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**PRIMAVERA**

**P6 Team Member User's Guide  
P6 EPPM Release 8.2**

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# Copyright

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Oracle Primavera P6 Team Member User's Guide

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# Getting Started

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## About P6 Team Member Applications

The P6 Team Member suite of applications is designed for individual contributors, or team members, to record status on their tasks without the need to learn an enterprise project management application. The P6 Team Member applications are P6 Team Member for iPhone app, P6 Team Member Web, and E-mail Statusing Service. These applications provide quick, convenient, and easy access to assigned tasks using the platform or device that accommodates your line of work.

Your project manager uses P6 to create and update the project schedule and task list. Depending on the project preferences the manager selected when creating the project in P6, the updates you make in P6 Team Member applications will apply immediately, or they may require approval before updates are applied to the project.

If you are an activity owner or you are associated with a resource assigned to tasks in P6, all P6 Team Member applications enable you to:

- ▶ View only your assigned tasks.
- ▶ Provide status on your tasks. The project manager customizes the status fields in your view. These fields can include time spent, time left, % complete, remaining duration, and start and finish dates.

### P6 Team Member for iPhone App

You can use the P6 Team Member for iPhone app to:

- ▶ Modify your view to group your task list by project and by current status, including Active, Overdue, Starred, or Completed.
- ▶ Mark a task with a star to signify importance. You can view all starred tasks in one list when you view your task list by the Starred option.

- ▶ Communicate with the project manager or other team members through e-mail. If a picture helps illustrate your message, you can also take a picture with your iPhone and attach it to your e-mail.
- ▶ Work with multiple tasks at one time. You can star or mark complete one or more tasks when in edit mode.

### P6 Team Member Web

You can use P6 Team Member Web to:

- ▶ Modify your view to filter your task list by project and by current status, including Active, Overdue, Starred, or Completed.
- ▶ Mark a task with a star to signify importance. You can view all starred tasks in one list when you view your task list by the Starred option.
- ▶ View a list of all your steps for a task. You can enter the % complete to show progress and mark as complete when you finish a step.
- ▶ View predecessor and successor tasks and send task owners e-mail.
- ▶ Communicate with the project manager or other team members through e-mail.

### E-mail Statusing Service

You can use E-mail Statusing Service to:

- ▶ Request a list of your current tasks through e-mail using the e-mail account associated with your P6 user account. You can request a filtered list of tasks by project, time frame, or by current status, including Active, Due, Overdue, Completed, or Starting.
- ▶ Reply to the e-mail you receive with your task list, record your progress, and send your updates.

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**Note:** Decide to use one of the following supported platforms for progressing tasks:

- P6 with optional support for updates using the P6 Team Member applications
  - P6 Progress Reporter
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**Caution:** If users need to use timesheets, they should use only P6 Progress Reporter and avoid using P6 Team Member applications to update their status.

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## Supporting P6 Team Member for iPhone App Users

In order to perform any of the tasks in this guide using your iPhone, you will need to verify the following requirements have been met.

To support the app for your team at your organization:

- 1) Verify with your administrator that support for the app has been deployed with your P6 application server.
- 2) Verify that the following items exist in P6:
  - a. You have a valid user account in P6.

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**Note:** With a valid user account, you can be assigned to activities as a resource assignment if your user account is associated with a labor resource, or as an activity owner.

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- b. Your user account is configured with at least one module access option.
  - c. You have one or more activity assignments (or *tasks*) for at least one active project. The P6 Team Member for iPhone app will show tasks that have not yet started, active tasks, and tasks you completed in the last 30 days.

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**Note:** OBS access to a project is not required in order for an iPhone user to view and update their assigned tasks.

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- 3) Download and install the mobile app, P6 Team Member, from the Apple App Store to your iPhone.
- 4) You will need the following information to log in:
  - a. The URL to the P6 server.
  - b. If using SSO, you will need your SSO username and password. Or, if using native authentication, you will need your P6 username and password.

### Upgrading

When upgrading from release 8.1 to 8.2, Starred tasks are not transferred. You will need to manually star your tasks again once the latest version is installed.

### Error Message

If you receive the message "Server URL points to an invalid web application.", one of the following conditions may exist:

- ▶ You do not have the latest version of P6 Team Member. Go to the Apple App Store to upgrade to the latest version.
- ▶ An SSL certificate needs to be obtained from a trusted certificate authority. Contact your administrator.

### Known Issues

- ▶ If you are in a time zone that observes daylight savings time, the hours displayed in your tasks may be off by one hour.
- ▶ If you do not have any tasks assigned to you, you may receive the message "Some data failed to load. Refresh to try again." on the Home page of the app. This issue will only occur if your company has version 8.2 deployed on the P6 application server.

## Supporting P6 Team Member Web Application Users

In order to perform any of the tasks in this guide using P6 Team Member Web, you will need to verify the following requirements have been met.

To support the application for your team at your organization:

- 1) Verify with your administrator that support for the app has been deployed with your P6 application server.
- 2) Verify that the following items exist in P6:
  - a. You have a valid user account in P6.

---

**Notes:** With a valid user account, you can be assigned to activities as a resource assignment if your user account is associated with a labor resource, or as an activity owner.

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- b. Your user account is configured with at least one module access option.
    - c. You have one or more activity assignments (or *tasks*) for at least one active project. The P6 Team Member application will show tasks that have not yet started, active tasks, and tasks you completed in the last 30 days.

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**Note:** OBS access to a project is not required in order for a P6 Team Member application user to view and update their assigned tasks.

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- 3) You will need the following information to log in:
  - a. The URL to the P6 Team Member Web server.
  - b. If using SSO, you will need your SSO username and password. Or, if using native authentication, you will need your assigned P6 username and password.
- 4) The default language setting is English. To change the language setting:
  - a. Enter the URL for the application in your browser.
  - b. At the end of the URL, enter: **?locale=<locale code>**

The locale codes are as follows:

- Brazilian Portuguese = pt\_BR
- French = fr
- German = de
- Italian = it
- Japanese = ja
- Russian = ru
- Spanish = es
- Simplified Chinese = zh\_CN
- Traditional Chinese = zh\_TW

For example, to change the language to German, the URL would be <http://yourserver/p6tmweb/?locale=de>.

- c. Bookmark this URL for future access.

## Known Browser Issues

If you experience an issue working in P6 Team Member Web, review the known issues to determine if your problem has a resolution.

### Internet Explorer

#### "Navigation to the webpage was canceled" in Internet Explorer

If you receive the message "Navigation to the webpage was canceled" when sending an e-mail in P6 Team Member Web, this is a known issue for Internet Explorer 8 on Windows 7.

To work around the issue, perform the following steps:

- 1) In Internet Explorer 8, select the **Tools** menu and click **Internet Options**.
- 2) In the **Internet Options** dialog box, click the **Security** tab.
- 3) On the **Security** tab, clear the **Enabled Protected Mode (requires restarting Internet Explorer)** option and click **OK**.
- 4) Restart Internet Explorer.

#### Loss of focus on dialog box in Internet Explorer

You can lose focus on a dialog box if you drag the box around the screen too quickly. To prevent this from occurring, slowly drag the dialog box to move it to a different position on the screen.

### Safari

#### Shortcut key Ctrl+Shift+T does not work when using Safari on a Macintosh

The keyboard shortcut for changing tabs on the Preferences dialog box, Ctrl+Shift+T, does not work when using Safari on a Macintosh. You must select the tab using a mouse or by tapping the tab, depending on your device.

