Oracle
Primavera Cloud
Application Administration Guide

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Oracle Primavera Cloud Application Administration Guide

Contents

About This Guide

This guide instructs you on how to begin using Oracle Primavera Cloud. You should complete most of the tasks in this guide before you let your users work with the application. These tasks include defining the following: application administrators, application settings, workspaces, permission sets, user groups, security settings and privileges, and configuration options. You can use the Global Admin settings and Summary & Settings panel to complete the tasks.

Configuration Process in Oracle Primavera Cloud

The following list provides guidelines and a general process for configuring your environment, including configuring application settings, setting up companies and workspaces, and administering user security. Because the structures are global across the organization, some processes might require information from many participants. You can vary the order in which you complete these processes depending on your organization's implementation plan.

▶ Add application administrators.

Application administrators are afforded privileges to access all objects and carry out all functions in the application. See ***Add an Application Administrator*** (on page 19).

▶ Configure general application settings.

Application settings define parameters that apply globally in the application. See ***Application Settings Overview*** (on page 30).

▶ Set up the workspace hierarchy for your organization.

Identify your organization's project structure, which is global across the organization. See the ***Workspaces Overview*** (on page 35) for more information.

▶ Create global, workspace, project, program, file, portfolio, idea, custom log, and report permission sets.

Define a standard set of permission sets that determine access rights to global and object-specific data. See ***Permission Sets Overview*** (on page 54) to determine what permission sets you need to create or customize.

▶ Create user groups.

User groups are a collection of users with the same security privileges and access. Groups can be assigned directly to a workspace, project, portfolio, file, idea, custom log, program, or report. When you create user groups, you assign permission sets to them to define the level of access that users will gain. See ***User Groups Overview*** (on page 95) to learn more about adding user groups.

▶ Add companies that partner with your organization.

See ***Set Up a Company*** (on page 108).

▶ Add users to companies in the application.

When you add users, you can determine the user groups that they will belong to as well as assign them direct access to objects. See ***Users Overview*** (on page 112) for more information on types of users.

▸ Assign user groups to objects.

Assigning a user group enables the users to receive the permissions assigned to the user group. User groups can be assigned to any object at the **Global Admin leve** (see "**Assign User Group Access to a Workspace or Project**" on page 99)l or from the Security tab for a workspace, project, portfolio, program, custom log, file, idea, or report.

▸ Add projects to the workspace (if needed).

Project managers usually perform this step. Refer to the *Oracle Primavera Cloud Help* for more information.

Additional user groups may be created at the project level.

▸ Configure shared data and objects at the workspace-level including **Dictionary Configuration** (on page 129) and **Defaults & Options Configuration** (on page 195).

▸ (Optional) Configure a generic integration user account in the identity domain. You can use this account to monitor the data modified through integrations and to prevent integration failures upon inadvertent changes to the shared user account. See **Setting up an Integration User Account** (on page 255).

Related Video Tips

Standard Template Overview Video

Using an Identity Domain

All Oracle Primavera Cloud customers whose environments are provisioned on Oracle Cloud Infrastructure (OCI) have access to an identity domain account. If you're the tenant administrator, you can access the identity domain to manage password security for the users added to your Primavera Cloud environment. Managing password security from your identity domain console is not necessary for you or other users to log in to Primavera Cloud, so the following actions are optional based on your organization's security needs.

The information for how to access your company's identity domain console is included in your Primavera Cloud welcome email.

You can choose to change the password policies for your Primavera Cloud environment users. Some examples of password policies that the tenant administrator can manage in an identity domain include the number of days until passwords expire, the required password complexity, and how many unique new passwords a user must use before they can reuse an old password, among other criteria. To learn more about your identity domain and password policies, visit the documentation for your identity domain.

▸ Oracle Cloud Infrastructure Identity and Access Management users: Refer to the **Managing Password Policies** (**https://docs.oracle.com/en-us/iaas/Content/Identity/passwordpolicies/Managing-Password-Policies.htm**) section.

▶ Oracle Identity Cloud Service users: Refer to the ***Manage Oracle Identity Cloud Service Password Policies*** (***https://docs.oracle.com/en/cloud/paas/identity-cloud/uaids/manage-oracle-identity-cloud-service-password-policies1.html***) section.

An identity domain might also provide the ability to set up an external identity provider to handle user credentials, with the identity domain acting as the service provider. To learn more about managing identity providers in your identity domain, visit the documentation for your identity domain.

▶ Oracle Cloud Infrastructure Identity and Access Management users: Refer to the ***Manage Identity Providers*** (***https://docs.oracle.com/en-us/iaas/Content/Identity/identityproviders/manage-identity-providers.htm***) section.

▶ Oracle Identity Cloud Service users: Refer to the ***Manage Oracle Identity Cloud Service Identity Providers*** (***https://docs.oracle.com/en/cloud/paas/identity-cloud/uaids/managing-oracle-identity-cloud-service-identity-providers.html***) section.

If your tenant administrator needs to be replaced for any reason, or if you have questions about your identity domain or would like to explore further actions in your identity domain, contact ***My Oracle Support*** (***https://support.oracle.com/portal/***).

> **Notes**:
>
> - To configure your Primavera Cloud environment for federated single sign-on (SSO) using SAML 2.0, see ***My Oracle Support*** (***https://support.oracle.com/portal/***) article (DOC ID ***2769385.1*** (***https://support.oracle.com/epmos/faces/DocumentDisplay?id=2769385.1***)).
> - Existing Primavera Cloud environments that use SSO must create identity provider policies in their identity domain and add apps to which the policies will apply so that users can log in to Primavera Cloud using these apps. See ***My Oracle Support*** (***https://support.oracle.com/portal/***) article (DOC ID ***2769385.1*** (***https://support.oracle.com/epmos/faces/DocumentDisplay?id=2769385.1***) – Part 3).

Environment Status

The Oracle Primavera Cloud Status Page provides updates on the events occurring in the data center where your Primavera Cloud instance is hosted. You can view events and updates directly on the status page or by subscribing to alerts.

You can access the Oracle Primavera Cloud Status Page here: https://statuspage.gbucnss.oci.oraclecloud.com/status/CEGBU_primavera_cloud_prod/

How can I subscribe to get updates?

To subscribe to the Status Page to receive updates in email or text messages:

1) On the **Status** page, select **Subscribe to updates**.
2) On the **Subscribe to updates** dialog box, select the **Email** or **SMS** tab, complete the fields, and then select **Subscribe to updates**.
3) Depending on your selection, open the email or text message and confirm your subscription.
4) For email subscriptions, the **Confirm** button in the email opens the **Manage Subscriptions** page, ensure only the data center where your instance of Primavera Cloud is hosted is selected, and then select **Update Subscription**.

To manage or cancel your subscription:

▸ **Email**: Select **Manage your subscription** from a Status Page email alert. On the **Manage Subscriptions** page, make changes to your data center selections and select **Update Subscription**, or select **Cancel Subscription**.
▸ **SMS**: Send the unsubscribe code you received in the last text message you received for the Status Page.

What events do we communicate?

We communicate the following events:

▸ Planned maintenance announcements.
▸ Reductions in system responsiveness.
▸ Unplanned outages resulting in an instance becoming unavailable.

What does an event's status indicate?

Maintenance announcements will typically have the following status:

▸ **Scheduled**: The maintenance event is scheduled for a specific date and time. Any outages or performance impact will be communicated to customers ahead of time.

An unplanned performance issue or outage will typically move through the following statuses:

▸ **Investigating**: Teams are actively investigating but the cause has not yet been identified.
▸ **Identified**: The cause and resolution action have been identified.
▸ **Monitoring**: A fix has been applied and is being monitored to ensure the system is operating as expected.
▸ **Resolved**: The service is back online and operating normally.

After each unplanned event is resolved, our teams will conduct an investigation to determine the cause, assign corrective actions, and ensure efforts are made to prevent the issue from happening in the future.

At what frequency is the service updated?

See Planned Maintenance Periods.

For all other events, we notify the customers as soon as the information is available and provide updates as necessary.

Where can you find accessibility information for the Status Page?

Accessibility information for the Oracle Primavera Cloud Status Page can be found in the Product Accessibility topic.

Application Administrators Overview

Administration Overview Video

An application administrator is a user whose main task is to configure the application so that it is ready to use. Application administrator is a unique status with the highest amount of security privileges possible in a tenant. Application administrators set up and manage workspaces, users, and security. They have the privileges to access all workspaces, projects, portfolios, programs, ideas, and global elements (such as workflows). An application administrator can assign a user in any company as an application administrator. Oracle recommends that you assign the application administrator privilege sparingly.

See the ***Get Started for Application Administrators*** (***https://docs.oracle.com/cd/E80480_01/207895.htm***) guide for more information.

Application Administrator Privileges

Application administrators are automatically assigned access to all objects in the application. They do not need to be explicitly assigned security permissions to any object and are also afforded all the privileges that are available in an object permission set.

Owing to their unique status, application administrators are the only users who can complete the following tasks:

▸ **Assign and unassign other application administrators**: Application administrators can assign another user in any company as a backup administrator. See ***Add an Application Administrator*** (on page 19) for more information.

▸ **Modify global permission sets and assign them to users**: The Permission Sets page in Global Admin provides application administrators one location to create and edit global permission sets as well as object permission sets, including workspaces, projects, portfolios, programs, custom logs, files, ideas, and reports. Global permissions allow users to perform functions across the application, such as administering companies and users. These permissions can be assigned to any user and do not belong to any one workspace. See ***Create a Permission Set in Global Admin*** (on page 56) and ***Assign User Access*** (on page 122) for more information.

▸ **Export/Import configuration package files**: Application administrators can use the Import/Export Configuration Data feature to copy workspace data from one environment to another. You can either export and import whole workspaces or create configuration sets to specify the data. See ***Import/Export Configuration Data Overview*** (on page 332) for more information.

▸ **View all jobs running as background services from the Manage Services page**: Application administrators can access the Manage Services page to view the user-initiated processes in the application that are in progress or have completed. See ***Monitor Service Status*** (on page 349) for more information.

- ▶ **View all workflow instances from the Monitor Workflows page**: Application administrators can view all workflow instances from the Monitor Workflows page. See *Monitor a Workflow Instance* (*https://docs.oracle.com/cd/E80480_01/English/user_guides/workflow_design_guide/82242.htm*) for more information.

- ▶ **Access the Users, License Usage, and User Usage pages**: Application administrators can access user details on the Users page to look up details about individual users, such as contact information, license assignments, global permission set assigned to a user, and user group assignments. They can also view the license usage and user usage of the licenses on the View License Usage and View User Usage pages, respectively. See *View User Details* (on page 121), *View License Usage* (on page 29), and *View User Usage* (on page 30) for more information.

- ▶ **Configure integration settings**: Application administrators can set up connections with external products, such as P6 EPPM, MS Project, or Primavera Gateway, using the Integrations app in Global Admin. They also determine what business flows will be available for each connection. The selected business flows are only available for the workspaces associated with the connection. See *Integration Overview* (on page 253) for more information.

- ▶ **Act as proxy users for other application administrators:** Application administrators can act as a proxy user for another application administrator in their absence. See *Add a Proxy User* (on page 128) for more information.

- ▶ **Manage Personal Identifiable Information (PII)**: Application administrators manage the personal information (PI) in Primavera Cloud by ensuring to request the appropriate consent to collect, process, store, and transmit the user PI. See *Configure Consent Notices for Oracle Primavera Cloud* (on page 22) and *Audit Consent Notices for Oracle Primavera Cloud* (on page 23) for more information.

Other Types of Administrators in Primavera Cloud

In addition to the application administrator, Primavera Cloud has two other types of administrators: global administrators and object administrators. Any user in the tenant can be assigned privileges for a global administrator or an object administrator.

- ▶ **Global Administrator**: Any user in the tenant can be assigned the global permission sets. Global permissions allow users to perform functions across the applications, such as manage companies and users, edit application settings, manage workflow instances, export projects, download excel files, and create and run user reports.

- ▶ **Object Administrator**: Any user in the tenant can be assigned as an object administrator. The Administrator permission sets that can be set at the object level grant administrator privileges to a user for that object only.

> **Note**: Global and object administrators can perform some of the same tasks as an application administrator but through different areas in the application. Below are some examples of the administration tasks that global or object administrators can perform:
>
> - Manage user access and default permission sets for a project or a workspace on the Security detail window for a project or workspace.
> - Manage user groups on the User Groups page in the workspace

Summary and Settings or in the Project Team app for a project.

- Manage global permission sets for a workspace on the Permissions page in workspace Summary and Settings.

Add an Application Administrator

Add application administrators to your organization to add users, configure application settings, create workspaces, and set up dictionaries and defaults & options. Oracle recommends that you assign the application administrator privilege sparingly.

To assign a new user as an application administrator:

1) In the object selector, select ⦿ **Global Admin**.

2) In the sidebar, select 🏢 **Companies** or 👤 **Users**.

3) On the 🏢 **Companies** page, select a company, and then in the **Users** section, select ✛ **Add**.

   On the 👤 **Users** page, select ✛ **Add**.

4) In the **Add User** panel, complete the following steps:

   Notes:

   - If Consent Notice is not enabled, application administrators can view all of the below steps in the Add User panel. User administrators can only view the User Details, User Groups, Apps, and Summary steps when adding a new user.
   - If Consent Notice is enabled, then only certain steps of the Add User panel will be available. For application administrators, the User Details, Defaults, Apps, and Summary steps will be available. For user administrators, only the User Details, Apps, and Summary steps will be available.

   I. In the **User Details** step, complete the **Basic** and **Permissions** sections:

   a. **Company**: Enter the company that the user is being added to.

      Note: If the user is being added to a company from the General page for a company, then this field will be autopopulated with that company and cannot be edited.

   b. **Office**: Select one or more offices for the user.

      Note: If the user is being added to a company from the General page for a company, then this field will be autopopulated with the office selected on the page. You can also add additional offices for the user.

   c. **Email**: Enter the email address for the user.

> **Notes**:
>
> - The email address will be the username required for logging into the application. If the email address already exists in the system, a Use This button will appear.
> - If a user is added to an instance of Oracle Primavera Cloud Cloud hosted in the Oracle Cloud Infrastructure, select the Non-Federated User option when adding a new user who does not exist in your company's identity provider.

    d. **First Name**: Enter the first name of the user.

    e. **Last Name**: Enter the last name of the user.

    f. **Language**: Enter the user's language.

    g. (Optional) Complete additional fields.

    h. (Optional) **Copy Security Settings from Existing User**: Application administrators can choose to copy the security settings from an existing user, which will copy their user groups, permission set defaults, user access, and apps. This will populate the User Groups, Defaults, Access, and Apps steps on this Add User panel, though you can then modify the choices on those steps to personalize the options for the new user. If Consent Notice is enabled, the User Groups and Access will not be copied from another user.

    i. **User Type**: To add an application administrator, select the **Application Administrator** check box.

    j. **License**: All licenses are selected by default when the User Type is selected as **Application Administrator**.

2. In the **User Groups** step, assign the user to user groups. Users will gain access to the objects that the user group is assigned to.

3. In the **Defaults** step, determine the default permission sets that a user will have when being assigned to a new object. For application administrators, select **Administrator (System)** for all objects.

4. In the **Access** step, assign the user direct access to individual projects, portfolios, workspaces, ideas, and programs. When you assign access to an object, you must also define the permission sets for that access. You can choose to keep the default permission sets or assign different permission sets. An access type of User indicates that the user was assigned directly to the object. An access type of Workspace indicates that the user has gained access to that object indirectly through the user's assignment to the workspace. The user was assigned to the owning workspace of the object with a permission set defined for that object that grants the user access.

5. In the **Apps** step, determine the apps that a user will be able to access from the sidebar.

6. In the **Summary** step, view a summary of all of the user information configured in the Add User panel. You can also edit your selections if necessary.

5) Select **Finish**.

You can also assign a user from any company as an application administrator from the following pages:

▶ **Users Page**: For a user row, select the check box in the **Application Administrator** column.

▸ **Companies Page**: Select a company, and then in the **Users** section, for a user row, select the check box in the **Application Administrator** column.

▸ **Users or Companies Details Page**: For a user row, select **Edit User Details** from the ⚙ **Context** menu, and then select **Application Administrator** in the **User Type** section.

Tips

▸ Users will receive an email with instructions on how to set their password.

▸ If you are adding users to a partner company, they will automatically have company restricted users selected by default. Deselect this option if you want to add the users as regular users.

Managing Personal Information in Primavera Cloud

About Consent Notices

Consent notices inform users how personal information (PI) is collected, processed, stored, and transmitted, along with details related to applicable regulations and policies. Consent notices also alert users that the action they are taking may risk exposing PI. Primavera Cloud helps you to ensure that you have requested the appropriate consent to collect, process, store, and transmit the PI your organization holds as part of Primavera Cloud data.

Consent notices should:

▸ be written in clear language which is easy to understand.
▸ provide the right level of detail.
▸ identify the purpose and legal basis for your collection, processing, storage, and transmission of PI.
▸ identify whether data will be transferred to named third parties.
▸ identify PI categories and list the data which will be collected, processed, stored, and transmitted.

About Personal Information

Personal information (PI) is any piece of data which can be used on its own or with other information to identify, contact, or locate an individual or identify an individual in context. This information is not limited to a person's name, address, and contact details. For example, a person's IP address, phone IMEI number, gender, and location at a particular time could all be personal information. Depending on local data protection laws, organizations may be responsible for ensuring the privacy of PI wherever it is stored, including in backups, locally stored downloads, and data stored in development environments.

> **Caution**: Personal information (PI) may be at risk of exposure. Depending on local data protection laws, organizations may be responsible for mitigating any risk of exposure.

Cookies Policy

Oracle might use cookies for authentication, session management, remembering application behavior preferences and performance characteristics, and to provide documentation support.

Also, Oracle might use cookies to remember your log-in details, collect statistics to optimize site functionality, and deliver marketing based on your interests.

Your Responsibilities

Information security and privacy laws can carry heavy penalties and fines for organizations which do not adequately protect PI they gather and store. If these laws apply to your organization, it is your responsibility to configure consent notices before they are required. You should work with your data security and legal teams to determine the wording of the consent notices you will configure in Oracle Primavera Cloud.

If a consent notice is declined, it is your responsibility to take any necessary action. For example, you may be required to ensure that the data is not stored or shared.

PI Data in Primavera Cloud

Personal information (PI) may be visible in multiple areas of Oracle Primavera Cloud, including but not limited to the following apps: Contracts, Cost and Funds, Dashboard, Documents, Field, Integration, Portfolio Analysis, Reports, Resources, Risk, Schedule, Scope, Strategic Alignment, Tasks, and Workflows and Forms. PI may also be visible in the following pages, including but not limited to: Global Admin settings, Profile, Preferences, Manage Proxy Users, Manage Services, and Monitor Workflows.

PI may be at risk of exposure in multiple areas of Primavera Cloud, including but not limited to downloaded tables, reports, documents, API, and mobile applications. Primavera Cloud allows for the creation of configured fields and codes that could be used to store PI. Consideration should be taken when creating these fields and codes to ensure PI policies for your organization are followed.

As part of Oracle Primavera Cloud Services, you may be using an identity domain to manage your user access and entitlements across a number of cloud and on-premises applications and services. If you are using or accessing an identity domain, you are responsible for deleting your details and data from the identity domain. You are responsible for retrieving your content in the identity domain during your applicable services period.

Provide API, Gateway, and Data Service access to users using the Security tab on the Privacy and Security page of Global Admin. These settings enable integration features across the application and users can synchronize external data with Primavera Cloud using the Integration app, Primavera Cloud REST APIs, or the Data Service.

Configure Consent Notices for Oracle Primavera Cloud

To configure consent notices for Oracle Primavera Cloud:

1) In the object selector, select ⛉ **Global Admin**.

2) In the sidebar, select ⬠ **Privacy & Security**.

3) On the **Privacy & Security** page, on the **Consent** tab, select **Accept PII Usage on Login**.

4) In the **Consent Notice Message** details window, enter the consent notice.

5) (Optional) Format the consent notice including headings, fonts, and links.

6) Select **Save**.

Audit Consent Notices for Oracle Primavera Cloud

You can see the status of consent acceptance for users. If the consent notice is changed, the consent acceptance for all users is reset.

To audit consent status for Oracle Primavera Cloud:

1) In the object selector, select ⬠ **Global Admin**.

2) In the sidebar, select 🏢 **Companies**.

3) Select a company row.

4) In the **Users** table, select the **Consent Status** column to sort by Accepted, Declined, and No Response.

Assign API, Gateway, and Data Service Access

Application administrators can configure Primavera Cloud API, Primavera Gateway, and Primavera Cloud Data Service access to enable integration features across the application. If these settings are enabled, users can synchronize external data with Primavera Cloud using the Integration app,   Primavera Cloud REST APIs, or the Data Service.

To provide API, Gateway, and Data Service access:

1) In the object selector, select ⬠ **Global Admin**.

2) In the sidebar, select ⬠ **Privacy & Security**.

3) Select the **Security** tab.

4) In the **API and Gateway** section, select the **Allow access** check box to enable users to integrate data using the Primavera Cloud API or Primavera Gateway.

   a. Select **All** to assign access to all users.

   b. Select **Only Selected** to assign access to selected users.

      1. In the table, select the **Add** button to add specific users to the list of users with API or Primavera Gateway access.

      2. In the **Add Users** dialog box, select a user, and then select ⟩ **Add from Available** to move it to the selected list.

> **Note**: To delete a user from the list of users with API or Primavera Gateway access, select the ⚙ **Context** menu next to a user, and then select **Delete**.

5) In the **Data Services** section, select the **Allow access to all users** check box to assign all users access to the Primavera Cloud Data Services.

> **Note**: Data Service access enables users to extract data from application database using the Data Service and access that data using Primavera Analytics.

License Usage Overview

Licenses control project creation and user access in Oracle Primavera Cloud. Three license models are available to best fit the needs of your organization.

The three license models include:

▶ **Project**: In this license model, you contract for a single project which can be accessed by an unlimited number of users. This contracted project is created in the production workspace. In addition, you also get access to a non-production project which can be used for testing. You can create additional projects, or import P6 XML or Microsoft Project projects to support your contracted project. You can rename or delete the additional projects you created, but you cannot rename or delete the contracted project.

▶ **Named User**: In the Named User license model, you can create an unlimited number of projects for a limited number of users. Additional user licenses can be purchased by contacting your Oracle sales representative.

▶ **Enterprise:** In the Enterprise License model, you can create an unlimited number of projects for an unlimited number of users. There are two enterprise license models, Enterprise Schedule and Enterprise Portfolio Planning.

If your organization has purchased a Named User license model, you will be able to access the License Usage page to view license usage and assign available licenses to users. You should monitor the License Usage page to ensure your company is compliant with the number of licenses they have purchased. Organizations with the Project or Enterprise license models do not need access to the License Usage page because all users are automatically assigned all licenses provided in the license model.

See *Types of Licenses* (on page 24) for more information on what licenses are available for users in each license model.

Types of Licenses

There are four Oracle Primavera Cloud Service licenses designed to meet the needs of your organization. Licenses determine what apps, pages, functionality, and mobile apps a user has access to.

Portfolio and Capital Planning License: For portfolio planners to propose and manage the portfolios across your organization.

Progress License: For users who only need access to their activities and timesheets.

Schedule License: For power schedulers to prioritize, plan, manage, and evaluate projects across your organization.

Task Management License: For schedulers that use task management to manage their projects.

Licenses are distributed according to the license model:

▶ If you have the Named Users license model, then you will assign available licenses to users.
▶ If you have the Project license model, then all users will automatically receive the Schedule license, the Tasks license, and the Progress license.
▶ If you have the Enterprise Schedule license model, then all users will automatically receive the Schedule license, the Tasks license, and the Progress license.
▶ If you have the Enterprise Portfolio Planning license model, then all users will automatically receive the Portfolio Planning license.

> **Notes**:
>
> ▪ Application Administrators are automatically assigned to each enabled license type.
> ▪ Application Administrators must manually enable the Task App for named users with the Schedule license. See ***Manage a User's Apps*** (on page 123). Once the application administrator enables the Task App, users can choose to show or hide it when working in Primavera Cloud. See ***Organize Your Apps*** (***https://docs.oracle.com/cd/E80480_01/240344.htm#t240359***) in the Oracle Primavera Help Guide.

The tables below highlight which apps, pages, functionality, and mobile apps come with which licenses. Users may still require additional security privileges before they can access the apps, pages, functionality, or mobile apps granted by their license assignment.

App Access per License

App	Schedule License	Portfolio and Capital Planning License	Progress License	Task Management License
Cost & Funds	X	X		
Custom Logs	X	X		
Dashboards	X	X		
Files	X	X		X
Form	X	X		

Integration	X	X		
Portfolio Analysis		X		
Project Team	X	X		X
Related Items		X		
Reports	X	X		X
Resources	X	X		
Risk	X			
Schedule	X			
Scope	X			
Strategic Alignment		X		
Tasks	X* (see note)			X
Workflows and Forms	X	X		
Primavera Cloud for iOS and Android	X		X	X

*Note: The Tasks app is included with Oracle Primavera Schedule Cloud Service, Part #: B108055, only. Users on prior versions of Oracle Primavera Schedule Cloud Service require a separate Oracle Primavera Task Management Cloud Service license, purchased separately.

User Page Access per License

User Page	Schedule License	Portfolio and Capital Planning License	Progress License	Task Management License
Inbox	X	X	X	X
All Notifications	X	X	X	X
My Activities	X		X	
Timesheets	X		X	
News Feed	X	X		
Preferences	X	X	X	X

Manage Services	X	X		
Monitor Workflows	X	X		
Manage Proxy Users	X	X	X	X

Object Selector Actions per License

Action	Schedule License	Portfolio and Capital Planning License	Progress License	Task Management License
View All Projects	X	X		X
Add Project	X	X		X
Add Project Proposal		X		
Add Project Template	X	X		
View All Portfolios		X		
Add Portfolio		X		
View All Programs	X	X		X
Add Program	X	X		X
View All Workspaces	X	X		X
Add Workspace	X	X		X
View All Ideas		X		
Add Idea		X		
Access Global Admin	X	X		X

Project Inventory Panel Actions per License

Action	Schedule License	Portfolio and Capital Planning License	Progress License	Task Management License
Add Project	X	X		X

Add Project Proposal		X		
Add Project Template	X	X		
Import P6 XML	X			
Export P6 XML	X			
Import/Export Microsoft Project	X	X		
Import from Excel	X	X		X
Download Import Template	X	X		X
Recalculate Measures		X		
Delete Project	X	X		

Assign a License to a User

Assign licenses to users so that they can work in the application. There are multiple ways to assign licenses to users. You can assign licenses to a user while creating the user or from the License Usage page, Users page, or Companies page.

License Usage Page

To assign a license to a user from the License Usage page:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⚹ **License Usage**.
3) On the **License Usage** page, select the licenses.
4) In the **Users** detail window, select **Assign**.
5) In the **Assign Users** dialog box:
   a. Enter part or all of the user's username or personal name into the **Search** field.
   b. Select a user, and then select **Assign**.
6) Select **Save**.

Users Page

To assign a license to a user from the Users page:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⚇ **Users**.

3) On the **Users** page, select a user, and do either of the following:

   ▸ In the table, select the check boxes for the license types that you want to assign to the user.

   ▸ In the **User Details** panel, in the **License** section, select the check boxes for the license types that you want to assign to the user.

4) Select **Save**.

Companies Page

To assign a license to a user from the Companies page:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select 🏢 **Companies**.

3) On the **Companies** page, in the table, select a company.

4) On the **Company Details** page, in the **Users** section, select a user, and then select the check boxes for the license types that you want to assign to the user.

5) Select **Save**.

> **Notes**:
>
> ▪ If the license type columns are not available, configure your view settings for the page and select the required columns for different license types (Portfolio Planning, Progress, Schedule, Tasks). For more information, see the Configure a Column topic.
>
> ▪ Application Administrators are automatically assigned to each enabled license type.

Tips

▸ Remove a user from a license by selecting the ⚙ **Context** menu next to the user and then selecting ✕ **Remove** or by deselecting the check box for a license assigned to the user.

View License Usage

You can view how many licenses your organization purchased, how many are assigned, and how many are available. Only organizations that purchase a Named User license will have access to a license usage page.

To view the number of licenses available and in use:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⚘ **License Usage**.

3) Compare the **Purchased** and **Assigned** columns. If the number assigned is larger than the number purchased, reduce the number of users assigned to the license or obtain additional licenses.

4) In the **Users** detail window, view the users assigned to that license.

Tips

▸ Use the **Chart** detail window for a visual representation of your organization's license usage over time.

▸ If your organization is in compliance with the amount of licenses they have purchased, ✅ **Licensing is in compliance for this product** displays in the **Available** column. If your organization is using more licenses than they have purchased, ⚠. **To be in compliance, you must reduce the number of users assigned to this product** displays in the **Available** column.

View User Usage

View user usage to evaluate which individuals are consistently logging into the application. By identifying users who are not logging into the application, you can evaluate which user licenses can be released. You can also identify users who are not logging in and change their status to inactive so that they can no longer access your system.

To view user usage:

1) In the object selector, select 🛡 **Global Admin**.
2) In the sidebar, select 👤 **User Usage**.
3) From the time frame drop-down list, select the period of time from which to view user log ins.

> **Note**: You can view the user usage for up to past 365 days from the current date.

4) Select one of the following views:
   ▸ **Active Users**: Users who have logged into the application in the specified time frame.
   ▸ **Dormant Users**: Users who have not logged into the application in the specified time frame.

Application Settings Overview

Application settings define parameters that apply globally in the application. Use these settings to customize the application to meet specific organization requirements and standards.

Configure a Company Logo for a Report

Upload your organization's logo to the application to make it available to add to customized reports. You cannot upload an image with a CMYK color format. The recommended size for a company logo is 240 x 240 pixels.

To upload your company logo to the application:

1) In the object selector, select 🛡 **Global Admin**.
2) In the sidebar, select ▦ **Application Settings**.

3) On the **Application Settings** page, in the **Company Logo for Reports** section, select ✐ **Upload Logo**.

4) In the **Upload Logo** dialog box, select ••• **Browse**, select your company logo, and then select **Upload**.

Configure the Workspace Label

Your organization can customize the application to match the terminology of your industry. For example, you can update the label workspace to say something more applicable to your organization such as Enterprise Project Structure (EPS).

> **Note**: If you choose to customize the workspace label, the field name will no longer match messages, training content, or documentation materials.

To edit the workspace label in the application:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⧚ **Application Settings**.

3) On the **Application Settings** page, in the **Workspace Label** section:

   a. In the **Workspace Label (Singular)** field, enter the singular form of the name to use in place of workspace.

   b. In the **Workspace Label (Plural)** field, enter the plural form of the name to be in place of workspaces.

   c. Select **Configure More Languages**, and do the following:

      1. In the **Workspace Label Language Configuration** dialog box, select a language row.

      2. In the **Workspace Label (Singular)** field, enter the singular form of the name to use in place of workspace in the selected language.

      3. In the **Workspace Label (Plural)** field, enter the plural form of the name to be in place of workspaces in the selected language.

      4. Select **Save**.

4) Select **Save**.

Configure the Fiscal Year Setup Settings

Define the start month and start date of the fiscal year. These settings will determine the timescale layout for budget planning and cash flow views.

> **Note**: After cost data is added to a project, this setting cannot be changed.

To configure fiscal year settings:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⫘ **Application Settings**.

3) On the **Application Settings** page, in the **Fiscal Year Setup** section:

   a. In the **Fiscal Start Month** list, select a month.

      This setting will drive the budget planning and cash flow timescales. For example, if the fiscal start month is April, Quarter 1 will show Apr, May and Jun as 1st Quarter months when the year bucket is expanded.

   b. In the **Fiscal Start Date** list, select a date of the selected month.

      This setting, along with the **Fiscal Start Month**, will drive the timescale layout for the budget planning and cash flow views.

   c. Select **Display dates in timescale** to display the fiscal start and end date in the monthly buckets of the timescale.

      For example, if the fiscal start date is the 20th, the monthly bucket would display Apr 20 - May 19.

4) Select **Save**.

Configure the Global Search Settings

Configure global searches to determine how users view results on the Advanced Search page. Configure caching specifications to show search results for multiple searches or only the latest search.

To configure global search settings:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⫘ **Application Settings**.

3) On the **Application Settings** page, in the **Global Search** section, complete the following fields:

   a. **Recent Items Added Ranking**: The number in this field represents the added ranking percentage to add to global search results that were recently accessed by the user. The highest ranking item is displayed first when the user searches.

   b. **Number of Days to Consider Items as Recent**: The number in this field represents the number of days a search result will be considered as recent.

   c. **Maximum Number of Results in Search Results**: The number in this field represents the maximum amount of search results per type returned on the global search page.

   d. (Optional) **User Multiple Search Caching**: Select this option if you want to cache multiple searches per user instead of only the latest search.

4) Select **Save**.

Synchronize All Resource and Role Availability and Rates

When making changes to resource and role availability and rates at the root workspace level, you can push down those changes to all child workspaces and projects. Use the synchronization option in **Application Settings** to synchronize resource and role availability and rates within all workspaces and projects.

Note: You must be an application administrator or have the application administrator security privilege to edit the **Application Settings** and use the **Synchronize Now** option.

To synchronize all resource and role availability and rates:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⫤ **Application Settings**.

3) On the **Application Settings** page, in the **Resource and Role Updates** section, select **Synchronize**.

4) On the **Synchronize availability and rates?** dialog box, select **Synchronize Now**. When **Synchronize Now** is selected all resource and role availability and rates will be updated based on the owning workspace. Synchronizing the availability and rates also updates all related workspaces and projects.

Tips
▸ You also have the option to synchronize resource and role availability by using the

   Synchronize Availability and Rates option from the **Actions** ▼ menu on the **Role List** or **Resource List** page.

Configure the Time Periods Settings

Configure time periods settings to specify time period abbreviations and the default number of hours in a work period. The Hours per Time Period setting is used as a conversion factor when users choose to display time units and durations in units other than hours, and no configured calendar overrides these defaults.

To configure time periods settings:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⫤ **Application Settings**.

3) On the **Application Settings** page, in the **Time Periods** section, configure the **Hours per Time Period** and **Time Period Abbreviations** fields.

4) Select **Save**.

Configure Background Services Settings

Configure background services settings to customize how the application handles background job processing.

To configure background services settings:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⫤ **Application Settings**.

3) On the **Application Settings** page, in the **Background Services** section, in the **Delete Integration Jobs Older Than (Days)** field, enter a value to determine when integration jobs will be automatically deleted from the application.

4) Select **Save**.

> **Note**: If the **Delete Integration Jobs Older Than (Days)** field is set to 0, no integration jobs will be automatically deleted. The value must be greater than zero for the automatic deletion process to take effect.

Configure Authentication Settings

Configure authentication settings to determine how Primavera Cloud handles identity federation when adding new users. These settings are available only when Primavera Cloud detects that the current instance of Primavera Cloud is configured with an identity provider other than Oracle Identity Cloud Service for authentication.

To configure the authentication settings:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select � **Application Settings**.

3) On the **Application Settings** page, in the **Authentication** section, select one of the following:

   ‣ **Allow adding users as federated only** option when all users must be authenticated by their company's own authentication system or identity provider.

   > **Note**: This option is selected by default.

   ‣ **Allow adding users as a mix of federated and non-federated** option when users can be authenticated using their company's identity provider or through Identity Cloud Service.

Configure Authentication Timeout Settings

On an instance of Primavera Cloud hosted in the Oracle Cloud Infrastructure, application administrators determine the time in seconds before mobile and API users must authenticate their sessions. Requiring users to periodically authenticate with the server ensures the security of the server and protects against unauthorized access to application data. Application administrators can determine the frequency of authentication to suit their company's security needs. The minimum value for this setting is 1 second and the maximum value is 2,592,000 seconds (30 days).

