are not the Project Manager must be captured in the Shell Access Request BP; approval will result in creation of a Project Team record for the requested user.

This is a non-workflow BP, however in an instance where PM or Admin edits the users record to change the status to inactive, an email is auto generated to notify the PM/Admin of the change.

1.2 User Groups & Permissions

Role	Permissions	Shell Level
Project Manager	Authorized to create, view and edit record	Project Level Shell
Admin - Organization	Authorized to create, view and edit record	Project Level Shell
All Project Users	Authorized to only view the record	Project Level Shell

1.3 Business Process Flow

Workflow Step	Summary
Create	The initiator creates the Project team record. Project team record can also be auto created from shell access request
View	User can view the record and will not be able to edit

**Edit**

User can edit the record

2. Step-by-Step Instructions

2.1 Create Project Team Record

User Role(s): - Project Manager, Admin - Organization

Explanation: - The user can create a new project team record and add required details in the form

1. In the left Navigator, click **Information > Project Team**.
2. Click **+ Create**.

The screenshot shows the 'Project Team' interface. On the left, a vertical navigator has a 'Project Team' item highlighted with a red box. The main area displays a table of records with columns: Record No., Creator, Creation Date, Status, User, and User Group. A '+ Create' button is highlighted with a red box in the top toolbar.

Record No.	Creator	Creation Date	Status	User	User Group
PT-00017	Company Administrator	10/17/2024 05:30 AM	Active	Pilli Anusha- Constructi...	BU Project Controls Spe...
PT-00016	Company Administrator	10/17/2024 05:30 AM	Active	Pilli Anusha- Constructi...	Change Control Approv...
PT-00015	Company Administrator	10/17/2024 05:30 AM	Active	Pilli Anusha- Constructi...	Construction Managers
PT-00014	Company Administrator	10/17/2024 05:27 AM	Active	Pilli Anusha- Constructi...	Construction Managers
PT-00013	Company Administrator	10/17/2024 05:27 AM	Active	Pilli Anusha- Constructi...	BU Project Controls Spe...
PT-00012	Company Administrator	10/17/2024 05:27 AM	Active	Pilli Anusha- Constructi...	Change Control Approv...
PT-00011	Company Administrator	08/27/2024 08:32 AM	Active	Srihariprasath Bharathi- ...	Construction Managers
PT-00010	Company Administrator	08/27/2024 06:22 AM	Active	Pooja Seth -View All Users	Construction Team
PT-00009	Company Administrator	08/27/2024 06:21 AM	Active	Pooja Seth -View All Users	Construction Team
PT-00008	Company Administrator	08/27/2024 06:19 AM	Active	Rajsrldhar Jayaseelan	Construction Managers
PT-00007	Rashmi Singh-Project M...	05/29/2024 01:02 AM	Active	Rashmi Singh-Project M...	Project Managers

3. In the **General** section of the **Create Project Team** window, enter text in the required field Status.
 - a. Select **Status** from dropdown values as Active or Inactive



Project Team

General

Record No

Creator

Record Last Update Date

Status *

Creation Date

4. In the **User Details** section of the **Create Project Team** window, select the User Group from dropdown value.
- Select **User Group** from dropdown values

User Details

User Group *
 Required

User

Job Title

E-Mail

Company

Mobile Phone

5. In the **User Pickers** section of the **Create Project Team** window, select the applicable user groups
- Select **User Group** from dropdown values

User Pickers

All Company Users

All Project Users *
 Required

BU Project Controls Specialist *
 Required

Change Control Approvers

Change Control Coordinators

Construction Managers

Note: Mandatory fields in this section will depend on the user group which user select in above step

6. Click on **Submit** after filling all necessary fields

Project Team

Save More Actions **Submit**

General

Record No
PT-00015

Creator

Record Last Update Date
10/18/2024 08:11 AM

Status *

Creation Date
10/17/2024 08:17 AM



2.2 View Project Team Record

User Role(s): - Project Manager, Admin – Organization, All Project Users

Explanation: - The user can view project team record and see the required details in the form

1. In the left Navigator, click **Information > Project Team**.
2. Click on relevant project record to open

Tasks

Notifications

Drafts

Shell Access Re...

Document Manager >

Information >

Directory

General

Project Team

Project Planning a...

Project Team

Actions View: All Records

Record No.	Creator	Creation Date	Status	User	User Group
PT-00015	Company Administrator	10/17/2024 05:17 AM	Active	Pilli Anusha- Construction Quality	Change Control Approv...
PT-00014	Company Administrator	10/17/2024 05:17 AM	Active	Pilli Anusha- Construction Quality	Construction Managers
PT-00013	Company Administrator	10/17/2024 05:17 AM	Active	Pilli Anusha- Construction Quality	Construction Managers
PT-00012	Company Administrator	09/30/2024 06:33 AM	Active	Srihariprasath Bharathi- Construction Managers	Construction Managers
PT-00011	Company Administrator	09/30/2024 06:33 AM	Active	Srihariprasath Bharathi- Construction Managers	Construction Managers
PT-00010	Company Administrator	09/30/2024 06:33 AM	Active	Hariharanath Maganti- Partner Contractor	Partner Contractors
PT-00009	Company Administrator	09/30/2024 06:30 AM	Active	Srihariprasath Bharathi- Construction Managers	Construction Managers
PT-00008	Company Administrator	06/05/2024 05:44 AM	Active	Company Administrator	All Project Users
PT-00007	Company Administrator	06/03/2024 10:55 AM	Active	Srihariprasath Bharathi- Construction Managers	Construction Managers
PT-00006	Company Administrator	05/30/2024 06:28 AM	Active	Srihariprasath Bharathi- Construction Managers	Construction Managers
PT-00005	Company Administrator	04/02/2024 10:56 AM	Active		Partner Contractors