## Supporting E-mail Updates with E-mail Statusing Service

Projects may require that P6 users temporarily work in remote locations without access to the private network where the P6 server resides. Diverse project teams may also exist with some members updating their tasks using P6, and others using e-mail.

In order to support the updating of assignment status by e-mail, you will need to verify the following requirements have been met.

To support e-mail updates for your team at your organization:

- 1) Verify with your administrator that support for e-mail task updates has been deployed with your P6 application server.
- 2) Verify that the following items exist in P6:

- a. You have a valid user account in P6.

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**Note:** With a valid user account, you can be assigned to activities as a resource assignment if your user account is associated with a labor resource, or as an activity owner.

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- b. Your user account is configured with at least one module access option.
- c. Your user account must specify your own unique e-mail address.
- d. Your associated resource has one or more activity assignments (or *tasks*) for at least one active project. The e-mail will show tasks that have not yet started, active tasks in progress, and tasks you completed in the last 30 days.

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**Note:** OBS access to a project is not required in order for a user to make status updates to their assigned tasks by e-mail.

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- 3) Download and install any e-mail client application or browser to access web mail.
- 4) Plan your task status by e-mail process with your team and manager. For example, consider details such as the timing of updates by e-mail versus updates made in P6 or other P6 Team Member applications to avoid conflicts.

### Your Role as a Team Member

P6 is the application used by your project manager to manage the projects you are working on. Your responsibilities on a project are broken down into tasks, also referred to as activities or assignments. Once a task is assigned to you in P6, you can view and update your status on the task in P6 Team Member for iPhone, P6 Team Member Web, or using E-mail Statusing Service.

The fields available for you to view and status are set for each project by the project manager in P6. The fields in your view may vary by project.

Have a conversation with your project manager to determine:

- ▶ If you are an activity owner or a resource assignment. The fields that display in the progress pane are specific to one of these roles.
- ▶ Which fields are important for you to update when providing status.
- ▶ How often you need to provide status.

### Field Definitions for Dates and Work Units

The fields available to you in P6 Team Member applications are assigned by your project manager in P6. Also, in P6, a team member is assigned as either a resource assignment or an activity owner. Talk to your project manager to find out which fields were assigned to you and if you are a resource assignment or an activity owner.

## Resource Assignment

### Finish By

The date you are scheduled to complete the task.

### Finished

The date you actually completed the task.

### Start By

The date you are scheduled to begin the task.

### Started

The date you actually began work on the task.

### Time Left

The total working time left to complete the task.

### Time Spent

The actual amount of time spent working on the task.

### Remaining Duration (RD)

The remaining duration is the period of time required to complete the task based on your current work schedule and additional project commitments.

For example, if you work a 6 hour shift and are assigned an 8 hour task, the remaining duration is 2 days since the 8 hour task cannot be completed in one 6 hour shift.

## Activity Owner

### % Complete

The percent of the task that has been completed.

The calculation of this field depends on the settings your project manager configured in P6.

This field is either:

- ▶ Calculated using units or duration.
- ▶ Calculated using the percentage complete from steps.
- ▶ A value you enter based on your own perception of the work you completed on this task.

### Expected Finish

The date you anticipate work on the task will finish.

### Finish By

The date you are scheduled to complete the task.

**Finished**

The date you actually completed the task.

**Remaining Duration (RD)**

The remaining duration is the period of time required to complete the task based on your current work schedule and additional project commitments.

For example, if you work a 6 hour shift and are assigned an 8 hour task, the remaining duration is 2 days since the 8 hour task cannot be completed in one 6 hour shift.

**Start By**

The date you are scheduled to begin the task.

**Started**

The date you actually began work on the task.

**Time Spent (Labor)**

The actual amount of time spent working on the task.

**Time Spent (Nonlabor)**

The number of nonlabor units used for the task.

**Time Left (Labor)**

The total working time left to complete the task.

**Time Left (Nonlabor)**

The total nonlabor units required to complete the task.

# Using the P6 Team Member for iPhone App

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## Working with the P6 Team Member for iPhone App

The P6 Team Member for iPhone app is a native iPhone *application*, or *app*, you can download to your iPhone. The app's primary functionality is to support remote updates to the status of your tasks. Task data is retrieved from and sent to your organization's central P6 server.

The app requires private network access from each iOS mobile device to your organization's hosted Team Member web services. For example, your administrator may take care of setting up your access behind a firewall, and may require that you establish virtual private network, or VPN, access from your device to the server.

You should be familiar with the following concepts described below.



Table of Key P6 Team Member for iPhone App Elements

Item	Description
1	<b>Status Bar:</b> A standard with almost all apps, the status bar appears at the upper edge of all pages and contains important information such as the time of day and the status of both the network connection and battery.
2	<b>Navigation Bar:</b> Each page's navigation bar will automatically include the appropriate controls to help you manage the tasks on a given page or switch to another page. For example, after viewing a task's details, tap <b>Back</b> to go back to the list of Active tasks.
3	<b>Main Viewing Area:</b> In this example, the name of the task appears in the top cell with its details appearing in the cells below it. All content, including tables or lists of tasks and date/time selection controls, appears in this main viewing area.

Item	Description
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- |   |  |
|---|--|
| 4 | <b>The Toolbar:</b> Located at the bottom of certain pages, toolbars contain controls that enable you to perform specific features. In the example image, the toolbar presents controls for sending e-mail and attaching a photo.  |
| 5 | <b>Home Button:</b> When you want to open the P6 Team Member for iPhone app, press the <b>Home</b> button to suspend your current app and then tap  <b>TeamMember</b> . Later, when you are finished using the app, press the <b>Home</b> button to return to another app on your iPhone. When you suspend and then re-launch the app, you are returned to the last task or tasks you were viewing. |

As you tap your way through the app, each successive page presents more detailed information. For example, from the **Home** page, tapping **Active** will show a list of your active assigned tasks. From that list, tapping a task will open its details where you can continue to record status updates before navigating back to the list of tasks or **Home** page.



### Starting the P6 Team Member for iPhone App for the First Time

Follow these steps to start the app for the first time. When you return to the app after working in other apps, the last page you were on will appear. Once you configure these settings, you won't need to perform these steps again unless your SSO cookies expire. If your cookies expire, you will need to enter your user name and password again.

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**Note:** You may need to activate your device's VPN feature to access your company's deployment of P6. Contact your administrator for more information.

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To start the app:

- 1) On your iPhone Home page, tap  **TeamMember**.
- 2) On the **Welcome to P6 Team Member** page, slide the **Single Sign On (SSO)** switch to either **ON** or **OFF**.
- 3) If you turn SSO on:
  - a. Enter the URL to your server is correct (for example, `http://server:port/p6tmws`). If necessary, tap the **URL** field to edit it.

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**Note:** You will need to specify the server name and port number in the URL.

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- b. Tap **Authenticate**.
  - c. Enter your SSO username and password.
- 4) If you turn SSO off:
  - a. Enter the URL to your server is correct (for example, `http://server:port/p6tmws`). If necessary, tap the **URL** field to edit it.
  - b. Enter your P6 username.
  - c. Enter your P6 password.
  - d. Tap **Done**.

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**Note:** Team Member Web Services supports LDAP, Native, or SSO mode. Your administrator will select the authentication mode when they configure P6.