To configure Authentication Timeout settings:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⤋ **Application Settings**.

3) On the **Application Settings** page, in the **Authentication Timeout** section, complete the following fields:

   a. **Mobile (Seconds)**: The duration in seconds before mobile users are required to authenticate with the Primavera Cloud server.

    b. **API (Seconds)**: The duration in seconds before API users are required to authenticate with the Primavera Cloud server.

4) Select **Save**.

Workspaces Overview

Creating Workspaces Video

Workspaces represent the hierarchical structure of your organization's businesses, projects, or processes. Workspaces can be subdivided into as many nodes or levels as needed to represent work at your organization. Nodes at the highest level might represent divisions within your organization, project types, site locations, or other major groupings that meet the needs of your organization.

The number of workspaces and their structure depend on your organization's project structure. For example, you might want to define increasingly lower levels of workspaces, similar to an outline, to represent broad areas of work that expand into more detailed projects. You might also want to create workspaces to contain users that require the same access to your organization's projects. Specify as many workspaces as necessary to fulfill the requirements of your operations executives and program managers. You can create workspaces under the production and non-production workspaces that are established for you. Most structures or data that you create under the non-production workspace can be moved to a production workspace through the import/export configuration feature.

Workspaces provide a way to customize sets of data for the projects contained within that structure. You can share data from higher level workspaces and create additional custom data within a specific workspace. Data that is required for the entire organization should be associated at the root level workspace so it can be pushed down to child production and non-production workspaces.

If you are a P6 user and would like more information about the functional differences between the Primavera Cloud workspace hierarchy and the P6 EPPM EPS, check out our Migration Guide on Oracle Help Center.

Working with Workspace Hierarchies

Workspaces in Primavera Cloud are arranged in a hierarchy that allows shared data and security to either be set at a high level and pushed down to child workspaces or configured individually at the workspace or project level. The top level of the workspace hierarchy consists of the root, or Company, workspace, and the root workspace has two child workspaces, Production and Non-Production. Each workspace, except the root workspace, can have additional child workspaces and projects with custom data sets and security. You can customize your workspace hierarchy with as many workspaces as necessary to suit the needs of your organization.

Tips for Creating Workspace Hierarchies

You should always plan ahead when creating your workspace hierarchy. Here are a few things to keep in mind when creating your workspace hierarchy in Primavera Cloud:

- After a workspace is created, it can be moved within the same workspace hierarchy. After shared data is added, you can delete the workspace. When deleting a workspace that contains data, the system will move all content to the parent workspace and workspace currency will be recalculated. For more information on workspace currency, see Workspace Currency Overview.

- Workspaces cannot be added between two workspaces, which means that you cannot add another level to the workspace hierarchy between two already existing levels. For example, if you add "Workspace A" to the "Production" workspace, then you will not be able to add a workspace between them. If you believe that you may one day want to add a level between existing workspaces, then you can add placeholder workspaces to ensure that that level can be utilized later. If you set the sharing method for shared data in the placeholder workspace to Automatic, then all shared data will be automatically pushed down to the child workspace.

- Some organizations might find it beneficial to organize the workspace hierarchy based on security access. Since security and permissions are defined at the workspace level, users who require the same security access should be added to the same workspace. If users from different departments in your organization require the same access to projects, then you should create the workspace hierarchy based on security needs instead of department or industry.

- Users can choose to use the Non-Production workspace as a test area before transferring data to the Production workspace. However, the Production and Non-Production workspaces can also be repurposed and renamed if you do not believe your organization will need a test area in the application.

- Certain shared data, including security data, can be pushed down to child workspaces manually or automatically. Global shared data should be configured as high up in the workspace hierarchy as it will be needed and set it to automatically share to all child workspaces. For example, if your organization has a list of codes that apply to all projects in all workspaces, you should configure those codes in the root workspace so that all workspaces can inherit them.

Workspace Hierarchy Example

The following is an example workspace hierarchy in Primavera Cloud using a placeholder workspace. In this example, the company utilizes the Non-Production workspace and has set up workspaces for Development, Testing, and Integration so that they can figure out the best configuration to suit their organization's needs. For example, they are using the Integration workspace to test integrations with P6 and Microsoft Project. They use these workspaces to make final changes before transferring data to the Production workspaces that users will be working in.

For the workspaces that will live under Production, the company has decided to organize its shared data and security access by location and currently has projects based in New York City and Los Angeles. The company believes that it may one day have projects in other locations, and they would need to differentiate the location further in the workspace hierarchy to better organize shared data. Therefore, when this company was first establishing its workspace hierarchy, it left a placeholder workspace between the Production workspace and the workspaces for the New York City and Los Angeles-based projects. They can now add workspaces at that level as child workspaces to Production.

In this example, the company branches out to Japan and decides to add countries as parent workspaces to cities because each country will have its own unique shared data. Because they created their workspace hierarchy with a placeholder workspace, they are able to add another child workspace to the Production workspace to designate another country (Japan) and change the name of the placeholder workspace to United States. The company is now able to incorporate countries into their workspace hierarchy.
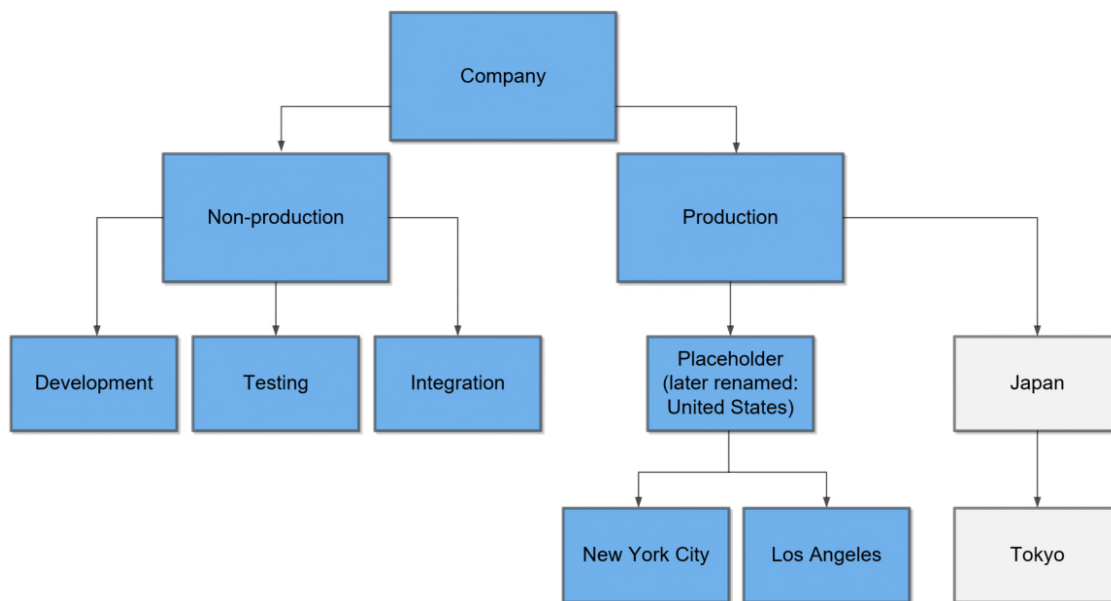
Create a Workspace

Creating multiple workspaces in the application enables you to represent hierarchical positions of all the projects in the database.

To create a workspace:

1) *Edit the Root Workspace* (on page 38)

    This task is performed by the application administrator during the initial setup and can be repeated for the production and non-production workspaces.

2) *Add a Workspace* (on page 38)
3) *Add an Image to a Workspace* (on page 40)
4) *Assign a User or User Group Access to a Workspace* (on page 102)
5) *Assign User Roles to a Workspace, Portfolio, or Project* (on page 103)
6) *Access a Workspace* (on page 42)

Edit the Root Workspace

Your organization can customize workspaces to conform to the hierarchy of your organization's structure and contain users that should have the same security access to projects. Each organization has one root workspace with the option to add an unlimited number of child workspaces to the production and non-production workspaces. The root workspace represents your organization. Only a user with the Administrator privilege can edit the root workspace. You can create data at the root workspace level to share in your production and non-production environments.

To edit the root workspace:

1) In the object selector, select **Workspaces**, and then select **View All Workspaces**.
2) In the **Workspaces** inventory panel, double-click the root workspace **Name**, **ID**, or **Description** column, and enter your changes.
3) Select **Save**.
4) In the inventory panel, select ✕ **Close**.

Tips
▸ You can also edit the Name, ID, or Description fields for any other workspaces, including production and non-productions workspaces.

Add a Workspace

Add workspaces to categorize projects using similar data sets. Use sibling workspaces to represent those that are hierarchically equal and child workspaces to represent those that are subordinate. If you have already created a workspace with data and object configurations that will meet the needs of your new workspace, you can create a copy of the original workspace to revise.

To add a workspace:

1) In the object selector, select **Workspaces**, and then select **View All Workspaces**.
2) In the **Workspaces** inventory panel, in the table, select a workspace row.

> **Note**: Do not select the Company workspace. You cannot create additional workspaces under the Company workspace.

3) Select ✛ **Add**, and enter a **Name**, **ID**, and **Description**.
4) In the **Parent Workspace** field, select ••• **Select**, choose where the workspace will reside in the organizational hierarchy, and select **OK**.
5) (Optional) In the **Copy From Another Workspace** field, select a workspace to copy.
6) Select the **Workspace Currency.** The **Exchange Rate** field is automatically populated with the latest exchange rate and is read only.

> **Note**: The default currency is the parent workspace currency. After cost data is entered, the currency is not editable. For more information on workspace currency, see Workspace Currency Overview.

7) Select **Save**.

8) In the inventory panel, select ✕ **Close**.

Tips

▸ To delete a workspace, you must be an application administrator. For more information on how to delete a workspace follow the steps in *Delete a Workspace* (on page 39).

▸ If you want to delete a workspace that contains an inherited CBS, you must delete the CBS and then reset the workspace CBS.

▸ You cannot create workspaces directly under the root workspace.

▸ You cannot add a workspace in the hierarchy between an existing parent and child workspace.

▸ You can move a workspace within the same hierarchy after it is created. Workspaces can be moved by selecting the ⚙ **Context** menu, and then selecting **Move up** or **Move Down**. For more information, see *Working with Workspace Hierarchies* (on page 35).

Delete a Workspace

You can delete a workspace that is no longer needed without losing data contained in that workspace, which allows you to better organize the hierarchical positions of all projects in the database. Workspaces can be deleted by an application administrator.

To delete a workspace:

1) In the object selector, select **Workspaces**, and then select **View All Workspaces**.

2) In the **Workspaces** inventory panel, in the table, select a workspace row.

3) Select the ⚙ **Context** menu and select **Delete**.

4) If the workspace is empty and does not contain any data, select **Delete** in the **Delete Workspace?** dialog box.

5) If the workspace is not empty and contains data, review the message in the **Delete Workspace?** dialog box, and select **Delete**.

> **Note**: When deleting a workspace that contains data, the system will move all content to the parent workspace. If an ID already exists at the parent workspace, the system appends the ID with a time stamp. The time stamp is formatted as YYMMDDHHMMSSmm.

6) The list of workspaces is updated and the deleted workspace is no longer visible.

Tips

▸ When a workspace is deleted, you can select **View Log** in the notification or go to Manage Services and view the Delete Workspace Log.

▸ If a CBS or evaluation category is present in a workspace, the delete workspace action will fail. The CBS and evaluation category must be deleted manually if you want to delete the workspace.

▸ When a workspace is deleted, all content in that workspace (for example, projects under the workspace as well as child workspaces and their projects) is moved to the parent workspace of the deleted workspace. Workspace costs are recalculated based on the currency and exchange rate in the new location.

Add an Image to a Workspace

A workspace image is shown in some areas of the application such as the Workspace Home page. You can upload your own image or choose from existing images. You cannot upload an image with a CMYK color format.

To add an image to a workspace:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Details**.

4) Select the **Workspace** image.

5) In the **Select Image for Workspace** dialog box, choose one of the following:

   ▸ Under the **Upload New Image** section, in the **Image** field, select **⋯ Browse**, and then select an image.

   ▸ Under the **Choose from Existing** section, select **Gallery** or **Uploaded**, and then select an existing image.

6) Select **Select**.

7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

You can also perform this task from the Workspace Home page:

1) In the object selector, select a workspace.

2) In the sidebar, select ⌂ **Home**.

Tips

▸ To restore the default workspace image, select **Reset to Default** in the **Select Image for Workspace** dialog box.

Best Practices for Initial Configuration of Workspace Security and User Groups

This topic provides the recommended steps to set up user groups and permissions in your organization's workspace structure. Depending on how your organization is structured and how you plan to use Primavera Cloud, this guide might not be the best practices for you.

Primavera Cloud provides automatic sharing of workspace security settings to create permission sets and user groups at a high level. As an application administrator, you only have to create the necessary user groups and permission sets for users once at the root workspace. The user groups will become available to all child workspaces, enabling you to add the appropriate users to the correct user groups at each child workspace. This process is shown in the image below.
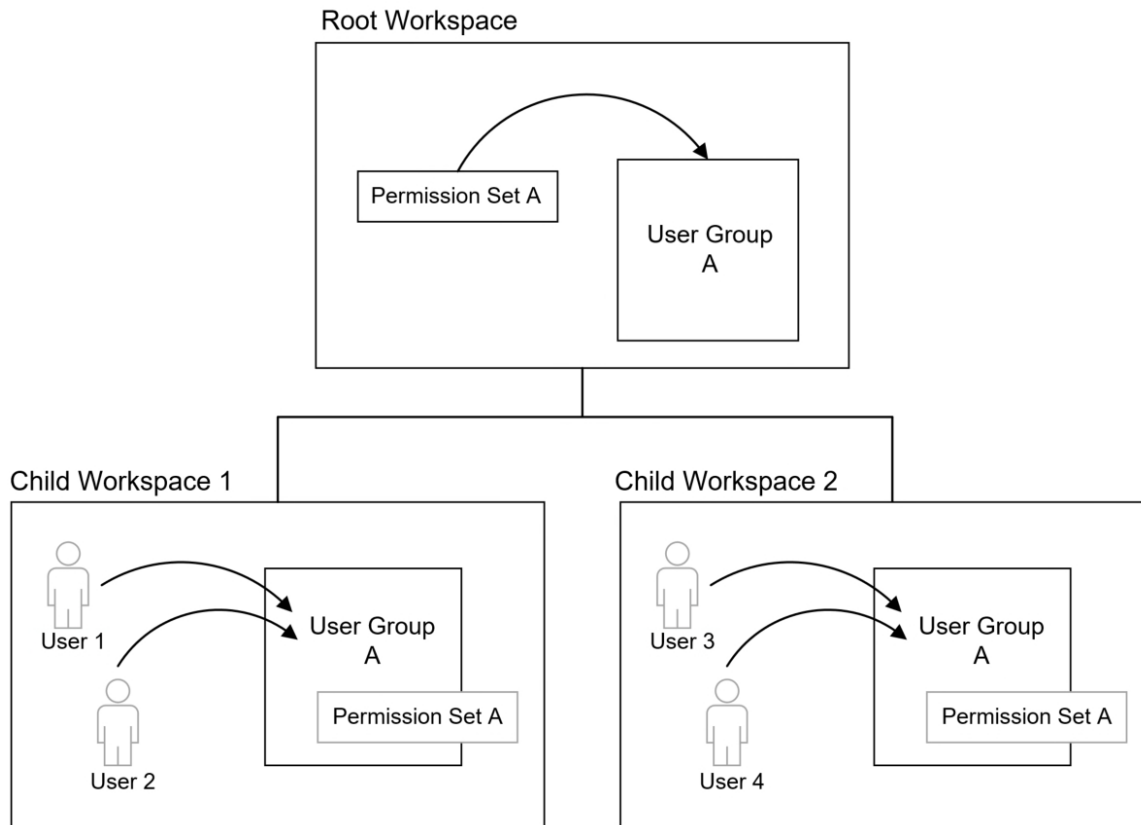
For example, you might have a group of users that propose projects in the application. All project proposers need to have the same permissions, but they need to work in different workspaces. At the root workspace, you can create the Project Proposer user group and assign it the Project Proposer permission set. The Project Proposer user group will become available to each child workspace. In each child workspace, you can then assign the users that belong to the Project Proposer user group for that workspace. You can complete this process for all of the necessary user groups in your instance of Primavera Cloud.

You can take the following steps for the initial workspaces security configuration in your instance of Primavera Cloud:

1) Create Permission Sets at the Root Workspace

   Permission sets are collections of security privileges that can be assigned to users or user groups. When you create the permission sets required by your organization at the root workspace, they will be available to be assigned to user groups at the root workspace and all child workspaces. See **Permission Sets Overview** (on page 54) for information about the permission sets available to be created.

2) Create Empty User Groups and Assign Permission Sets at the Root Workspace

User groups are collections of users with the same security permissions. At the root workspace, create the user groups needed to suit your organization's needs and assign the appropriate permission sets. Adding user groups at the root workspace makes them available to all workspaces in your instance of Primavera Cloud. By keeping the user groups empty at the root workspace, you will be able to determine who is added to each user group at the child workspace. See *Add a User Group at the Workspace Level* (on page 99) for more information.

3) Add and Assign Users to User Groups in Child Workspaces

By assigning users to the correct user group at the child workspace level, the user is afforded the associated security permissions in the child workspace. Assign users to user groups as soon as they are added to Primavera Cloud to ensure that they are afforded the correct permissions when they receive their welcome email containing their login credentials. See *Assign a User to a User Group at the Workspace Level* (on page 101) for more information.

Access a Workspace

Open a workspace to view apps that enable you to configure or view data at a workspace level such as workflows, shared data, reports, dashboards, ideas, resources, and documents.

To open a workspace:

In the object selector, select a workspace.

Move Workspace Overview

Move Workspace enables you to select a destination workspace for a workspace you want to move. For example, if you have a workspace set up in Non-production, you can simply move that workspace to Production without having to replicate data.

The workspace you are moving is the selected workspace, and the workspace you are moving it to is the target workspace.

Important to Know When Moving a Workspace

▶ The option to move a workspace is only available to users who have the Move Workspace permission assigned to them at both the selected and target workspaces.
▶ When choosing a target workspace, users will only see the workspaces they have access to in the target workspace list, which will not contain the selected workspace, its parent, children, or siblings where applicable.
▶ All children of the selected workspace are moved with the selected workspace.
▶ All data owned by the selected workspace or its children is moved with the selected workspace to the target. There are data handling exceptions, see *Considerations When Moving a Workspace to a Different Workspace* (on page 44) for more information.
▶ Cost data in the selected workspace is recalculated based on the currency and exchange rate of the target workspace.
▶ While the workspace move is in progress, no actions may be performed on the workspace until the move is complete.
▶ The move workspace action cannot be undone.

▸ Moving a workspace can take some time depending upon the workspace contents and how much data it contains.

When the selected workspace is successfully moved to the target workspace, or if the move workspace action fails, a Move Workspace Log is created. Only data of the selected workspace is displayed in the Move Workspace Log. Data moved with any of the selected workspace's children is not displayed. For more information, see *Move Workspace Log* (on page 49).

Move a Workspace to a Different Workspace

Move a Workspace Video

You can move a workspace to a different workspace in the Workspace inventory panel. The workspace being moved is the selected workspace, and the workspace it is moved to is the target workspace.

Moving a workspace to a different workspace can affect shared data. Some inherited shared data may have to be promoted to the common parent workspace, and some may be removed. For more information on moving a workspace, see *Move Workspace Overview* (on page 42). For more information on data handling during a move workspace action, see *Considerations When Moving a Workspace to a Different Workspace* (on page 44).

The move workspace action cannot be undone.

To move a workspace:

1) In the object selector, select **Workspaces**, and then select **View All Workspaces**.
2) In the **Workspaces** list, locate the workspace you would like to move, which is the selected workspace.
3) Select the ⚙ **Context** menu, and select **Move Workspace**.

> **Note**: The option to move a workspace is only available to users who have the Move Workspace permission assigned to them at both the selected and target workspaces.

4) In the **Move Workspace** dialog box, select the target workspace from the list, or use the search.

> **Note**: Users will only see the workspaces they have access to in the target workspace list. The target workspace list does not contain the selected workspace or its parent, children, or siblings where applicable.

5) Select **Move.**

Tips

▸ While the workspace move is in progress, no actions may be performed on the workspace until the move is complete.
▸ When the selected workspace is successfully moved to the target workspace, or if the move workspace action fails, a Move Workspace Log is created. For more information, see *Move Workspace Log* (on page 49).

Considerations When Moving a Workspace to a Different Workspace

When moving the selected workspace to a target workspace, some data items will be moved to the target workspace, will be moved and renamed if the same ID already exists, or will be automatically removed from the selected workspace. The following details what to expect when moving a workspace to another workspace, how data is handled in a move, security and permission information, and what circumstances will block a move from succeeding.

Important to Know When Moving a Workspace

▶ The option to move a workspace is only available to users who have the Move Workspace permission assigned to them at both the selected and target workspaces.

▶ When choosing a target workspace, users will only see the workspaces they have access to in the target workspace list, which will not contain the selected workspace, its parent, children, or siblings where applicable.

▶ All child workspaces are moved with the selected workspace.

▶ Cost data in the selected workspace is recalculated based on the currency and exchange rate of the target workspace.

▶ While the workspace move is in progress, no actions may be performed on the workspace until the move is complete.

▶ The move workspace action cannot be undone.

▶ Moving a workspace can take some time depending upon the workspace contents and how much data it contains.

How Data is Handled When Moving the Selected Workspace to the Target Workspace

▶ **Data Created at the Selected Workspace Level**

  ▶ All data owned by the selected workspace or its children is moved with it to the target workspace.

▶ **Inherited Shared Data**

  ▶ Inherited shared data is data that the workspace or its children does not own but has been inherited in the hierarchy.

  ▶ An automatic assessment of the selected workspace and its children will run to determine whether this data is utilized within the hierarchy (for example, if is associated with any projects, activities, etc.).

    ▪ If the inherited data is currently in use anywhere within the hierarchy, it will be promoted to the common parent of the selected and target workspaces.

    ▪ If the inherited data is not currently in use, it will be removed from the selected workspace and its hierarchy. It is not removed from its owning workspace or deleted from the system.

    ▪ Inherited data that is removed will not appear in the removed section of the Move Workspace Log, with the exception of User Access and User Groups.

▶ **Object Name Conflicts**

  ▶ All affected objects that have naming conflicts, for example two codes with the same name in both the selected and target workspace, undergo a renaming process before moving with the selected workspace or being promoted to a common parent.

- ‣ The renaming process will add an underscore and the timestamp of the move, "_YYMMDDHHMMSSmm", to the object name.
- ‣ Cost category renaming will not go as usual, but will attach a randomly generated 4 digit number to ensure uniqueness.

▸ **Special Cases**
  - ‣ Cost data
    - ▪ Cost data in the selected workspace is recalculated based on the currency and exchange rate of the target workspace.
    - ▪ Cost category renaming will not go as usual, but will attach a randomly generated 4 digit number to ensure uniqueness.
  - ‣ Dashboards
    - ▪ Inherited Workspace level dashboards will not be promoted to the common parent, even when in use.
    - ▪ Inherited Project, Program, and Portfolio level dashboards assigned to individual entities will be promoted to the common parent.
  - ‣ Folder Templates
    - ▪ Folder Templates are not treated as shared data and will be removed even if in use.
  - ‣ Forms, Workflows, and Mapping
    - ▪ If the selected workspace owns a workflow configuration that uses a design, form, or configuration inherited from its parent, the design, form, or configuration will be promoted to the common parent of the selected and target workspaces. This is the only case where inherited forms will be promoted.
    - ▪ If the selected workspace has an inherited workflow configuration that is not in use in any workflow the selected workspace owns but is triggered when an instance is run (even once), that workflow will be promoted to the common parent of the selected and target workspaces.
    - ▪ If the selected workspace is using an inherited form or workflow for mapping, that form or workflow will be removed and the mapping in the target workspace will be inherited. If there is no mapping in the target workspace, mapping in the selected workspace is set as default.
  - ‣ Locations
    - ▪ Inherited locations will be promoted to the common parent even when not associated with or used in any objects in the selected workspace.
  - ‣ Object Sharing Method
    - ▪ The object sharing method (automatic or manual) will remain as they were previously defined in the selected workspace.
  - ‣ Removed Data
    - ▪ Objects that are inherited and not in use will be removed but will not appear in the removed section of the Move Workspace Log, except for User Access and User groups. See Security and Permissions section for more details.
  - ‣ Reports
    - ▪ Inherited workspace reports will not be promoted to the common parent.

- ▶ Risk Data
  - ▪ Inherited Risk Matrices and Risk Threshold Templates are not treated as shared data and will be removed even if in use.
- ▶ Users
  - ▪ Inherited users will not be promoted to the common parent.

Security and Permissions

- ▶ Administrators inherently have the Move Workspace permission for all workspaces, and can grant this permission to users.
- ▶ Users must have the Move Workspace permission for both the selected and target workspaces to move a workspace.
- ▶ User Access (individuals) or User Groups (groups) with inherited access to the selected workspace will be removed.
- ▶ User Access or User Groups assigned direct access to the selected workspace will retain their access to that workspace and to its descendants.
- ▶ User Access or User Groups may appear in the Move Workspace Log more than once if they were removed from multiple workspaces in the hierarchy of the selected workspace.

Circumstances That Prevent a Workspace Move

The following scenarios will prevent the Move Workspace action or cause it to fail

Scenario	Outcome	Resolution
The user does not have the Move Workspace permission for the selected and target workspace.	If the user does not have the Move Workspace permission for the selected workspace, the Move Workspace option will not be available. If the user has Move Workspace permission for the selected workspace but not the target workspace, the Move button will be disabled in Move Workspace Dialog.	The user must have the Move Workspace permission for both the selected and target workspaces.

The number of unique workspace currencies in the selected and target workspaces combined exceeds the maximum of three workspace currencies.	Move Workspace will fail.	This needs to be rectified prior to the Move Workspace action.
The selected workspace has inherited funds.	Move Workspace will fail.	The inherited fund must be removed from the selected workspace prior to the Move Workspace action.
The selected workspace has inherited CBS.	Move Workspace will fail.	The inherited CBS must be removed from the selected workspace prior to the Move Workspace action.
The selected workspace has an inherited evaluation matrix with a different ID from the evaluation matrix in the target workspace.	Move Workspace will fail.	The inherited evaluation matrix must be removed from the selected workspace prior to the Move Workspace action.

The selected workspace has a workflow that contains an inherited User Group that does not exist in the target workspace.	Move Workspace will fail.	The inherited user group must be present at the target workspace prior to the Move Workspace action.
The selected workspace or any of its children has a Workflow that is in progress.	Move Workspace will fail.	Wait for any workflows in progress to complete or cancel the workflows in progress.
The selected workspace or any of its children contains projects that are in the process of being moved	Move Workspace will fail.	Wait for project move to finish.
The selected workspace, the target workspace, or a child of either is already in the process of being moved by another user.	Move Workspace will fail.	Refresh the Workspace Inventory page to reflect the latest workspace hierarchy data.

The selected workspace, the target workspace, or a child of either is in the process of adding or deleting workspace.	Move Workspace will fail.	Refresh the Workspace inventory page to reflect the latest workspace hierarchy data.

When the selected workspace is successfully moved to the target workspace, or if the move workspace action fails, a Move Workspace Log is created. Only the selected workspace data is displayed in the Move Workspace Log. Data moved with any of the selected workspace's children is not displayed. For more information, see *Move Workspace Log* (on page 49).

Move Workspace Log

The Move Workspace Log displays after a selected workspace is moved to a target workspace and can be accessed from the notifications panel, from the Manage Services page, or from the Inbox. The Move Workspace Log displays the name of the selected workspace, the name of the target workspace it was moved to, the start date that the move workspace process began, the end date the process was completed, who moved the workspace, any child workspaces moved with the selected workspace, and a list of impacted items.

The list of impacted items is sorted by Item Type in a table. Each impacted Item Type is designated as Moved, Renamed, or Removed. You can select the Item type to view important details for each individual item. The details panel displays the Total number of items affected, Name, ID, and Details for each item. Only data from the selected workspace is displayed in the Move Workspace Log. Data from any child workspace moved with the selected workspace is not displayed. Inherited workspace data that is removed during the move will not appear in the removed section of the Move Workspace Log, with the exception of User Access and User Groups. For more information on data handling during a move workspace action, see *Considerations When Moving a Workspace to a Different Workspace* (on page 44).

Shared Data Overview

Creating and Sharing Data Elements Video

Workspaces provide a way to customize sets of data for the workspaces and projects contained within that structure. You can share data from higher level workspaces and create additional custom data within a specific workspace. Data that is required for the entire organization should be associated at the root level workspace and use an Automatic sharing method so it is pushed down to child workspaces. Data that does not need to be automatically pushed down to child workspaces should use the default Manual sharing method.

Shared data prevents the need to re-enter data. It is locked for editing by the owning workspace, prohibiting unauthorized changes in other workspaces and projects. You must have the required security privileges to add, edit, and delete shared data. If your data ownership needs change, you can update the owning workspace. You cannot delete or move shared data if it is actively used by a child workspace or project.

Most shared data is accessible from the workspace-level Summary & Settings panel. Some shared data is owned in several workspace-level apps. A limited subset of shared data is also available in the project context. You can manage various configuration and security data types including:

- Dictionaries
  - Analysis Views
  - Baseline Categories
  - Calendars
  - Codes
  - Cost Categories
  - Currencies
  - Curve Profiles
  - Custom Log Types
  - Evaluation Categories
  - Locations
  - Measures
  - Reasons
  - Reporting Cycles
  - Risk Matrix Templates
  - Risk Threshold Templates
  - Rules of Credit
  - Strategy Types
  - Units of Measure
- Defaults & Options
  - Configured Fields
- Permissions
  - Permission Sets
- Security
  - User Groups
- Workspace-Level App Data
  - Charts
  - Dashboards
  - Folder Templates
  - Forms
  - Reports

‣ Workflow Designs

‣ Workflow Configurations

Manage Shared Dictionaries

A child workspace can inherit dictionary data with a Manual sharing method from a parent workspace by using the Assign feature. Child workspaces can select which data to inherit instead of receiving all data by default. This method of data sharing prevents irrelevant data from being added to the workspace.

To pull down data from a parent workspace:

1) *Navigate to a dictionary page* (see page 359).

2) On the dictionary item page, select **Assign**.

3) In the **Assign** dialog box, select additional dictionary items, and select **Assign**.

4) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

🖳 **Dashboards**

🗁 **Files**

📊 **Portfolio Analysis**

👫 **Resources**

▪ **Risk**

🗏 **Schedule**

🔳 **Scope**

◎ **Strategic Alignment**

≡ **Tasks**

⤴ **Workflows and Forms**

Edit the Dictionary Sharing Method

Using Automatic and Manual Sharing for Dictionaries Video

If your data sharing methods change, you can update the sharing method of the data object. Any changes will affect new child workspaces. For example, if you change a data object to be shared automatically, all new child workspaces will automatically inherit this data. If you would like to use the data in pre-existing workspaces, you must use the Assign button to inherit the data.

The data sharing method must be changed in the owning workspace.

To edit the sharing method:

1) *Navigate to a dictionary page* (see page 359).

2) On the dictionary item page, select a dictionary entry.

3) In the **Sharing Method** list, specify how the data is shared between parent and child workspaces:

   ▸ **Manual**: The data can be pulled down by child workspaces individually, using the **Assign** button in each child workspace. This is the default option.

   ▸ **Automatic**: The data is pushed down to child workspaces automatically.

4) Save your changes:

   a. Select **Save**.

   b. In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

🖳 **Dashboards**

🗁 **Files**

📈 **Portfolio Analysis**

📊 **Reports**

👥 **Resources**

■ **Risk**

☰ **Schedule**

🗗 **Scope**

◎ **Strategic Alignment**

☰✓ **Tasks**

⤸ **Workflows and Forms**

Update the Owning Workspace of Dictionary Items

Update the owning workspace to move a dictionary item to another workspace that you are assigned. If you move the item higher in the workspace hierarchy, it will be available to more workspaces. If you move it to a higher workspace, all child workspaces can access the dictionary item.

To update the owning workspace of a dictionary item:

1) *Navigate to a dictionary page* (see page 359).

2) On the dictionary item page, select a dictionary entry.

3) Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.

4) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.

5) Save your changes:

   a. Select **Save**.

‣ In the **Summary & Settings** panel, select ✕ **Close**.

Tips

‣ You can also perform this task from context-specific pages in a workspace.

This setting is used in the following apps:

🏛 **Cost and Funds**

⊞ **Dashboards**

🗁 **Files**

📈 **Portfolio Analysis**

📖 **Reports**

👥 **Resources**

◼ **Risk**

📑 **Schedule**

🖾 **Scope**

◎ **Strategic Alignment**

☲ **Tasks**

🗘 **Workflows and Forms**

Update the Owning Workspace of Permission Sets

Update the owning workspace to move permission sets to another workspace that you are assigned. If you move the item higher in the workspace hierarchy, the permission set will be available to more workspaces. All child workspaces can access a permission set.

To update the owning workspace of a permission set:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Permissions**, and then select an object.

4) On the permission set page, select a permission set.

5) Select **Manage Shared Data**.

6) In the **Manage** dialog box, select a permission set row.

7) Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.

8) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.

9) Select **Save**.

10) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

‣ You can also perform this task from context-specific pages in a workspace.

▶ Create shells of permission sets and user groups at the root workspace so that they inherit down the hierarchy to child workspaces.

This setting is used in the following apps:

🏛 **Cost and Funds**

🗁 **Files**

📈 **Portfolio Analysis**

📊 **Reports**

👥 **Resources**

◼ **Risk**

☰ **Schedule**

🗔 **Scope**

◎ **Strategic Alignment**

☰ **Tasks**

⟲ **Workflows and Forms**

Security

Setting up the security for your application will allow you to control which users have access to what objects. Any security privileges set in the application will apply to mobile users.

To set up the security for the application, create permission sets and assign them to user groups. User groups are inherited down the workspace hierarchy. In child workspaces and projects, users can be added to the user groups, and the user groups can be assigned to objects.

Global permission sets and permission sets for all objects in all workspaces can be created and managed from the Permission Sets page in Global Admin. Permission sets for a workspace and the projects, portfolios, programs, custom logs, files, ideas, and reports in the workspace can also be managed at the workspace level. User groups for all workspaces can be managed from the User Groups page in Global Admin and also at the workspace or project level.

Permission Sets Overview

Creating Permission Sets and User Groups Video

Permission sets are collections of security privileges that can be assigned to individual users or user groups. There are two types of permission sets in the application: global and object permission sets.

Global Permission Sets

All users must be assigned a global permission set. Global permission sets determine a user's access to application settings and application-wide functions such as administering workflows, assigning proxy users, adding and supervising timesheets, managing users and companies, and more.

Global permission sets are configured when a user is being added to the application or by editing the user's details. The default global permission set for new users is View Only (System), though the application administrator can choose a different default global permission set. Global permission sets cannot be assigned to user groups.

Object Permission Sets

Users and user groups can also be assigned security permission sets for workspaces, projects, portfolios, programs, custom logs, files, ideas, and reports when access to these objects is being granted. Object permission sets are comprised of privileges that define a user's ability to perform certain functions such as add, edit, and delete. They also define a user's level of access to an object and its data. Object permission sets can be created by application administrators in Global Admin and by workspace administrators at the workspace level.