3. Project team record is displayed

Project Team

General

Record No

PT-00015

Creator

Company Administrator

Record Last Update Date

10/17/2024 05:17 AM

Status

Active

Creation Date

10/17/2024 05:17 AM

User Details

User Group

Change Control Approvers

Job Title

Contractor - Accenture

Company

Southern Company

User

Pilli Anusha- Construction Quality

E-Mail

X2PNANUS@southernco.com

Mobile Phone

User Pickers

All Company Users

All Project Users

Pilli Anusha- Construction Quality

2.3 Edit Project Team Record



User Role(s): - Project Manager, Admin – Organization

Explanation: - The user can edit project team record and edit the required details in the form

1. In the left Navigator, click **Information > Project Team**.
2. Click on relevant project record to open

Record No.	Creator	Creation Date	Status	User	User Group
PT-00015	Company Administrator	10/17/2024 05:17 AM	Active	Pilli Anusha- Construction Quality	Change Control Approv...
PT-00014	Company Administrator	10/17/2024 05:17 AM	Inactive	Pilli Anusha- Construction Quality	Change Control Approv...
PT-00013	Company Administrator	10/17/2024 05:17 AM	Active	Pilli Anusha- Construction Quality	Construction Managers
PT-00012	Company Administrator	09/30/2024 06:33 AM	Active	Srihariprasath Bharathi- Construction Managers	Construction Managers
PT-00011	Company Administrator	09/30/2024 06:33 AM	Active	Srihariprasath Bharathi- Construction Managers	Construction Managers
PT-00010	Company Administrator	09/30/2024 06:33 AM	Active	Hariharanath Maganti- Partner Contractor	Partner Contractors
PT-00009	Company Administrator	09/30/2024 06:30 AM	Active	Srihariprasath Bharathi- Construction Managers	Construction Managers
PT-00008	Company Administrator	06/05/2024 05:44 AM	Active	Company Administrator	All Project Users
PT-00007	Company Administrator	06/03/2024 10:55 AM	Active	Srihariprasath Bharathi- Construction Managers	Construction Managers
PT-00006	Company Administrator	05/30/2024 06:28 AM	Active	Srihariprasath Bharathi- Construction Managers	Construction Managers
PT-00005	Company Administrator	04/02/2024 10:56 AM	Active		Partner Contractors

3. Click on **Edit** once **Project team** record is displayed

Project Team

More Actions **Edit**

General

Record No: PT-00015
Creator: Company Administrator
Record Last Update Date: 10/17/2024 05:17 AM

Status: Active
Creation Date: 10/17/2024 05:17 AM

User Details

User Group: Change Control Approvers
Job Title: Contractor - Accenture
Company: Southern Company

User: Pilli Anusha- Construction Quality
E-Mail: X2PIANUS@southernco.com
Mobile Phone:

4. In the **General** section of the **Create Project Team** window, enter text in the required field Status.
 - a. Select **Status** from dropdown values as Active or Inactive

Project Team

General

Record No:

Creator:

Record Last Update Date:

Status: **Active** (dropdown menu)

Creation Date:

5. In the **User Details** section of the **Create Project Team** window, select the User Group from dropdown value.
 - a. Select **User Group** from dropdown values



User Details

User Group *
Select
Required

Job Title

Company

User

E-Mail

Mobile Phone

6. In the **User Pickers** section of the **Create Project Team** window, select the applicable user groups
- Select **User Group** from dropdown values

User Pickers

All Company Users

All Project Users *

Type a Name...
Required

BU Project Controls Specialist *

Type a Name...
Required

Change Control Approvers

Change Control Coordinators

Construction Managers

Note: Mandatory fields in this section will depend on the user group which user select in above step

7. Click on **Submit** after filling all necessary fields

Project Team

Project Team

Save More Actions **Submit**

General

Record No
PT-00015

Creator
Company Administrator

Record Last Update Date
10/18/2024 08:11 AM

Status *
Active

Creation Date
10/17/2024 08:17 AM

2.5 Related Business Processes

The Project Team Business Process (BP) integrates with other business processes to support efficient team management within Oracle Unifier. These related processes streamline the automation of project team setup, ensure consistency across project records, and maintain alignment between access management and stakeholder engagement.

Business Process	Summary
Shell Access Request	Auto-creates a corresponding Project Team record when the workflow is completed with an access type of "Add." This integration eliminates manual data entry and accelerates user onboarding into the project environment.



Stakeholder Register

Stakeholder Register records pick a user/role from the Active Project Team records.



3. Business Unit Guidance

This user guide offers baseline instructions. For localized guidance, users should visit their respective business unit portals (accessible via the link below).

[EPPM Training Homepage](#)

4. Appendix

4.1 Getting Help & Support

If you encounter any issues or require assistance, there are two primary channels available:

Business Unit Administrator	IT Support
For process-related inquiries or issues, users can reach out to the designated Business Unit Administrator. They are equipped to provide guidance and support specific to the business process within Oracle Unifier.	For technical issues or challenges beyond the scope of the Business Unit Administrator's expertise, users can contact IT Support. They can assist with platform-related technical difficulties, account access problems, or any other IT-related concerns.