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### Starting the P6 Team Member for iPhone App

When returning to the app after exiting from it, you do not have to configure any settings or login again; however, if using SSO you will periodically be prompted to re-authenticate per security settings at your organization.

You must be connected to a network to start and run the app.

- 1) On your iPhone **Home** page, tap  **TeamMember**.
- 2) On the P6 Team Member for iPhone **Home** page:
  - a. Review the list of the types of tasks available, their quantity, and the date and time when you last downloaded this task information from the server.

**Note:** The app will automatically refresh the **Home** page whenever you launch it and whenever you return to the Home page from a task list.

- b. (Optional) Tap  **Refresh** to update the **Home** page by downloading any changes from the server to your iPhone.

## Working with Tasks in the P6 Team Member for iPhone App

You can use the app to view and update the status of your tasks as well as to communicate with other project members or your manager.



### Table of Primary Task List Details

Item	Description
①	<b>Home Page:</b> This page displays the four types of task lists including the number of tasks in each list. In this example, the user has tapped Active.
②	<b>Active Task List:</b> The user's list of active assignments appears sorted chronologically by <b>Finish By</b> date. Each task specifies its name under its work breakdown structure (WBS) name. If your tasks are derived from more than one project, you can tap  <b>Grouped</b> to display the name of the project for each group of tasks.

Item	Description
1	<p><b>Task Progress Indicator:</b> This circular gauge indicates progress with both color shading of the portion complete relative to the whole and an actual percentage value. Whenever the <b>Finish By</b> date occurs in the past, the chart's color is set to red. For example, the <i>Define Business Requirements</i> task in this example is overdue and its red progress indicator shows 67% with darker red shading in its circle.</p>
4	<p><b>◆ Milestone:</b> The diamond indicates this task is a start or finish milestone. A milestone represents any significant event or goal in a project. Although milestones are considered a type of task, milestones have zero duration; at any given moment they are either achieved or not. Some examples of milestones in an office building addition project might include project definition complete, structure complete, and end bidding process.</p> <p>The milestone icon is red when the scheduled date has been reached and the milestone start or finish is now overdue.</p> <p>A start milestone only shows a Start By date and a finish milestone only shows a Finish By date.</p> <p><b>Note:</b> Milestones can only be viewed and updated by a team member who is assigned as an activity owner in P6. A resource cannot view an assigned milestone.</p>
5	<p><b>🔒 Locked Project:</b> This icon indicates a project is locked and your tasks are currently unavailable for status updates.</p>



### Table of Primary Task Features

Item	Description
1	<p><b>Viewing Tasks:</b> After viewing a list of tasks selected on the <b>Home</b> page, focus on a specific task and tap it to view its details. The app displays the WBS and project name in addition to the name of the task. It also displays the <b>Start By/Started</b> or <b>Finish By</b> fields.</p> <p>Your project manager uses P6 to customize additional fields available for you to view and update. In this example, the fields available for you to update are <b>Time Spent</b> and <b>Time Left</b>.</p>
2	<p><b>Updating Tasks:</b> You can edit a task to reflect updates to its status over time. For example, update the <b>Time Spent</b>. You can also change the remaining <b>Time Left</b> as well as indicate a task is complete or mark special tasks with a ★ <b>Star</b> to track them separately.</p> <p><b>Note:</b> If the project is locked, you can view the task; however, you will have to wait until the project lock is released to provide status on the task.</p>

Item	Description
------	-------------

- |   |   |
|---|---|
| 3 | <b>Sending E-Mail About Tasks:</b> You can send your comments about a particular task to one or more recipients via e-mail. |
| 4 | <b>Sending Photos About Tasks:</b> You can also attach a task-related photograph from your iPhone to your e-mail message.   |

## Viewing Your Tasks

You can view a summary showing the number of your assigned tasks arranged by status on the **Home** page.

From here, you can tap **Active**, **Overdue**, **Starred**, or **Completed** to view a particular task list, and optionally, group tasks by project or arrange them in a flat list. You can determine each task's current progress by glancing at its progress indicator. If a task list extends down and off the screen, flick up to view any additional tasks.

If you have no currently assigned tasks of a particular type, you will see a 0 as its count (for example, **overdue 0**). You cannot tap these task lists because there are no tasks to show.

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## Viewing a Task Summary

You can view a summary of your assigned tasks by type. A count of the number of tasks in each list also appears.

To view a summary of your tasks:

- 1) On the **Home** page:
  - a. Review the summary. It lists the types of tasks currently assigned to you and the quantity of each type in the list. This includes:
    - **Active:** Tasks currently in-progress. These are tasks assigned to you that you have not yet started or have started but have not yet completed.

- **Overdue:** Tasks with a **Finish By** date, or **Start By** date for start milestones, prior to today.
  - **Starred:** Tasks you have marked with a  **Star** to indicate they are important or favorites.
  - **Completed:** Tasks you have completed in the last 30 days.
- b. Tap  **Refresh** to update the **Home** page with the current counts for each task list from the server to your iPhone. The date and time when you last refreshed this task information from the server appears below the summary.

### Viewing Active Tasks

You can view your active assigned tasks. The task list is automatically sorted by the **Finish By** field.

To view your active tasks:

- 1) On the **Home** page, tap **Active**.
- 2) Tap a task to view its details and then tap **Cancel** to return to the list.
- 3) Tap **Back** to return to the **Home** page.

### Viewing Overdue Tasks

You can view a list showing only your overdue tasks. A task is overdue if its planned finish date occurs in the past and it is not yet marked complete. The task list is automatically sorted by the **Finish By** field.

To view overdue tasks:

- 1) On the **Home** page, tap **Overdue**.
- 2) Tap a task to view its details and then tap **Cancel** to return to the list.
- 3) Tap **Back** to return to the **Home** page.

### Viewing Starred Tasks

You can view the tasks you marked with a star. The task list is automatically sorted by the **Finish By** field.

To view starred tasks:

- 1) On the **Home** page, tap **Starred**.
- 2) Tap a task to view its details and then tap **Cancel** to return to the list.
- 3) Tap **Back** to return to the **Home** page.

### Viewing Completed Tasks

You can view the tasks you completed in the last 30 calendar days. The task list is automatically sorted by the **Finished On** date field.

To view completed tasks:

- 1) On the **Home** page, tap **Completed**.
- 2) Tap a task to view its details and then tap **Cancel** to return to the list.
- 3) Tap **Back** to return to the **Home** page.

### Viewing Tasks by Project

When viewing tasks, you also have the option of arranging them as a flat list or grouped by project.

To view tasks by project:

- 1) On the **Home** page, tap **Active**, **Overdue**, **Starred**, or **Completed**.
- 2) On the **Tasks** page, tap  **Grouped**.

---

**Note:** Tap  **Grouped** again to arrange the list of tasks back into a flat list.

---

### Starting Tasks

After viewing tasks, you can indicate that you have started working on them.

To start a task:

- 1) On the **Home** page, tap **Active**, **Overdue**, or **Starred**.
- 2) On the **Tasks** page, tap the task you want to update.
- 3) On the **Task Details** page:
  - a. View the project name, WBS, start by date, and effort to verify this is the task you want to start. You cannot edit these fields.
  - b. Tap **Start** to indicate your work on this task has just started. Under the **When did you start this task?** prompt, tap **Done** to accept the original value, or slide the day/month and time controls, if enabled, to select another actual start date, and then tap **Done**.
  - c. Tap **Save**.
- 4) Tap **Back** to return to the **Home** page.