When you assign access to an object, you can choose to define permission sets that pertain to the objects within that object. For example, when you are assigning a user access to a project, you can choose to also assign a files permission set, which will then grant the user those privileges for all files in the project. If you want a user to only be able to access one file, then you should assign that user to the file directly. Additionally, when you assign a user or user group access to a workspace, the permission sets you define will also apply to any child workspace.

If a user or user group is assigned more than one permission set for an object, the user or group has the privileges for all assigned permissions. For example, if a user is granted the Add Project privilege in one user group that they are assigned to but not another, they will still be granted the Add Project privilege.

There are two default permission sets that cannot be modified from the Permission Sets page but are available to assign to users: Administrator (System) and View Only (System).

▸ The Administrator (System) permission set has all privileges assigned. It grants all functionality for an object as well as access to all of the object's data. If a user has the Administrator (System) permission set for a workspace, they will be able to see all data in the child workspaces as well. The Administrator (System) permission set for a workspace or project also grants the ability to edit the user and user group security for that object. If a user adds a workspace, project, portfolio, program, custom log, file, idea, or report, then they will automatically gain the Administrator (System) permission set for that object.

▸ The View Only (System) permission set is the default permission set assigned to objects for users and provides read-only access to objects and their data. Some pages and objects that have their own View privileges are not included in this permission set. To learn which pages and objects have their own View privileges, check out Understanding View Privileges in the *Oracle Primavera Cloud Help*.

Create a Permission Set in Global Admin

The Permission Sets page in Global Admin provides application administrators one location to create and edit global permission sets as well as object permission sets, including workspaces, projects, portfolios, programs, custom logs, files, ideas, and reports.

All users added to Primavera Cloud will receive a global permission set. You must choose a global permission set to be the default permission set for new users who are added to the application. Select the default permission set for all new users by selecting the Default Permission Set check box in the privileges section of the Permission Sets page. The global permission set can be changed from the default permission set when a user is being added.

When creating permission sets for workspaces and the other objects, you will first select the workspace where the permission set will be owned. These permission sets are inherited by all child workspaces. Inherited permission sets are also displayed on the Permission Sets page. The Owning Workspace of the permission set is the workspace where the permission set was created. Permission sets for objects can also be created in Summary & Settings.

To create a permission set on the Permission Sets page of Global Admin:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⚘ **Permission Sets**.
3) On the **Permission Sets** page, select an object tab.
4) In the **Workspace** picker, select a workspace to add a new permission set in that workspace.

> **Note**: You do not need to select a workspace on the **Global** tab.

5) On the **Permission Sets** page, on the object tab, select ＋ **Add**.
6) In the **Name** field, enter a unique name.
7) Expand each category to assign privileges.
8) Select **Save**.

Tips

▶ To duplicate a permission set, select the ⚙ **Context** menu, and then select **Duplicate**. The Administrator (System) permission set cannot be duplicated.

▶ To delete a permission set, select the ⚙ **Context** menu, and then select **Delete**. The View Only (System) and Administrator (System) global permission sets cannot be deleted.

▶ For quicker configuration, use **Select All** to select or deselect all check boxes. Select the check box in a privilege column to select all privileges in that column.

Create a Workspace Permission Set

Create workspace permission sets to determine a user's level of access to a workspace. Users can only access workspaces that they have been assigned.

To create a workspace permission set:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Permissions**, and then select **Workspace**.

4) On the **Workspace** permission sets page, select ✛ **Add**.

5) In the **Name** field, enter a unique name.

6) In the **Description** field, enter a description of the permission set.

7) In the **Privileges** section, expand each category to assign privileges.

8) Select **Save**.

9) In the **Summary & Settings** panel, select ✕ **Close**.

> **Notes**:
>
> - To assign users to a workspace permission set, use the **Security** page in the Workspace Summary & Settings panel.
> - To assign a default workspace permission set to a user group, use the **Default Permissions** tab of the **User Groups** page.

Tips

▶ Provide clear permission set names and descriptions to help you manage permissions.

▶ You can duplicate existing permission sets by selecting the ✛ **Add** ▼ menu and selecting **Duplicate**. The Administrator (System) permission set cannot be duplicated.

▶ You can delete a permission set by selecting the profile and selecting ✕ **Delete**. You can only delete permission sets that are not currently in use. The View Only (System) and Administrator (System) global permission sets cannot be deleted.

Create a Project Permission Set

Create project permission sets to determine a user's level of access to each project. Users can only access projects that they have been assigned.

To create a project permission set:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Permissions**, and then select **Project**.

4) On the **Project** permission sets page, select ✛ **Add**.

5) In the **Name** field, enter a unique name.

6) In the **Description** field, enter a description of the permission set.

7) In the **Privileges** section, expand each category to assign privileges.

8) Select **Save**.

9) In the **Summary & Settings** panel, select ✕ **Close**.

> **Notes**:
>
> - To assign users to a project permission set, use the **Security** page in the **Project Team** app.
> - To assign a default project permission set to a user group, use the **Default Permissions** tab of the **User Groups** page.

Tips

▶ Provide clear permission set names and descriptions to help you manage permissions.

▶ You can duplicate existing permission sets by selecting the ✛ **Add** ▼ menu and selecting **Duplicate**. The Administrator (System) permission set cannot be duplicated.

▶ You can delete a permission set by selecting the profile and selecting ✕ **Delete**. You can only delete permission sets that are not currently in use. The View Only (System) and Administrator (System) global permission sets cannot be deleted.

Create a Portfolio Permission Set

Create portfolio permission sets to determine a user's level of access to each portfolio. Users can only access portfolios that they have been assigned.

To create a portfolio permission set:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Permissions**, and then select **Portfolio**.

4) On the **Portfolio** permission sets page, select ✛ **Add**.

5) In the **Name** field, enter a unique name.

6) In the **Description** field, enter a description of the permission set.

7) In the **Privileges** section, expand each category to assign privileges.

8) Select **Save**.

9) In the **Summary & Settings** panel, select ✕ **Close**.

> **Notes**:
>
> - To assign users to a portfolio permission set, use the **Security** page in the Portfolio Summary & Settings panel.
> - To assign a default portfolio permission set to a user group, use the **Default Permissions** tab of the **User Groups** page.

Tips

▶ Provide clear permission set names and descriptions to help you manage permissions.

▶ You can duplicate existing permission sets by selecting the ✛ **Add** ▼ menu and selecting **Duplicate**. The Administrator (System) permission set cannot be duplicated.

▸ You can delete a permission set by selecting the profile and selecting ✕ **Delete**. You can only delete permission sets that are not currently in use. The View Only (System) and Administrator (System) global permission sets cannot be deleted.

Create a Report Permission Set

Create report permission sets to determine a user's level of access to reports. Users can only access reports that they have been assigned.

To create a report permission set:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Permissions**, and then select **Report**.

4) On the **Report** permission sets page, select ✛ **Add**.

5) In the **Name** field, enter a unique name.

6) In the **Description** field, enter a description of the permission set.

7) In the **Privileges** section, expand each category to assign privileges.

8) Select **Save**.

> **Notes**:
>
> ▪ Workspace reports are automatically inherited by child workspaces but are only visible to users with appropriate security privileges. To ensure non-admin users can view a workspace report, either assign the users access to the specific report or assign privileges in the report's owning workspace.
>
> ▪ To assign users access to all reports owned by a workspace, use the **Security** detail window in the **Workspaces** inventory panel. To assign users access to a specific report, use the **Security** detail window on the **Report List** page.
>
> ▪ To assign a default report permission set to a user group, use the **Default Permissions** tab of the **User Groups** page.

Tips

▸ Provide clear permission set names and descriptions to help you manage permissions.

▸ You can duplicate existing permission sets by selecting the ✛ **Add** ▼ menu and selecting **Duplicate**. The Administrator (System) permission set cannot be duplicated.

▸ You can delete a permission set by selecting the profile and selecting ✕ **Delete**. You can only delete permission sets that are not currently in use. The View Only (System) and Administrator (System) global permission sets cannot be deleted.

Create a File Permission Set

Create file permission sets to determine a user's level of access to files. Users can only access files and folders that they have been assigned.

To create a file permission set:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Permissions**, and then select **File**.

4) On the **File** permission sets page, select ＋ **Add**.

5) In the **Name** field, enter a unique name.

6) In the **Description** field, enter a description of the permission set.

7) In the **Privileges** section, expand each category to assign privileges.

8) Select **Save**.

9) In the **Summary & Settings** panel, select ✕ **Close**.

> **Notes**:
>
> - To assign users to a file permission set, use the **Security** detail window on the **File List** page.
> - To assign a default file permission set to a user group, use the **Default Permissions** tab of the **User Groups** page.

Tips

▶ Provide clear permission set names and descriptions to help you manage permissions.

▶ You can duplicate existing permission sets by selecting the ＋ **Add** ▼ menu and selecting **Duplicate**. The Administrator (System) permission set cannot be duplicated.

▶ You can delete a permission set by selecting the profile and selecting ✕ **Delete**. You can only delete permission sets that are not currently in use. The View Only (System) and Administrator (System) global permission sets cannot be deleted.

Create an Idea Permission Set

Create idea permission sets to determine a user's level of access to each idea.

To create an idea permission set:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Permissions**, and then select **Idea**.

4) On the **Idea** permission sets page, select ＋ **Add**.

5) In the **Name** field, enter a unique name for the permission set.

6) In the **Description** field, enter a description for the permission set.

7) In the **Privileges** section, expand the **Idea** category to assign privileges.

8) Select **Save**.

9) In the **Summary & Settings** panel, select ✕ **Close**.

Notes:

- To assign users to an idea permission set, use the **Security** page in the Idea Summary & Settings panel.
- To assign a default idea permission set to a user group, use the **Default Permissions** tab of the **User Groups** page.

Tips

▸ Provide clear permission set names and descriptions to help you manage permissions.

▸ You can duplicate existing permission sets by selecting the ✛ **Add** ▼ menu and selecting **Duplicate**. The Administrator (System) permission set cannot be duplicated.

▸ You can delete a permission set by selecting the profile and selecting ✕ **Delete**. You can only delete permission sets that are not currently in use. The View Only (System) and Administrator (System) global permission sets cannot be deleted.

Create a Custom Log Permission Set

Create custom log permission sets to determine a user's level of access to each project. Users can only access custom logs that they have been assigned.

To create a custom log permission set:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Permissions**, and then select **Custom Log**.

4) On the **Custom Log** permission sets page, select ✛ **Add**.

5) In the **Name** field, enter a unique name.

6) In the **Description** field, enter a description of the permission set.

7) In the **Privileges** section, expand each category to assign privileges.

8) Select **Save**.

9) In the **Summary & Settings** panel, select ✕ **Close**.

Notes:

- To assign users to a custom log permission set, use the **Permissions** detail window on the **Custom Logs** page in the Project Summary & Settings panel.
- To assign a default custom log permission set to a user group, use the **Default Permissions** tab of the **User Groups** page.

Tips

▸ Provide clear permission set names and descriptions to help you manage permissions.

▸ You can duplicate existing permission sets by selecting the ✛ **Add** ▼ menu and selecting **Duplicate**. The Administrator (System) permission set cannot be duplicated.

▶ You can delete a permission set by selecting the profile and selecting ✕ **Delete**. You can only delete permission sets that are not currently in use. The View Only (System) and Administrator (System) global permission sets cannot be deleted.

Create a Program Permission Set

Create program permission sets to determine a user's level of access to each program.

To create a program permission set:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Permissions**, and then select **Programs**.

4) On the **Program** permission sets page, select ＋ **Add**.

5) In the **Name** field, enter a unique name for the permission set.

6) In the **Description** field, enter a description for the permission set.

7) In the **Privileges** section, expand each category to assign privileges.

8) Select **Save**.

9) In the **Summary & Settings** panel, select ✕ **Close**.

> **Notes:**
>
> ▪ To assign users to a program permission set, use the **Security** page in the Program Summary & Settings panel.
>
> ▪ To assign a default program permission set to a user group, use the **Default Permissions** tab of the **User Groups** page.

Tips

▶ Provide clear permission set names and descriptions to help you manage permissions.

▶ You can duplicate existing permission sets by selecting the ＋ **Add** ▼ menu and selecting **Duplicate**. The Administrator (System) permission set cannot be duplicated.

▶ You can delete a permission set by selecting the profile and selecting ✕ **Delete**. You can only delete permission sets that are not currently in use. The View Only (System) and Administrator (System) global permission sets cannot be deleted.

Security Privileges Definitions

Global Security Privileges Definitions

When creating a permission set, use the following definitions to determine the functionality each privilege controls and other privileges that may also be required. Selecting one privilege may automatically select other privileges if they are required for the original privilege to function properly. These other privilege selections cannot be changed without affecting the selection of the original privilege. Any privilege requirements are noted in the definition.

Configuration

Administer Workflow Instances

Enables users to view and manage all workflow instances on the **Monitor Workflows** page.

Application Settings

Enables users to edit application settings, which set global preferences for Oracle Primavera Cloud.

Assign Proxy Users

Enables users to assign other users to act as a proxy user.

Companies

Enables users to add, edit, and delete companies.

If Add is selected, the Edit privilege for Companies is also selected and cannot be changed. If Delete is selected, the Add and Edit privileges for Companies are also selected and cannot be changed. Selecting Add, Edit, or Delete also selects the Enable User Administration privilege and cannot be changed.

Create and Run User Reports

Enables users to create and run user reports.

Download Excel Files

Enables users to download tables as Microsoft Excel files.

Export Projects

Enables users to export projects to P6 XML and Microsoft Project XML.

Manage Timesheets

Enables users to enter time and submit, approve, or reject a resource's timesheets.

If Enable is selected, the Add, Edit, Delete, and View privileges for Timesheets are also selected and cannot be changed.

Supervise Timesheets

Enables users to enter time and submit timesheets on behalf of the resources assigned to the projects.

If Enable is selected, the Add, Edit, Delete, and View privileges for Timesheets are also selected and cannot be changed.

Timesheet Settings

Enables users who are not application administrators to manage timesheet settings.

If Edit is selected, the View privilege for Timesheets is also selected and cannot be changed.

Timesheets

Enables users to add, edit, delete, and view timesheets.

User Administration

Enables users who are not application administrators to add and edit users.

This privilege can be assigned to users from another company. However, users that are also marked as restricted can only add and edit users from their company.

Workspace Security Privileges Definitions

When creating a permission set, use the following definitions to determine the functionality each privilege controls and other privileges that may also be required. Selecting one privilege may automatically select other privileges if they are required for the original privilege to function properly. These other privilege selections cannot be changed without affecting the selection of the original privilege. Any privilege requirements are noted in the definition.

Configuration

Analysis Views

Enables users to add, edit, and delete Analysis Views.

If you select the add, edit, or delete privileges, all privileges are automatically selected.

Baseline Categories

Enables users to add, edit, and delete baseline categories.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add and edit are automatically selected and cannot be changed.

Calendars

Enables users to add, edit, and delete workspace-level calendars. To add or edit a holiday list, both Add and Edit must be enabled.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are also selected and cannot be changed.

Applies to: Workspace-level Calendars dictionary

CBS

Enables users to add, edit, and delete a workspace CBS.

Charts

Enables users to add, edit, and delete charts.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add, edit, and view are automatically selected and cannot be changed.

Codes

Enables users to add, edit, and delete codes and code values data. To edit color associations from the workspace Codes dictionary, the edit privilege must be enabled.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add, edit, and view are automatically selected and cannot be changed.

Configured Fields

Enables users to add, edit, and delete configured fields.

If you select the add privilege, edit is automatically selected. If you select the delete privilege, add and edit are automatically selected and cannot be changed.

Cost Categories

Enables users to add, edit, or delete cost categories.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add, edit, and view are automatically selected and cannot be changed.

Custom Log Types

Enables users to add, edit, or delete custom log types in the workspace Summary & Settings. Users with the Add privilege can also assign a custom log type from a parent workspace or duplicate a custom log type. Users with the Delete privilege can also remove custom log assignments. Users with the Edit privilege can also apply a custom log type to programs and projects and assign and remove configured fields and codes.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add and edit are automatically selected and cannot be changed.

Currencies

Enables users to add, edit, and delete currencies.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add, edit, and view are automatically selected and cannot be changed.

Curve Profiles

Enables users to add, edit, and delete a curve profile.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add, edit, and view are automatically selected and cannot be changed.

Evaluation Categories

Enables users to add, edit, or delete evaluation categories.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add and edit are automatically selected and cannot be changed.

Field Labels

Enables users to edit field labels.

Folder Templates

Enables users to add, edit, and delete folder templates.

If you select the add, edit, or delete privileges, all privileges are automatically selected.

Forms

Enables users to add, edit, delete, or view forms.

If you select the add privilege, edit, delete, and view are automatically selected. If you select the edit privilege, the view privilege is automatically selected. If you select the delete privilege, add, edit, and view are automatically selected.

Locations

Enables users to add, edit, and delete locations data.

You must assign all privileges.

Measures

Enables users to add, edit, and delete measures.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add and edit are automatically selected and cannot be changed.

Notebook Topics

Enables users to add, edit, and delete Notebook Topics.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add and edit are automatically selected and cannot be changed.

Reasons

Enables users to add, edit, and delete reasons.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add and edit are automatically selected and cannot be changed.

Report Cycles

Enables users to add, edit, and delete reporting cycles.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add and edit are automatically selected and cannot be changed.

Resource Costs/Financials

Enables users to edit and view workspace-level rates on a resource owned by the current workspace or the parent workspace.

If Edit is selected, the View Resource Costs/Financials and Edit Resources privileges are also selected and cannot be changed.

Applies to: Resources

Resources

Enables users to add, edit, and delete workspace-level resources. The Add privilege also enables users to assign a resource from the parent workspace to the current workspace. To promote a resource to the parent workspace, the Add Resource privilege for the parent workspace must be enabled. To assign roles to a resource, the Edit Roles privilege must also be selected. To view and edit workspace rates on a resource owned by the current workspace or the parent workspace, the View and Edit privileges for Resource Costs/Financials must also be selected.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, the Add Resources, Edit Resources, Edit Resource Costs/Financials and View Resource Costs/Financials privileges are also selected and cannot be changed.

Applies to: Resources

Restricted Configured Fields

Enables users to edit workspace-level restricted configured fields.

Applies to: Projects, Portfolios, and Programs.

Risk Matrix Templates

Enables users to add, edit, and delete risk matrices.

You must assign all security privileges.

Risk Threshold Templates

Enables users to add, edit, and delete risk thresholds.

You must assign all security privileges.

Role Cost/Financials

Enables users to edit and view workspace-level rates on a role owned by the current workspace or the parent workspace.

If Edit is selected, the View Role Costs/Financials and Edit Roles privileges are also selected and cannot be changed.

Applies to: Resources

Roles

Enables users to add, edit, and delete workspace-level roles. The Add privilege also enables users to assign a role from the parent workspace to the current workspace. To promote a role to the parent workspace, the Add Role privilege for the parent workspace must be enabled. To assign resources to a role, the Edit Resources privilege must also be selected. To view and edit workspace rates on a role owned by the current workspace or the parent workspace, the View and Edit privileges for Role Costs/Financials must also be selected.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, the Add Roles, Edit Roles, Edit Role Costs/Financials and View Role Costs/Financials privileges are also selected and cannot be changed.

Applies to: Resources

Rules of Credit

Enables users to add, edit, and delete rules of credit.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add, edit, and view privileges are automatically selected and cannot be changed.

Set Tasks Color Settings

Enables users to set the Color Tasks by attribute in Workspace Settings.

Start Workflows

Enables users to start workflow instances manually from the **Start Workflow** page.

If the Start Workflows privilege is enabled, the Workflows and Forms view privilege is automatically selected and cannot be removed.

Strategy Types

Enables users to add, edit, or delete strategy types.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add and edit are automatically selected and cannot be changed.

Units of Measure

Enables users to add, edit, and delete units of measure.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add, edit, and view are automatically selected and cannot be changed.

Views

Enables users to add, edit, and delete workspace views and filters.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add, edit, and view are automatically selected and cannot be changed.

Workflow Configuration

Enables users to add, edit, delete, or view workflow configurations.

If you select the add privilege, edit, delete, and view are automatically selected. If you select the edit privilege, the view privilege is automatically selected. If you select the delete privilege, add, edit, and view are automatically selected.

Workflow Design

Enables users to add, edit, delete, or view workflow designs.

If you select the add privilege, edit, delete, and view are automatically selected. If you select the edit privilege, the view privilege is automatically selected. If you select the delete privilege, add, edit, and view are automatically selected.

Workspaces

Enables users to add, edit, and delete workspace hierarchy nodes, add or update workspace logo, and edit workspace ID, name, description, and workspace currency (if costs do not exist). Workspace nodes at the highest level (root) must be added by an application administrator.

If you select the add privilege, edit is automatically selected. If you select the delete privilege, add and edit are automatically selected.

Workspace Dashboards

Enables users to add, edit, and delete dashboards at the workspace level.

You must assign all security privileges.

General

Allow Project Creation to Copy from Existing

Enables users to allow project creation to copy from an existing project.

Funding

Enables users to add, edit, delete, and view funds.

If you select the add privilege, edit and view are automatically selected and cannot be changed. If you select the delete privilege, add, edit, and view are automatically selected and cannot be changed. If you select the add, edit, or delete privilege, the edit and view privilege for Funding Costs/Financials are automatically selected.

Funding Costs/Financials

Enables users to edit and view funds and financial data.

If you select the edit privilege, view is automatically selected and cannot be changed. If you select the edit or view privilege, the view privilege for Funding is automatically selected and cannot be changed.

Ideas

Enables users to add and submit ideas in the workspace.

Import Project

Enables users to import XML or XER files from P6 EPPM and Microsoft Project.

Import Project Excel

Enables users to import Microsoft Excel (.xls or .xlsx) files for creating projects.

Move Project

Enables users to move a project from one workspace to another workspace. When you select Enable, the Project's Add privilege is automatically selected and cannot be changed. You must have this privilege in both the origin and destination workspace to have complete access to shared data during the move process.

Move Workspace

Enables users to move a workspace from one workspace to another workspace. You must have this privilege in both the selected and target workspaces to move the workspace. When you select Enable, the workspace's Add and Edit privilege is automatically selected.

Portfolios

Enables users to add portfolios.

Print Layouts

Enables users to add print layouts.

Programs

Enables users to add programs to the workspace.

Project Proposals

Enables users to add project proposals from the Project inventory panel or as part of an idea approval workflow. Only users with the Portfolio and Capital Planning Cloud Service license can add project proposals.

Applies to: Accept Idea workflow action, Project Inventory

Project Template

Enables users to add project templates.

Projects

Enables users to add projects.

Promote Report to Workspace

Enables users to promote a user or project report to a workspace report.

Recalculate Workspace Costs

Enables users to recalculate workspace costs when editing cost information.

Strategies

Enables users to add, edit, or delete strategies.

If you select the add privilege, edit and view are automatically selected and cannot be changed. If you select the delete privilege, add, edit, and view are automatically selected and cannot be changed.

Workspace Aggregate Cost Data

Enables users to view aggregate cost data for all projects and child workspaces within the workspace. If users also have the Project Costs/Financials privilege, they can access CBS costs in the project from the workspace Cost Sheet page.

Workspace Cost Sheet

Enables users to add and edit the workspace cost sheet.

If you select the edit privilege, the edit privilege for CBS is automatically selected and cannot be changed.

Users and Security

Permission Sets

Enables users to add, edit, and delete global, workspace, project, portfolio, file, and report permission sets.

You must assign all security privileges.

User Groups

Enables users to add, edit, and delete user groups for the workspace. Users with this privilege can edit the user groups from the Workspace Summary & Settings or from the User Groups page in Global Admin.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add and edit, are automatically selected and cannot be changed.

Project Security Privileges Definitions

When creating a permission set, use the following definitions to determine the functionality each privilege controls and other privileges that may also be required. Selecting one privilege may automatically select other privileges if they are required for the original privilege to function properly. These other privilege selections cannot be changed without affecting the selection of the original privilege. Any privilege requirements are noted in the definition.

Contract

Contracts

Enables users to add, edit, delete, or view contracts.

The add and delete privileges for contracts also apply to contract line items.

If you select the add privilege, edit and view are automatically selected and cannot be changed.

If you select the edit privilege, the view privilege is automatically selected and cannot be changed.

If you select the delete privilege, all privileges for Contract Costs/Financials are also automatically selected and cannot be changed.

Contract Costs/Financials

Enables users to edit or view contract costs and financial information associated with contracts.

If you select the edit privilege, the view privilege is automatically selected and cannot be changed. The edit and view privileges for Contracts are also selected and cannot be changed.

Contracts Approval

Enables users to approve and withdraw contracts.

If you enable this option, the privileges to edit and view Contract Costs/Financials are selected and cannot be changed.

Commitments

Enables users to add, edit, delete, or view commitments.

The add and delete privileges for commitments also apply to commitment line items.

If you select the add privilege, edit and view are automatically selected and cannot be changed.

If you select the edit privilege, the view privilege is automatically selected and cannot be changed.

If you select the delete privilege, all privileges for Commitment Costs/Financials are also automatically selected and cannot be changed.

Commitment Costs/Financials

Enables users to edit or view commitment costs and financial information associated with commitments.

If you select the edit privilege, the view privilege is automatically selected and cannot be changed.

Commitments Approval

Enables users to approve and withdraw commitments.

If you enable this option, the privileges to edit and view Commitment Costs/Financials are selected and cannot be changed.

Changes

Enables users to add, edit, delete, and view changes.

If you select the add privilege, edit and view are automatically selected and cannot be changed.

If you select the edit privilege, the view privilege is automatically selected and cannot be changed.

Changes Costs/Financials

Enables users edit and view changes.

If you select the edit privilege, the view privilege is automatically selected and cannot be changed.

These privileges also apply to changes.

Close/Reopen/Void Changes

Enables users to close, reopen, or void changes.

Change Orders

Enables users to add, edit, delete, and view change orders.

The add and delete privileges for change orders also apply to change order line items.

If you select the add privilege, edit and view are automatically selected and cannot be changed.

If you select the edit privilege, the view privilege is automatically selected and cannot be changed.

If you select the delete privilege, all privileges for Change Order Costs/Financials are also automatically selected and cannot be changed.

In order to add change orders, you also need at least the view privilege for contracts or commitments.

Change Order Costs/Financials

Enables users to edit or view change order costs and financial information associated with change orders.

If you select the edit privilege, the view privilege is automatically selected and cannot be changed. The edit and view privileges for change orders are also selected and cannot be changed.

Change Orders Approval

Enables users to approve and withdraw change orders.

If you enable this option, the privileges to edit and view Change Orders are selected and cannot be changed.

Potential Change Orders

Enables users to add, edit, delete, and view potential change orders.

If you select the add privilege, edit and view are automatically selected and cannot be changed.

If you select the edit privilege, the view privilege is automatically selected and cannot be changed.

If you select the delete privilege, all privileges for Potential Change Orders Costs/Financials are also automatically selected and cannot be changed.

Potential Change Orders Costs/Financials

Enables users to edit and view Potential Change Orders Costs/Financials.

These privileges also apply to potential change orders.

Potential Change Order Proposals

Enables users to add, edit, and delete potential change order proposals.

Approve a Proposal and Close the Potential Change Order

Enables users to approve proposals and close potential change orders.

Withdraw a Potential Change Order

Enables users to withdraw potential change orders.

Payment Applications

Enables users to add, edit, delete, and view payment applications.

If you select the add privilege, edit and view are automatically selected and cannot be changed.

If you select the edit privilege, the view privilege is automatically selected and cannot be changed.

If you select the delete privilege, all privileges for Payment Application Costs/Financials are also automatically selected and cannot be changed.

In order to add payment applications, you also need at least the view privilege for contracts or commitments.

Payment Application Costs/Financials

Enables users to edit or view payment application costs and financial information associated with payment applications.

If you select the edit privilege, the view privilege is automatically selected and cannot be changed. The edit and view privileges for payment applications are also selected and cannot be changed.

Payment Applications Approval

Enables users to approve and withdraw payment applications.

If you enable this option, the privileges to edit and view Payment Applications are selected and cannot be changed.

Cost

Accept Proposed Budget and Request Changes

Enables users to accept a proposed budget for a project or request change.

Applies to: Costs and Funds

Actuals

Enables users to add, edit, delete, or view actual project spending. This privilege does not grant users access to the cost and financial information associated with actuals records. For that, the user must have the Actuals Costs/Financials privilege.

If you select the add privilege, edit and view are automatically selected and cannot be changed.

If you select the edit privilege, the view privilege is automatically selected and cannot be changed.

If you select the delete privilege, all privileges for Actuals and Actuals Costs/Financials are also automatically selected and cannot be changed.

Applies to: Costs and Funds

Actuals Costs/Financials

Enables users to edit or view costs and financials associated with actuals records.

If you select the edit privilege, the view privilege is automatically selected and cannot be changed. The edit and view privilege for Actuals is also automatically selected and cannot be changed.

If you select the view privilege, the view privilege for Actuals is automatically selected and cannot be changed.

Applies to: Costs and Funds

Cash Flow Snapshots

Enables users to add, edit, or delete cash flow snapshots.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add and edit are automatically selected and cannot be changed.

Applies to: Costs and Funds

Project Budget

Enables users to add, edit, delete, or view budgets.

If you select the add privilege, the edit and view privileges are automatically selected and cannot be changed. If you select the delete privilege, add and edit are automatically selected and cannot be changed. If you select the edit privilege, view is automatically selected and cannot be changed.

If you select the add, edit, delete, or view privileges, the view privilege for Project Costs/Financials is also selected.

If the Project Costs/Financials view privilege is disabled, the Budget page is restricted.

Applies to: Costs and Funds

Project Budget Approval

Enables users to approve project budgets.

If you select the enable privilege, the Project Budget edit and view privileges are selected and cannot be changed, and the Project Costs/Financials view privilege is selected and cannot be changed.

Applies to: Costs and Funds

Project Cost Sheet

Enables users to add, edit, or delete project CBS codes. It also enables users to select and edit budget sources.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add and edit are automatically selected and cannot be changed.

Applies to: Costs and Funds

Recalculate Project Costs

Enables users to recalculate project, activity, and resource assignment costs when editing cost information. When run from the Costs and Funds app, only the project objects that are selected at run time will be recalculated. This does not include activity and resource assignments costs. Activities and resource assignments are the only objects whose costs are recalculated from the Activities page in the Schedule app.

If you select the enable privilege, the Edit Project privilege, the Edit Project Costs/Financials privilege, and the view Project Costs/Financials privilege are also selected and cannot be changed.

Applies to: Costs and Funds, Schedule

Documents

Custom Log Types

Enables users to add, edit, or delete custom logs in the project Summary & Settings. Users with the Add privilege can also assign a custom log from the workspace or duplicate a custom log. Users with the Delete privilege can also remove custom log assignment. Users with the Edit privilege can also assign and remove configured fields and codes at the project level.

To be able to assign user or user group access to a custom log, or to remove that assignment, a user needs the following permissions: the Edit privilege for Custom Log Type (either in a custom Project Permission Set or by assigning the user the built-in Administrator permission set for the project) AND the built-in Administrator permission set for Custom Logs when the user is assigned to the project or workspace. This also applies to giving users the ability to edit the permissions of custom logs assigned from the workspace.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add and edit are automatically selected and cannot be changed.

Manage Submittal Approvals

Enables users to manage submittal approvals.

If you enable this privilege, the Upload Submittals for My Company privilege is also enabled.

Spec Sections

Enables users to add, edit, or delete spec sections.

If you select the add privilege, edit is automatically selected. If you select the delete privilege, add and edit are automatically selected.

Submittals

Enables users to add, edit, or delete submittals.

If you select the add privilege, edit is automatically selected. If you select the delete privilege, add and edit are automatically selected.

Upload Submittals for All Companies

Enables users to upload submittals for all companies.

Upload Submittals for My Company

Enables users to upload submittals for their associated companies.

Funds

Funding

Enables users to add, edit, delete, and view funds.

If you select the add privilege, edit and view are automatically selected and cannot be changed. If you select the delete privilege, add, edit, and view are automatically selected and cannot be changed. If you select the add, edit, or delete privilege, the edit and view privilege for Funding Costs/Financials are automatically selected and cannot be changed.

Applies to: Costs and Funds

Funding Costs/Financials

Enables users to edit and view funds and financial data.

If you select the edit privilege, view is automatically selected and cannot be changed. If you select the edit or view privilege, the view privilege for Funding is automatically selected and cannot be changed.

Applies to: Costs and Funds

Tasks

Complete Constraints for All Companies

Enables users to enter a delivered date on task constraints regardless of assigned company.

If Enable is selected, the Enable privilege for Complete Constraints for My Company and the Edit privilege for Constraints are also selected and cannot be changed.

Applies to: Tasks

Complete Constraints for My Company

Enables users to enter a delivered date on task constraints that belong to the company to which they are assigned.

If Enable is selected, the Edit privilege for Constraints is also selected and cannot be changed.

Applies to: Tasks

Configure Task Notifications for Others

Enables users to configure task notification preferences on behalf of other users and configure default task notification preferences for all users assigned to at least one task in the project.

Applies to: Tasks

Configure Task Plan

Enables users to add and configure a task plan for a project.

If Add is selected, the user can add a task plan with custom swimlanes and apply it to the Work Plan page.

Applies to: Tasks

Constraints

Enables users to add, edit, and delete task constraints regardless of the user's assigned company. To assign tasks to constraints, or to remove an assignment, the Edit privileges for Tasks for All Companies or Tasks for My Company must also be selected.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are also selected and cannot be changed.

Applies to: Tasks

Link Constraint to Aconex Package

Enables users to link a task constraint to an Aconex package. To link a task constraint to an Aconex package, the Enable privilege must be selected.

Applies to: Tasks

Manage Commitments and Complete All Company's Tasks

Enables users to commit, recommit, and add reasons to any public task, delete commitments and recommitments on any public task, complete any public task, and complete private tasks that belong to them.

If Enable is selected, the Enable privilege for Manage Commitments and Complete My Tasks and the Edit privilege for Tasks for All Companies are also selected and cannot be changed.

Applies to: Tasks

Manage Commitments and Complete My Company's Tasks

Enables users to commit, recommit, and add reasons to public tasks to the company to which they are assigned, delete commitments and recommits on public tasks to the company to which they are assigned, complete public and private tasks to the company to which they are assigned, and complete task milestones that belong to the company to which they are assigned.

If Enable is selected, the Manage Commitments and Complete My Tasks privilege is also enabled.

Applies to: Tasks

Manage Commitments and Complete My Tasks

Enables users to commit, recommit, and add reasons to public tasks to which they are assigned, delete commitments and recommitments on public tasks to which they are assigned, complete public and private tasks to which they are assigned, and complete task milestones that belong to the company to which they are assigned.

If Enable is selected, the Edit privilege for Tasks for My Company is also selected and cannot be changed.

Applies to: Tasks

Tasks for All Companies

Enables users to add, edit, and delete any public task regardless of assigned company and any private tasks that belong to them.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are also selected and cannot be changed. Any privilege selected also selects the corresponding privilege for Tasks for My Company.

Applies to: Tasks, Schedule

Tasks for My Company

Enables users to add, edit, and delete public tasks that belong to the company to which they are assigned and private tasks that belong to them.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are automatically selected and cannot be changed.

Applies to: Tasks, Schedule

Project

Add WBS from other projects/templates

Enables users to copy WBS nodes and objects within the nodes from a project template or another project. To use this feature, the Add Activities privilege must also be selected.

Applies to: Schedule, Scope

Alerts

Enables users to add, edit, and delete system alerts that appear when thresholds are met on project-level data. Users do not require privileges to subscribe or unsubscribe themselves to an alert.

If you select the add, edit, or delete privilege, all Alerts privileges are also selected and cannot be changed.

Applies to: Costs and Funds, Schedule, Scope

Baselines

Enables users to add, edit, and delete project baselines. To choose or change a baseline type, the Enable Baselines - Set Project Baselines privilege must also be selected. To modify data within a baseline, privileges in the Schedule (Baselines) section must also be selected.

The Add and Edit privileges must be selected together. If Delete is selected, the Add Baselines, Edit Baselines, and Enable Baselines - Set Project Baselines privileges are also selected and cannot be changed.

Applies to: Schedule, Scope

Baselines - Set as Current Schedule

Enables users to set a project baseline as the current schedule. To use this feature, the Add Baselines and Edit Baselines privileges must also be selected.

Applies to: Schedule

Baselines - Set Project Baselines

Enables users to select a baseline type when adding a baseline or change the type of an existing baseline.

If Enable is selected, the Add Baselines and Edit Baselines privileges are also selected and cannot be changed.

Applies to: Schedule, Scope

Calendars

Enables users to add, edit, and delete project-level calendars. To edit a holiday list or promote a calendar to the parent workspace, the Add and Edit Calendars privileges for the parent workspace must be enabled.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are also selected and cannot be changed.

Applies to: Project-level Calendars dictionary

Close Reporting Periods

Enables users to close the current reporting period to further edits. Closed periods allow for accurate project analysis and reporting.

Applies to: Scope

Codes

Enables users to add, edit, and delete project-level activity codes and code values. To promote a code to the parent workspace, Add, Edit, and the Add Codes privilege for the parent workspace must be enabled.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are also selected and cannot be changed.

Applies to: Project-level Codes dictionary, Schedule

Companies

Enables users to assign or remove companies from a project and change the color associated with each company.

Applies to: Project Team

Currencies

Enables users to change the project currency and its associated exchange rate.

If Edit is selected, the Edit Project privilege is also selected and cannot be changed.

Applies to: Project Settings

Global Change

Enables users to add, edit, or delete public global changes or private global changes that belong to them. Users must have the Add and Edit privileges to copy global changes from another project.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are also selected and cannot be changed.

Applies to: Schedule

Global Change - Run

Enables users to run public global changes or global changes that belong to them. Users must have the Edit Activities privilege selected in the Current, Baselines, or Scenarios section of the Schedule privileges to make changes to activities in the current schedule, baseline, or scenario.

If Enable is selected, the Add Global Change and Edit Global Change privileges are also selected and cannot be changed.

Applies to: Schedule

Project

Enables users to edit and delete projects and project templates.

The Edit privilege enables users to edit project and project template data such as project details, codes, and settings. Some data such as alerts, currencies, and dictionaries have their own privileges. The Edit privilege is required to be able to configure the attribute a task is colored by for the project and enables the Color By setting in Project Settings. The Edit privilege is required to be able to move a project to a new destination workspace.

If Delete is selected, Edit is also selected and cannot be changed.

Applies to: Project Inventory, Project Settings

Project Costs/Financials

Enables users to view and edit project cost fields across the application, including at the portfolio and program levels, for pages to which the user has access. Without the Edit privilege, cost fields will be read-only. Without the View privilege, depending on the page, cost fields may be hidden, show a lock icon instead of a value, or the page may be restricted entirely.

Configured fields with a Data Type of Cost for objects in other contexts, objects with their own Cost/Financials privileges (Changes, Change Estimates, Change Order, Contract, Commitments, Fund, Payment Applications, Potential Change Orders, Project Actuals), and the File object are not controlled by the Project Costs/Financials privileges. When the View privilege is selected, the following functionality is enabled:

▸ Cost-related field values on the Cost Sheet page are displayed.

▸ All fields on the project Cash Flow page are displayed.

▸ Cost-related field values on the project Budget page are displayed and editable as long as the project Edit Project Budget and View Project Budget privileges are also enabled.

▸ Cost-related project-level field values on the program Summary Cost Sheet page are displayed.

▸ Cost-related project-level field values on the portfolio Budget Planning, Published Views, and Scenario Comparison pages are displayed.

▸ Cost-related project-level risk field values on the project Risk Register page are displayed.

▸ Cost-related project-level risk field values on the program Risk Register page are displayed as long as the program View Risk and project View Risk privileges are also enabled.

▸ Cost-related activity and resource assignment field values are displayed.

▸ Cost-related scope field values are displayed.

▸ The Construction Value field in the project details is displayed.

▸ Cost-related field values on the Schedule Comparison page for project activities and resource assignments are displayed.

▸ Configured fields with a Data Type of Cost are editable for the following objects as long as the Edit privilege for the corresponding object (Project Budget or Project Cost Sheet) is also enabled: Budget, Budget Changes, Budget Transfers, Project Cost Sheet. These objects do not require the Edit privilege for Project Costs/Financials to be enabled in order to be edited. Cost type configured fields for the Budget Details object can be edited without enabling the Edit privileges for Project Costs/Financials or Project Budget. Cost type configured fields for the Budget Details object are displayed as long as the View Project Costs/Financials and View Project Budget privileges are also enabled.

When the Edit privilege is selected, the following functionality is enabled:

▸ All fields on the project Cash Flow page are editable.

▸ Cost-related project-level risk fields on the project Risk Register page are editable as long as the project Edit Risk and View Risk privileges are also enabled.

▸ Cost-related project-level risk fields on the program Risk Register page are editable as long as the program View Risk, project Edit Risk, and project View Risk privileges are also enabled.

▸ Cost-related activity and resource assignment fields are editable as long as the Edit Activities privilege is also enabled.

▸ Cost-related scope fields are editable as long as the Edit privilege for an individual scope object is also enabled.

▸ Configured fields with a Data Type of Cost are editable for the following objects as long as the Edit privilege for the corresponding object is also enabled: Activity, Custom Log, Project, Resource Assignment, Risk, Scope Assignment, Scope Item, Submittal, Task, WBS, Work Packages.

▸ Set up store period performance for a project as long as the Edit Project, Enable Store Period Performance, Add Baseline, Enable Baseline - Set Project Baseline, and Enable Recalculate Project Costs privileges are also enabled.

▸ Store period performance for a project as long as the Enable Store Period Performance privilege is also enabled.

▸ Recalculate project costs as long as the Enable Recalculate Project Costs privilege is also enabled.

If the Edit privilege is selected, the View Project Costs/Financials and Edit Project privileges are also selected and cannot be changed.

Applies to: Costs and Funds, Project Details, Risk, Schedule, Scope

Project Dashboards

Enables users to add, edit, and delete dashboards at the project level.

If you select the add, edit, or delete privilege, all Project Dashboards privileges are also selected and cannot be changed.

Applies to: Dashboards

Project Integration

Enables users to run project synchronizations between Primavera Cloud and P6 EPPM or Primavera Gateway. To view project synchronizations, the Edit Project privilege must also be selected.

Applies to: Integration

Promote Report to Project

Enables users to promote user type reports to the project type, making them available to other users of the project.

Applies to: Reports

Scenarios

Enables users to add, edit, and delete project scenario details and view scenarios and scenario schedules. To interact with the objects or tools within a scenario, such as activities, leveler, relationships, or scheduler, the corresponding privileges for that object or tool and the View Scenarios privilege must also be selected. If Edit is selected, users can use Get Activities to add activities to the scenario.

If Add is selected, Edit and View are also selected and cannot be changed. If Edit is selected, View is also selected and cannot be changed. If Delete is selected, Add, Edit, and View are also selected and cannot be changed.

Applies to: Schedule

Scenarios - Set as Current Schedule

Enables users to set a project scenario as the current schedule.

If Enable is selected, the Add Scenarios, Edit Scenarios, and View Scenarios privileges are also selected and cannot be changed.

Applies to: Schedule

User Groups

Enables users to add, edit, and delete project-level user groups. Users with the Edit privilege can also edit the permission sets of enabled inherited user groups, assign users to an inherited user group, and remove users from an inherited user group if the user was assigned at the project level. Users with these privileges can configure user groups from the Project Team app or from the User Groups page in Global Admin.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are also selected and cannot be changed.

Applies to: Global Admin, Project Team

Views

Enables users to add, edit, and delete project-level views and filters. Users do not require privileges to add, edit, or delete personal views or filters.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are also selected and cannot be changed.

Applies to: Project-level pages that support named views

WBS

Enables users to add, edit, and delete WBS nodes.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are also selected and cannot be changed.

Applies to: Schedule, Scope

Project Proposals

Project Proposals

Enables users to delete project proposals and edit project proposal data such as project details, codes, and settings. Some data such as alerts, currencies, and dictionaries have their own privileges. Project configured fields with a Data Type of Cost are editable in project proposals as long as the Edit Project Proposals and Edit Project Costs/Financials privileges are enabled. Objects within a project proposal that are not listed here are controlled by the same privileges that control those objects in the project context.

You need this privilege to launch a project proposal workflow. This privilege allows users to add project proposals and launch a workflow even if they do not have the Start Workflows privilege.

Applies to: Project Inventory, Project Settings

Project Proposals and WBS Costs/Financials

Enables users to edit and view cost fields for pages within a project proposal to which the user has access. When the Edit privilege is selected, all functionality for the View Project Costs/Financials privilege is enabled, and all fields on the project proposal Cash Flow page are editable. All other cost fields are controlled by the Project Costs/Financials privileges.

If the Edit privilege is selected, the View Project Costs/Financials and Edit Project Proposals privileges are also selected and cannot be changed.

Applies to: Costs and Funds, Project Details

Resources

Resource Costs/Financials

Enables users to edit and view project-level rates on a project resource or a workspace resource assigned to the project.

If Edit is selected, the View Resource Costs/Financials and Edit Resource privileges are also selected and cannot be changed.

Applies to: Resources

Resource Demand

Enables users to add, edit, and delete resource demands. The Edit privilege also enables users to create demand units from the project schedule and recalculate role costs.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are also selected and cannot be changed.

Resources

Enables users to add, edit, and delete project-level resources. The Add privilege also enables users to assign a workspace resource to the project level. To promote a resource to the parent workspace, the Add Resource privilege for the parent workspace must be enabled. To assign roles to a resource, the Edit Roles privilege must also be selected. To view and edit project-level rates on a project resource or a workspace resource assigned to the project, the View and Edit privileges for Resource Costs/Financials must also be selected.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, the Add Resources, Edit Resources, Edit Resource Costs/Financials and View Resource Costs/Financials privileges are also selected and cannot be changed.

Applies to: Resources

Role Costs/Financials

Enables users to edit and view project-level rates on a project role or a workspace role assigned to the project.

If Edit is selected, the View Role Costs/Financials and Edit Roles privileges are also selected and cannot be changed.

Applies to: Resources

Roles

Enables users to add, edit, and delete project-level roles. The Add privilege also enables users to assign a workspace role to the project level. To promote a role to the parent workspace, the Add Role privilege for the parent workspace must be enabled. To assign resources to a role, the Edit Resources privilege must also be selected. To view and edit project-level rates on a project role or a workspace role assigned to the project, the View and Edit privileges for Role Costs/Financials must also be selected.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, the Add Roles, Edit Roles, Edit Role Costs/Financials and View Role Costs/Financials privileges are also selected and cannot be changed.

Applies to: Resources

Risk

Risk

Enables users to add, edit, delete, or view risks.

If you select the add privilege, edit and view are automatically selected. If you select the delete privilege, add, edit, and view are automatically selected.

Risk Analysis

Enables users to run risk analysis.

Risk Matrix

Enables users to add, edit, delete, or risk matrixes.

If you select the add privilege, edit is automatically selected. If you select the delete privilege, add and edit are automatically selected.

Schedule (Current)

Activities

Enables users to add, edit, and delete activities in the current schedule. To view or edit activity or assignment costs, the View Project Costs/Financials and Edit Project Costs/Financials privileges must also be selected. Some cost fields may be indirectly modified by editing fields they are connected to, even if Edit Project Costs/Financials is disabled. To manage risks or tasks associated with activities in the current schedule, the appropriate Risk and Tasks privileges must also be selected.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are also selected and cannot be changed. When an Activities privilege in the Schedule (Current) section is selected, the same Activities privileges in the Schedule (Baselines) and Schedule (Scenarios) sections are also selected and cannot be changed.

Applies to: Schedule

Level

Enables users to level resources and roles in the current schedule. When the leveler is run, the scheduler is also run, and activities may be modified even if Edit Activities is disabled.

If Enable is selected, the Enable Schedule privilege in the Schedule (Current) section and the same Level privileges in the Schedule (Baselines) and Schedule (Scenarios) sections are also selected and cannot be changed.

Applies to: Schedule

Merge Activities to Current Schedule

Enables users to run the merge process for activities in a scenario or baseline to the current schedule from the Schedule Comparison page. Activities with variances will display in the Activities list.

If Enable is selected, the Merge Mode toggle displays on the Schedule Comparison page.

Applies to: Schedule

Relationships

Enables users to add, edit, and delete relationships between activities in the current schedule.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are also selected and cannot be changed. When a Relationships privilege in the Schedule (Current) section is selected, the same Relationships privileges in the Schedule (Baselines) and Schedule (Scenarios) sections are also selected and cannot be changed.

Applies to: Schedule

Schedule

Enables users to run the scheduler in the current schedule. When the scheduler is run, activities may be modified even if Edit Activities is disabled.

If Enable is selected, the Enable Schedule privileges in the Schedule (Baselines) and Schedule (Scenarios) sections are also selected and cannot be changed.

Applies to: Schedule

Store Period Performance

Enables users to run the store period performance for a schedule.

Applies to: Schedule

Schedule (Baselines)

Activities

Enables users to add, edit, and delete activities in a project baseline. To use this feature, the Add Baselines and Edit Baselines privileges must also be selected. Activities are added to baselines using the Get Activities feature. To view or edit baseline activity or assignment costs, the View Project Costs/Financials and Edit Project Costs/Financials privileges must also be selected. Some cost fields may be indirectly modified by editing fields they are connected to, even if Edit Project Costs/Financials is disabled. To manage risks associated with activities in the baseline, the appropriate Risk privileges must also be selected.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are also selected and cannot be changed.

Applies to: Schedule

Level

Enables users to level resources and roles in a project baseline. To use this feature, the Add Baselines and Edit Baselines privileges must also be selected. When the leveler is run, the scheduler is also run, and activities may be modified even if Edit Activities is disabled.

If Enable is selected, the Enable Schedule privilege is also selected and cannot be changed.

Applies to: Schedule

Merge Activities to Baseline

Enables users to run the merge process for activities in a scenario, a baseline, or the current schedule to a baseline from the Schedule Comparison page. Activities with variances will display in the Activities list.

If Enable is selected, the Merge Mode toggle displays on the Schedule Comparison page.

Applies to: Schedule

Relationships

Enables users to add, edit, and delete relationships between activities in a project baseline. To use this feature, the Add Baselines and Edit Baselines privileges must also be selected.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are also selected and cannot be changed.

Applies to: Schedule

Schedule

Enables users to run the scheduler in a project baseline. To use this feature, the Add Baselines and Edit Baselines privileges must also be selected. When the scheduler is run, activities may be modified even if Edit Activities is disabled.

Applies to: Schedule

Schedule (Scenarios)

Activities

Enables users to add, edit, and delete activities in a project scenario. To use this feature, the View Scenarios privilege must also be selected. To view or edit scenario activity or assignment costs, the View Project Costs/Financials and Edit Project Costs/Financials privileges must also be selected. Some cost fields may be indirectly modified by editing fields they are connected to, even if Edit Project Costs/Financials is disabled. To manage risks associated with activities in the scenario, the appropriate Risk privileges must also be selected.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are also selected and cannot be changed.

Applies to: Schedule

Level

Enables users to level resources and roles in a project scenario. To use this feature, the View Scenarios privilege must also be selected. When the leveler is run, the scheduler is also run, and activities may be modified even if Edit Activities is disabled.

If Enable is selected, the Enable Schedule privilege is also selected and cannot be changed.

Applies to: Schedule

Merge Activities to Scenario

Enables users to run the merge process for activities in a scenario, a baseline, or the current schedule to a scenario from the Schedule Comparison page. Activities with variances will display in the Activities list.

If Enable is selected, the Merge Mode toggle displays on the Schedule Comparison page.

Applies to: Schedule

Relationships

Enables users to add, edit, and delete relationships between activities in a project scenario. To use this feature, the View Scenarios privilege must also be selected.

If Add is selected, Edit is also selected and cannot be changed. If Delete is selected, Add and Edit are also selected and cannot be changed.

Applies to: Schedule

Schedule

Enables users to run the scheduler in a project scenario. To use this feature, the View Scenarios privilege must also be selected. When the scheduler is run, activities may be modified even if Edit Activities is disabled.

Applies to: Schedule

Scope

Approve/Reject Scope Change Requests

Enables users to approve or reject scope change requests, reject individual change items, withdraw approved change requests, and reopen rejected change requests and items. When this privilege is selected, the following add and edit privileges are also selected: Work Packages, Scope Items, Scope Assignments, and Scope Change Requests. The edit and view privileges for Project Costs/Financials are also selected.

PBS

Enables users to add, edit, or delete PBSs.

If you select the add privilege, edit is automatically selected. If you select the delete privilege, add and edit are automatically selected.

Scope Assignments

Enables users to add, edit, or delete scope item assignments. If you have the delete privilege, you can only delete work packages before the baseline is set.

If you select the add privilege, edit is automatically selected. If you select the delete privilege, add and edit are automatically selected.

Scope Change Requests

Enables users to add, edit, or delete scope change requests and pending change items in the Scope Item Changes, Work Package Changes, Scope Item Change Details, and Work Package Change Details pages. This privilege also allows users to add and edit scope items on the Scope Item Change Details page if the user also has the corresponding add and edit Scope Items privileges. Also allows users to add and edit work packages and scope assignments on the Work Package Change Details page if the user also has the corresponding add and edit Work Packages and Scope Assignments privileges.

If you select the add privilege, edit is automatically selected. If you select the delete privilege, add and edit are automatically selected.

Scope Items

Enables users to add, edit, or delete scope items. If you have the delete privilege, you can only delete work packages before the baseline is set.

If you select the add privilege, edit is automatically selected. If you select the delete privilege, add and edit are automatically selected.

Work Packages

Enables users to add, edit, or delete work packages. If you have the delete privilege, you can only delete work packages before the baseline is set.

If you select the add privilege, edit is automatically selected. If you select the delete privilege, add and edit are automatically selected.

Portfolio Security Privileges Definitions

When creating a permission set, use the following definitions to determine the functionality each privilege controls and other privileges that may also be required. Selecting one privilege may automatically select other privileges if they are required for the original privilege to function properly. These other privilege selections cannot be changed without affecting the selection of the original privilege. Any privilege requirements are noted in the definition.

Budget Plan

Approve Budget Scenario

Enables users to approve scenarios associated with budget plans.

Budget Scenarios

Enables users to add, edit, or delete budget scenarios.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add and edit are automatically selected and cannot be changed.

Propose Budget Scenario

Enables users to launch a Propose workflow from the Budget Planning and Selection Analysis views.

This privilege allows a user to launch workflows using the actions button or menu even if they do not have the Start Workflow privilege.

Send Budget Scenario for Approval

Enables users to launch the Send for Approval workflow from the Budget Planning and Selection Analysis views.

This privilege allows a user to launch workflows using the actions button or menu even if they do not have the Start Workflow privilege.

Send Budget Scenario for Review

Enables users to launch the Send for Review workflow from the Budget Planning and Selection Analysis views.

This privilege allows a user to launch a workflow using the action button or menu even if they do not have the Start Workflow privilege.

Funds

Funding

Enables users to add, edit, delete, and view funding for portfolios.

If you select the add privilege, edit and view are automatically selected for both Funding and Funding Costs/Financials and cannot be changed. If you select the delete privilege, add, edit, and view for Funding and Funding Costs/Financials are automatically selected and cannot be changed.

Funding Costs/Financials

Enables users to edit or view funding costs and financials.

If you select the edit privilege, view is automatically selected and view privileges for Funding are also enabled.

Portfolio

Assign Workflows to Portfolios

Enables users to specify which workflows the system initiates when budget plans are set to the Send for Review, Propose, and Send for Approval phases.

Portfolio Costs

Enables users to view or edit portfolio costs.

If you select the edit privilege, view is automatically selected and edit is selected for Portfolios and cannot be changed.

Portfolio Dashboards

Enables users to add, edit, and delete dashboards at the portfolio level.

You must assign all privileges.

Portfolio Thresholds

Enables users to add, edit, or delete portfolio monitoring thresholds.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add, edit, and view are automatically selected and cannot be changed.

Portfolios

Enables users to edit or delete portfolios.

If you select the delete privilege, edit is automatically selected and cannot be changed.

Promote Report to Portfolio

Enables users to promote a user report to portfolio level.

Snapshots

Enables users to add or delete snapshots.

If you select the delete privilege, add is automatically selected and cannot be changed.

Resource Plan

Approve Resource Scenario

Enables users to approve scenarios associated with resource plans.

If you select enable, the edit privilege for Resource Scenarios is automatically selected and cannot be changed.

Propose Resource Scenario

Enables users to launch a Propose workflow from the Resource Planning page.

This privilege allows a user to launch workflows using the actions button or menu even if they do not have the Start Workflow privilege. If you select enable, the edit privilege for Resource Scenarios is automatically selected and cannot be changed.

Resource Scenarios

Enables users to add, edit, or delete resource scenarios.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add, and edit are automatically selected and cannot be changed.

Send Resource Scenario for Approval

Enables users to launch the Send for Approval workflow from the Resource Planning page.

This privilege allows a user to launch workflows using the actions button or menu even if they do not have the Start Workflow privilege. If you select enable, the edit privilege for Resource Scenarios is automatically selected and cannot be changed.

Send Resource Scenario for Review

Enables users to launch the Send for Review workflow from the Resource Planning page.

This privilege allows a user to launch a workflow using the action button or menu even if they do not have the Start Workflow privilege. If you select enable, the edit privilege for Resource Scenarios is automatically selected and cannot be changed.

Report Security Privileges Definitions

When creating a permission set, use the following definitions to determine the functionality each privilege controls and other privileges that may also be required. Selecting one privilege may automatically select other privileges if they are required for the original privilege to function properly. These other privilege selections cannot be changed without affecting the selection of the original privilege. Any privilege requirements are noted in the definition.

Portfolio Report

Enables users to edit or delete portfolio reports.

If you select the delete privilege, edit is automatically selected and cannot be changed.

Program Report

Enables users to edit or delete program reports.

If you select the delete privilege, edit is automatically selected and cannot be changed.

Project Report

Enables users to edit or delete project reports.

If you select the delete privilege, edit is automatically selected and cannot be changed.

Run and Preview Portfolio Report

Enables users to run and preview project reports.

Run and Preview Program Report

Enables users to run and preview program reports.

Run and Preview Project Report

Enables users to run and preview project reports.

Run and Preview Workspace Report

Enables users to run and preview workspace reports.

Workspace Report

Enables users to edit or delete workspace reports.

If you select the delete privilege, edit is automatically selected and cannot be changed.

File Security Privileges Definitions

When creating a permission set, use the following definitions to determine the functionality each privilege controls and other privileges that may also be required. Selecting one privilege may automatically select other privileges if they are required for the original privilege to function properly. These other privilege selections cannot be changed without affecting the selection of the original privilege. Any privilege requirements are noted in the definition.

Download Files

Enables users to download files to use offline.

Files

Enables users to add, edit, or delete files.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add, edit, and view are automatically selected and cannot be changed.

Folders

Enables users to add, edit, or delete folders.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add, edit, and view are automatically selected and cannot be changed.

Ideas Security Privileges Definitions

When creating a permission set, use the following definitions to determine the functionality each privilege controls and other privileges that may also be required. Selecting one privilege may automatically select other privileges if they are required for the original privilege to function properly. These other privilege selections cannot be changed without affecting the selection of the original privilege. Any privilege requirements are noted in the definition.

Accept

Enables users to accept a submitted idea or withdraw an accepted idea.

To create a project proposal from an accepted idea, a user also needs the Add privilege for Project Proposals at the workspace level. A user does not need the Accept privilege for an idea to create a project proposal from an already accepted idea.

Applies to: Accept Idea workflow action, Withdraw an Accepted Idea workflow action

Assign Owner

Enables users to assign an owner to an idea. Idea owners are responsible for evaluating and accepting or rejecting ideas.

Applies to: Assign Idea Owner workflow action

Evaluation

Enables users to access the Evaluation page in the Strategic Alignment app.

The Edit privilege enables a user to edit the Evaluation page to rank an idea against evaluation subcategories to calculate the idea's evaluation score. An evaluation score can only be calculated when the status of the idea is Submitted. The Edit privilege for Idea must also be enabled to edit the Evaluation page.

If you select the Edit privilege, the View privilege is also selected and cannot be changed.

Applies to: Evaluation page

Idea

Enables users to edit and delete ideas.

The Edit privilege enables a user to edit idea details, such as the idea name or ID, on the Idea Home page. It also enables a user to submit an idea, link an idea to a project or idea in the Related Items app, or assign a code to an idea in the Idea Summary & Settings.

If you select the Delete privilege, the Edit privilege is also selected and cannot be changed.

Applies to: Idea Home page, Submit Idea workflow action, Related Items, Idea Codes

Reject

Enables users to reject a submitted idea.

Applies to: Reject Idea workflow action

Reopen

Enables users to reopen a rejected idea for reconsideration.

Applies to: Reopen Idea workflow action

Set As Draft

Enables users to set an idea as a draft.

Applies to: Set Idea as Draft workflow action

Custom Log Security Privileges Definitions

When creating a permission set, use the following definitions to determine the functionality each privilege controls and other privileges that may also be required. Selecting one privilege may automatically select other privileges if they are required for the original privilege to function properly. These other privilege selections cannot be changed without affecting the selection of the original privilege. Any privilege requirements are noted in the definition.

Custom Log

Custom Log Items

Enables users to add, edit, or delete custom log items. This privilege also enables users to download and then import the Custom Log Item Import Template. Log items are accessed by selecting a custom log from the Log List page of the project or program-level Custom Logs app.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add and edit are automatically selected and cannot be changed.

Applies to: Custom Logs

Program Security Privileges Definitions

When creating a permission set, use the following definitions to determine the functionality each privilege controls and other privileges that may also be required. Selecting one privilege may automatically select other privileges if they are required for the original privilege to function properly. These other privilege selections cannot be changed without affecting the selection of the original privilege. Any privilege requirements are noted in the definition.

Program

Custom Log Types

Enables users to add, edit, or delete custom logs in the program Summary & Settings. Users with the Add privilege can also assign a custom log from the workspace or duplicate a custom log. Users with the Delete privilege can also remove custom log assignment. Users with the Edit privilege can also assign and remove configured fields and codes at the program level.

To be able to assign user or user group access to a custom log, or to remove that assignment, a user needs the following permissions: the Edit privilege for Custom Log Type (either in a custom Program Permission Set or by assigning the user the built-in Administrator permission set for the program) AND the built-in Administrator permission set for Custom Logs when the user is assigned to the program or workspace. This also applies to giving users the ability to edit the permissions of custom logs assigned from the workspace.

If you select the add privilege, edit is automatically selected and cannot be changed. If you select the delete privilege, add and edit are automatically selected and cannot be changed.

Program

Edit or delete a program.

If you select the delete privilege, the edit privilege is automatically selected and cannot be changed.

Program Costs/Financials

Enables users to edit and view costs and financial information for programs.

Program Dashboards

Enables users to add, edit, and delete dashboards at the program level.

You must assign all security privileges.

Promote Report to Program

Enables users to promote a user report to program level.

Cost

Cash Flow Snapshot

Enables users to add, edit, or delete cash flow snapshots.

Program Aggregate Cost Data

Enables users to view the cost data on the Summary Cost Sheet page.

Program Budget

Enables users to add, edit, or delete program budget data.

Program Budget Approval

Enables users to approve program budgets.

Program Cost Sheet

Enables users to add, edit, or delete program CBS codes.

If you select the add privilege, edit is automatically selected. If you select the delete privilege, add and edit are automatically selected.

Recalculate Program Costs

Enables the **Recalculate** button on the Program Cost Sheet to refresh the data on the program.

Risk

Risk

Enables users to add, edit, delete, or view program risks.

Risk Matrix

Enables users to add, edit, delete, or view program risk matrixes.

If you select the add privilege, edit is automatically selected. If you select the delete privilege, add and edit are automatically selected.

User Groups Overview

Creating Permission Sets and User Groups Video

A user group is a collection of permission sets that determine access to objects for a group of users. Users that should be afforded the same access to an object are added to user groups in the appropriate workspace or project. A user group can be assigned to a workspace, project, portfolio, report, file, idea, custom log, or program.

How are user groups inherited?

User groups are owned by a workspace, which means that they can be inherited by workspaces and projects below the owning workspace in the hierarchy. The owning workspace for a user group is the workspace it was created at or the owning workspace of the project that the user group was created at. The owning workspace does not control access, but instead determines where the user groups become available to be assigned.

User groups created at the workspace level are automatically inherited by child workspaces and projects, where they are available to be modified and assigned as needed. User groups created at the project level will only be available to that project.

Since workspace user groups are inheritable and customizable, they should be created as high in the workspace hierarchy as possible so that they are available to be assigned in all child workspaces and their projects.

How are users added to user groups?

Users are assigned to user groups at the workspace or project where they should gain access. For example, if you assign User A to User Group 1 in Workspace X, then the user will gain access to Workspace X and its child workspaces. This won't grant User A access to the objects that User Group 1 is assigned to in the parent workspace of Workspace X.

Can users be added to more than one user group?

Yes. A user in multiple user groups assigned to the same object has access to that object with all permissions assigned by the user groups of which they are a member. For example, if they are granted the Add Project privilege in one user group that they are assigned to but not another, they will still be granted the Add Project privilege.

Do user groups grant access as soon as they are created and users are added?

No. User groups need to be directly assigned to a workspace, project, portfolio, report, file, idea, custom log, or program for access to be granted. Before a user group is assigned to an object, no access has been granted to users in the user group, even to the owning workspace of the user group.

Users added to a user group *after* the user group has been assigned to an object will automatically gain access to those objects.

Multiple user groups can be assigned to the same object.

Where are user groups managed, and who can create and edit user groups?

User groups can be managed at the Global Admin, workspace, or project level.

In Global Admin, user groups in the application can be managed by application administrators, workspace and project administrators, and users with the user group privilege for a project or workspace. While application administrators have access to all user groups, all other users who manage user groups in Global Admin can only view user groups for workspaces and projects that they have access to.

User groups can also be managed from the Summary & Settings of a workspace or from the Project Team app of a project. At the workspace or project level, only user groups for that object and inherited user groups can be managed by administrators and by users with the User Groups privilege at that level.

User groups can be assigned to workspaces and projects on the Global Admin User Groups page. They can be assigned to all objects at the object level as well.

Manage User Groups in Global Admin

The User Groups page in Global Admin provides one central location to add user groups and assign user group access for all workspaces and projects in the application. You can select a project or workspace in the Context picker to view all user groups for that context including those inherited from workspaces in the hierarchy.

On this page, users can also be assigned to user groups for any context. Use the Show Inherited Workspace Users toggle in the Users section to view the users in the user group that were inherited by that context from workspaces up the hierarchy.

User Group Page Permissions

Access to the User Groups page in Global Admin and its functionality is only available to users with the correct permissions.

Application administrators have complete access to the Users Groups page and its functionality. They are able to view all workspaces and projects in the Context picker, view all users for any user group, and assign access for all user groups.

Workspace administrators (users assigned the Administrator permission set for a workspace), project administrators (users assigned the Administrator permission set for a project), and users with the User Group privilege for a workspace or project can access the User Groups page in Global Admin, but with limited functionality. For these users, the availability of workspaces and projects in the Context picker will depend on the user's individual access – all inaccessible contexts will be labeled Restricted in the hierarchy. These users will also not be able to view inherited workspace users for a user group if they do not have access to the workspace where the user belongs to the user group.

Workspace administrators and project administrators can assign user groups to a workspace or project on the User Groups page, but users with the User Group privilege for a workspace or project do not have this functionality.

The access and actions for a user based on their permission level are summarized in the table below.

User Groups Page Functionality by Role

	Access All Contexts in Context Picker	Add, Edit, and Delete User Groups	View All Inherited Users for a User Group	Assign Users to a User Group	Assign User Group to a Workspace or Project
Application Administrator	X	X	X	X	X
Workspace Administrator		X		X	X
Project Administrator		X		X	X
User with User Group privilege for a Workspace		X		X	
User with User Group privilege for a Project		X		X	

Note: The User Administration global privilege does not provide access to the User Groups page.

Add a User Group in Global Admin

A user group is a collection of permission sets that determine access to objects for a group of users. The User Groups page in Global Admin provides one location where user groups in all workspaces and projects can be added and managed.

Application administrators, workspace administrators, project administrators, and users with the User Groups privilege can add a user group on the User Groups page in Global Admin. Workspace administrators, project administrators, and users with the User Group privilege might have restrictions on what contexts they can access from the Context picker. See ***Manage User Groups in Global Admin*** (on page 96) for more details.

To add a user group:

1) In the object selector, select ⊘ **Global Admin**.
2) In the sidebar, select 👥 **User Groups**.
3) In the **Context** picker, select a workspace or project to add the user group to.
4) On the **User Groups** page, select ＋ **Add**.
5) In the **Name** field, enter a unique name for the user group.
6) In the **Description** field, enter a description of the user group.
7) In the **Permission Sets** field for each Permission Type, select a permission set.
   Some permission sets may be required in order to assign access later.
8) Select **Save**.

> **Note**: Users will not be granted access to objects until their user group is assigned to an object.

Tips

▸ There are two permission sets provided by the application that you can assign to users and user groups:
  ▸ The Administrator (System) permission set has all privileges assigned. It grants all functionality for an object as well as access to all of the object's data. It also grants the ability to edit the user and user group security for that object.
  ▸ The View Only (System) permission set provides read-only access to objects and their data. The View Only (System) permission set for a project, portfolio, or program does not include access to cost or financial information.

Assign a User to a User Group on the User Groups Page

On the User Groups page in Global Admin, you can assign users to all of your user groups. You can assign multiple users to a user group at the same time on the Assign dialog box. To assign a user to a user group, you must be an application administrator, workspace administrator, project administrator, or have the User Group privilege for a workspace or project.

To assign a user to an existing user group:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⚏ **User Groups**.

3) In the **Context** picker, select the workspace or project to assign the user to the user group at.

4) Select a user group row, and in the **Users** section, select **Assign**.

5) In the **Assign Users** dialog box, in the **View By** field, select **All Companies**, **All Users**, or **Active Users**.

6) Select one or more users from the **Available** list, and then select ⟩ **Add from Available** to move them to the **Selected** list.

7) Select **Assign**.

8) Select **Save**.

> **Note**: Users will not be granted access to objects until their user group is assigned to an object.

Tips

▸ If a user group is inherited by a child workspace, you can view the inherited users by selecting **Show Inherited Workspace Users**.

Assign User Group Access to a Workspace or Project

Assign user groups to a workspace or project so that users will gain access to the objects. Until the user group is assigned to an object, it does not grant any access to the users in it.

Only application administrators, workspace administrators, and project administrators have the ability to assign user group access in Global Admin. For user group access to be assigned, the required permission sets must be defined.

To assign user group access to a workspace or project:

1) In the object selector, select ⌾ **Global Admin**.

2) In the sidebar, select ⚏ **User Groups**.

3) In the **Context** picker, select a workspace or project to assign the user group to.

4) In the **User Group** list, in the **Enabled** column, select the check box for a user group that you want to assign to the chosen workspace or project.

5) Select **Save**.

Tips

▸ To remove user group access to a context, select a context from the **Context** picker, and then clear the **Enabled** check box for a user group row.