### Updating and Completing Tasks

After viewing your tasks and recording that progress has started, you can update their progress. The steps below assume you are updating Time Spent and Time Left. If your project manager assigned you different fields to update, you can update them in a similar manner.

To update a task:

- 1) On the **Home** page, tap **Active**, **Overdue**, or **Starred**.
- 2) On the **Tasks** page, tap the task you want to update.
- 3) On the **Task Details** page, tap the item and adjust the value you want to update.
  - a. Tap **Time Spent** and align the spinning days and hours to reflect the actual time spent. Tap **Done**.
  - b. Tap **Time Left** and align the spinning day and hours to reflect the estimated remaining time. Tap **Done**.

---

**Note:** **Time Left** is updated once you update **Time Spent**. Update this field if the amount of time remaining on the task is different than **Time Left** minus **Time Spent**.

---

- c. Tap **Finish By** and align the spinning day/month and time controls, if enabled, to reflect the new finish date. Tap **Done**.
  - d. Tap ☆ **Star** to mark the task as a favorite. Completed tasks cannot be starred.
  - e. Tap **Mark Task Complete** to indicate your work on this task is finished. Any **Time Left** will automatically be applied to the **Time Spent**. Under the **When did you finish this task?** prompt, tap **Done** to accept the original value, or slide the day/month and time controls, if enabled, to select another actual finish date, and then tap **Done**.
  - f. Tap **Save**. You cannot remove the finish date after you tap **Save**.
- 4) Tap **Back** to return to the **Home** page.

### Tips

- ▶ Once a task is marked complete, you cannot return it to the Active task list. However, you can update the **Start** date, **Finished** date, and **Time Spent** fields.
- ▶ You cannot update tasks in projects that are locked.

### About Time Spent and Time Left

The following rules apply to the relationship between the **Time Spent** and **Time Left** labor and nonlabor fields in the P6 Team Member for iPhone app:

- ▶ Changes to **Time Left** do not affect **Time Spent**.
- ▶ **Time Left** and **Time Spent** will always be greater than or equal to zero.
- ▶ If **Time Left** is greater than zero, the inverse of any changes to **Time Spent** will be applied to **Time Left** until it reaches zero. For example, if **Time Left** is 5 hours and **Time Spent** is 3 hours, when you change **Time Spent** to 6 hours, **Time Left** will automatically be reduced to 2 hours. Likewise, if **Time Spent** is changed to 1 hour then **Time Left** will automatically be increased to 7 hours.

---

**Note:** If **Time Left** is equal to zero and you manually increase it to a value greater than zero, this rule becomes reinstated for all future changes to **Time Spent**.

---

- ▶ If **Time Left** is equal to zero, changes to the value of **Time Spent** will not affect **Time Left**.
- ▶ Depending on the project and activity settings in P6, changes to **Time Spent** or **Time Left** may cause a change to the task's **Finish By** field value (the assignment's **Finish Date** in P6). However, you will not see this change until you tap **Save**. If there was a change, the new value will be shown in the refreshed task list.

## Starring Tasks

You can mark a task with a star to designate it as an important or favorite assignment and track it in a separate list with other starred tasks. You cannot star a completed task or a task that is in a locked project.

To star a task:

- 1) On the **Home** page, tap **Active** or **Overdue**.
- 2) On the **Tasks** page, tap the task you want to star.
- 3) On the **Task Details** page:
  - a. Tap ☆ **Star**. The icon's white color will change to gold (★ **Star**).
  - b. Tap **Save** to return to the list of tasks.
- 4) Tap **Back** to return to the **Home** page.

### Tip

You can perform the reverse operation to unstar a task. On the **Home** page, tap **Starred** and tap a task. Then tap the ★ **Star** icon to change it back to ☆ **Star**.

## Sending E-Mail About a Task

You can send e-mail about a task and attach an optional photo to one or more recipients.

To e-mail comments and a photo about a task:

- 1) On the **Home** page, tap **Active**, **Overdue**, **Starred**, or **Completed**.
- 2) On the **Tasks** page, tap a task.
- 3) On the **Task Details** page, tap  **E-Mail** or tap  **E-mail with Photo**.
- 4) These substeps apply only if you tap  **E-mail with Photo** to attach a photo image to your e-mail message.
  - a. Tap **Choose Existing Photo** to select an existing photo on your device.
  - b. If your device is equipped with a camera, tap **Shoot Photo** to take a new picture.
- 5) On the e-mail form:
  - a. Specify the recipients.

- b. Enter your custom message above the auto-inserted activity information. For example, you might provide an explanation for your status update or an additional description to accompany a photo.
- c. Tap **Send**.
- 6) Tap **Cancel** to return to the list.
- 7) Tap **Back** to return to the **Home** page.

### Tip

E-mail itself is not provided by the P6 Team Member for iPhone app. The app simply uses your device's e-mail application and its settings, contacts, etc. If you experience a problem sending e-mail, check the outbox in your e-mail application or consult your network administrator.

## Working with Multiple Tasks in Edit Mode

To help you mark multiple tasks complete or star them, the P6 Team Member for iPhone app offers a quick multi-task *Edit* mode. Using Edit mode, you first select the tasks you want to mark and then designate them as completed or starred all at once.



### Table of Key Steps to Using Edit Mode

Item	Description
1	<b>Starting Edit Mode:</b> From the navigation bar in a task list, tap <b>Edit</b> .
2	<b>Selecting Tasks:</b> In Edit mode, an empty circle appears to the left of each task.

Item	Description
------	-------------

- |   |   |
|---|---|
| 3 | <b>Marking Complete or Star:</b> After selecting a task, its empty circle is checked. When you tap <b>Complete</b> or <b>Star</b> in the toolbar, the new status is applied to only the tasks you selected in the list.   |
| 4 | <b>Starring Tasks</b> (as shown): If you choose <b>Star</b> , the  <b>Star</b> icon appears for each selected task.<br><b>Completing Tasks:</b> If you choose <b>Complete</b> , the tasks no longer appear in the active or overdue lists. Instead, they are listed only under the completed task list. |

---

**Note:** Contact your manager or administrator if you feel you need to restore certain data. For example, if you mark multiple tasks complete and then discover that they were marked complete by mistake or additional work effort is required, your manager can use P6 to manually remove the finish date.

---

## Completing Multiple Tasks

You can mark multiple tasks complete. Updating multiple tasks simultaneously is faster than marking tasks complete one at a time. However, care should be taken to avoid marking tasks complete by mistake since you cannot remove the Finished date and return the task to the Active task list.

---

**Note:** Contact your manager or administrator if you feel you need to restore certain data. For example, if you mark multiple tasks complete and then discover that they were marked complete by mistake or additional work effort is required, your manager can use P6 to manually remove the finish date.

---

To mark multiple tasks complete:

---

**Note:** You cannot set the finish date when completing multiple tasks at once. The finish date for the tasks will be the **Finished By** date for each task.

---

- 1) On the **Home** page, tap **Active**, **Overdue**, or **Starred**.
- 2) On the **Tasks** page:
  - a. Tap **Edit**.
  - b. In Edit mode, select the tasks you have completed. The application temporarily marks each one with the  **Selected** icon.

---

**Note:** Tasks that are in locked projects cannot be selected.

---

- c. Tap **Complete**.
- d. Tap **Back** to return to the **Home** page.