Manage User Groups at the Workspace Level

Add a User Group at the Workspace Level

User groups can be created at the workspace level, where they will be available to be assigned to objects in the workspace. They will also be automatically inherited by child workspaces and projects.

User groups can be assigned to a workspace, project, portfolio, report, file, idea, custom log, and program.

To create a user group at the workspace level:

1) In the object selector, select a workspace.

2) In the sidebar, select ✿ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **User Groups**.

4) On the **User Groups** page, select ✛ **Add**.

5) In the **Add Group** dialog box:

    a. In the **Name** field, enter a unique name for the group.

    b. In the **Description** field, enter a description of the user group, and select **Next**.

    c. Enter part or all of a user's login name or personal name into the **Search** field.

    d. Select one or more users, and then select **Next**.

    e. In a **Permission Set** column for each **Permission Type**, select a permission set. Add any permission sets applicable to all users of the group.

6) Select **Add**.

7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

> **Note**: Users will not be granted access to objects until their user group is assigned to an object.

Tips

‣ Duplicate a user group by selecting the ✛ **Add** ▼ menu and selecting **Duplicate**.

‣ To remove a user from the user group, select the ✿ **Context** menu by the user's name, and then select **Remove**.

‣ If a user group is inherited by a child workspace, you can view the inherited users by selecting **View Inherited Users**.

‣ The Search feature searches the entire list of users for matches. During that initial search, it will stop after finding 500 results, then filter out those who have already been assigned. For this reason, your maximum number of search results might vary. To limit the number of results, be as specific as possible when entering a name in the search field. For example, enter the first and last name of the user.

Assign a Default Permission Set to a User Group at the Workspace Level

Default permission sets allow you to assign an existing permission set automatically when you assign user groups to workspaces, projects, portfolios, reports, files, ideas, custom logs, and programs. After a user group is assigned to an object, the permission set can be modified at any time. You do not have to select a default permission set. If you change a default permission set for a user group, permissions on existing assignments will not change.

To assign a default permission set to a group:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **User Groups**.

4) On the **User Groups** page, select a user group, and then select the **Default Permissions** detail window.

5) In the **Default Permissions** detail window:

   a. In the **Permission Set** column, in the **Permission Type** row, select a permission set.

   b. Add any permission sets applicable to all users of the group.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Assign a Deleted System User Group in the Root Workspace

By default, Primavera Cloud includes several predefined—or "system"—user groups. If any of these groups is deleted from the root workspace, you can retrieve it as long as you have access to the root workspace.

To retrieve a deleted system user group in the root workspace:

1) In the object selector, select the root workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **User Groups**.

4) Above the list of user groups (and not in the Users detail window for a user group), select **Assign**.

5) In the **Assign System User Groups** dialog box, select a deleted system user group.

6) Select **Assign**.

7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

Assign a User to a User Group at the Workspace Level

You can assign a user to a user group on the User Groups page in the workspace Summary & Settings.

To assign a user to a user group:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **User Groups**.

4) On the **User Groups** page, select a user group, and then select the **Users** detail window.

5) In the **Users** detail window, select **Assign**.

6) In the **Assign** dialog box, enter part or all of a user's login name or personal name into the **Search** field.

7) Select one or more users, and then select **Assign**.

8) Select **Save**.

9) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▶ To remove a user from the user group, select the ⚙ **Context** menu by the user's name, and then select **Remove**.

▶ If a user group is inherited by a child workspace, you can view the inherited users by selecting **View Inherited Users**.

▶ The Search feature searches the entire list of users for matches. During that initial search, it will stop after finding 500 results, then filter out those who have already been assigned. For this reason, your maximum number of search results might vary. To limit the number of results, be as specific as possible when entering a name in the search field. For example, enter the first and last name of the user.

View Inherited Users in a Workspace User Group

User groups are automatically inherited by child workspaces and projects. If you select an inherited user group, you can view a list of all users inherited from parent workspaces.

To view inherited users:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **User Groups**.

4) On the **User Groups** page, select an inherited user group, and then select the **Users** tab.

5) On the **Users** tab, select **View Inherited Users**.

6) Review the inherited users, and select **OK**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

User Access Overview

User access can be set at the workspace, project, portfolio, report, file, idea, custom log, and program level. Access can be assigned to individual users or to groups of users through user groups. Users and user groups can also gain access to objects when they are assigned to a workspace. Privileges are assigned to users and groups through permission sets, which determine what a user can see and what tasks a user can perform.

Assign a User or User Group Access to a Workspace

Assign user access at the workspace level individually or through groups. Each user or group must be assigned a workspace permission set. If a user or user group has a set of default permission sets, these will be used but can be changed during the assignment. At the workspace level, assigning a user or group an object permission set will grant access to all instances of that object within the current workspace.

To assign user access to a workspace:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Security**.

4) Select the **Assign** ▼ menu, and then select **User** or **Group**.

5) In the **Assign User** or **Assign Group** dialog box, enter the user or group name.

6) Select the name, and select **Next** ⟩.

7) In the **Permission Set** column, select the workspace permission set.

8) (Optional) Add any other permission sets applicable to that user or group.

9) Select **Assign**.

10) Select **Save**.

11) In the **Summary & Settings** panel, select ✕ **Close**.

You can also do this in the Workspace inventory panel.

1) In the object selector, select **Workspaces**, and then select **View All Workspaces**.

2) In the table, select a project, and then select the **Security** detail window.

Tips

▸ There are two permission sets provided by the application that you can assign to users and user groups:

  ▸ The Administrator (System) permission set has all privileges assigned. It grants all functionality for an object as well as access to all of the object's data. It also grants the ability to edit the user and user group security for that object.

  ▸ The View Only (System) permission set provides read-only access to objects and their data.

▸ If you added the workspace, you are automatically assigned access to the workspace with the Administrator (System) permission set.

▸ If a user has the Administrator (System) permission set for a workspace, they will be able to access all data in the child workspaces as well.

▸ User access assignments made at the workspace level will not be seen in the Security detail windows for the objects within the workspace.

▸ The Search feature searches the entire list of users for matches. During that initial search, it will stop after finding 500 results, then filter out those who have already been assigned. For this reason, your maximum number of search results might vary. To limit the number of results, be as specific as possible when entering a name in the search field. For example, enter the first and last name of the user.

Assign User Roles to a Workspace, Portfolio, or Project

Assigning user roles enables you to route portfolio budget and resource planning workflows to specific users. This can be done at multiple levels. Assigning roles at the workspace level is useful if the same people will be assigned the same roles for all projects within the workspace. At the portfolio level, the user role assignments apply to all projects within the portfolio. If assigned at the project level, the user roles will only apply to that project.

The creator of a workspace, portfolio, or project is, by default, assigned to it as a reviewer, approver, and owner. The creator is also assigned as the primary reviewer, primary approver, and primary owner and can assign other users to the object. New projects in any workspace automatically inherit the role assignments from that workspace, but changes to the workspace role assignments do not affect the role assignments of its projects.

To assign user roles to a workspace or portfolio:

1) In the object selector, select a workspace or portfolio.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Security**.

4) Select ✎ **Edit Roles**.

5) In the **Edit Roles** dialog box, in the **Assign Roles** section, select ＋ **Assign Users**.

6) In the **Select User** dialog box, enter a username, select the name, and then select **Assign**.

7) In the **Edit Roles** dialog box, select the roles you want users to perform:

   ▶ **Reviewer**: The users assigned to the Reviewer role will receive notification when a planner sends a budget or resource plan scenario out for review.

   ▶ **Approver**: The users assigned to the Approver role will receive notification when a planner sends a budget or resource plan scenario out for approval.

   ▶ **Owner**: The users assigned to the Owner role in the respective projects will receive notification when a planner shares the projects in a budget or resource plan scenario proposal for negotiations.

8) Review the primary roles in the **Set Primary Role Defaults** section and make updates as necessary.

9) Select **Assign**.

10) Select **Save**.

11) In the **Summary & Settings** panel, select ✕ **Close**.

To assign user roles to a project:

1) In the object selector, select a project.

2) In the sidebar, hover over ▣ **Project Team**, and select **Security**.

Tips

▶ You can also do this in the Workspaces, Portfolios, or Projects inventory panels.

Manage User Groups at the Project Level

Add a Project User Group

You can create user groups at the project level to give a group of users the same access and privileges to a specific project. Project-level user groups will not have access to other projects in the workspace unless they belong to other user groups for those projects. Users can belong to multiple user groups, and multiple user groups can be assigned to a project. Project-level user groups will not be inherited by other objects.

User groups created in a parent workspace will also appear in the project user group list. You can add users at the project level to these inherited user groups.

To add a project user group:

1) In the object selector, select a project.

2) In the sidebar, hover over ⧉ **Project Team**, and select **User Groups**.

3) On the **User Groups** page, select ✛ **Add**.

4) In the **Add User Group** dialog box:

   a. In the **Name** field, enter a unique name for the group.

   b. In the **Description** field, enter a description of the user group.

   c. In the **Permission Sets** section, select a **Permission Set** for each **Permission Type**, and then select **Next**.

   d. In the **Assign Users** step, configure the **View By** settings and enter **Search** terms to locate users to add to the group.

   e. Select one or more users, and then select **Next**.

5) Select **Add**.

Tips

▸ To show the list of users assigned to a user group at the workspace level, select an inherited user group, and then select **Show Workspace Users**.

▸ To remove a user from a group, select the ⚙ **Context** menu next to a user, and then select **Remove**. Inherited users can only be removed from the user group in the workspace they were added.

User Access Overview

User access can be set at the workspace, project, portfolio, report, file, idea, custom log, and program level. Access can be assigned to individual users or to groups of users through user groups. Users and user groups can also gain access to objects when they are assigned to a workspace. Privileges are assigned to users and groups through permission sets, which determine what a user can see and what tasks a user can perform.

Enable a User Group at the Project Level

You can enable user groups to work on projects. This also means that the user group will be assigned to the project. Enabling a workspace or project user group requires the selection of a project permission set, thereby granting the user group access to the current project. After you enable a user group to work on the project, you can select or edit all permissions that are applicable at the project level. When a project user group is created, it is automatically enabled.

To enable a user group to work on a project:

1) In the object selector, select a project.

2) In the sidebar, hover over ⧉ **Project Team**, and select **User Groups**.

3) In the **User Group** section, select **Enabled** next to a user group.

4) (Optional) Select **Show Workspace Users** to show users assigned to the user group at the workspace level.

5) (Optional) In the **Permission Sets** section, modify any available permission sets.

> **Note**: All enabled user groups must have an assigned project permission set.

6) Select **Save**.

Tips

▶ Use the **Security** page to manage user group access and assignment to the project. User groups assigned to the project on the **Security** page are automatically enabled on the **User Groups** page.

Assign a User or User Group Access to a Project

Users can be assigned to projects individually or through user groups. To access a project, each user or user group must be assigned a project permission set. A user or user group may have been configured with a default permission set. This permission set can be changed for the project assignment at any time.

To assign user access to a project:

1) In the object selector, select a project.

2) In the sidebar, hover over 🖻 **Project Team**, and select **Security**.

3) Select the **Assign** ▼ menu, and then select **User** or **Group**.

4) In the **Assign User** or **Assign Group** dialog box, enter the user or group name.

5) Select the name, and select **Next**.

6) In each **Permission Set** column, select a permission set for each permission type.

> **Note**: If you assigned a user or user group that is configured with a default permission set, you can keep the default or select another if necessary.

7) Add any other optional permission sets applicable to that user or group.

8) Select **Assign**.

9) Select **Save**.

You can also do this in the Projects inventory panel.

1) In the object selector, select ⚘ **Projects**, and then select **View All Projects**.

2) In the table, select a project, and then select the **Security** detail window.

Tips

▶ There are two permission sets provided by the application that you can assign to users and user groups:

    ▶ The Administrator (System) permission set has all privileges assigned. It grants all functionality for an object as well as access to all of the object's data. It also grants the ability to edit the user and user group security for that object.

- ▸ The View Only (System) permission set provides read-only access to objects and their data. The View Only (System) permission set does not include access to cost or financial information.
- ▸ If you added the project in the application, you are automatically assigned access to the project with the Administrator (System) permission set assigned.
- ▸ The Search feature searches the entire list of users for matches. During that initial search, it will stop after finding 500 results, then filter out those who have already been assigned. For this reason, your maximum number of search results might vary. To limit the number of results, be as specific as possible when entering a name in the search field. For example, enter the first and last name of the user.

Companies and Users

Add companies and users that need access to Primavera Cloud.

All users must belong to a company and at least one office when added to the application. You can add users directly to the company on the Company Details page or to any company on the Users page. User details and user access can also be edited from either page.

You can download the import template and import companies and users to the application from the Companies or Users page.

Companies Overview

Creating Companies Video

Multiple companies can work together using the same Primavera Cloud environment. For example, if the owning company hires a design firm and a subcontractor to work on the same project, the owning company can add both of the other companies as partner companies. The owning company can also add users to the partner companies and give them access to workspaces, projects, portfolios, programs, and ideas. Application administrators and users with any Companies global privileges are able to manage companies in the application.

Companies are categorized into groups such as vendors, resellers, owners, design consultants, architects, engineers, subcontractors, suppliers, and more. Users are added to companies, making information more manageable. Users working at partner companies can be assigned as a restricted user to give them limited access to your Primavera Cloud environment.

Two types of companies can exist in the application:

Owning company: An owning company has been created for you. A single owning company is required. You cannot change the status of an owning company to inactive, and it is not possible to delete an owning company.

Partner companies: A partner company is a separate entity from the owning company that needs to access your application. Examples of partner companies include vendors, resellers, subcontractors, owners, suppliers, and other consultants. Partner companies are listed under the owning company on the Companies page in the Global Admin settings. Users can be added to a partner company and assigned restricted access which will only allow them to see projects, portfolios, and programs assigned to their company in specific apps.

Add an App Preset

You can create app presets to customize which apps are available to your company, companies you partner with, and individual users. For example, if you are partnering with a company that should not have access to your budget information, you can create an app preset that hides the Cost and Funds app. Create as many app presets as necessary to meet the needs of your organization. Choose a default preset and create custom presets as needed. A custom preset, called All New Users, has already been created.

To add an app preset:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select 🏢 **Companies**.

3) On the **Companies** page, select the **Actions** ▼ menu, and then select **Manage App Presets**.

> **Note**: This can also be done from the **Users** page.

4) In the **Manage App Presets** dialog box, select ✛ **Add**.

5) In the **Add preset** field, enter a name for the app preset.

6) In the app list, select ✎ **Make this app visible** or ⊘ **Hide this app**.

7) Select **Save**.

Tips

▶ You can also manage app presets from the **Users** page.

▶ Select ✎ **Hide All** or ⊘ **Show All** to hide or show all apps in an app preset.

▶ Select the ⚙ **Context** menu, and select **Use as Default** to use that app preset as the default app preset when adding new users.

▶ When new apps are available, you can edit your App Presets to include the new app for all or a select group of users.

Set Up a Company

Add the companies your organization works with manually or by importing spreadsheets with existing company data.

Choose one of the following methods to add companies:

▶ Manually Add Companies
  ▶ *Add a Company* (on page 109)
▶ Import Companies and Users
  ▶ *Download an Import Template for Importing Companies, Offices, and Users* (on page 109)
  ▶ *Import Companies, Offices, and Users from Microsoft Excel* (on page 110)

You can also make corrections or updates to company and office data from the Company Details page:

▶ **Edit Company Details** (on page 111)
▶ **Add an Office to a Company** (on page 111)
▶ **Edit Office Details** (on page 112)

Add a Company

Add the companies that work with your organization. After you add partner companies, you can add users to the companies.

To add a company:

1) In the object selector, select ⊘ **Global Admin**.
2) In the sidebar, select ▥ **Companies**.
3) On the **Companies** page, select ＋ **Add**.
4) In the **Add Company** dialog box, complete the following required fields:
   a. On the **General** tab, complete the following fields:
      ▪ **Name**: Enter the name of the company. If the company already exists in another Oracle Primavera Cloud instance, you can select it from the Import Existing Company list. You should not create a duplicate record for the same company.
      ▪ (Optional) Complete other fields including **Website**, **Status**, **Business Type**, or **Description**.
   b. Select the **Corporate Office** tab and complete the following fields:
      ▪ **Postal Code**: Enter the postal code of the corporate office.
      ▪ **Country**: Select the country of the corporate office.
      ▪ Entering a **Postal Code** and **Country** will generate **City** and **State / Province.**
      ▪ (Optional) Complete the other fields, including **Street**, **Street 2**, **Phone**, **Fax**, and **Willing to Travel**.
        The **Willing to Travel** field specifies how far, in miles or kilometers, the company is willing to travel for work.
   c. (Optional) Select the **Other Information** tab, and complete any other fields or assign a **Performance Rating** by selecting the highest star of the rating.
   d. (Optional) Select the **Configured Fields** tab, and enter default values for any company specific fields.
5) Select **Add**.

Tips

▶ You can also add inactive companies or change active companies to inactive.

Download an Import Template for Importing Companies, Offices, and Users

Download a Microsoft Excel template from the Companies or Users page to use when importing companies, offices, and users.

To download an import template:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select 🏢 **Companies** or 👤 **Users**.

3) On the **Companies** or **Users** page, select **Actions** ▼, and then select **Download Import Template**.

Tips
▸ See **Import Companies, Offices, and Users from Microsoft Excel** (on page 110) for instructions on how to import the Import Template once it is completed.
▸ The import template is downloaded as a Microsoft Excel file with the default file name CompanyImportTemplate.
▸ The top two rows of the worksheet are required when importing companies from a worksheet. Do not change the data in these rows.
▸ Application administrators and users with the necessary permissions can import companies and users using the import template. A user must have the Add Companies global privilege to import new companies. A user must have the User Administration global privilege to import users for a company. User administrators will not be able to import user information for a company that does not already exist or that the user is not associated with. Companies and users for the company can be created in the same Import Template, or the Import Template can be imported with only company details or user details added.
▸ Review the Instructions worksheet on the first tab of the spreadsheet for helpful tips on populating the import template.

Import Companies, Offices, and Users from Microsoft Excel

Application administrators and users with the necessary permissions can import companies and users on the Companies or Users page. You will use the Import Template that you download as a Microsoft Excel (.xls or .xlsx) file and fill out. If you still need to download the Import Template, see **Download an Import Template for Importing Companies, Offices, and Users** (on page 109).

A user must have the Add Companies global privilege to import new companies. A user must have the User Administration global privilege to import users for a company. User administrators will not be able to import user information for a company that does not already exist or that the user is not associated with. Companies and users for the company can be created in the same Import Template, or the Import Template can be imported with only company details or user details added.

To import companies:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select 🏢 **Companies** or 👤 **Users**.

3) On the **Companies** or **Users** page, select the **Actions** ▼ menu, and then select **Import from Excel**.

4) In the **Import Companies and Users** dialog box, select ••• **Browse**, select a file, and then select **Import**.

Edit Company Details

You can edit details about a company, such as address and URL, if they change.

To edit company details:

1) In the object selector, select ⛊ **Global Admin**.
2) In the sidebar, select 🏢 **Companies**.
3) On the **Companies** page, in the table, select a company.
4) In the company details section, select ✏ **Edit**.
5) In the **Edit Company** dialog box, make any changes on the **General**, **Corporate Office**, **Other Information**, or **Configured Fields** tabs.
6) Select **Save**.

> **Notes**:
>
> - Application administrators can edit the details for any net new company records that they have created in their Primavera Cloud tenant.
> - Application administrators cannot edit the details for the company records that already exist in Lobby and have been imported into their Primavera Cloud tenant.
> - No company records that were created before the 23.10 (October 2023) release of Primavera Cloud can be edited. To modify the global details of such companies, Create a Service Request (SR) using the My Oracle Support (MOS) portal.
> - Check the **Date Added** column on the **Companies** page to verify if a company record was created before 23.10 (October 2023). If an application administrator is unable to edit a company record created after 23.10 (October 2023), that means the company was imported and not created net new in Primavera Cloud.

Add an Office to a Company

After a company is created with a corporate office, you can add branch offices to the company. Users can be added to the corporate office or branch offices.

To add an office to a company:

1) In the object selector, select ⛊ **Global Admin**.
2) In the sidebar, select 🏢 **Companies**.
3) On the **Companies** page, in the table, select a company.
4) In the **Offices** section, select ＋ **Add**.
5) In the **Add Branch Office** dialog box, on the **General** tab, complete the following fields:

▸ **Name**: Enter the name of the office. If the office already exists in another Oracle Primavera Cloud instance, you can select it from the list that generates as you type. You should not create a duplicate record for the same company.

▸ (Optional) Complete the **Phone**, **Fax**, or **Willing to Travel** fields. The **Willing to Travel** field specifies how far, in miles or kilometers, the company is willing to travel for work.

6) Select the **Address** tab, and complete the following fields:

▸ **Postal Code**: Enter the postal code of the branch office.

▸ **Country**: Select the country of the branch office.

▸ Entering a **Postal Code** and **Country** will generate **City** and **State.**

▸ (Optional) Complete other fields including **Street** and **Street 2**.

7) Select **Add**.

Edit Office Details

You can edit details about an office, such as address and phone number, if they change.

To edit office details:

1) In the object selector, select ⍟ **Global Admin**.
2) In the sidebar, select 🏢 **Companies**.
3) On the **Companies** page, in the table, select a company.

4) In the **Offices** section, select the ⚙ **Context** menu for an office and then select **Edit Office**.
5) In the **Edit Branch Office** dialog box, make any changes on the **General** or **Address** tabs.
6) Select **Save**.

> **Note**: The address and contact information for a Corporate Office must match the company. Therefore, if you select the ⚙ **Context** menu and then select **Edit Office** for a company's Corporate Office, the **Corporate Office** tab on the **Edit Company** dialog box will open. From here, you can edit both the Corporate Office and the company at the same time.

Users Overview

Setting Up Users Video

You can add and manage all of your users from the Global Admin settings. There are five user types in the application: regular users, company restricted users, application administrators, contacts, and idea submitters. You can add users manually or by importing spreadsheets with user data.

You can add the following types of users in the application:

▸ **Users**: Users of the application whose access to data is determined by assigned permissions. Users are not restricted to view only the records of certain companies by default.

▶ **Company Restricted Users**: Users from other companies may need access to your Primavera Cloud database. You can add users to the companies that your organization partners with as restricted users. When you add a user to a partner company, restricted user is selected by default. You can create restricted users in the owning company and partner companies. Restricted users cannot be added as application administrators and can only view records assigned to their company in specific apps. Restricted users can be given access to add users, but they can only add, edit, and delete users from their company.

▶ **Application Administrators**: Application administrators are users with privileges to access all workspaces, projects, portfolios, programs, ideas, and global elements (such as workflows). Only application administrators can assign or remove the application administrator user type for a user. Only users created under the owning company can be assigned the application administrator user type. The Administrator permission set that can be set at the object level is a separate concept from the application administrator user type.

▶ **Contact Only**: A user who receives Primavera Cloud email notifications but cannot log in to the application. A contact does not require a Primavera Cloud license.

▶ **Idea Submitter Only**: A user who can submit ideas in the application. This user can only see information for the company that they belong to. You can add an unlimited amount of Idea Submitter Only users to the application, but it is only available if you have the Enterprise license model or the Named User license model with a Portfolio and Capital Planning Cloud Service license enabled. An Idea Submitter Only user does not require a Primavera Cloud license.

For example, your company may have several projects that require work from an outside subcontractor. Employees of the subcontractor company will need access to the projects in your database. You can add the company as a partner company, and then add users to that company. You can add the employees of the subcontractor as company restricted users, giving them access only to the projects that their company is working on in specific apps. Your other data and projects remain protected and secure.

You do not need to be an application administrator to create users if you have the User Administration global privilege. Users with the User Administration global privilege can add and manage users in their own company.

If you are managing users in an identity domain, be aware that deleting a user in the identity domain will prevent a user from logging into Primavera Cloud, even if the user is recreated with the same email address and user name. The unique key that matched the original user account to their Primavera Cloud login is erased upon deletion and cannot be recreated. Therefore, do not delete a user in identity domain unless they no longer need access to Primavera Cloud.

Add a User

Add users to assign access to the individuals your company works with. You can choose whether to assign application administrators, company restricted users, contacts, idea submitters, or general users.

All users added to the application must be associated with a company. Users can only be assigned to one company throughout Primavera Cloud. When you are adding a user to a company for the first time, add them to the correct company. A user may be invited to multiple instances of Primavera Cloud, but can only be associated to the same company. For example, if a user is assigned to Company A on an instance of Primavera Cloud, then they can only be added to Company A on any other instance that they are invited to.

To add a user:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⚇ **Users**.

> **Note**: This can also be done from the General page for a company. To access the General page, select a company on the Companies page.

3) On the **Users** page, select ✛ **Add**.

4) In the **Add User** panel, complete the following steps:

> **Notes**:
> - If Consent Notice is not enabled, application administrators can view all of the below steps in the Add User panel. User administrators can only view the User Details, User Groups, Apps, and Summary steps when adding a new user.
> - If Consent Notice is enabled, then only certain steps of the Add User panel will be available. For application administrators, the User Details, Defaults, Apps, and Summary steps will be available. For user administrators, only the User Details, Apps, and Summary steps will be available.

I. In the **User Details** step, complete the **Basic** and **Permissions** sections:

a. **Company**: Enter the company that the user is being added to.

> **Note**: If the user is being added to a company from the General page for a company, then this field will be autopopulated with that company and can't be edited.

b. **Office**: Select one or more offices for the user.

> **Note**: If the user is being added to a company from the General page for a company, then this field will be autopopulated with the office selected on the page. You can also add additional offices for the user.

c. **Email**: Enter the email address for the user.

Notes:

- The email address will be the username required for logging into the application. If the email address already exists in the system, a Use This button will appear.

- If a user is added to an instance of Oracle Primavera Cloud hosted in the Oracle Cloud Infrastructure, select the Non-Federated User option when adding a new user who does not exist in your company's identity provider.

d. **First Name**: Enter the first name of the user.

e. **Last Name**: Enter the last name of the user.

f. **Language**: Enter the user's language.

g. (Optional) Complete additional fields.

h. (Optional) **Copy Security Settings from Existing User**: Application administrators can choose to copy the security settings from an existing user, which will copy their user groups, permission set defaults, user access, and apps. This will populate the User Groups, Defaults, Access, and Apps steps on this Add User panel, though you can then modify the choices on those steps to personalize the options for the new user. If Consent Notice is enabled, the User Groups and Access will not be copied from another user.

i. **User Type**: Select a User Type for the user from the following options:

- **User**: A user of the system whose access to data is determined by assigned permissions.

- **Company Restricted User**: A user of the system who can only access records associated with the assigned company.

- **Application Administrator**: A user of the system who can administer all components of the application. This option is only available for users created in the owning company.

- **Contact Only**: A user of the system who receives Primavera Cloud email notifications but cannot log in to the application. A contact does not require a license.

- **Idea Submitter Only**: A user who can submit ideas in the application. This user can only see the information of the company they belong to. An Idea Submitter does not require a Primavera Cloud license.

j. **License**: Select which Oracle Primavera Cloud Service licenses to assign from the following options. You only have to select licenses for users in the Named Users license model. See *Types of Licenses* (on page 24) for more information on which apps and pages each license grants access to.

- **Portfolio and Capital Planning License**: For portfolio planners to propose and manage the portfolios across your organization.

- **Progress License**: For users who only need access to their activities and timesheets.

- **Schedule License**: For power schedulers to prioritize, plan, manage, and evaluate projects across your organization.

- **Tasks License**: For schedulers that use task management to manage their projects.

    k. **Global Permission Set**: Select a permission set for the user.

2. In the **User Groups** step, assign the user to user groups. Users will gain access to the objects that the user group is assigned to.

3. In the **Defaults** step, determine the default permission sets that a user will have when being assigned to a new object. The default permission sets will populate the permission set fields when new user access is being assigned. However, the permission sets chosen for the user's access to the specific object can be modified when the access is being added.

4. In the **Access** step, assign the user direct access to individual projects, portfolios, workspaces, ideas, and programs. When you assign access to an object, you must also define the permission sets for that access. You can choose to keep the default permission sets or assign different permission sets. An access type of User indicates that the user was assigned directly to the object. An access type of Workspace indicates that the user has gained access to that object indirectly through the user's assignment to the workspace. The user was assigned to the owning workspace of the object with a permission set defined for that object that grants the user access.

5. In the **Apps** step, determine the apps that a user will be able to access from the sidebar.

6. In the **Summary** step, view a summary of all of the user information configured in the Add User panel. You can also edit your selections if necessary.

5) Select **Finish**.

Tips

▶ Users will receive an email with instructions on how to set their password.

▶ If you are adding users to a partner company, they will automatically have company restricted users selected by default. Deselect this option if you want to add the users as regular users.

Invite an Existing User to a New Tenant

All users added to Primavera Cloud must be associated with a company. Users can only be assigned to one company throughout Primavera Cloud. A user may be invited to multiple instances or tenants of Primavera Cloud, but can only be associated to the same company. For example, if a user is assigned to Company A on an instance of Primavera Cloud, then they can only be added to Company A on any other instance that they are invited to.

To add a user to another instance or tenant, you first need to specify the user's company. You may come across one of the following scenarios when adding an existing user to a new tenant:

▶ User's email ID and company records match

▶ User's email ID and company records do not match

User's email ID and company records match

If the user's email ID and company match:

1) Follow the steps to *add a user* (on page 113) up until step 4.

2) In the **Company** field, enter the company that the user is being added to.

3) In the **Email** field, enter the email ID for the user.

4) Select **Use This** if you want to continue adding the user using the company and email ID provided.

> **Notes**:
>
> - The **Use This** button only appears if the user's email ID and company record match.
> - Use an alias email ID if you do not want to continue adding the user with the company and email provided.

5) Complete the rest of the steps to finish *adding the user* (see "*Add a User*" on page 113).

User's email ID and company records do not match

If the user's email ID and company do not match, search for the user's company record and associate it with the current tenant, if required. You may come across one of the following scenarios when searching for the user's company:

▶ User's company is associated with the current tenant
▶ User's company is not associated with the current tenant

User's company is associated with the current tenant

If the user's email ID and the company you entered do not match, search for the user's company record. If the company is associated with the current tenant, use that company, and then add the user. To add the user:

1) Follow the steps to *add a user* (on page 113) up until step 4.
2) In the **Company** field, enter the company that the user is being added to.
3) In the **Email** field, enter the email ID for the user.
4) If you receive a message that the user already exists in another company, go back to the **Company** field, and select that company from the **Select Company** dialog box.
5) Complete the rest of the steps to finish *adding the user* (see "*Add a User*" on page 113).

User's company record is not associated with the current tenant

If the user's email ID and the company you entered do not match, search for the user's company record. If the company is not found, then first add the company, and then add the user:

1) Follow the steps to *add a user* (on page 113) up until step 4.
2) In the **Company** field, enter the company that the user is being added to.
3) In the **Email** field, enter the email ID for the user.
4) If you receive a message that the user already exists in another company, go back to the **Company** field, and select that company from the **Select Company** dialog box.
5) If the company record is not found, follow steps to *add the Company* (see "*Add a Company*" on page 109) to the current tenant.
6) Complete the rest of the steps to finish *adding the user* (see "*Add a User*" on page 113).

Download an Import Template for Importing Companies, Offices, and Users

Download a Microsoft Excel template from the Companies or Users page to use when importing companies, offices, and users.

To download an import template:

1) In the object selector, select ⬭ **Global Admin**.

2) In the sidebar, select 🏢 **Companies** or 👤 **Users**.

3) On the **Companies** or **Users** page, select **Actions** ▼, and then select **Download Import Template**.

Tips

▸ See *Import Companies, Offices, and Users from Microsoft Excel* (on page 110) for instructions on how to import the Import Template once it is completed.

▸ The import template is downloaded as a Microsoft Excel file with the default file name CompanyImportTemplate.

▸ The top two rows of the worksheet are required when importing companies from a worksheet. Do not change the data in these rows.

▸ Application administrators and users with the necessary permissions can import companies and users using the import template. A user must have the Add Companies global privilege to import new companies. A user must have the User Administration global privilege to import users for a company. User administrators will not be able to import user information for a company that does not already exist or that the user is not associated with. Companies and users for the company can be created in the same Import Template, or the Import Template can be imported with only company details or user details added.

▸ Review the Instructions worksheet on the first tab of the spreadsheet for helpful tips on populating the import template.

Import Companies, Offices, and Users from Microsoft Excel

Application administrators and users with the necessary permissions can import companies and users on the Companies or Users page. You will use the Import Template that you download as a Microsoft Excel (.xls or .xlsx) file and fill out. If you still need to download the Import Template, see *Download an Import Template for Importing Companies, Offices, and Users* (on page 109).

A user must have the Add Companies global privilege to import new companies. A user must have the User Administration global privilege to import users for a company. User administrators will not be able to import user information for a company that does not already exist or that the user is not associated with. Companies and users for the company can be created in the same Import Template, or the Import Template can be imported with only company details or user details added.

To import companies:

1) In the object selector, select ⬭ **Global Admin**.

2) In the sidebar, select 🏢 **Companies** or 👤 **Users**.

3) On the **Companies** or **Users** page, select the **Actions** ▼ menu, and then select **Import from Excel**.

4) In the **Import Companies and Users** dialog box, select ••• **Browse**, select a file, and then select **Import**.

Add an App Preset

You can create app presets to customize which apps are available to your company, companies you partner with, and individual users. For example, if you are partnering with a company that should not have access to your budget information, you can create an app preset that hides the Cost and Funds app. Create as many app presets as necessary to meet the needs of your organization. Choose a default preset and create custom presets as needed. A custom preset, called All New Users, has already been created.

To add an app preset:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⬛ **Companies**.

3) On the **Companies** page, select the **Actions** ▼ menu, and then select **Manage App Presets**.

> **Note**: This can also be done from the **Users** page.

4) In the **Manage App Presets** dialog box, select ＋ **Add**.

5) In the **Add preset** field, enter a name for the app preset.

6) In the app list, select ⬉ **Make this app visible** or ◯ **Hide this app**.

7) Select **Save**.

Tips

▸ You can also manage app presets from the **Users** page.

▸ Select ⬉ **Hide All** or ◯ **Show All** to hide or show all apps in an app preset.

▸ Select the ⚙ **Context** menu, and select **Use as Default** to use that app preset as the default app preset when adding new users.

▸ When new apps are available, you can edit your App Presets to include the new app for all or a select group of users.

Assign a User to a User Group on the Users Page

You can assign a user to a user group on the Users page. Users that are added to a user group will gain access to the objects that the user group is assigned to. The level of access will be determined by the permission sets configured for the user group.

You must be an application administrator or have the User Administration global privilege to be able to assign a user to a user group on the Users page. However, if you have the User Administration privilege, then you will only be able to see contexts that you have access to in the Context picker - contexts that you do not have access to will appear as Restricted.

To assign a user to a user group from the Users page:

1) In the object selector, select ⬡ **Global Admin**.

2) In the sidebar, select ⚇ **Users**.

3) In the table, select a user row to open the **User Details** panel.

4) In the **User Details** panel, in the **User Groups** section, select **Assign**.

5) In the **Assign User Groups** dialog box, in the **Context** picker, select a context.

   The context is the workspace or project where the user will be assigned to the user group.

6) Select one or more user groups from the **Available** list, and then select 〉 **Move Right** to move them to the **Selected** list.

7) Select **Save**.

> **Note**: Users will not be granted access to objects until their user group is assigned to an object.

Tips

▸ In the **User Groups** section of the **User Details** panel, the **Owning Workspace** is the owning workspace of the user group. The **Assigned At** field is the workspace where the user was assigned to the user group.

Edit User Details

Edit general information for a user, such as name and language, as well as user permissions such as user type, licenses, and global permission sets.

To edit user details from the Edit User Details panel:

1) In the object selector, select ⬡ **Global Admin**.

2) In the sidebar, select ⚇ **Users**.

> **Note**: This can also be done from the General page for a company. To access the General page, select a company on the Companies page.

3) On the **Users** page, select the ⚙ **Context** menu for a user row, and then select **Edit User Details**.

4) On the **Edit User Details** panel, edit user details.

5) Select **Save**.

> **Note**: The user type for an existing user can't be updated to Contact Only.

View User Details

View user details to see contact information, license assignments, and user group assignments for a user. Only application administrators can view the profiles of other users.

To view a user profile:

1) In the object selector, select ⬟ **Global Admin**.

2) In the sidebar, select ⚲ **Users**.

3) Select a user to view their details.

4) In the **User Details** panel, you can view the following information about a user:

   ‣ **High-Level Details**: The user's avatar and all available information about the user. Information about the user's name and email is drawn from the LDAP store.

   ‣ **Global Permission Set**: The global permission set assigned to the user. Select the **Global Permission Set** drop down menu to change the permission set.

   ‣ **Licenses**: The licenses assigned to the user. Select the check box next to a license to assign or remove a license for the user.

   ‣ **User Group Assignment**: The user group to which a user is assigned. Select **Assign** to assign the user to a user group. Or, select **Delete** from the ⚙ **Context** menu to delete a user group assignment

5) Select **Save** if you made any changes to the user details.

Manage Access

Manage the objects that a user has access to from the Manage Access panel.

User Access Overview

User access can be set at the workspace, project, portfolio, report, file, idea, custom log, and program level. Access can be assigned to individual users or to groups of users through user groups. Users and user groups can also gain access to objects when they are assigned to a workspace. Privileges are assigned to users and groups through permission sets, which determine what a user can see and what tasks a user can perform.

Manage Access Panel Overview

User access determines what objects a user has access to and to what extent. The Manage Access panel provides you with one location to manage direct user access and workspace user access to projects, portfolios, workspaces, ideas, and programs. In this panel, you can add user access to an object and also edit the permission sets for a user access. You must be an application administrator in order to access the Manage Access panel.

Understanding Access Type

The Manage Access panel provides a central location to view assignments for a user with either of two access types: User or Workspace. You can use the quick filter options to filter the Manage Access panel by a specific access type.

If an assignment has an access type of User, the user gained access to the object by being assigned to it directly.

If an assignment has an access type of Workspace, then the user gained access to the object indirectly through the user's assignment to the object's owning workspace. When the user was assigned to the owning workspace, a permission set for the object (project, portfolio, workspace, idea, or program) was defined, which gave the user access to all instances of that object in the workspace and all child workspaces. The owning workspace is the workspace that the object exists in.

For example, if a user is assigned to Workspace A with a Portfolios permission set defined, then the user will then gain access to all portfolios in the workspace that already exist or are added later. The portfolios will appear on the Portfolios tab of the Manage Access panel with an access type of Workspace and an owning workspace of Workspace A. The level of access that the user has to the portfolios will depend on the privileges in the Portfolios permission set.

> **Note**: If a user has gained access to a project, portfolio, idea, or program through both a user access and a workspace assignment, the Access Type on the Manage Access panel will say User.

Assign User Access

You can assign a user access to all projects, portfolios, workspaces, ideas, and programs from the Manage Access panel. When a user is assigned access to an object, the permission sets chosen will determine what privileges a user has for that object. Users will gain access to the object as soon as the assignment is added. You must be an application administrator to access the Manage Access panel.

When you add access to an object from the Manage Access panel, the access type will be User.

To assign user access:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⋏ **Users**.

> **Note**: This can also be done from the General page for a company. To access the General page, select a company on the Companies page.

3) On the **Users** page, select the ⚙ **Context** menu for a user row, and then select **Manage Access**.

4) In the **Manage Access** panel, select the **Projects**, **Portfolios**, **Workspaces**, **Ideas**, or **Programs** tab.

5) On the tab, select **Assign**.

6) In the **Assign** dialog box, select an object from the **Available** list and then select ⟩ **Move Right** to move it to the **Selected** list.

7) Select **Next**.

8) In a **Permission Set** column for each Permission Type, select a permission set.

   Some permission sets may be required in order to assign the access.

9) Select **Assign**.

> **Note**: If a user has gained access to a project, portfolio, idea, or program through both a user access and a workspace assignment, the Access Type on the Manage Access panel will say User.

Tips

▸ There are two permission sets provided by the application that you can assign to users and user groups:

  ▸ The Administrator (System) permission set has all privileges assigned. It grants all functionality for an object as well as access to all of the object's data. It also grants the ability to edit the user and user group security for that object.

  ▸ The View Only (System) permission set provides read-only access to objects and their data. The View Only (System) permission set for a project, portfolio, or program does not include access to cost or financial information.

Manage a User's Default Permission Sets

You can manage a user's default permission sets from the Users page. A user's default permission sets are the permission sets that a user will have when assigned to a new object. However, the permission sets can be changed when the access is being added.

To manage a user's default permission sets:

1) In the object selector, select ⛨ **Global Admin**.

2) In the sidebar, select ⚇ **Users**.

> **Note**: This can also be done from the General page for a company. To access the General page, select a company on the Companies page.

3) On the **Users** page, select the ⚙ **Context** menu for a user row, and then select **Manage Defaults**.

4) In the **Manage Defaults** dialog box, for each **Permission Type**, select the default permission set you want a user to have when assigned to a new object.

5) Select **Save**.

Manage a User's Apps

A user's apps are the apps that are available to them from the sidebar when they are using the application. When you manage a user's apps, you can either choose an existing app preset for the user, or customize the apps available for the user.

To manage a user's apps:

1) In the object selector, select ⛨ **Global Admin**.

2) In the sidebar, select ⚇ **Users**.

> **Note**: This can also be done from the General page for a company. To access the General page, select a company on the Companies page.

3) On the **Users** page, select the ⚙ **Context** menu for a user row, and then select **Manage Apps**.

4) In the **Manage Apps** dialog box, do one of the following:

   ▸ In the **Presets** list, select an existing app preset to assign that app preset to the user.

   ▸ In the app list, select ⚘ **Make this app visible** or ⚪ **Hide this app** to customize the user's apps.

   ▸ Select an app preset and then customize the user's apps based on the presets.

5) Select **Save**.

View User Summary

Open the User Summary panel to view information about a user in a printer-friendly format. The user summary panel is view only and includes the user details, user groups, access, default permission sets, and apps for the user.

To view the user summary:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⚇ **Users**.

> **Note**: This can also be done from the General page for a company. To access the General page, select a company on the Companies page.

3) On the **Users** page, select the ⚙ **Context** menu for a user row, and then select **View User Summary**.

4) (Optional) Select the 🖶 **Print** icon to print the user summary.

5) Select ✕ **Close** when you are done viewing the user summary.

Add and Associate a Resource with an Existing User

You can add and associate a new resource with an existing user. An associated resource is required for users updating their timesheets to record progress on activities.

To add and associate a resource with an existing user:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⚇ **Users**.

> **Note**: This can also be done from the General page for a company. To access the General page, select a company on the Companies page.

3) In the table, select a user row, select the ⚙ **Context** menu, and then select **Add Resource**.

> **Note**: The **Add Resource** option for the user is disabled if a resource is already associated with the user.

4) In the **Add Resource** dialog box, complete the following fields:
   - **Resource ID**: Enter a unique ID for the new resource.
   - (Optional) **Select Timesheet Approver**: If timesheets are going to be submitted, select a timesheet approver for the resource.
   - **Select Workspace**: Select the owning workspace for the new resource. This should be the workspace where the projects that the resource will be assigned to will reside. The resource will be available to all child workspaces in the workspace selected.
   - In the table, select an existing resource that you will add the new resource to as a sibling or child.
   - **Add resource as**: Select whether to add the resource as a sibling or child of the selected resource in the workspace resource hierarchy.

5) Select **Add**.

Associate a Resource with a User

When a user of the application is also a resource in the application, you can associate the resource with the user's account.   An associated resource is required for users updating their timesheets to record progress on activities.

To associate a resource with a user:

1) In the object selector, select 🛡 **Global Admin**.

2) In the sidebar, select ⚇ **Users**.

> **Note**: This can also be done from the General page for a company. To access the General page, select a company on the Companies page.

3) In the table, select a user row, and select the **Associated Resource** column.

> **Note**: If the **Associated Resource** column is not available on the grid,
>
> you can add it from the 🖉 **Settings** panel.

4) In the **Select Resource** dialog box:
   - ▸ In the **Associate a** field, select **Workspace Resource** or **Project Resource** to associate the user with a workspace resource or a project resource.
   - ▸ In the **Select Workspace** or **Select Project** field, select a workspace containing the existing resource to be associated.

    ▸ In the table, select a resource. You can also search for a resource in the **Search** field.

5) Select **Select**.

Tips

▸ To remove an associated resource, select **Remove** in the **Select Resource** dialog box.

Reset a User Password

You can send a password reset email to an active user. The user will receive an email with instructions on how to reset the password. You can choose to do this if a user forgets their password or locks themselves out of the application. Resetting the password will unlock the account for the user.

To reset a password of a user:

1) In the object selector, select ⛉ **Global Admin**.

2) In the sidebar, select ⚲ **Users**.

> **Note**: This can also be done from the General page for a company. To access the General page, select a company on the Companies page.

3) In the table, select a user row, select the ⚙ **Context** menu, and then select **Reset User Password**.

4) In the **Confirm** dialog box, select **Yes**.

An email is sent to the user with instructions on how to set up a new password.

> **Note**: The **Reset User Password** option is not available if a user is set to use identity federation in an instance of Primavera Cloud hosted in the Oracle Cloud Infrastructure.

Set a User as Inactive

When a user no longer needs access to your company's instance of Oracle Primavera Cloud, you can change the status of the user to inactive. Deactivating a user removes the license and prevents the user from logging into your company's environment. If the user needs access again in the future, you can change the status back to active.

When you deactivate a user, they will no longer be available to assign to objects or roles in the application. However, if you deactivate a user that is already assigned to an object or a role, they will remain in that assignment until the assignment is changed.

Users cannot be deleted from the Primavera Cloud application to protect historical data. If you are managing users in an identity domain, be aware that deleting a user in the identity domain will prevent a user from logging into Primavera Cloud, even if the user is recreated with the same email address and user name. The unique key that matched the original user account to their Primavera Cloud login is erased upon deletion and cannot be recreated. Therefore, do not delete a user in your identity domain unless they no longer need access to Primavera Cloud.

To set a user as inactive:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⚲ **Users**.

> **Note**: This can also be done from the General page for a company. To access the General page, select a company on the Companies page.

3) In the table, select a user row, select the ✿ **Context** menu, and then select **Deactivate User**.

> **Note**: The user will only be inactive in this company's instance of Primavera Cloud. Any other instances that the user has access to will not be changed.

4) Select **Save**.

Tips

▶ To set a user as active, select a user row, select the ✿ **Context** menu, and then select **Activate User**. When you set a user as active, licenses need to be associated with the user.

Proxy Users Overview

Designate a Proxy User Video

The proxy user feature permits you to act as another user in the application. You can complete tasks or assignments on behalf of another user, and another user can complete tasks or assignments on your behalf. For example, if you will be out of the office for two weeks of vacation, you can assign a co-worker or manager to act as your proxy in your absence if they have the same licenses as you. The user will have access to any projects and workspaces that you do. While other users are acting as proxy for you, each action they complete will be noted as Added On Behalf Of or Modified On Behalf Of to indicate that another user has completed the action on your behalf.

You must have the required security privileges to assign proxy users. The proxy user must have the same or more licenses as a user to act as their proxy. Only application administrators can act as a proxy user for other application administrators.

Add a Proxy User

Assign a user to serve as a proxy for you if you will be away from work. The proxy user that you assign will be able to complete tasks on your behalf.

> **Note**: The proxy user must have the same or more licenses as you to act as your proxy.

To add a proxy user:

1) In the header, select your username.
2) On the **User** menu, select **Proxy Users**, and then select **Manage Proxy Users**.
3) On the **Manage Proxy Users** page, select **Assign**.
4) In the **Assign Users** dialog box:
   a. Enter part or all of a user's login name or personal name into the **Search** field.
   b. Select a user, and then select **Assign**.
5) In the **Start Date** field, select a start date.
6) In the **End Date** field, select an end date.
7) Select **Save**.

Tips
▸ Select **Revoke** to revoke an active user's ability to act as your proxy.
▸ Select **Delete** to delete a pending user's ability to act as your proxy.

View Your Proxy Users

You can use the Manage Proxy Users page to manage the users you can act as a proxy for. This table includes active, pending, and expired proxies.

To view your proxy users:

1) In the header, select your username.
2) On the **User** menu, select **Proxy Users**, and then select **Manage Proxy Users**.
3) On the **Manage Proxy Users** page, in the **Proxy To** section, view the list of users that you can act as a proxy for.

Act as a Proxy User

If you are assigned as a proxy user in the application, you can act as that user at any time during the proxy period to complete any work or tasks on behalf of a user. While acting as another user, you cannot change any user preferences. The only objects on the user menu that you will be able to access are the Background Services and Get Primavera Cloud Mobile pages.

To act as another user:

1) In the header, select your username.
2) On the **User** menu, select **Proxy Users**, and then select a username.
3) Select **Yes** to act as that user.

Tips

▶ Select the **User** menu, and then select **Logout of Proxy** to end the proxy session.

Dictionary Configuration

Oracle Primavera Cloud enables your organization to define a series of application-wide parameters and values that apply globally and to all projects in a workspace. Use these settings to customize the application to meet specific requirements and standards.

Analysis Views Overview

Analysis views are dynamic tools portfolio budget planners use to view, compare and analyze budget plan data. Analysis views are built upon customizable layout types, charts, and grids that capture information from budget plan scenarios. Charts provide a visual representation of data, while grids enable planners to view plan values and costs in greater detail.

Create analysis views to simplify scenario comparisons, and speed up the planning process. Budget planners use analysis views along with the portfolios Budget Planning page during selection analysis to determine the best mix of projects for a portfolio budget plan. While the Budget Planning page provides time phased budget data, analysis views provide fast and accurate insights into additional project attributes. Planners use analysis views to get a direct comparison of project data, such as Return on Investment, Net Present Value, and Profitability Index, and to evaluate projects for potential inclusion in a budget plan.

In the *workspace-level settings* (see "*Add an Analysis View to a Workspace*" on page 129), you can create analysis views and then publish them to any portfolio in your workspace. You can also view and edit existing analysis views for the portfolios in your workspace. You can make any analysis view in your workspace available to as many of your portfolios as necessary. In the portfolio-level settings, you can add analysis views or associate an analysis view from the parent workspace or another portfolio in the workspace.

Add an Analysis View to a Workspace

Add an analysis view to create a meaningful display of portfolio budget plan scenario data. When adding an analysis view, you can select a view type to specify the arrangement for the charts and grids included in the view.

After creation, workspace analysis views can be configured and made available to the portfolios in your workspace.

To add an analysis view to a workspace:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Analysis Views**.

4) Select ＋ **Add View** ▼, and select a view type.

5) In the **Name** dialog box, enter a unique name for the analysis view.

6) Select **OK**.

7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ When editing an Analysis View, select the **Change Type** menu on the **View** tab, and select a type to change the layout of the analysis view after you have created it.

This setting is used in the following apps:

🏛 **Cost and Funds**

Configure an Analysis View in a Workspace

You can configure charts and grids to tailor them to your analysis views.

At the workspace level, you can choose which portfolios the analysis view should be available to and whether other users have the ability to customize the view.

To configure an analysis view in a workspace:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Analysis Views**.

4) Select an analysis view.

5) On the **View** tab, select the chart pane or grid pane you would like to modify, and select **Configure**.

6) Configure your chart or grid:

▸ If you selected a chart, use the **Configure Chart** wizard to change the properties of the chart.

▸ If you selected a grid, use the grid **Settings** dialog box to change the properties of the grid.

7) On the **Settings** tab, configured the following columns:

▸ **Portfolios**: Select a check box to make the current analysis view available to that portfolio.

▸ **Publish View**: Select to enable users to access the analysis view from the **Published Views** page for the portfolio. If disabled, the view will not be displayed. The analysis view must be available to the portfolio before you can publish it.

▸ **User Customization**: Select to allow a user with the appropriate privileges to customize the analysis view while viewing data.

8) Select **Save**.

9) Select **Save**.

10) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

Publish an Analysis View to a Portfolio

Publish analysis views to portfolios to enable planners to evaluate project selection based on key performance indicators and other project attributes. You can publish multiple views to a single portfolio, enabling planners to switch between views and compare data based on different sets of criteria. Analysis views published to portfolios can also be viewed in the portfolio-level settings.

To publish an analysis view to a portfolio:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Analysis Views**.

4) Select an analysis view.

5) On the **Settings** tab, configured the following columns:

   ▸ **Portfolios**: Select a check box to make the current analysis view available to that portfolio.

   ▸ **Publish View**: Select to enable users to access the analysis view from the **Published Views** page for the portfolio. If disabled, the view will not be displayed. The analysis view must be available to the portfolio before you can publish it.

   ▸ **User Customization**: Select to allow a user with the appropriate privileges to customize the analysis view while viewing data.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

Baseline Categories Overview

A baseline category provides additional context for baselines that schedulers and planners across an organization can use to ensure that specific baseline conventions are maintained at a workspace level. This ensures that users are selecting the correct baseline for their intended purpose, and the correct baseline information will be used for schedule comparison and approvals. Baseline categories can be assigned at any time from the Manage Baselines dialog box or the Baselines page.

Only users with the Workspace-level Baseline Categories Add, Edit, and Delete privileges can manage them. User must have the Edit Baselines privilege to make baseline category assignments.

Add a Baseline Category

Add a baseline category to create meaningful context and standards for baselines that are created for projects in your organization. When adding a baseline category, you can assign it to a workspace and determine a preferred sharing method.

After creation, baseline categories are made available for assignment for the projects in your workspace whenever a user creates a baseline. Baseline assignments can be modified at any time after a baseline has been created.

To add a baseline category to a workspace:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Baseline Categories**.

4) Select ＋ **Add** to create a new baseline category in the list.

5) In the **Name** dialog box, enter a unique name for the baseline category. Be sure to enter a name that will hold significance for any users in your organization who may be creating baselines.

6) In the **Sharing Method** list, select either **Manual** or **Automatic**. See *Shared Data Overview* (on page 49) for more information on data sharing methods.

7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

Tips:

▶ You can import baseline categories using P6 XML Import if they are assigned to project baselines and selected for import. After a baseline category is imported, it is available to assign to other baselines in the workspace. Users must have the workspace level Import XML privilege to import objects. See Importing P6 XML or XER into Oracle Primavera Cloud.

Calendars Overview

Managing Calendars Video

Calendars enable you to define available workdays and work hours in a day, observe national and recognized holidays, and add exceptions to the standard work time. Assign calendars to projects, resources, roles, and activities to specify their time constraints in a uniform way. Calendar assignments are used for scheduling, leveling, risk analysis, and other processes throughout the application.

You can create an unlimited number of calendars to accommodate different work patterns. For example, if some activities require a five-day workweek, while others can only be performed part-time (such as Monday, Wednesday, and Friday), you can create different calendars and assign them to the activities and resources in your projects. An activity's Type setting determines whether the activity will use the calendars from its assigned resources and roles or from the project when scheduling its dates.

Before calendars can be assigned, they must be made available to supporting objects. Each workspace-level calendar can be made available to projects, resources/roles, or both. This ensures calendars intended for projects or resources/roles are only available to those types of objects. The calendar marked as the default calendar is automatically made available to projects, resources, and roles within the workspace and is automatically assigned to new projects, resources, and roles when they are created. The calendar assigned to a project also controls the default calendar for new activities within the project. There is one default calendar per workspace. Any calendar in the workspace can be assigned as the default calendar.

You can also create Calendars (Project-level) if they only need to be available to a single project. Project-specific calendars are available for assignment to the project and project activities, resources, and roles. When assigning a calendar to a project, activity, resource, or role, you can choose from a workspace-level or project-level calendar. If a project-level calendar should be made available to more projects, you can promote it to the parent workspace.

The default workspace calendar designation and calendar assignments on individual objects can be changed at any time. Each project, resource, role, and activity must always have a calendar assigned.

Add a Holiday List

Add a holiday list to include any public or company holidays observed by the organization that should be reflected in project and resource schedules. An existing list can be assigned to a calendar during the calendar's creation, or you can assign a calendar's holiday list later. One holiday list can be selected per calendar.

Holiday lists are available to be used throughout the workspace hierarchy. You must have the security privileges required to add and edit calendars in the workspace to add and edit a holiday list.

To add a holiday list:

1) ***Navigate to the Calendars dictionary page*** (see page 360).

2) Select **Holidays**.

3) In the **Manage Holiday Lists** dialog box, select ✚ **Add**, and then enter a name for the holiday list. You can also select an existing list.

4) Select **Edit Holiday List**.

5) Select ✚ **Add** to create a new holiday for the list. Enter a name for the holiday. You can also select an existing holiday.

6) Choose when the holiday occurs:

   ‣ **Once on**: Select if this holiday is a onetime occurrence.

   ‣ **Repeat every**: Select if this holiday occurs on the same date every year.

      > **Note**: You can select on a calendar when holidays are recognized as part of the standard work week.

   ‣ **Repeat the**: Select if this holiday occurs on a different date each year, but always occurs on the same day and week each year.

7) Continue to enter dates as needed.

8) Save your changes:

    a. Select **Save**.

    b. In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

🏃 **Resources**

▣ **Risk**

☰ **Schedule**

▦ **Scope**

⩸ **Tasks**

Add a Calendar

Add calendars to a workspace so they can be available for assignment to projects, resources, and roles within the workspace.

To add a calendar:

1) *Navigate to the Calendars dictionary page* (see page 360).

2) Select ＋ **Add**.

3) In the **Add Calendar** wizard, complete the following steps:

    a. **Name**: Enter a **Name** and **ID** for the calendar. Select **Next**.

    b. **Create Work Week**: Specify the standard number of work hours per day by manually entering the number of hours or by selecting the time period on the calendar. Change the time periods on the calendar by dragging the entire block of time or by expanding or reducing the block of time. Select **Next**.

    c. **Add Holidays**: Choose a holiday list to assign to the calendar. The holidays in the selected list are displayed.

        ▪ Select the **If a holiday falls on standard nonwork time, move** option if your calendar has holidays that fall on standard nonwork time and should be marked as holiday time during standard work time. Select where on the calendar the holiday should be reflected.

Notes:

- This setting affects the placement of activities and resources/roles during scheduling and leveling. Changes to a holiday's placement on the calendar are not reflected in the Calendar tab of the Calendars dictionary page.

- This setting applies to holidays being placed on nonwork time during the standard work week. It is unaffected by unavailable time created by an exception.

- Select **Finish**.

4) Save your changes:

   a. Select **Save**.

   b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ You can assign a calendar from a higher-level workspace by selecting **Assign**. You can only modify a calendar from its owning workspace.

▸ To duplicate an existing calendar, select the ⚙ **Context** menu next to the calendar, and then select **Duplicate**. This is useful if you want to modify a calendar assigned from a different workspace.

▸ You can modify a calendar's name and ID values in the calendar list, its standard hours on the **Standard Work Week** tab, and its holiday list on the **Summary** tab.

This setting is used in the following apps:

🏛 **Cost and Funds**

👥 **Resources**

▣ **Risk**

▤ **Schedule**

▥ **Scope**

▦ **Tasks**

Set Calendar Exception Time

Exception time is set by selecting periods of time on a calendar that are exceptions to the calendar's standard working hours. You can set exception time for individual dates or in bulk for a range of dates. Select a period of time on a particular date to specify the new working time for that date or use the Manage Exceptions button to specify the exception time for a date range. For example, your organization may decide to give employees a half day of vacation time the day before a scheduled holiday. In this case, the first half of the standard work day would be selected, thereby designating it as exception time. You can also set an entire day or date range as unavailable, indicating that the day or the date range cannot be worked at all. Or, you can set the entire day or date range as available, indicating that the day or date range can be worked without the restrictions of standard work hours. Remove the changes by setting individual days back to standard working time or using the Remove option in the Manage Exceptions dialog box.

The calendar's Day and Week views enable you to add exception time, but only the Week view supports setting an entire day as unavailable or available. The Month and Year views enable you to see the different working time types at a high level. A legend below the calendar indicates whether each time period displayed is standard, exception, unavailable, or holiday time.

Set Exception Time for a Range of Dates

To set calendar exception time for a date range:

1) ***Navigate to the Calendars dictionary page*** (see page 360).
2) Select a calendar.
3) Select the **Summary** or **Calendar** tab.
4) Select the **Manage Exceptions** button.
5) In the **Manage Exceptions** dialog box:
   I. In the **Select Exception Dates** section, from the **Exception Type** drop-down list, select **Unavailable** or **Available**.

   For Unavailable Exception Type:
   - In the **From** and **To** fields, select the dates for which you want to add the **Unavailable** exception.

   Notes:
   - You can select **Unavailable** exception time for full days only. If you selected **Unavailable** exception type, then the **Full Day** check box will be selected by default.
   - Only the working days of a standard work week are marked as unavailable. For example, if Saturday and Sunday are non-working days for your standard work week, then the **Unavailable** exception will not be added to any Saturdays and Sundays within your selected date range.

   For Available Exception Type:
   a. In the **From** and **To** fields, select the dates for which you want to add the Available exception.

    b. (Optional) Select the **Full Day** check box to make full days within your selected date range as available.

    c. In the **Start Time** and **End Time** fields, specify the time when the **Available** exception time starts and ends for your selected date range.

> **Notes**:
>
> - The **Start Time** and **End Time** fields will not be available if you selected the **Full Day** check box.
> - **Available** exception time is added for both working and non-working days of the standard work week.

  2. Select **Add Exception**.

  3. In the **Exception Dates** section, view your specified exception time.

  4. (Optional) Repeat the above steps to add additional exception time for a new set of dates.

  5. Select **Apply** to apply the exceptions to the selected calendar.

6) Save your changes:

    a. Select **Save**.

    b. In the **Summary & Settings** panel, select ✕ **Close**.

> **Note**: You can view your added exception time in the **Exceptions** section on the **Summary** tab. The **Exceptions** section displays the exceptions as individual dates.

Set Exception Time for Individual Dates

To set calendar exception time for individual dates:

1) *Navigate to the Calendars dictionary page* (see page 360).
2) Select a calendar.
3) Select the **Calendar** tab.
4) Navigate to a time period in the calendar when exception time should be added.
5) In the **Day** or **Week** view, make any of the following adjustments to the calendar:

  ▸ To change the work hours for a day, select a period of time on a specific day. Change the exception time on the calendar by dragging the entire block of time or by expanding or reducing the block of time. The block of time indicates the new work hours for the day.

  ▸ To set an entire day as nonworking time, select the date ▼menu, and then select **Unavailable**.

  ▸ To set an entire day as working time, select the date ▼menu, and then select **Available**.

  ▸ To revert any changes you made to a day, select the date ▼menu, and then select **Set to Standard**. You can also remove individual blocks of exception time by select the **X** within a block.

6) Save your changes:

    a. Select **Save**.

> ▸ In the **Summary & Settings** panel, select ✕ **Close**.

7) Exceptions are displayed on the **Summary** tab.

Tips

▸ Any day can be set as unavailable, available, or with a range of exception time within the day. This includes days set as holidays.

▸ To remove an already defined exception, in the **Exception Dates** section of the **Manage Exceptions** dialog box, select **Remove,** and then select **Apply**.

This setting is used in the following apps:

🏛 **Cost and Funds**

👥 **Resources**

⬛ **Risk**

📋 **Schedule**

▦ **Scope**

☰✓ **Tasks**

Specify Calendar Availability for Assignment

Before calendars can be assigned, they must be made available to supporting objects. Each workspace-level calendar can be made available to projects, resources/roles, or both. Both options as selected by default when a calendar is created. If a calendar is not available to one of these objects, it will not appear as an option when assigning calendars to that type of object.

The calendar set as the default calendar is automatically made available to projects, resources, and roles. This can only be changed if you set a different calendar as the default.

   a. To specify calendar availability:

1) *Navigate to the Calendars dictionary page* (see page 360).
2) Select a calendar.
3) Select the **Summary** tab.
4) In the **Available To** section, select **Project**, **Resource/Role**, or both.
5) Save your changes:
   a. Select **Save**.

> ▸ In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

👥 **Resources**

⬛ **Risk**

📋 **Schedule**

⧉ **Scope**

☰ **Tasks**

Configure Calendar Time Period Settings

A calendar's time period settings specify the default number of hours in each work period. The standard time period hours defined in the Application Settings are displayed by default, but can be changed after the calendar is created. Time period settings are separate from the calendar's standard work week values, which specify the working hours for each day of the week.

The application calculates and stores time unit values in hourly increments, but you can configure your user preferences to display time units in other increments, such as days or weeks. The values specified for Time Periods are used to convert hours to other time increments for display, and to convert all non-hourly time increments to hours for storage in the database.

To configure a workspace-level calendar's time period settings:

1) *Navigate to the Calendars dictionary page* (see page 360).
2) Select a calendar.
3) Select the **Summary** tab.
4) In the **Time Periods** section, enter the default number of hours in a day, week, month, and year.
5) Save your changes:

    a. Select **Save**.

    b. In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

👥 **Resources**

▪ **Risk**

🗏 **Schedule**

⧉ **Scope**

☰ **Tasks**

Set the Default Calendar

There is one default calendar per workspace. The calendar set as the default calendar in the workspace-level Calendars dictionary is automatically assigned to new projects, resources, and roles when they are created. The calendars of existing projects, resources, or roles are not affected. Any calendar in the workspace can be assigned as the default calendar. One calendar must always be defined as the default.

The default calendar is automatically made available to projects, resources, and roles. This can only be changed if you set a different calendar as the default. The application has a built-in default calendar. The settings in this calendar cannot be changed. After another calendar has been assigned as the default, this calendar can be deleted.

You can also set the default calendar on the **Project** page in the workspace Defaults & Options. Choose from a list of calendars that are available to the Project object. This will also make the calendar available to resources and roles.

To set the default workspace calendar:

1) *Navigate to the Calendars dictionary page* (see page 360).
2) In the list of calendars, select the **Default** option for a calendar.
3) Save your changes:
    a. Select **Save**.

    b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▶ If the calendar you selected was only available to Project or Resource/Role, then both options are automatically selected when you select a new default calendar.

This setting is used in the following apps:

🏛 **Cost and Funds**

👥 **Resources**
▪ **Risk**
📖 **Schedule**
🗔 **Scope**
☰ **Tasks**

Update the Owning Workspace of a Calendar

Update the owning workspace of a calendar to move it to another workspace that you are assigned. If you move a calendar to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a calendar:

1) *Navigate to the Calendars dictionary page* (see page 360)
2) Select a calendar.
3) Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.
4) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.
5) Select **Save**.
6) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

👥 **Resources**

◼ **Risk**

📗 **Schedule**

🗓 **Scope**

☑ **Tasks**

Codes Overview

Codes help you categorize your data objects based on characteristics that they share. If you have many instances of an object, codes help you group and filter potentially vast amounts of information spanning different areas of the organization. You can also use codes to arrange objects hierarchically. The application supports an almost unlimited number of codes and values; therefore, you can establish as many as you need to meet the filtering, sorting, and reporting requirements of your organization.

At the workspace level, codes can be created and associated with a wide variety of objects available within the workspace. At the project level, you can create activity and task codes that will only be available to a single project.

Workspace-level codes can be created for the following objects:

▸ Activities
▸ Commitments
▸ Contracts
▸ Custom Logs
▸ Files
▸ Funds
▸ Ideas
▸ Portfolios
▸ Programs
▸ Projects
▸ RFIs
▸ Reports
▸ Resources/Roles
▸ Risks
▸ Scope Assignments
▸ Scope Items
▸ Strategies
▸ Submittals
▸ Tasks
▸ Task Constraints
▸ WBSs

▸ Work Packages

Add a Code

Using Colors with Activity Codes Video

Create codes to help categorize and track objects based on attributes they share.

You can apply workspace-level codes to one or more of the following objects: Activities, Custom Logs, Files, Funds, Ideas, Portfolios, Programs, Projects, Reports, Resources/Roles, Risks, Scope Assignments, Scope Items, Strategies, Task Constraints, Tasks, WBSs, and Work Packages.

To add a code to one or more objects:

1) *Navigate to the Codes dictionary page* (see page 360).
2) In the table, select ＋**Add Code** ▼.
3) In the new row, in the **Name** and **ID** columns, enter a name and ID for the new code.
4) In the **Applies to** panel, select one or more objects to apply the code.
5) Save your changes:
    a. Select **Save**.

    b. In the **Summary & Settings** panel, select ✕ **Close**.

You can also perform this task on a single object from the Summary & Settings panel in **Primavera Cloud**:

1) In the object selector, select a workspace.
2) In the sidebar, select ⚙ **Summary & Settings**.
3) On the **Summary & Settings** menu, select **Defaults & Options**.
4) Select the object, and then select the **Codes** tab.

> **Note**: To add a code to this object that exists in the current or parent workspace, select **Assign**. Codes that display for the current workspace are the codes assigned to other objects in the workspace. Codes that display from the parent workspace are only the codes that are assigned to the same object type.

Tips

▸ Individual activity code values can be associated with a color, which can then be used to color activity bars in the Gantt chart on the **Activities** page.
▸ The color associated with code values can be displayed on the **Portfolio Scorecard** page.

This setting is used in the following apps:

🏛 **Cost and Funds**

🗒 **Custom Logs**

🖥 **Dashboards**

- **Files**
- **Portfolio Analysis**
- **Reports**
- **Resources**
- **Risk**
- **Schedule**
- **Scope**
- **Strategic Alignment**
- **Tasks**
- **Workflows and Forms**

Add a Value to a Code

Add values to codes so that you can group, sort, and filter objects based on their code values.

To add a code value:

1) *Navigate to the Codes dictionary page* (see page 360).
2) In the table, select a code or code value.
3) Do either of the following:

   ‣ In the toolbar, select the ✛ **Add Code** ▼ menu, and then select **Add Code Value**. A new value is beneath the selection.

   ‣ In the table, select the ✿ **Context** menu, and select **Add Code Value**.
4) In the **Name** and **ID** columns, enter a name and ID for the code value.
5) (Optional) In the **Color** column, select a color for the code value.

   ‣ Code value colors are used on the **Activities** and **Task List** pages and workspace dashboard charts to color activity bars in the Gantt chart according to each activity's or task's assigned codes and code values.

   ‣ The color associated with code values can be displayed on the **Portfolio Scorecard** page.
6) Save your changes:
   a. Select **Save**.

   b. In the **Summary & Settings** panel, select ✕ **Close**.

You can also perform this task on a single object from the Summary & Settings panel in **Primavera Cloud**:

1) In the object selector, select a workspace.

2) In the sidebar, select ✿ **Summary & Settings**.
3) On the **Summary & Settings** menu, select **Defaults & Options**.
4) Select the object, and then select the **Codes** tab.

This setting is used in the following apps:

🏛 **Cost and Funds**

🗐 **Custom Logs**

🗐 **Dashboards**

🗀 **Files**

📈 **Portfolio Analysis**

🗐 **Reports**

👥 **Resources**

◼ **Risk**

🗐 **Schedule**

🗐 **Scope**

◎ **Strategic Alignment**

🗐 **Tasks**

🗐 **Workflows and Forms**

Update the Owning Workspace of a Code

Update the owning workspace of a code to move it to another workspace that you are assigned. If you move the code to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a code:

1) *Navigate to an object configuration page* (see page 361).
2) On the object page, select the **Codes** tab.
3) On the **Codes** tab, select a code.
4) Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.
5) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.
6) Save your changes:
   a. Select **Save**.