### Starring Multiple Tasks

You can mark specific tasks with a star to signify their relative importance over your other tasks. Starring multiple tasks simultaneously is faster than marking tasks with a star one at a time.

---

**Note:** You cannot star a completed task or a task in a locked project.

---

To mark multiple tasks with a star:

- 1) On the **Home** page, tap **Active** or **Overdue**.
- 2) On the **Tasks** page:
  - a. Tap **Edit**.
  - b. In Edit mode, select the tasks you want to star. The application temporarily marks each one with the  **Selected** icon.

---

**Note:** Tasks that are in locked projects cannot be selected.

---

- c. Tap **Star**.
- d. Tap **Back** to return to the **Home** page.

### Configuring Preferences for the P6 Team Member for iPhone App

At any time, you can view or adjust the following user-modifiable settings.

- 1) On your iPhone Home screen, listed with your other mobile apps, tap **Settings**.
- 2) On the **Settings** page, tap  **TeamMember**.
- 3) On the **P6 Team Member Application Settings** page:
  - a. Slide the **Display Time** switch to **ON** to view and edit the time of day when a task starts or finishes.
  - b. Tap **Units of Time** and then select either *Days and Hours* or *Hours and Minutes*. In the navigation bar, tap **TeamMember** to go back.

---

**Note:** The definition of a day, for example, 8h or 10h, is calculated for each task based on its assigned project or resource calendar in P6.

---

- c. Slide the **Single Sign On (SSO)** switch to either **ON** or **OFF**.
- d. Tap **Server URL** to set or edit the server address provided by your administrator.

---

**Note:** You may need to activate your device's VPN feature to access your company's deployment of P6. Contact your administrator for more information.

---

- e. Tap **P6 Username** to set or edit your username. This username must match your P6 username. If using SSO, the value in this field, if any, is ignored.
- f. Flick up to verify the **Version** on your device complies with the latest approved version in place at your organization.
- g. (Optional) Tap **About** to view additional information about this application. Tap **TeamMember** to go back.
- h. Tap **Settings** and then press the **Home** button on your device.

# Using P6 Team Member Web

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## P6 Team Member Web Overview

P6 Team Member Web is a status reporting application, which enables you to communicate status on your work quickly and efficiently.

From P6 Team Member Web, you can:

- ▶ View all tasks currently assigned to you.
- ▶ Update your tasks to communicate your status.
- ▶ Communicate with your project manager or other team members through e-mail.
- ▶ View the tasks that must be completed before you can begin work on your task and tasks that are dependent on you finishing your task.

## Keyboard Shortcuts

You can access functions in P6 Team Member Web using the following keyboard shortcuts.

Action	Keyboard Shortcut
<b>Global</b>	
Open the Preferences dialog box	Ctrl+Alt+P
Open the Help	Ctrl+Alt+H
Log out of the application	Ctrl+Alt+O
Open the project filter list	Ctrl+Alt+A
Open the task status list	Ctrl+Alt+B
Focus on the task list	Ctrl+Alt+L
Save	Ctrl+Alt+Enter

Cancel	Esc
Move to the next element	Tab
Confirm a selection	Enter
<b>Task Pane</b>	
Move up and down the task list	Up and down arrows
Start a task	Ctrl+Alt+S
Send an e-mail	Ctrl+Alt+E
Star a task	Ctrl+Alt+F
Complete a task	Ctrl+Alt+D
Open More link	Ctrl+Alt+M
<b>Progress Panel</b>	
Undo an action	Ctrl+Alt+Z
<b>Steps Panel</b>	
Undo an action	Ctrl+Alt+Z
Open More link	Ctrl+Alt+M
Select  <b>Complete Step</b>	Ctrl+Alt+D
<b>Related Tasks Panel</b>	
Open More link	Ctrl+Alt+M
<b>Dialog Boxes</b>	
Close the dialog box	Ctrl+Alt+X
Open the Help	Ctrl+Alt+H

## Working with Tasks

The task pane is your main work area. Use this area to view your assigned tasks. When you select a task in the tasks pane, all panels on the right, which include the progress panel, Steps panel, and Related Tasks panel, display information for the task. Use the progress panel to update your tasks to show progress.

The screenshot displays the Oracle P6 Team Member web interface. At the top, there's a navigation bar with 'Welcome User', 'Preferences', 'Help', and 'Logout'. Below this, a filter bar shows 'Show my tasks in All projects that are Active' and '26 tasks found'. The main area contains a list of tasks, each with a progress indicator, project name, WBS, and dates. The task 'IT1060 - Develop System' is selected and highlighted in blue. To the right, a detailed task pane for 'IT1060 - Develop System' is open, showing 'Start By: Dec-20-2011', 'Finish By: Feb-13-2012', 'Time Spent: 0d 0hr', and 'Time Left: 23d 2hr'. The task pane also includes sections for 'Steps' and 'Related Tasks'. Numbered callouts (1-9) highlight various UI elements: 1 (filters), 2 (task pane), 3 (start button), 4 (task pane details), 5 (progress indicator), 6 (action icons), 7 (task list item), 8 (lock icon), and 9 (task list item).

### Table of Screen Highlights

Item	Description
1	<p><b>Filters:</b> Use one or more of the filtering options to display only the tasks that you want to see in your view.</p> <ul style="list-style-type: none"> <li>▶ The project filter enables you to limit the number of tasks in your view by displaying only the tasks for the selected projects.</li> <li>▶ The view preferences enable you to view Active, Overdue, Completed, or Starred tasks.</li> </ul>
2	<p><b>Task pane:</b> Select a task to review in the task pane and update the status of your task using the progress, steps, and related task panels. From this pane you can indicate you started the task, send an e-mail, mark the task as important by starring it, or mark the task complete.</p> <p>An italicized task heading with an asterisk (*) indicates a change has been made but not saved.</p> <p><b>Note:</b> WBS (work breakdown structure) is a project management term used for the logical breakdown and arrangement of tasks in a project. The WBS path helps you to understand exactly where your task fits within the scope of the project.</p>

Item	Description
3	<p><b>Start button:</b> Select the start button to indicate progress on the task has begun. Once you select start, the progress fields are editable. The start button is red when the task is overdue.</p>
4	<p><b>Progress panel:</b> Use this area to communicate dates and time worked. The fields available in your view are set by your project manager.</p>
5	<p><b>Progress indicator:</b> Provides a visual representation of your progress on the task. The indicators are color coded to allow you to view your progress at a glance.</p> <ul style="list-style-type: none"> <li>▶ Green: The finish date for the task has not been reached.</li> <li>▶ Red: The finish date for the task has been reached and the task is now overdue.</li> </ul>
6	<p> <b>E-mail:</b> Launches an e-mail in your e-mail application, providing task details from the tasks pane. Use this to send your project manager or another team member an e-mail.</p> <p> <b>Star Task:</b> Select the star to indicate that this task is important to you. For example, you can star all your high priority tasks. Or, you can star all tasks you are currently working on to make it easier to view your current workload.</p> <p> <b>Complete Task:</b> Select the check mark when you have finished work on the task.</p>
7	<p> <b>Milestone:</b> Indicates this task is a start or finish milestone. A milestone represents any significant event or goal in a project. Although milestones are considered a type of task, milestones have zero duration; at any given moment they are either achieved or not. Some examples of milestones in an office building addition project might include project definition complete, structure complete, and end bidding process.</p> <p>The milestone icon is red when the scheduled date has been reached and the milestone start or finish is now overdue.</p>
8	<p> <b>Locked Project:</b> Indicates the project is locked and your tasks are currently unavailable for status updates.</p>
9	<p><b>Save or Cancel control panel:</b> The control panel slides up from the bottom when a change is made displaying the number of tasks that have been updated.</p>

## Tasks

As a task owner, you are responsible for communicating progress by statusing your tasks in P6 Team Member Web.