   ▸ In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

🗐 **Custom Logs**

🗐 **Dashboards**

📈 **Portfolio Analysis**

🗐 **Reports**

⚘ **Resources**

◼ **Risk**

☰ **Schedule**

▣ **Scope**

◎ **Strategic Alignment**

☰✓ **Tasks**

⤸ **Workflows and Forms**

Currencies Overview

Configure currencies in the application to track the cost of your projects in their native currency. For example, if the base currency of your organization is Euros, but your project is located in the United States, you may want to set your project currency to United States Dollars. On pages that support costs, you can view costs in workspace or base currency. You cannot change the currency of a workspace or project once cost data exists.

Base Currency

The base currency is set at the root workspace during company provisioning. The base currency you select should be the currency that the majority of the workspaces and projects will use.

Workspace Currency

Set a workspace currency for any workspace that will not use the base currency. The workspace currency is the currency of record for the workspace, and when cost data is entered it will be in this currency. The workspace currency exchange rate follows the most recent exchange rate defined in the workspace. If workspace currency is selected but is not supported, cost data will display in the base currency. For a currency to be available to use as a workspace currency, an exchange rate must be defined and the sharing method set to Automatic. For more information, see Workspace Currency Overview.

Project Currency

Set project currencies for any projects that will not use the base currency. The project currency exchange rate follows the most recent exchange rates defined in the workspace. On pages that support project costs, you can view costs in the project, workspace, or base currency.

Add a Currency

Add currencies to workspaces to make them available to projects in the workspace. All currencies added to the root workspace are inherited in child workspaces. Changes to these currencies must be made in the owning workspace. Add any other currencies that projects may need by selecting them from the preexisting list.

To add a currency:

1) *Navigate to the Currencies dictionary page* (see page 360).

2) On the **Currencies** page, select ＋ **Add**.

3) In the **Select Currency** dialog box, select currencies, and select **Select**.

4) Modify other currency settings as needed.

5) Save your changes:

    a. Select **Save**.

    b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸   The Decimal Places setting enables you to select how many decimal places to show when viewing costs in the application. The database stores values for up to 6 decimals for cost fields, regardless of the number of decimal places set to display.

This setting is used in the following apps:

🏛 **Cost and Funds**

📈 **Portfolio Analysis**

👥 **Resources**

⬛ **Risk**

🗒 **Schedule**

🖼 **Scope**

◎ **Strategic Alignment**

☵ **Tasks**

Add a Custom Currency

You can create custom currencies if the default currencies do not meet the needs of your organization.

To add a custom currency:

1) *Navigate to the Currencies dictionary page* (see page 360).

2) On the **Currencies** page, in a new row, complete the following fields:

    ▸   **Name**: Enter a unique name for the currency.

    ▸   **Currency Code**: Enter a unique currency code with fewer than 3 characters.

    ▸   **Currency Symbol**: Enter a currency symbol. The currency symbol is displayed next to monetary amounts in the application for users who chose to display currency symbols.

    ▸   **Decimal Places**: Enter the amount of decimal places to display. The application shows up to 5 decimal places.

    ▸   **Sharing Method**: Specify how the currency is shared between parent and child workspaces:

        ▪   **Manual**: The currency can be pulled down by child workspaces individually, using the **Assign** button in each child workspace. This is the default option.

        ▪   **Automatic**: The currency is pushed down to child workspaces automatically.

3) Save your changes:

   a. Select **Save**.

   b. In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

📊 **Portfolio Analysis**

👥 **Resources**

▪ **Risk**

📃 **Schedule**

🖼 **Scope**

◎ **Strategic Alignment**

📝 **Tasks**

Modify a Project Currency

Projects inherit the base or workspace currency by default, but you can set a custom project currency. A workspace currency must have an exchange rate defined to appear in the list of currencies available to the project. A project can be viewed in the project, workspace, or the base currency. For information on pages that support workspace currency, see Workspace Currency Overview.

The currency exchange rate will be set for the life of the project at the project creation date. For example, if the project is created on Jan 5, 2022, the project exchange rate will be set to the exchange rate for that date and will not reflect changes to the workspace exchange rate. The exchange rate can be modified on the project (under project details), but only if no cost data has been entered.

The project currency cannot be changed if costs exist for a project.

To modify a project currency:

1) *Navigate to the project Details page* (see page 359).
2) In the **Currency** section, in the **Project Currency** field, select the project currency.
3) Save your changes:

   a. Select **Save**.

   b. In the **Summary & Settings** panel, select ✕ **Close**.

   The **Exchange Rate** field is automatically populated with the exchange rate defined at the workspace level. You can change it if costs are not already defined for the project.

This setting is used in the following apps:

🏛 **Cost and Funds**

📊 **Portfolio Analysis**

👥 **Resources**

■ **Risk**

▤ **Schedule**

▦ **Scope**

◎ **Strategic Alignment**

☰✓ **Tasks**

Add an Exchange Rate

Add exchange rates to currencies to keep cost calculations up-to-date. Exchange rates added to workspace currencies will apply to project currencies. A workspace currency must have an exchange rate defined to appear in the list of currencies available to the project. You can add past exchange rates to retain a historical record before the currency is in use, or you can enter the current exchange rate. You cannot enter future exchange rates. You cannot delete or edit historical exchange rates. All exchange rates must be added to the currency in the owning workspace.

For workspaces with workspace currency, all cost data will be recalculated and exchange rates updated based on the latest exchange rate of the workspace currency.

To add an exchange rate to a currency:

1) *Navigate to the Currencies dictionary page* (see page 360).
2) On the **Currencies** page, in the table, select a currency.
3) In the **Exchange Rates** detail window, enter an **Effective Date** and **Exchange Rate**.
4) Save your changes:
    a. Select **Save**.
    b. In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

📈 **Portfolio Analysis**

👫 **Resources**

■ **Risk**

▤ **Schedule**

▦ **Scope**

◎ **Strategic Alignment**

☰✓ **Tasks**

Update the Owning Workspace of a Currency

Update the owning workspace of a currency to move it to another workspace that you are assigned. If you move a currency to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a currency:

1) *Navigate to the Currencies dictionary page* (see page 360).

2) On the **Currencies** page, in the table, select a currency.

3) Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.

4) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.

5) Select **Save**.

6) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

📈 **Portfolio Analysis**

👥 **Resources**

⬛ **Risk**

🗐 **Schedule**

🖾 **Scope**

◎ **Strategic Alignment**

🗒 **Tasks**

Folder Templates Overview

Folder templates provide a way to create folder and file structures that can be used across your organization. If your organization has standard folders or files that will be used across various workspaces, you can create a folder template that can be applied to project or portfolio file folders. Applying a template applies all folders and files to the selected folder from the template. Using templates saves time by eliminating the need to re-import files and folders multiple times in multiples projects and portfolios. Folder templates are managed at the workspace level in the Files app.

Add a Folder Template

Create folder templates to use across your organization.

To add a folder template:

1) In the object selector, select a workspace.

2) In the sidebar, hover over 🗎 **Files**, and then select **Folder Templates**.

3) On the **Folder Templates** page, select ✛ **Add**, and then enter a **Template Name**.

4) Select **Save**.

Tips

▸ Select the template name to edit your template.

Edit a Folder Template

You can use the Editing Folder Template page to create a folder structure, add files, and apply previously created templates. You must be in a folder template's owning workspace to edit the folder template.

To edit a folder template:

1) In the object selector, select a workspace.

2) In the sidebar, hover over 🅐 **Files**, and then select **Folder Templates**.

3) In the table, select the name of a template.

4) On the **Editing Folder Template** page, choose from the following options:

    a. Select ✛ **Add File** to add files that will be used in multiple projects and portfolios.

    b. Select ✛ **Add Folder** to set up a folder structure.

    c. Select the ⚙ **Context** menu, and then select **Apply Template**. In the **Apply Template to Selected Folder** dialog box, choose a template, and select **OK**.

Forms Overview

In Oracle Primavera Cloud, forms are used to present or collect data about a variety of objects. They can be shown to users during workflows, or they can be used to replace some default forms in the application.

When creating workflows, you can add forms to form tasks and manual decision tasks. Form tasks require performers to complete or review forms. Manual decision tasks do not require forms, but they can include forms that performers can fill out or view before making required decisions.

When configuring workspace settings, you can choose a form to take the place of the default General page for all projects or portfolios in the workspace. You can also replace the default Propose Risk form with a custom form.

To add, edit, delete, and view workflows and forms, you must have the corresponding security privileges.

Consult the *Workflow Design Guide t*o learn more about designing forms.

Locations Overview

A location is a geographical reference defined by a pair of coordinates; longitude and latitude.

To create a location, you can enter its coordinates directly or enter a street address and allow the application to find the longitude and latitude for you.

Assign locations to projects, resources, or risks to produce reports based on geographical location. You can also group and filter lists of objects that support locations. Locations are created and stored in the Locations dictionary at the workspace level. They can also be created and stored at the project, resource, or risk level and optionally saved to the Locations dictionary for future use. When choosing projects for a portfolio, location data can be used as a filter condition.

> **Note**: Oracle Primavera Cloud uses Oracle Map Cloud service for location data. (***http://elocation.oracle.com*** (***http://elocation.oracle.com***))

Add a Location

Create locations to assign to projects, resources, or risks so that you can report, search, and filter by location.

To create a location:

1) ***Navigate to the Locations dictionary page*** (see page 360).

2) On the **Locations** page, select ╋ **Add**.

3) In the **Add Location** dialog box:

    a. In the **Name** field, enter a name for the new location.

    b. In the **ID** field, enter a unique identifier for the location.

    c. (Optional) In the **Description** field, enter a description of the location

    d. Enter either a street address or the latitude and longitude.

> **Notes:**
>
> - Input longitude and latitude in the format that is appropriate for your geolocation service. Enter longitude and latitude in decimal degrees or directional designators.
> - Select a country when locating using longitude and latitude to improve results.

    e. Select **Locate**.

    f. Select **Add**.

4) Save your changes:

    a. Select **Save**.

    b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ You can also import locations from a worksheet. Select **Import** ▼, and then select **Download Import Template** to generate a template to help you format the data correctly.

    ▸ Locations can be created on the **Details** Summary & Settings page for a project, on the **Resource List** page for a resource, or in the project or program **Risk Register** for a risk. By default, the locations created for a project, resource, or risk are stored with the object, but you can optionally save the location to the Locations dictionary for future use.

This setting is used in the following apps:

  🏛 **Cost and Funds**

  📈 **Portfolio Analysis**

  👥 **Resources**

  ◼ **Risk**

  ☰ **Schedule**

  🗓 **Scope**

  ◎ **Strategic Alignment**

Download an Import Template for Importing Locations

Download a Microsoft Excel template to use when importing location data.

To download an import template:

1) *Navigate to the Locations dictionary page* (see page 360).

2) On the **Locations** page, select **Import** ▼, and then select **Download Import Template**.

3) Save your changes:

    a. Select **Save**.

    b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips
    ▸ The import template is downloaded as a Microsoft Excel file with the default file name LocationImportTemplate.
    ▸ The top two rows of the worksheet are required when importing data locations from a worksheet. Do not change the data in these rows.

This setting is used in the following apps:

  🏛 **Cost and Funds**

  📈 **Portfolio Analysis**

  👥 **Resources**

  ◼ **Risk**

  ☰ **Schedule**

  🗓 **Scope**

  ◎ **Strategic Alignment**

⩩ **Tasks**

Import Locations

You can import new locations into the application from a Microsoft Excel (.xls or .xlsx) file.

To import locations:

1) *Navigate to the Locations dictionary page* (see page 360).
2) On the **Locations** page, select **Import**.
3) In the **Import Locations** dialog box, select ••• **Browse**, select a file, and select **Import**.
4) Save your changes:
   a. Select **Save**.

   b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ Select **Download Import Template** to download a template file ready for you to populate with data.
▸ Input longitude and latitude in the format that is appropriate for your geolocation service. Enter longitude and latitude in decimal degrees or directional designators.

This setting is used in the following apps:

🏛 **Cost and Funds**

📈 **Portfolio Analysis**

👥 **Resources**

⬛ **Risk**

☰ **Schedule**

▦ **Scope**

◎ **Strategic Alignment**

⩩ **Tasks**

Update the Owning Workspace of a Location

Update the owning workspace of a location to move it to another workspace that you are assigned. If you move the location to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a location:

1) *Navigate to the Locations dictionary page* (see page 360).
2) In the table, select a location row.

3) Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.
4) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.

5) Select **Save**.

6) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

📈 **Portfolio Analysis**

👥 **Resources**

🎲 **Risk**

📃 **Schedule**

🖼 **Scope**

◎ **Strategic Alignment**

📑 **Tasks**

Notebook Topics Overview

Notebook topics are collections of notes that provide additional information on an activity. For example, you could have two notebook topics named Objectives and Constraints respectively. The Objectives notebook topic might provide a list of the main goals to strive for when working on the activity. The Constraints notebook topic could include information on obstacles or roadblocks that you need to be aware of as you progress through your activity.

Notebook topics are created at the Workspace level and then assigned to project activities. Notebook topics with sharing method set to Automatic are inherited in the workspace hierarchy by default. Those notebook topics set to Manual must be selected for display in any child workspaces. The owning workspace of a notebook topic can be changed, and you can only delete, rename, or update the sharing method of a notebook topic while in the owning workspace of that notebook topic.

Activities can have more than one notebook topic assigned to them. A notebook topic can be assigned to multiple activities, but those activities do not share notebook topic contents; the contents of the notebook topic are edited specifically for that activity. Notebook topics can include attachments, such as files or images, as well as links to external web pages. To see notebook topics assigned to an activity, the Notebook Topics column must be displayed in the view on the Activities page.

You must be assigned Notebook Topic privileges to add, edit, or delete a notebook topic in the workspace. You must have Edit privilege assigned for Activities in order to assign and edit existing notebook topics.

Add a Notebook Topic

Notebook topics are added at the workspace level. After notebook topics are added, they can be assigned to project activities within the workspace. You must be assigned the Add, Edit, Delete privilege for Notebook Topics to be able to add a notebook topic to the workspace.

To add a notebook topic:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Notebook Topics**.

4) In the table, select ＋ **Add**.

5) In the new row, in the new **Name** field, enter a unique name for the notebook topic.

6) (Optional) Update the **Sharing Method** field. The sharing method is set to **Manual** by default.

7) In the **Applies to** panel, select **Activities**.

8) Select **Save**.

Tips

▶ To add notebook topics from parent workspaces that have the sharing method set to Manual, select **Assign...**. Notebook topics in parent workspaces that have the sharing method set to Automatic will show by default.

▶ Use the ⚙ **Context** menu to add and delete notebook topics, view which workspaces the notebook topic is currently used by, and change the owning workspace of the notebook topic.

Workflow Designs and Workflow Configurations Overview

Workflows use predefined sequences of steps and tasks to route different kinds of information among different kinds of workers. Organizations use workflows to manage processes that involve many people, many steps, or steps that need to be completed in a specific order.

In Primavera Cloud, workflows can be configured to manage these objects:

▶ Budgets
▶ Budget changes
▶ Budget transfers
▶ Changes
▶ Change orders
▶ Commitments
▶ Contracts
▶ Ideas
▶ Portfolios
▶ Potential Change Orders
▶ Projects
▶ Proposed Project Risks
▶ Submittals

After a workflow has been created, it can start automatically or manually. Workflows can be set to start automatically when some action occurs with the objects they run against. For example, a project workflow can be set to start automatically when a project proposal is created. Managers and administrators can also start workflows on the Start Workflows page.

Consult the *Workflow Design Guide t*o learn more about designing and configuring workflows.

Portfolio Configuration Options

Analysis Views Overview

Analysis views are dynamic tools portfolio budget planners use to view, compare and analyze budget plan data. Analysis views are built upon customizable layout types, charts, and grids that capture information from budget plan scenarios. Charts provide a visual representation of data, while grids enable planners to view plan values and costs in greater detail.

Create analysis views to simplify scenario comparisons, and speed up the planning process. Budget planners use analysis views along with the portfolios Budget Planning page during selection analysis to determine the best mix of projects for a portfolio budget plan. While the Budget Planning page provides time phased budget data, analysis views provide fast and accurate insights into additional project attributes. Planners use analysis views to get a direct comparison of project data, such as Return on Investment, Net Present Value, and Profitability Index, and to evaluate projects for potential inclusion in a budget plan.

In the ***workspace-level settings*** (see "***Add an Analysis View to a Workspace***" on page 129), you can create analysis views and then publish them to any portfolio in your workspace. You can also view and edit existing analysis views for the portfolios in your workspace. You can make any analysis view in your workspace available to as many of your portfolios as necessary. In the portfolio-level settings, you can add analysis views or associate an analysis view from the parent workspace or another portfolio in the workspace.

Create an Analysis View in a Workspace

Create analysis views to analyze important project data while developing the portfolio budget. Analysis views are highly customizable and enable you to select the values important for evaluation, such as Return on Investment, Net Present Value, and Internal Rate of Return. Analysis views aid in providing budget planners with concise and clear information when selecting projects for a budget plan. At the workspace level, you can add, publish, and delete analysis views for individual portfolios in the workspace. Analysis views are displayed and opened from the Published Views page at the portfolio level.

To create an analysis view:

1) ***Add an Analysis View to a Workspace*** (on page 129)
2) ***Configure an Analysis View in a Workspace*** (on page 130)
3) ***Publish an Analysis View to a Portfolio*** (on page 131)

Add an Analysis View to a Workspace

Add an analysis view to create a meaningful display of portfolio budget plan scenario data. When adding an analysis view, you can select a view type to specify the arrangement for the charts and grids included in the view.

After creation, workspace analysis views can be configured and made available to the portfolios in your workspace.

To add an analysis view to a workspace:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Analysis Views**.

4) Select ✚ **Add View** ▼, and select a view type.

5) In the **Name** dialog box, enter a unique name for the analysis view.

6) Select **OK**.

7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ When editing an Analysis View, select the **Change Type** menu on the **View** tab, and select a type to change the layout of the analysis view after you have created it.

This setting is used in the following apps:

🏛 **Cost and Funds**

Configure an Analysis View in a Workspace

You can configure charts and grids to tailor them to your analysis views.

At the workspace level, you can choose which portfolios the analysis view should be available to and whether other users have the ability to customize the view.

To configure an analysis view in a workspace:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Analysis Views**.

4) Select an analysis view.

5) On the **View** tab, select the chart pane or grid pane you would like to modify, and select **Configure**.

6) Configure your chart or grid:

▸ If you selected a chart, use the **Configure Chart** wizard to change the properties of the chart.

▸ If you selected a grid, use the grid **Settings** dialog box to change the properties of the grid.

7) On the **Settings** tab, configured the following columns:

▸ **Portfolios**: Select a check box to make the current analysis view available to that portfolio.

▸ **Publish View**: Select to enable users to access the analysis view from the **Published Views** page for the portfolio. If disabled, the view will not be displayed. The analysis view must be available to the portfolio before you can publish it.

▸ **User Customization**: Select to allow a user with the appropriate privileges to customize the analysis view while viewing data.

8) Select **Save**.

9) Select **Save**.

10) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

Publish an Analysis View to a Portfolio

Publish analysis views to portfolios to enable planners to evaluate project selection based on key performance indicators and other project attributes. You can publish multiple views to a single portfolio, enabling planners to switch between views and compare data based on different sets of criteria. Analysis views published to portfolios can also be viewed in the portfolio-level settings.

To publish an analysis view to a portfolio:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Analysis Views**.

4) Select an analysis view.

5) On the **Settings** tab, configured the following columns:

    ▸ **Portfolios**: Select a check box to make the current analysis view available to that portfolio.

    ▸ **Publish View**: Select to enable users to access the analysis view from the **Published Views** page for the portfolio. If disabled, the view will not be displayed. The analysis view must be available to the portfolio before you can publish it.

    ▸ **User Customization**: Select to allow a user with the appropriate privileges to customize the analysis view while viewing data.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

Measures Overview

Measures are user-defined metrics for quantitatively monitoring the health and performance of your data. You can create separate measures for *portfolios or strategies* (see "*Add a Measure for a Portfolio or Strategy*" on page 160), programs, and projects. For example, you can create measures to capture the number of on-time projects in your portfolio or program, the return on investment of individual strategies, or the percentage of critical activities in a project. Measures can be added as part of the view on a variety of pages throughout the application.

Depending on the context, different object types are available to be used as the measure's aggregation source, whose data is captured, aggregated, and displayed as the measure's value. The value can be a cost, number, or percentage. Measures have two dimensions: actual and target. The actual value is required, and indicates the current value of the data the measure is defined to track. The target value is optional, and can be used when comparing the measure against a defined threshold that you want to meet. Establish thresholds and indicators to visually represent the status of a measure. Actual and target values can be calculated using a formula or they can be set for manual entry. When defining formulas for the actual or target value, choose whether the expression is based on attributes of the measure's aggregation source object or based on existing measures. Attributes and existing measures cannot be used in the same expression for a measure.

Measures are created at the workspace level and are available to the owning workspace's hierarchy depending on their sharing method. To use a measure for a particular portfolio or strategy within a workspace, the measure must first be associated with that portfolio or strategy. Program and project measures do not need to be associated before they can be used in workspaces where they are available. Use the following table to determine where different measure types are configured, the pages where they are available to be used, and the objects that can be used as an aggregation source.

Configuring Measures

Measure Type	Configuration Location	Available To	Aggregation Source
Portfolio	Workspace Measures Dictionary	▶ Portfolios Inventory ▶ Portfolio: Scorecard ▶ Workspace: Summary Scorecard	Project
Strategy	Workspace Measures Dictionary	▶ Workspace: Strategy List, Strategy Scorecard	Project
Program	Program Defaults & Options	▶ Programs Inventory	Project, Program
Project	Project Defaults & Options	▶ Projects Inventory ▶ Portfolio: Budget Planning, Selection Analysis, Scenario Comparison, Scorecard	Activity, Risk, Program, Project

Measure tracking is also supported by Primavera Cloud's reporting and dashboard functionality.

Create a Measure

Create measures to provide data that can be used for monitoring the health and status of portfolios or strategies.

To create a measure:

1) **Add a Measure for a Portfolio or Strategy** (on page 160)
2) **Set a Threshold for a Portfolio or Strategy Measure** (on page 162)
3) **Associate a Measure with a Portfolio** (on page 163)
4) **Associate a Measure with a Strategy** (on page 164)

For more details, see:

▸ **Working with Measures** (on page 164)

Add a Measure for a Portfolio or Strategy

Use the workspace Measures dictionary to add measures for portfolios and strategies. Measures use expressions to quantitatively monitor data important to you. A measure's aggregation source indicates the object type whose data is being captured. Portfolio and strategy measures support projects as an aggregation source and capture data from the projects within a portfolio or associated with a particular strategy node.

The target and actual values used for measures can be configured for manual entry or using a formula. Manual values are entered on pages where the measures appear. Formulas are defined by creating expressions using project attributes or using existing dictionary measures. Project attributes include project-level fields and project measures that exist in the workspace. Measures that use existing measures are called measure-based measures. Measure-based measure expressions can use one or more measures available in the Measures dictionary, or they can use measures referencing specific portfolios or strategies. When choosing a measure, you can select its target or actual expression. Attributes and measure-based measures cannot be used in the same expression.

For information on creating advanced formulas for measures, refer to the *Oracle Primavera Cloud Expression Language Guide on Oracle Help Center.*

After the measure is created, it must be associated with a portfolio or strategy within the workspace before it can monitor project data. See **Associate a Measure with a Portfolio** (on page 163) or **Associate a Measure with a Strategy** (on page 164) for more information.

To add a measure for a portfolio or strategy:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Measures**.

4) Select ╋ **Add**.

5) In the table, complete the following fields:

  ▸ **Name**: The name of the measure.

- ▸ (Optional) **Description**: Details about the measure.
- ▸ **Data Type**: The type of data that the measure generates. Options include Cost, Number, and Percentage.
- ▸ **Target Type**: Determines whether the Target value of the measure is manually entered or calculated using a formula. Entering a target value is not required.
- ▸ **Actual Type**: Determines whether the Actual value of the measure is manually entered or calculated using a formula.
- ▸ **Measure Based**: Determines whether the measure is created using existing measures. This option is available when either Target Type or Actual Type is set to Formula.
- ▸ **Tracking Frequency**: Determines how frequently you want to monitor the measure. For example, if a formula-based measure's tracking frequency is set to Weekly, it is computed every week. If it is a manual measure with Weekly tracking frequency, you can enter measure values in weekly buckets.
- ▸ **Aggregation Source**: Determines whether you are capturing project or program data in the measure.

6) If **Target Type** or **Actual Type** is set to Formula, select the **Data Source** detail window to configure their formulas.

> **Note**: The Data Source detail window is not displayed if both types are set to Manual.

7) In the **Data Source** detail window, select any of the following sections, if applicable:
- ▸ **Actual**: Formula that calculates the current values for the measure.
- ▸ (Optional) **Target**: Formula that calculates a value that can be used when setting thresholds to measure against. See *Set a Threshold for a Portfolio or Strategy Measure* (on page 162) for more information.
- ▸ **Base Expression**: The base expression for the Actual or Target formulas when **Percentage** is the selected **Data Type**.

8) In the selected section, enter a formula manually or using a formula template.
  a. To enter a formula manually:
    1. Select the **Field** list to locate the field to use in the calculation.

        When the **Measure Based** option is selected, the Field list will only show measures available to use in the formula. In the list, select **Referenced Measures** to select measures that are currently assigned to portfolios or strategies.

    2. Select **Portfolio** or **Strategy** to specify the context for the measure associated to the formula. You cannot have a mix of portfolio and strategy contexts in a measure.

        > **Note**: Portfolio context measures pull values from the projects associated with the portfolio, and Strategy context measures pull from the projects associated with the strategy. If a measure is displayed in a context not specified in the formula, the measure will not display a value.

    3. Select **Insert**.
    4. Select the mathematical symbols for the expression.
    5. Add any other fields or symbols needed for the expression.

    b. To use a formula template:

        1. In the **Aggregation Type** list, select the calculation needed for the formula. The list is only enabled when **Measure Based** is not selected.

        2. Select **Portfolio** or **Strategy** to specify the context for the measure associated to the formula. You cannot have a mix of portfolio and strategy contexts in a measure.

> **Note**: Portfolio context measures pull values from the projects associated with the portfolio, and Strategy context measures pull from the projects associated with the strategy. If a measure is displayed in a context not specified in the formula, the measure will not display a value.

        3. Select **Insert**. The formula template appears.

        4. To use the template, highlight or delete **Field** or **Filter**, including the angle brackets, select a field from the **Field** list, and select **Insert**. Repeat for any additional fields or fields to filter by.

        5. Add any other fields or symbols needed for the expression.

9) Select **Validate Formula**.

10) Select **Save**.

11) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ After the measures process is complete, you can review the measures log to view details about the process, including process start and finish and what portfolios or strategies were included. You can access the measures log from the **Manage Services** page.

▸ Select the ⚙ **Context** menu next to an existing measure, and then select **Duplicate** to duplicate the measure. Duplicated measures do not maintain the portfolio or strategy associations of the original measure.

This setting is used in the following apps:

⊞ **Dashboards**

📈 **Portfolio Analysis**

◎ **Strategic Alignment**

Set a Threshold for a Portfolio or Strategy Measure

Set thresholds for measures to see the status of measures using visual indicators.

To set a threshold for a portfolio or strategy measure:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Measures**.

4) In the table, select the measure.

5) Select the **Thresholds** detail window.

6) Select ✛ **Add**.

7) In the **Operator** field, select a parameter to use in the threshold calculation.

8) In the **Value** field, enter a threshold value to use in the calculation.

9) In the **High Value** field, enter the top of the range when the operator is set to Within Range or Not Within Range.

10) In the **Indicator Color** field, select a color to visually represent status when the threshold is met.

11) In the **Indicator Icon** field, select an icon to visually represent status when the threshold is met.

12) In the **Goal** list, select whether a high or low value indicates a positive change in the measure.

For example, High Values would be selected when measuring Net Savings to represent that an increase in value is a positive change.

13) In the **Threshold Computation Method**, select how thresholds are calculated using Actual and Target values.

 ▸ **Actual Value**: The current value. This is the value as calculated by the expression for Actual on the Data Source tab.

 ▸ **Percent of Target**: The percentage of the actual value compared to the target value.

14) Add as many thresholds as necessary for the measure.

15) Select **Save**.

16) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

▱ **Dashboards**

�📊 **Portfolio Analysis**

◎ **Strategic Alignment**

Associate a Measure with a Portfolio

Before a measure can be used to track data on projects or programs in a portfolio, it must first be associated with the portfolio. This will also make the measure available to add to views on pages where portfolio measures are supported.

To associate a measure with a portfolio:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Measures**.

4) In the table, select the measure.

5) Select the **Portfolios** detail window.

6) Select 🔗 **Link**.

7) In the **Link Portfolios** dialog box, select one or more portfolios, and then select **Link**.

8) Select **Save**.

9) In the **Summary & Settings** panel, select ✕ **Close**.

You can also perform this task from the Portfolios inventory panel:

1) In the object selector, select ▪ **Portfolios**, and then select **View All Portfolios**.
2) In the table, select the portfolio, and select the **Measures** detail window.

This setting is used in the following apps:

📈 **Portfolio Analysis**

◎ **Strategic Alignment**

Associate a Measure with a Strategy

Before a measure can be used to monitor strategy performance, it must first be associated with a strategy node. This will also make the measure available to add to views on pages where strategy measures are supported.

To associate a measure with a strategy:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.
3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Measures**.
4) In the table, select the measure.
5) Select the **Strategies** detail window.

6) Select 🔗 **Link**.
7) In the **Link Strategies** dialog box, select one or more strategies, and then select **Link**.
8) Select **Save**.

9) In the **Summary & Settings** panel, select ✕ **Close**.

You can also perform this task from the Strategy List page:

1) In the object selector, select a workspace.

2) In the sidebar, hover over ◎ **Strategic Alignment**, and select **Strategy List**.
3) In the table, select the strategy node, and select the **Measures** detail window.

This setting is used in the following apps:

◎ **Strategic Alignment**

Working with Measures

Measures are configured metrics used to monitor the health and status of a portfolio, strategy, program, or project. Measures can be created using aggregates of object attributes, by using existing measures, or set for manual entry. Object attributes and existing measures cannot be used in the same expression for a measure.

Measures have two dimensions: actual and target. A target value can optionally be defined to use when setting thresholds for the measure. Thresholds and indicators are defined to visually represent the status of a measure.

Use the workspace Measures dictionary to create portfolio and strategy measures, the Program Defaults & Options page to create program measures, and the Project Defaults & Options page to create project measures. See **Measures Overview** (on page 158) for more information.

For information on creating advanced formulas for measures, refer to the *Oracle Primavera Cloud Expression Language Guide on Oracle Help Center.*

Table of Screen Highlights

Item	Description
1	**Aggregation Type**: Provides a template for formulas that use Sum, Min, Max, Count, and Average equations. Select the Aggregation Type, and select Insert.
	For example, the Sum template displays the following:
	sum(< Field >,< Filter >)
	Replace <Field> with the name of the field to be summed. Optionally, replace <Filter> with a field that will filter the results by. Add any additional filter requirements using the mathematical symbols provided.

Item	Description
2	**Field**: Provides all the fields that can be used in formulas.
	If Measure Based is selected, only existing measures display. Select Referenced Measures in the Field list to view measures that are currently assigned to Portfolios or Strategies. Select either the actual or target value for the measure.
	Select a field name, and select Insert. The proper formatting for the field displays.
3	**Mathematical Symbols**: Used when defining formulas manually or when using the aggregation type template.
4	**Validate Formula**: Verifies the formula works.

The following table provides examples of formulas that can be created. Total Cost is represented in the preceding image.

Table of Measure Examples

Measure Name	Data Type	Target	Actual	Base Expression (Actual)
Total Cost	Cost	sum(object.Project_currentApprovedBudgetBase)	sum(object.Project_atCompletionCost, object.Project_status=='Active')	
Projects on Time	Percentage		count(object.ProjectCode_Code, object.Project_scheduleVariance<10)	count(object.ProjectCode_Code)
Cost/ROI Ratio	Number		object.'PortfolioMeasure_Total Cost'/object.'PortfolioMeasure_Return on Investment' **Note**: This expression is Measure Based.	
Project Count	Number		count(object.ProjectCode_Code,object.Project_status=='Active')	
Return on Investment	Number		average(object.Project_returnInvestment)	

Measure Name	Data Type	Target	Actual	Base Expression (Actual)
Net ROI	Number		0.25*Portfolios.get("Consulting","Consulting Portfolio").'PortfolioMeasure_ROI' + 0.50*Portfolios.get("E&C","E&C Portfolio").'PortfolioMeasure_ROI' + 0.50*Portfolios.get("Energy","Energy Portfolio").'PortfolioMeasure_ROI' Note: This expression is Measure Based and references measures from other portfolios.	

Defining Thresholds

The following image provides an example of thresholds that can be set for the Total Cost example. These thresholds are used to determine how status for the measure is visually represented on pages where it is displayed.

Table of Screen Highlights

Item	Description
1	**Goal**: Determines whether a high or low value indicates a positive change in the measure.
2	**Threshold Computation Method**: Determines how thresholds are calculated using Actual and Target values. ▶ **Actual Value**: The current value. This is the value as calculated by the expression for Actual on the Data Source detail window. ▶ **Percent of Target**: The percentage of the actual value compared to the target value.
3	**Operator**: The operators necessary for comparing values in the thresholds.
4	**Value**: The values the operators use for comparison.
5	**High Value**: The top of the range when the operator is set to Within Range or Not Within Range.
6	**Indicator Color**: The color to visually represent status when the threshold is met.
7	**Indicator Icon**: The icon to visually represent status when the threshold is met.

Project Configuration Options

CBS Overview

A Cost Breakdown Structure (CBS) is used to track, manage, and report costs related to a project or program. The CBS standardizes costs into categories that represent manageable cost sources for an organization and a standard cost classification system. The CBS is comprised of cost codes that are classified into three types: expense, capital, or none. These codes are concatenated based on the segment definition and can be viewed as a flat or hierarchical structure. CBS codes are used in top-down and bottom-up cost planning and tracking.

The app enables you to create CBSs at the workspace and project levels. When you create a CBS at the project level, you can select the budget sources for your project. This selection can be edited from the Cost Sheet page.

Workspace CBS

Any CBS codes that are standards in your organization should be associated at the highest level workspace or node that they apply to so that they are available to child workspaces and projects. A CBS at the workspace level can be copied from the parent workspace, copied from sibling workspaces, imported from a Microsoft Excel spreadsheet, or entered manually. If you have created a unique workspace CBS, it can serve as a resource for projects in that workspace and sibling and child workspaces. Each workspace can contain only one CBS. The workspace CBS is created to serve as a CBS for projects and child workspaces to roll up the child workspace and project costs for a high level view of costs within that workspace.

Project or Program CBS

CBS codes at the project level can be copied from the parent workspace. If you have created a unique project CBS, it can serve as a resource for other projects in that workspace. Each project cost sheet can contain only one CBS.

Create a Workspace CBS

Creating a workspace CBS enables you to use the same CBS across multiple projects in your workspace and in sibling workspaces. If a workspace and a child workspace share the same CBS, costs will roll up to the workspace Cost Sheet page, providing a high level view of project and child workspace costs in the workspace.

Choose one of the following methods to create your CBS:

▸ *Add a Workspace CBS* (on page 169)

   Add a new CBS if your workspace has a unique CBS.