A task might also be referred to as an activity or an assignment. Each task has start and finish dates as well as fields used to show your progress. These fields are customized by your project manager using an application called P6.

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### Viewing Tasks

The application automatically displays all active tasks assigned to you by your project manager. The tasks are ordered by the earliest *Finish By* date. There are filtering and project selection options that can be used in combination to enable you to refine your list and status your tasks more efficiently.

To modify your task view:

- 1) View tasks for a select group of projects by selecting the **Show my tasks in** list and choosing one or more projects. Once you make your selection, select another area of the application to close the list, or select **Esc**.
- 2) Set your filtering preferences by selecting one of the following options.
  - Active:** Displays all tasks that are currently assigned to you and are not marked complete.
  - Overdue:** Displays all active tasks where the current date is past the due date.
  - Completed:** Displays all tasks that were marked complete and the Finished date is within the last 30 days.
  - Starred:** Displays all active tasks that you starred. Starred tasks signify importance. For example, you can star all your high priority tasks. Or, you can star all tasks you are currently working on to make it easier to view your current workload.

## Starting Tasks

After you start working on a task, report your progress.

---

**Note:** The fields displayed in your view are customized by your project manager. Not all fields mentioned here are available in your view and there may be additional fields in your view not mentioned in the procedure. Discuss with your manager the fields you need to update to provide status on your tasks.

---

To start a task:

- 1) Select a task.
- 2) Select **Start** (Ctrl+Alt+S).
- 3) In the progress panel:
  - a. Update the **Started** date field, if you started the task on a date other than the scheduled date.
  - b. Enter your status. For example, **Time Spent** or **% (complete)**.

---

**Note:** If **Time Left** is greater than zero, the amount of time added to **Time Spent** will be deducted from the amount in **Time Left**. If **Time Left** is zero, then there is no change to this field.

---

- 4) Select **Save** (Ctrl+Alt+Enter).

## Tips

- ▶ As you make updates to your work units, your progress is shown in the progress indicator in the task pane.
- ▶ You can mark a task complete without indicating progress. When you mark a task that has not been started as complete, the task is automatically marked as started, the planned dates become the started and finished dates, and the time left becomes the time spent.
- ▶ If your task is a milestone, you are not presented with a start button. For a milestone, select  **Complete Task** (Ctrl+Alt+D) and update the **Started** date for a start milestone, or the **Finished** date for a finish milestone.

---

## Updating Tasks

Update your tasks to record your progress.

---

**Note:** The fields displayed in your view are customized by your project manager. Not all fields mentioned here are available in your view and there may be additional fields in your view not mentioned in the procedure. Discuss with your manager the fields you need to update to provide status on your tasks.

---

To update a task:

- 1) Select a task.
- 2) In the progress panel:
  - a. Enter your status. For example, **Time Spent**, **%** (percent complete), or **RD** (remaining duration).

---

**Notes:**

- If **Time Left** is greater than zero, the amount of time added to **Time Spent** will be deducted from the amount in **Time Left**. If the **Time Left** is zero, then there is no change to this field.
  - If the **%** (percent complete) field is disabled, your percent complete is automatically calculated using steps.
- 
- b. Update your **Finish By** or **Expected Finish** date, if necessary.
  - 3) In the **Steps** panel, update **% Complete** for your assigned steps, if applicable.
  - 4) Select **Save** (Ctrl+Alt+Enter).

**Tips**

- ▶ If **Time Spent** is disabled, either you did not select **Start** to indicate progress has begun or the task is a milestone.
- ▶ As you make updates to your work units, your progress is shown in the progress indicator in the task pane.
- ▶ You can mark a task complete without indicating progress. When you mark a task that has not been started as complete, the task is automatically marked as started, the planned dates become the started and finished dates, and the time left becomes the time spent.

---

**Sending E-Mail About a Task**

To communicate with your project manager or team members about a task, send an e-mail from the task pane. The e-mail will include the project name, task name and ID, and WBS. Additional fields may display depending on the settings your project manager configured for the project.

To send an e-mail:

- 1) Select a task.
- 2) In the task pane, select  **E-mail** (Ctrl+Alt+E).

**Tips**

- ▶ You must have an e-mail client installed to use this feature.

### Starring Tasks

You can mark a task with a star to designate it as important and track it in a separate list with other starred tasks.

To star a task:

- 1) Select a task.
- 2) In the task pane, select  **Star Task** (Ctrl+Alt+F).
- 3) Select **Save**.

### Tips

- ▶ When a task is marked complete, it is removed from the Starred view.
- ▶ You cannot star a completed task.

### Completing Tasks

Mark a task complete when you have finished your work for the task.

To mark a task complete:

- 1) Select a task.
- 2) In the task pane, select  **Complete Task** (Ctrl+Alt+D).
- 3) In the progress panel:
  - a. Update the status fields.
  - b. Update the **Finished** date if the finish date is not the scheduled **Finished by** date.
- 4) Select **Save**.

### Tips

- ▶ Once you complete a task, you cannot return the task to an active state. However, you can update the started date, finished date, or actual work units for a completed task.
- ▶ If your task entry is a milestone, select  **Complete Task** (Ctrl+Alt+D) and update the **Started** date for a start milestone, or the **Finished** date for a finish milestone.

## Working with Steps

Use the Steps panel to view your assigned steps and report your progress on these steps.

Step Description	% Complete	Status
Review scope and objectives as stated in the Project Charter document.	100	Completed (Green Checkmark)
Conduct business requirements meeting with team	100	Completed (Green Checkmark)
Create outline of requirements	50	In Progress (Checkmark)
Clearly define the business requirements	0	Not Started (Checkmark)
Business Requirements Document should be routed for review and approval.	0	Not Started (Checkmark)

### Table of Screen Highlights

Item	Description
①	<b>% Complete:</b> Enter your percentage complete as you progress through each step.
②	<b>Step Completed:</b> When you are finished with a step, select <b>Complete Step</b> , or enter 100 in the <b>% Complete</b> field.

## Steps

Steps are used to break a task down into a more granular level of detail. When your assigned task includes steps, be sure to provide status for the steps when updating the task.

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## Updating Steps

Update your steps to record your progress.

To update a step:

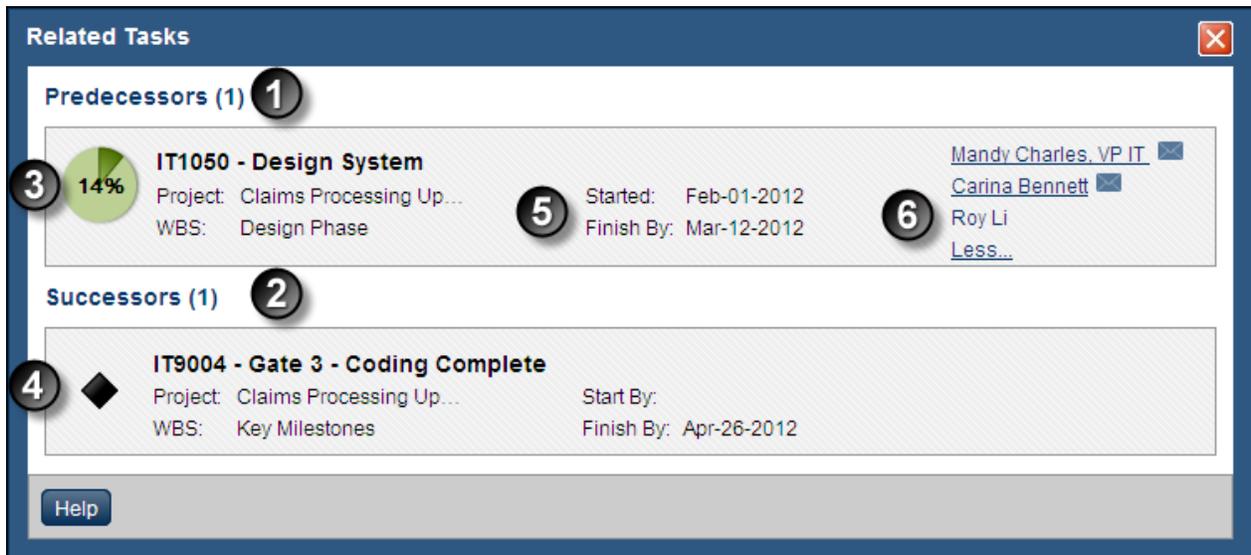
- 1) Select a task.
- 2) In the **Steps** panel:
  - a. Select **More** (Ctrl+Alt+M) to view all steps, if all steps are not visible.
  - b. In the **% Complete** field, enter a percentage value for your work complete.
  - c. If you are finished with the step, either:
    - Enter **100** in the percentage field.
    - Select  **Complete Step** (Ctrl+Alt+D).
  - d. Select **Save** (Ctrl+Alt+Enter).

## Tips

- ▶ Depending on the settings configured by your project manager, your % (percent complete) for the task may be calculated using steps. Steps either have equal weight or are weighted according to the effort required to complete the step.
- ▶ You can begin reporting progress on your steps for a task before you start the task.
- ▶ If you do not have any steps to complete on this task, this panel will not display.

## Working with Related Tasks

Use the Related Tasks panel to view predecessor and successor tasks and communicate with the task owners.



**Related Tasks**

**Predecessors (1)**

**3** **14%** **IT1050 - Design System** **5** **6**

Project: Claims Processing Up... Started: Feb-01-2012  
WBS: Design Phase Finish By: Mar-12-2012

[Mandy Charles, VP IT](#)   
[Carina Bennett](#)   
[Roy Li](#)  
[Less...](#)

**Successors (1)**

**4** **IT9004 - Gate 3 - Coding Complete**

Project: Claims Processing Up... Start By:  
WBS: Key Milestones Finish By: Apr-26-2012

[Help](#)

Table of Screen Elements

Item	Description
1	<b>Predecessors:</b> View progress on predecessor tasks to determine if you can begin your task on time.
2	<b>Successors:</b> View the tasks that have a dependency on you finishing your assigned task.
3	<p><b>Progress indicator:</b> Use the progress indicator to determine how much work has been done on a task.</p> <p>The color indicates the state of the task and the shading represents the percent complete.</p> <ul style="list-style-type: none"> <li>▶ Gray - Not started</li> <li>▶ Green - In progress</li> <li>▶ Red - Overdue</li> </ul>
4	<b>Milestone:</b> The milestone  icon indicates this is a start milestone if it is under Predecessors and a finish milestone if it is under Successors.
5	<p><b>Dates for Predecessors:</b></p> <ul style="list-style-type: none"> <li>▶ <b>Start By/Started and Finish By/Finished:</b> Use these dates along with the progress indicator to determine when the predecessor task will complete.</li> <li>▶ <b>Start By:</b> Use the milestone date to determine when the milestone is scheduled to begin.</li> </ul> <p><b>Dates for Successors:</b></p> <ul style="list-style-type: none"> <li>▶ <b>Start By/Started and Finish By/Finished:</b> Use these dates to determine when a successor task is scheduled to begin and end.</li> <li>▶ <b>Finish By:</b> Use the milestone date to determine when the milestone is scheduled to be complete.</li> </ul>
6	<b>Task owners:</b> View the name of the people responsible for the task. Send an e-mail to the task owner to communicate project status. For example, e-mail the owner of a predecessor task to request additional information on a task, or notify a task owner of a successor task of a potential issue that could delay the start of their assigned task. The e-mail feature is only available if the task owner has an e-mail address assigned in P6. The e-mail  icon indicates an address is available for the task owner.

## Related Tasks

The Related Tasks panel displays predecessor and successor tasks. Predecessor tasks are required to start or finish *before* the selected task has started or finished; successor tasks are required to start or finish *after* the selected task has started or finished. These relationships are set by your project manager in P6.

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---

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### Viewing Predecessor or Successor Tasks

Use the Related Tasks panel to view information on tasks that have a relationship with your assigned task.

To view predecessor or successor tasks:

- 1) Select a task.
- 2) In the **Related Tasks** panel:
  - a. Select **More** (Ctrl+Alt+M) to view all predecessor and successor tasks.
  - b. View the task owners name and the start and finish dates.
  - c. For Predecessor tasks, view the progress indicator to gauge how much work remains before you can begin your task.  
For Successor tasks, view which tasks are scheduled to begin after your work is complete. View the progress indicator to determine if the task owner began work on the task.

### Tips

- ▶ If you do not have any predecessor or successor tasks, this panel will not display.

---

### Sending E-mail to a Predecessor or Successor Task Owner

To communicate with the person responsible for a task that begins before or after your assigned task, you can send an e-mail from the Related Tasks panel.

To send an e-mail:

- 1) Select a task.
- 2) In the **Related Tasks** panel:

- a. Select **More** (Ctrl+Alt+M) to view all predecessors and successors tasks.
- b. Select the task owner's name or  **E-mail**.

### Tips

- ▶ You must have an e-mail client installed to use this feature.
- ▶ You will not be able to send an e-mail if any of the following conditions exist:
  - ▶ An owner has not been assigned to the task.
  - ▶ The task owner does not have an e-mail address assigned in P6.

## Preferences

You can customize your view to display dates and work units in a format that you prefer. You can also change your password.

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## Configuring My Date, Time, and Unit View Preferences

You can choose how to format dates, time, and units that display in the application.

To configure your view preferences:

- 1) Select **Preferences** (Ctrl+Alt+P).
- 2) In the **Preferences** dialog box, select **Date and Time**.
- 3) In the **Date and Time** pane:
  - a. In the **Date Format** list, choose a format to display the day, month, and year.
  - b. To display hours along with the dates, select **Display Time**.
  - c. In the **Time Format** list, choose to view either a 12 or 24 hour format.
  - d. In the **Unit and Duration Format** list, choose a format to view and enter work units.
  - e. Select **Save** (Ctrl+Alt+Enter).

## Changing My Password

You can reset your password at any time.

The password setting is hidden if your company is running enterprise authentication.

To change your password:

- 1) Select **Preferences** (Ctrl+Alt+P).
- 2) In the **Preferences** dialog box, select **Password**.
- 3) In the **Password** pane:
  - a. In the **Old Password** field, enter your current password.
  - b. In the **New Password** field, enter a new password.

---

**Notes:**

-  When the Password Policy is enabled, the password must be between 8 and 20 characters and contain at least one number and one letter.
- When the Password Policy is disabled, the password must be between 1 and 20 characters. The application does not allow blank passwords.

- 
- c. In the **Confirm Password** field, enter the new password again for verification.
  - d. Select **Save** (Ctrl+Alt+Enter).

# Using E-mail Statusing Service

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## Working with Activity Updates by E-mail using E-mail Statusing Service

As a team member with assignments in P6, you can request a list of your assigned activities, or *tasks*, directly from the P6 server using e-mail. You must follow the syntax and formatting specified below on the subject line of your e-mail message. In all cases, only tasks from active projects in which you (the requesting user) are assigned as a resource or activity owner will be returned.

There are three types of request filters: *status*, *time*, and *project*. A status request is a minimum requirement; a time and project request are optional extensions to the status request. A valid request would appear in the e-mail subject line as:

```
<Status><Optional Time Period><Optional Active Project>
```

---

**Note:** If you need assistance with the options, syntax, or required formatting of these messages, send an e-mail message with only the word `Help` or a `?` in the subject line to receive more detailed instructions. In addition, if your status request message is ever invalid, you will be notified by e-mail.

---

## Requests Based on Status

### Active

Returns all activities assigned to you that have not yet been completed, including any that are not started, those that are in-progress, tasks due today, and tasks that are overdue.

### Due

Returns all tasks scheduled to finish today.

### Overdue

Returns all active tasks that were scheduled to finish prior to today.

### Completed

Returns all tasks where the finished date is today's date.

## Starting

Returns all tasks scheduled to start today.

## Requests Based on Time

Requests by status can optionally be filtered based on a specified number of days, weeks, or months prior to or after today.

### in next <number> <units of time>

Returns only the tasks of the requested status that will occur in the next number of days, weeks, or months you specify.

### in last <number> <units of time>

Returns only the tasks of the requested status that have already transpired in the previous number of days, weeks, or months you specify.

---

#### Notes:

- There is a 180 day limit to viewing completed tasks. Any completed task with a Finished Date more than 180 days in the past will not be returned.
  - If the completed task was updated with a Finished Date within the past 180 days and the last approved Finished Date is more than 180 days in the past, the task will not be sent to you regardless of the updated Finished Date. (This only applies if Team Member status updates require approval.)
- 

## Requests Based on Project

Requests by status can optionally be filtered based on an active project name or project ID.

### on Project <Project ID or Name>

Returns only the tasks of the requested status and optional time period filter that belong to the specified active project.

---

**Example 1:** Pat is defined as both a user and resource in P6. Pat is assigned to a client site in another country to perform tasks in a series of projects: A, B, and C. She has nearly finished her assignments for Project A. She wants to use e-mail to request her active assignments for the next 30 days in Project B. She sends an e-mail message to the P6 task request account designated by her manager. The body of her message is empty; however, she types the following subject line:

```
active in next 30 days on project B
```

---

**Example 2:** Pat received a phone call from her manager who wants her to focus exclusively on her assignments from any active projects scheduled to finish in the next week. Pat's e-mail request is now:

due in next 1 week

### Replying with Task Status Updates

After receiving the requested list of tasks from the P6 server, you can reply with your status updates for all your tasks at the same time. The fields you can update depend on the status of the task (see the table below). However, for all tasks you can never edit the following static information: the project name, WBS name, activity name, and status.

The fields available to you in the e-mail are assigned by your project manager in P6. Also, in P6, you are assigned as either a resource assignment or an activity owner. Talk to your project manager to find out which fields were assigned to you and if you are a resource assignment or an activity owner as some of the status fields depend on your role.

**Table of Task Status Fields Available by E-Mail**

Field	New (not started)	Started (in-progress)	Done (completed)	Sample Value
<b>Resource Assignment</b>				
Start/Started Date	Yes	Yes	Yes	15-APR-2012
Finish/Finished Date	Yes	Yes	Yes	18-APR-2012
Time Spent	Yes	Yes	Yes	1d 2h
Time Left	Yes	Yes	-	2d 6h
RD (Remaining Duration)	Yes	Yes	-	5 d
Finished (Y/N)	Yes	Yes	-	N
<b>Activity Owner</b>				
Start/Started Date	Yes	Yes	Yes	15-APR-2012

Finish/Finished Date	-	-	Yes	18-APR-2012
Activity % Complete	Yes (see notes)	Yes (see notes)	-	.25
Expected Finish	Yes	Yes	-	
Time Spent (Labor/Nonlabor)	Yes	Yes	Yes	1d 2h
Time Left (Labor/Nonlabor)	Yes	Yes	-	2d 6h
RD (Remaining Duration)	Yes	Yes	-	4d
Finished (Y/N)	Yes	Yes	-	N
<p><b>Notes for % (percent complete):</b></p> <ul style="list-style-type: none"> <li>▶ The calculation of the Activity % Complete field depends on the settings your project manager configured in P6. The field is either calculated using units or duration, calculated using the percentage complete from steps, or a value you enter based on your own perception of the work you completed on this task.</li> <li>▶ If you enter <b>1</b>, which indicates the task is 100% complete, you must also enter <b>Y</b> for Finished (Y/N) to mark this task complete.</li> </ul>				

If your e-mail application does not support bulk inline e-mail editing in your reply message, use the **Update this task** link for each task.

---

**Example 3:** Next week, Pat requests a new list of tasks by e-mail. She receives the new list showing two activities for Project B. She wants to update the project schedule to show that she has already finished the first task on schedule and has started work on the second one with 1 day and 4 hours of time already spent. However, she has started the second task three days later than scheduled. She clicks **Reply** in her e-mail application, leaves the subject line as is, and makes only the following entry in the body of her reply message for the first task:

**Finished (Y/N): Y**

---

---

For the second task which was originally supposed to start on April 15, she makes the following entries in the same e-mail reply message:

**Start:** 18-Apr-2012

**Time Spent:** 1d 4h

When she sends the message to P6, the schedule is updated with her progress. The status of the first task is automatically set to *Completed* and the status of the second is set to *In Progress*.

---

## Updating the Progress of Activities Using E-mail

If E-mail Statusing Service is configured at your organization, you can request a list of your assigned activities using e-mail. Then, you can reply with your status updates.

To update activity status using e-mail:

- 1) Using any e-mail application, log into the e-mail account uniquely associated with your user account and resource entry in P6.
- 2) To request a list of your assignments, send an e-mail message to the P6 status updates e-mail address specified by your administrator.
- 3) When you get the list of your assignments as a message in your inbox, open it.
- 4) (Optional) To update the status of only a single task:
  - a. Click on the **Update this task** link.
  - b. In the resulting form, enter your updates.
  - c. Click **Send**.

---

**Note:** To save time, try to update the status of all your tasks at the same time. If your e-mail application does not support bulk inline e-mail editing in your reply message, you will have to use the **Update this task** step for each task.

---

- 5) To update the status of one or more tasks at the same time, click **Reply**.
- 6) In the reply message:
  - a. Enter your status updates using the approved formatting.
  - b. Click **Send**.
- 7) A confirmation message will be sent to you after your updates have been processed.

---

**Note:** If you need assistance with the options, syntax, or required formatting of these messages, send an e-mail message with only the word `Help` or `?` in the subject line to receive more detailed instructions.

---