▸ *Copy a Parent Workspace CBS* (on page 173)

   Copy a parent workspace CBS if you want to use the same CBS as the parent.

▸ *Create a Workspace CBS by Import* (on page 170)

   Add a CBS by importing if your organization already has a structured CBS you want to use.

▸ *Copy a Sibling Workspace CBS* (on page 173)

   Copy a sibling workspace CBS if you want to use a CBS from a sibling workspace.

Add a Workspace CBS

Add a CBS at the workspace level when projects included in the workspace or sibling workspaces need to use the same CBS.

To add a workspace CBS:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.

4) On the **CBS** page, select **Create CBS**.

5) In the **CBS Setup** dialog box, select **Create new**, and select **Next**.

6) Provide at least one segment definition. Each segment definition you enter here corresponds with a level in the CBS hierarchy. The number of segment definitions you create determines the number of hierarchical levels you can have in your CBS. For example, if you only define one segment, then the CBS will be a flat list with one level. If, however, you define two segments, then the CBS can be two levels deep, with some CBS codes nested under the top-level CBS codes. Use these fields to provide segment definitions:

▸ **Name**: The name of the segment definition. Remember, here you are defining the name of the hierarchical level, not the name of an individual item. For example, if you are using MasterFormat to organize specs and documents, it would make more sense to enter "Divisions" here than to enter something like "Procurement and Contracting" or "General Requirements." That's because each of these things is itself a division. After you have defined the segment definitions, you can enter the individual divisions—like "Procurement and Contracting" or "General Requirements"—back where you are defining the CBS.

▸ **Default Value**: For CBS codes that are subordinate to top-level CBS codes, this optional default value appears in their place before you add them. For example, let's say you've defined two segments, one called Divisions and another called Subdivisions. Let's also say that the default value for Subdivisions is 00. On the Cost Sheet page, if you add a new top-level CBS code titled "HVAC", then that code will be appended with 00 to read "HVAC 00." The **Separator** value determines how this default code is separated from the name of the parent code. In this case, we're using a space.

a. **Separator**: The separator that follows the name of the division. This can be a period, space, or hyphen. For example, let's say you have two segment definitions and have set the Separator value of the top-level segment to be a period. Let's also say the default value for both is 00. If you then add a new top-level CBS code titled "HVAC," it will appear on the Cost Sheet page as "HVAC.00".

7) Select **Finish**.

8) Enter your CBS codes, and select **Save**.

9) On the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ Create an import template in Microsoft Excel instead of manually entering values if you have a lot of CBS codes to enter.

This setting is used in the following apps:

🏛 **Cost and Funds**

▪ **Risk**

▣ **Scope**

Create a Workspace CBS by Import

Creating a CBS using Microsoft Excel enables you to use the CBS already defined by your organization.

To create a CBS by import:

1) *Download an Import Template for Importing CBS Codes*

2) **Import a CBS** (on page 172)

Download an Import Template for Importing CBS Codes

Download a Microsoft Excel template to use when importing a workspace CBS. The number of levels in the segment definition in the spreadsheet must match the number of levels in the segment definition in the application.

To download an import template:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.

4) On the **CBS** page, select **Create CBS**.

5) In the **CBS Setup** dialog box, select **Create new**, and select **Next**.

6) Provide at least one segment definition. Each segment definition you enter here corresponds with a level in the CBS hierarchy. The number of segment definitions you create determines the number of hierarchical levels you can have in your CBS. For example, if you only define one segment, then the CBS will be a flat list with one level. If, however, you define two segments, then the CBS can be two levels deep, with some CBS codes nested under the top-level CBS codes. Use these fields to provide segment definitions:

   ‣ **Name**: The name of the segment definition. Remember, here you are defining the name of the hierarchical level, not the name of an individual item. For example, if you are using MasterFormat to organize specs and documents, it would make more sense to enter "Divisions" here than to enter something like "Procurement and Contracting" or "General Requirements." That's because each of these things is itself a division. After you have defined the segment definitions, you can enter the individual divisions—like "Procurement and Contracting" or "General Requirements"—back where you are defining the CBS.

   ‣ **Default Value**: For CBS codes that are subordinate to top-level CBS codes, this optional default value appears in their place before you add them. For example, let's say you've defined two segments, one called Divisions and another called Subdivisions. Let's also say that the default value for Subdivisions is 00. On the Cost Sheet page, if you add a new top-level CBS code titled "HVAC", then that code will be appended with 00 to read "HVAC 00." The **Separator** value determines how this default code is separated from the name of the parent code. In this case, we're using a space.

   a. **Separator**: The separator that follows the name of the division. This can be a period, space, or hyphen. For example, let's say you have two segment definitions and have set the Separator value of the top-level segment to be a period. Let's also say the default value for both is 00. If you then add a new top-level CBS code titled "HVAC," it will appear on the Cost Sheet page as "HVAC.00".

7) Select **Finish**.

8) On the **CBS** page, select the **Actions** ▼ menu, and then select **Download Import Template**.

9) Select **Save**.

10) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ The import template is downloaded as a Microsoft Excel file with the default file name, ExportDataToSpreadsheet.

▸ The top two rows of the CBS Codes worksheet are required when importing data from a worksheet. Do not change the data in these rows.

▸ The top row of the Segment Separators worksheet is required when importing data from a worksheet. If you need to add another level to your hierarchy, increment the level number for each new level.

▸ The segment definition specified in the spreadsheet must match the segment definition specified in the application.

▸ Review the Instructions worksheet on the first tab of the spreadsheet for helpful tips on populating the import template.

This setting is used in the following apps:

🏛 **Cost and Funds**

🎲 **Risk**

📇 **Scope**

Import a CBS

Import a CBS into the application from a Microsoft Excel (.xls or .xlsx) file.

To import a CBS:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.

4) On the **CBS** page, select the **Actions** ▼ menu, and then select **Import**.

5) In the **Import CBS** dialog box, select ••• **Browse**, select the file you want to import, and select **Import**.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ The segment definition specified in the spreadsheet must match the segment definition specified in the application.

This setting is used in the following apps:

🏛 **Cost and Funds**

🎲 **Risk**

📇 **Scope**

Copy a Sibling Workspace CBS

Copy the CBS of a sibling workspace if any projects within your workspace will use the same CBS.

To copy a sibling workspace CBS:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.
3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.
4) On the **CBS** page, select **Create CBS**.
5) In the **CBS Setup** dialog box, select **Copy from other**, and select **Next**.
6) Select a CBS to use, and select **Next**.
7) Select the CBS codes you want to include, and select **Finish**.
8) Select **Save**.

9) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

◼ **Risk**

▣ **Scope**

Copy a Parent Workspace CBS

Copy the parent workspace CBS if your workspace will use the same CBS.

To copy a parent workspace CBS:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.
3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.
4) On the **CBS** page, select **Create CBS**.
5) In the **CBS Setup** dialog box, select **Build from**, and select **Next**.
6) Select the CBS codes you want to include, and select **Finish**.
7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

◼ **Risk**

▣ **Scope**

Modify a Workspace Segment Definition

Use segment definitions to control the depth of the CBS hierarchy and how codes are concatenated. The number of segment definitions you create determines the number of hierarchical levels you can have in your CBS. For example, if you only define one segment, then the CBS will be a flat list with one level. If, however, you define two segments, then the CBS can be two levels deep, with some CBS codes nested under the top-level CBS codes.

To modify a segment definition:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.

4) On the **CBS** page, select the **Actions** ▼ menu, and then select **Edit Segment Definitions**.

5) In the **Segments** dialog box, make any edits, and select **Save**.

6) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▶ You cannot add a new segment definition if the existing segment definition is associated with a CBS code that is already assigned costs.

▶ You cannot remove a segment definition if the CBS codes form a hierarchy as deep as the row number of the segment definition.

▶ You cannot add or remove segment definitions to or from a workspace or project CBS that has been copied from its parent. However, importing from the parent CBS may pull down additional segment definitions.

This setting is used in the following apps:

🏛 **Cost and Funds**

▦ **Risk**

🔲 **Scope**

Add a CBS Code

Add or delete CBS codes if your workspace CBS needs change.

To add a CBS code:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.

4) On the **CBS** page, in the ⚙ **Context** menu, select **Add Below**.

5) In the new row, enter the new CBS code.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▶ All CBS codes are created as active, but you can deactivate any codes that you do not want to be available for use by other users for scope assignments or copying CBSs.

▶ Select the ⚙ **Context** menu to organize your codes by moving them vertically or hierarchically.

▶ If the CBS was copied from its parent workspace, you cannot add CBS root codes. However, you can add a new child CBS code indented below the root. To add a child CBS code, select the ⚙ **Context** menu, and then select **Add**.

▶ You cannot delete a CBS code if the code has been copied by any projects or child workspaces in the owning workspace.

This setting is used in the following apps:

🏛 **Cost and Funds**

🎲 **Risk**

📋 **Scope**

Import Additional CBS Codes

If you copied a parent workspace CBS, you can update the workspace CBS with additional codes as your CBS needs change. You can import new codes added to the original CBS or import codes that you did not select before.

To import additional CBS codes:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.

4) On the **CBS** page, select the **Actions** ▼ menu, and then select **Import**.

5) In the **Import CBS** dialog box, select the codes you want to include, and select **Import**.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

🎲 **Risk**

📋 **Scope**

Codes Overview (Project-level)

In the project Codes dictionary, codes are available to be assigned to activities and tasks within the project. Project-specific codes are useful when there are codes that only need to be available to a single project. You can use codes to help you categorize your data based on shared characteristics. Codes can be added as columns, grouping bands, sorting options, filters, and more. If a project-level code should be made available to more areas of your application, you can promote it to the parent workspace.

Add a Project-level Code

Codes enable you to categorize and track objects based on attributes they share. Add codes to the project Codes dictionary if they should only be available to a specific project. You can promote project-level codes if they should be made available to other objects in the project's parent workspace.

You can apply project-level codes to activities and tasks within the project.

To add a project-level code:

1) *Navigate to the project Codes dictionary page* (see page 361).

2) In the table, select ➕ **Add Code** ▼.

3) In the new row, in the **Name** and **ID** columns, enter a name and ID for the new code.

4) In the **Applies to** panel, select one or more objects to apply the code. All are selected by default.

   ▸ **Activities**: Select to make the code available for assignment to activities in the project.

   ▸ **Tasks**: Select to make the code available for assignment to tasks in the project.

5) Save your changes:

   a. Select **Save**.

   b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ Individual activity and task code values can be associated with a color.   Colors associated with activity codes are used for activity bars in the Gantt chart on the Activities page. Colors associated with task codes are used for task bars in the Gantt chart on the Task List page and task cards on Tasks App pages.

▸ To promote a code and its values to the parent workspace Codes dictionary, select a code in the table, select the ⚙ **Context** menu, and then select **Promote to Workspace**. Select **Save**.

Add a Value to a Project-level Code

Add values to codes so that you can group, sort, and filter objects based on their code values. At the project level, you can add values to project-specific codes. Individual activity and task code values can be associated with a color. Colors associated with activity codes are used for activity bars in the Gantt chart on the Activities page. Colors associated with task codes are used for task bars in the Gantt chart on the Task List page and task cards on Tasks App pages.

To add a code value to a project-level code:

1) *Navigate to the project Codes dictionary page* (see page 361).

2) In the table, select a code or code value.

3) Do either of the following:

 ‣ In the toolbar, select the ╋ **Add Code** ▼ menu, and then select **Add Code Value**. A new value is added beneath the selection.

 ‣ In the table, select the ✿ **Context** menu, and then select **Add Code Value**.

4) In the **Name** and **ID** columns, enter a name and ID for the code value.

5) (Optional) In the **Color** column, select a color for the code value. Code value colors are for activity bars in the Gantt chart on the Activities page. Code value colors are used for task bars in the Gantt chart on the Task List page and task cards on Tasks App pages.

6) Save your changes:

 a. Select **Save**.

 b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips

 ‣ Code values can be configured hierarchically to further enhance your object organization.

 Select the ✿ **Context** menu next to a code value, and then choose to move the value up, down, left, or right.

Cost Categories Overview

A cost category is used to define costs into a category more specific than a CBS code. The most commonly used cost category types are labor, equipment, materials, and other. These types allow you to categorize costs into groups. For example, you may want to track costs associated with labor. However, that label may be too broad. You can create a cost category called Subcontractor Labor with a type of Labor. This cost category can be assigned to all budget line items or actual line items that are a result of subcontractor labor.

When you create cost categories, you should evaluate what fields you want to be enabled for use, particularly if you plan to use the calculation fields. Different cost categories enable different fields. A cost category type of Other will not enable any extra fields.

Labor: If the cost category type is Labor, Quantity, Unit of Measure, Production Rate, and Labor Rate are editable fields. Cost for a budget line item with a labor cost category is equal to Quantity multiplied by Production Rate multiplied by Labor Rate. You can also manually enter the Cost.

Equipment: If the cost category type is Equipment, Quantity, Unit of Measure, and Unit Rate are editable fields. Cost for a budget line item with an equipment cost category is equal to Quantity multiplied by Unit Rate. You can also manually enter the Cost.

Materials: If the cost category type is Materials, Quantity, Unit of Measure, and Unit Rate are editable fields. Cost for a budget line item with a materials cost category is equal to Quantity multiplied by Unit Rate. You can also manually enter the Cost.

Other: Other is the most broad cost category type, which is used when your costs do not fall into the labor, equipment, or materials types. Cost categories with a type of Other allow the user to enter a cost value only. All other fields used for calculating costs are unavailable.

Add a Cost Category

You can create as many cost categories as necessary to meet the business needs of your organization.

To add cost categories:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Cost Categories**.

4) On the **Cost Categories** page, select ＋ **Add**.

5) In the new row, complete the following fields:

    a. **Abbreviation**: Enter an abbreviation that is 10 characters or less.

    b. **Name**: Enter a unique name.

    c. **Type**: Select a type. Valid values include Labor, Equipment, Materials, and Other.

    d. **Sharing Method**: Specify how the data is shared between parent and child workspaces:

        ▪ **Manual**: The data can be pulled down by child workspaces individually, using the **Assign** button in each child workspace. This is the default option.

        ▪ **Automatic**: The data is pushed down to child workspaces automatically.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

▦ **Scope**

Update the Owning Workspace of a Cost Category

Update the owning workspace of a cost category to move it to another workspace that you are assigned. If you move a cost category to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a cost category:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Cost Categories**.

4) In the table, select a cost category row, select the ⚙ **Context** menu, and then select **Change Owning Workspace**.

5) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

▣ **Scope**

Curve Profiles Overview

Curve profiles enable you to specify the allocation of scope assignment costs, quantities, and hours over the duration of an activity; resource or role hours spread over the duration of an activity; and budget quantities over their durations.

Amounts are distributed evenly throughout an activity unless a nonlinear distribution is specified using a curve profile. Scope assignments can use curve profiles regardless of whether they are linked to activities.

Interpreting Curve Profiles

After you navigate to the Curve Profiles dictionary page, you can view all of the default and custom curve profiles available to you. Select a curve profile to view a graph that represents how it works. The x-axis, labeled at the top of the graph, represents the percentage of the object's duration. The y-axis, labeled along the left side of the graph, represents the percentage of the object that has been allocated to th e duration percentages. The numbers along the bottom of the graph indicate what percentage of the is allocated at each increment of the duration.

Among the simplest built-in curve profiles is the Linear profile. Select it to view its graph. By default, the Linear curve profile evenly distributes 5.00% of the total quantity to every 5% increment in the item's duration, rounding as necessary.

Here is a list of all the built-in curve profiles:

- ▶ Bell
- ▶ Double Bell
- ▶ Delayed Double Bell
- ▶ Offset Triangular
- ▶ Triangular Decrease
- ▶ Triangular Increase
- ▶ Front Loaded
- ▶ Three Step
- ▶ Linear
- ▶ Back Loaded
- ▶ Trapezoidal
- ▶ Triangular

Define a Curve Profile

Define curve profiles to specify how scope assignment costs, quantities, and hours spread over the duration of an activity; resource or role hours spread over the duration of an activity; and budget quantities over budget durations. There are some default curve profiles defined in the application. You can add a new curve, which is based on the default linear curve, or copy and modify one of the existing curves.

To define a curve profile:

1) *Navigate to the Curve Profiles dictionary page* (see page 360).

2) To copy an existing curve, select the ⚙ **Context** menu next to the curve to copy, and select **Duplicate**.

   To create a curve, select the ⚙ **Context** menu for a curve, and select **Add**.

3) Enter a **Curve Name**.

4) Modify the curve value percentages to create a curve that indicates how your costs and quantities should distribute over time. Curves are defined by 21 points (5% intervals from 0 to 100 is the default for a new curve).

5) Select **Prorate** to make the total of the distribution values equal to 100% while maintaining the shape you specified.

6) Save your changes:

   a. Select **Save**.

   b. In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

🏃 **Resources**

⬛ **Risk**

🗏 **Schedule**

🗗 **Scope**

Update the Owning Workspace for Curve Profiles

Update the owning workspace of a curve profile to move it to another workspace that you are assigned. If you move the curve profile to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a curve profile:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Curve Profiles**.

4) In the table, select a curve profile.

5) Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.

6) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.

7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

👥 **Resources**

▣ **Risk**

☰ **Schedule**

▦ **Scope**

Evaluation Categories Overview

Evaluation Overview Video

Define project, program, and idea evaluation categories based off of organizational business drivers. Evaluation categories are grouped into an evaluation matrix, which you can use to rank and assess your projects, programs, and ideas against your company's requirements and standards. In portfolio management, overall project and program evaluation scores are then viewed in the Prioritization Matrix.

Evaluation Matrix Overview

An Evaluation Matrix utilizes evaluation categories and subcategories to assess projects. There is one evaluation matrix per workspace.

Helpful Definitions

Evaluation Categories: User-defined categories that help to assess projects, programs, or ideas in an evaluation matrix and projects or programs in a prioritization matrix.

Evaluation Matrix: Utilizes evaluation categories and subcategories to assess projects.

Evaluation Score: The quantitative score of a project based on the qualitative ranking of projects.

Evaluation Subcategories: Divisions of evaluation categories with assigned ranks, weights, types, and statuses.

Prioritization Matrix: Utilizes evaluation categories and subcategories to assess multiple projects or programs.

Ranks: The rating or position assigned to an evaluation subcategory indicating its relative importance or performance level based on that subcategory's assigned weight.

Weight Percent: The weight percentages for the evaluation ranking.

Evaluation Categories and Subcategories

The evaluation matrix includes evaluation categories, each with their own subcategories. For an Evaluation Matrix to have an Active status, there must be at least one subcategory in each category with a status of Enabled. When all subcategories of a category in an Evaluation Matrix have status Disabled, the Evaluation Matrix will have an Inactive status and will not be usable.

An Evaluation Matrix is inherited from a parent workspace. However, in the inherited evaluation matrix, subcategories can be added, removed, disabled, or their weight adjusted in descendant workspaces. Individual evaluation subcategories can have an owning workspace and are considered a shared data separate from the evaluation matrix. A user with the Edit permission for Evaluation Categories can change the owning workspace for individual evaluation subcategories. This gives users a lot of flexibility in matrix configurations for their workspace.

Subcategory Behavior in Parent and Child Workspaces

Even if a parent and child workspace share subcategories, any changes in the weight of the subcategory in the parent workspace will not update the weight of that same subcategory in the child or any descendant workspaces. When a subcategory is disabled in a workspace, that subcategory is then disabled in descendant workspaces as well. The only way to enable a disabled subcategory is through the workspace where it was originally disabled. You can only delete a subcategory in its owning workspace. Select Used By to see a list of workspaces where the subcategory is currently in use.

Evaluation Matrix Scores and the Prioritization Matrix

Due to the possible independent subcategories and weights depending upon user configuration, the same Evaluation Matrix can result in different scores for two workspaces in the same hierarchy. Multiple project evaluation scores can be compared in the Prioritization Matrix, allowing you to prioritize and select the right project to pursue according to your company's requirements and standards. See Prioritization Matrix for more information.

Add an Evaluation Matrix

There is one evaluation matrix per workspace. The evaluation matrix includes evaluation categories, each with their own subcategories. Add evaluation categories to rank and assess projects, programs, and ideas. See *Evaluation Matrix Overview* (on page 181) for more information.

To add an evaluation matrix:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Evaluation Categories**.

4) Select ＋ **Add**.

5) In the new row, complete the following fields for a category:
    ‣ **Name**: The name of the evaluation category.

▸ (Optional) **Description**: Details describing the evaluation category.

▸ **Weight**: The relative weight of the sibling evaluation node to indicate contribution of a given node to its parent evaluation node.

▸ **Weight Percent**: The weight or relative rank of the evaluation node compared to its siblings. This value indicates the percentage that the evaluation node is contributing to the parent strategy. The Weight Percent for all sibling evaluation nodes equals 100. This field is read-only.

6) (Optional) Select the ⚙ **Context** menu, and select **Add Subcategory**.

7) In the new row, complete the same fields for the subcategory including the following option:

▸ **Type (Optional)**: Determines the type of ranking applied to a subcategory. Select **Manual** (Default) or **Thresholds.** When **Thresholds** is selected, you have the option to configure specific fields to associate with each rank.

8) (Optional) In the **Project Thresholds**, **Program Thresholds**, and **Ideas Thresholds** detail windows, configure the ranking for the subcategory when **Thresholds** is selected as the **Type**. Make any of the following modifications:

▸ **Name**: Modify the names as needed. This option is available in the Project Thresholds, Program Thresholds, and Ideas Thresholds details window.

▸ **Description**: Explains the ranking of the subcategory.

▸ **Color**: Select a color representing the evaluation ranking.

▸ **Field**: Determine a specific map to a ranking.

▸ **Operator**: Select an operator to determine how the ranking is applied.

▸ **Value**: Enter a value to determine the evaluation ranking.

▸ **High Value**: Enter a high value to determine the evaluation ranking. This field is only required if the Within or Not Within Range is selected as the Operator.

▸ **Reverse Ranks Order**: Select the icon to reverse the order of the ranks. Weigh percentage values remain the same.

▸ **Weight Percent**: The weight percentages for the evaluation ranking. The default values are evenly distributed based on the number of selected ranks. You can manually specify different percentage values.

9) In the **Ranks** detail window, configure the ranking for the subcategory. A scale is preconfigured for you. Make any of the following modifications:

▸ **Scale**: Determine how many options are available on the rating scale. You can display up to 21 options. When increasing or decreasing the scale, you must confirm your selection in the confirmation window. When decreasing the rank scale, additional rank details are deleted, and weight percent values are reset based on the selected rank.

▸ **Reverse Ranks Order**: Select the icon to reverse the order of the ranks. Weight percentage values remain the same.

▸ **Name**: Modify the names as needed. For a scale number greater than 9, a default generic rank name will be added such as Rank 10 and Rank 11.

▸ **Weight Percent**: The weight percentages for the evaluation ranking. The default values are evenly distributed based on the number of selected ranks. When additional ranks are added, the newly created weight percent fields are defaulted to zero. When a rank is removed the weight percent values are reset. You can manually specify different percentage values.

> ▸ **Color**: Select a color representing the evaluation ranking.

> ▸ (Optional) **Description**: Details describing the rating. When the scale is increased, new blank description fields are displayed.

10) Select **Save**.

11) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

- ▸ If a subcategory is currently in use it cannot be deleted.
- ▸ You can add or disable subcategories in inherited evaluation matrices.
- ▸ For an Evaluation Matrix to have an Active status, there must be at least one subcategory in each category with a status of Enabled. When all subcategories of a category in an Evaluation Matrix have status Disabled, the Evaluation Matrix will have an Inactive status and will not be usable.

This setting is used in the following apps:

📈 **Portfolio Analysis**

◎ **Strategic Alignment**

Scope Reporting Cycles Overview

The reporting periods for projects are defined by patterns set in reporting cycles. Reporting periods are used as part of the project control process to compare actual progress for scope assignments against the planned progress captured in the project baseline.

Reporting periods for a reporting cycle can be set to occur daily, weekly, semi-monthly, or monthly, depending on the reporting requirements for a project. Factors to be considered when defining reporting cycles include duration, cost, overall risk, and reporting needs of stakeholders involved in the project. For example, if a project is expected to have an overall duration of one month, the reporting period may be daily. In contrast, if a project has an expected duration of five years, then the reporting period may be monthly.

Each project can use only one reporting cycle. Therefore, scope period closeout and store period performance in the same project will both use the same reporting cycle. Scope period closeout takes place on the Period Closeout page of the Scope app, and store period performance closeout occurs on the Activities page of the Schedule app.

Define a Reporting Cycle

Reporting cycles are defined to create reporting periods which are used to plan and update progress on scope assignments and to store period performance for your activities.

Reporting cycles can be set to occur daily, weekly, semi-monthly, or monthly, depending on the reporting requirements for a project.

To define a reporting cycle:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Reporting Cycles**.

4) In the **Name** field, enter a name for the reporting cycle.

5) Complete the following fields in the **Period Pattern** section:

  ▸ **Period Frequency**: Choose whether the reporting periods should be Daily, Weekly, Semi-Monthly, or Monthly.

  A daily cycle begins at 12 a.m. and ends at 11:59 p.m. A semi-monthly cycle includes days 1 through 15 in one period and days 16 through the end of the month in a subsequent period, except for February which ends on day 14 in the first period.

  ▸ **Period End**: Select the last day in the reporting period for the cycle when the Period Frequency is set to Weekly or Monthly.

  A monthly cycle ending with a **Middle of the month** setting will end on the 15th, except for February which ends on the 14th.

  ▸ **Base Date**: Select the date used as the starting point for generating the period start and end dates in the **Period Preview** section on this page.

  ▸ **Prefix**: Enter a prefix for the period naming convention label, which is used to distinguish individual time periods when viewing reporting cycles in a time phased view.

  ▸ **Suffix**: Enter a numerical suffix for the period naming convention label, which is used to distinguish individual time periods when viewing reporting cycles in a time phased view.

  ▸ **Increment**: Select a number to increment the suffix by in each period naming convention label, which is used to distinguish individual time periods when viewing reporting cycles in a time phased view.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

  ▸ A reporting cycle cannot be deleted if it is used by a project or inherited by a child workspace.

This setting is used in the following apps:

▤ **Schedule**

▥ **Scope**

Assign a Default Reporting Period

If several projects within a workspace will use the same reporting cycle, you can set a default reporting cycle for all new projects within the workspace to inherit. This can be changed at the project level.

To assign a default reporting period:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Reporting Cycles**.

4) Select **Default** for the reporting cycle that you want to be the default.

5) Select **Save**.

6) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

 ▤ **Schedule**

 ▣ **Scope**

Update the Owning Workspaces of a Reporting Cycle

Update the owning workspace of a reporting cycle to move it to another workspace that you are assigned. If you move a reporting cycle to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a reporting cycle:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Reporting Cycles**.

4) Select a reporting cycle.

5) Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.

6) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.

7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

 ⚇ **Resources**

 ▤ **Schedule**

 ▣ **Scope**

Risk Thresholds Overview

Risk thresholds are scales that you define for rating risks in terms of likelihood, cost impact, schedule impact, and any custom impacts you want to define. Each scale comprises a range of values used to delineate different levels of risk that may face the project or program. The risk thresholds are the inputs used to create a risk matrix, the scoring mechanism used to compute risk scores for identified project or program risks.

The risk thresholds that are necessary for a risk matrix are:

▸ **Probability**: The likelihood of a risk occurring.

▶ **Schedule**: The amount of time the risk will increase or decrease the project or program schedule, defined as either a percentage of the project's planned duration or as a project or program duration value. Programs do not support relative thresholds, which use percentage values.

▶ **Cost**: The cost impact if a risk occurs, defined as either a percentage of the project's planned cost or as a monetary value for the project or program. Programs do not support relative thresholds, which use percentage values.

▶ **User-defined**: Any optional user-defined impacts configured for your workspace, such as safety or environmental impacts. User-defined thresholds use text, rather than quantitative values, to define the impact of the risk.

Add a Risk Threshold Template

Add risk thresholds to define the risk scoring criteria to use for a risk matrix. Risk thresholds are added at the workspace level as templates, making them available to use in child workspaces, projects, and programs. You should add risk threshold templates at a level in your workspace hierarchy where they are available to all workspaces, projects, and programs that will need them. The risk threshold template data is copied to a project or program when a matrix is assigned. You can modify the risk threshold at the project or program level without affecting the template or other projects or programs to which the template is assigned.

To add a risk threshold template:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Risk Threshold Templates**.

4) In the table, select ＋ **Add**.

5) In the new row, complete the following fields:

   ▶ **Name**: Enter a name for the risk threshold.

   ▶ **Type**: Select a threshold type:

      ▪ **Probability**: Measures the likelihood of a risk occurring.

      ▪ **Schedule**: Measures the amount of time the risk will increase or decrease the project or program schedule, defined as a duration value.

      ▪ **Cost**: Measures the cost impact if a risk occurs, defined as a monetary value.

      ▪ **User**: Measures the impact of the risk in terms of a user-defined impact.

      ▪ **Relative Schedule**: Measures the amount of time the risk will increase or decrease the project schedule, defined as a percentage of the project's planned duration.

      ▪ **Relative Cost**: Measures the cost impact if a risk occurs, defined as a percentage of the project's planned cost.

      Notes:

      ▪ Relative threshold values used by project risk matrixes are unable to be recalculated by program risk matrixes. At the program level, program probability and impact fields for a project risk using relative

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thresholds will appear blank.

- ▪ You cannot assign a matrix with relative thresholds to a program.
- ▪ Relative thresholds cannot be used in quantitative risk analysis.

   ▸ **Number of Levels**: Select a number of threshold levels.
6) In the **Levels** detail window, configure each level defined for the threshold:

   ▸ **Name**: Enter a name for the level.

   ▸ **Code**: Enter a short name or abbreviation for the level.

   ▸ **Low**: Enter a minimum value for the threshold range.

   ▸ **High**: Enter a maximum value for the threshold range.

   ▸ (Optional) **Color**: Select a color for the threshold level.
7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

 ◪ **Risk**

Update the Owning Workspace of a Risk Threshold Template

Update the owning workspace of a risk threshold template to move it to another workspace that you are assigned. If you move a risk threshold template to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a risk threshold template:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Risk Threshold Templates**.

4) In the table, select a risk threshold template.

5) Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.

6) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.

7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

 ◪ **Risk**

Risk Matrixes Overview

The risk matrix is a tool that helps provide a guide for risk assessment using qualitative metrics. A risk matrix includes probability threshold values, cost and schedule impact threshold values, and user-defined threshold values, which are used in the calculation of the risk score. The risk score is a general indicator of the significance of a risk and whether it requires extra attention. You can define separate risk matrixes for projects and programs.

Add a Risk Matrix Template

Add risk matrixes to assess and prioritize project or program risks.

Risk matrixes are added at the workspace level as templates, making them available to use in child workspaces, projects, and programs. You should add risk matrix templates at a level in your workspace hierarchy where they are available to all workspaces and the projects or programs that will need them. When a risk matrix is assigned to a project or a program, the data from template is copied to the project or program. This enables you to modify the project's or program's risk matrix without changing the template or other project or program matrixes to which the template is assigned.

To add a risk matrix template:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Risk Matrix Templates**.

4) In the table, select ＋ **Add**.

5) In the new row, complete the following fields:

   ‣ **Name**: Enter a name for the new matrix.

   ‣ **Matrix Size**: This is a read-only field that indicates the number of probability levels and the number of impact levels.

   ‣ **Probability**: Select a probability threshold.

   ‣ **Cost Impact**: Select a cost threshold.

   ‣ **Schedule Impact**: Select a schedule threshold.

   ‣ (Optional) **User Impact**: Select one or more user-defined thresholds.

   > **Notes**:
   > - All impact thresholds for a risk matrix must contain the same number of levels.
   > - You cannot assign a matrix with relative thresholds to a program.

6) In the **Scoring Method** column, select one of the following risk scoring methods:

   ‣ **Highest Impact**: The overall impact for a risk is set to the highest of all the impacts assigned to the risk.

   ‣ **Average Impact**: The overall impact is determined by calculating the average of all impact values.

7) (Optional) In the **Description** column, enter a summary of the risk matrix.

8) In the **Sharing Method** list, specify how the data is shared between parent and child workspaces:

   ‣ **Manual**: The data can be pulled down by child workspaces individually, using the **Assign** button in each child workspace. This is the default option.

   ‣ **Automatic**: The data is pushed down to child workspaces automatically.

9) Select **Save**.

10) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

‣ The inputs for the risk matrix are the risk thresholds, which you must add on the **Risk Threshold Templates** page in the workspace settings.

‣ The Probability and Impact Diagram (PID) is a graphical representation of your risk matrix which is automatically created based upon your threshold selections. Select 🖉 **Settings** to modify the PID color settings.

This setting is used in the following apps:

◼ **Risk**

Configure the Probability and Impact Diagram Settings

The Probability and Impact Diagram (PID) is a graphical representation of your risk matrix template which is automatically created based upon your threshold selections. You can adjust the color settings for the PID to color-code risk scores.

To configure the PID color settings:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Risk Matrix Templates**.

4) Select a risk matrix template, and then select the **Probability and Impact Diagram** detail window.

5) Select 🖉 **Settings**.

6) On the **Score Colors** tab in the **Settings** dialog box, do the following to define grid colors for the PID:

   a. In the **Color** list, use the picker to select a grid color.

   b. In the **Greater Than Value** field, select a risk score value to associate with the selected color.

   c. (Optional) To define additional grid colors, select ＋ **Add**, and specify the color settings.

7) Select **Apply**.

8) Select **Save**.

9) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

■ **Risk**

Update the Owning Workspace of a Risk Matrix Template

Update the owning workspace of a risk matrix template to move it to another workspace that you are assigned. If you move a risk matrix template to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a risk matrix template:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Risk Matrix Templates**.

4) In the table, select a risk matrix template.

5) Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.

6) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.

7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

■ **Risk**

Rules of Credit Overview

Rules of credit can be used when tracking progress on scope assignments. A rule is defined by its milestones and their percentage complete. These rules are used when contracts require certain conditions to be met before a payment is made. The rules are also used when it is necessary to track progress of an assignment at a more detailed level or when there are specific steps that need to be completed to satisfy the scope assignment.

The rules are configurable to meet the needs of the contract or general project statusing requirements. In some cases, it is necessary to track the percentage complete for each milestone. In other cases, it is only important to track whether the milestone is complete.

A rule of credit is set at the scope assignment level when the work package is set to measure progress by Milestone Percent Complete. The milestones defined for the rule of credit are used to show progress.

Rules of credit are typically defined by project managers and cost controls engineers.

Add a Rule of Credit

Add rules of credit for tracking progress on scope assignments when the work package progress measure is set to Milestone Percent Complete.

To add a rule of credit:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Rules of Credit**.

4) Select ＋ **Add**.

5) In the **Name** field, enter the name for the rule of credit.

6) In the **Input Type** list, choose how to apply the rule of credit:

   ▸ **Manual**: Enables users to enter their percentage complete on a milestone. Use this option if it is important to track the percentage complete on a milestone.

   ▸ **0/100 Percent Complete**: Enables users to mark a milestone as complete. Use this option if it is important to show whether the work is complete or not complete. A weighted percentage is still applied to enable a percentage complete rollup at the work package level.

7) Use the table to define milestones used to track percentage complete.

   a. In the **Milestone Name** field, enter the name of a milestone.

   b. In the **Incremental Percent Complete** field, enter the percentage each milestone represents for the rule of credit. The Cumulative Percent Complete must equal 100%.

8) Select **Save**.

9) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ A rule of credit cannot be deleted if it is applied to a work package.

This setting is used in the following apps:

🗗 **Scope**

Update the Owning Workspace of a Rule of Credit

Update the owning workspace of a rule of credit to move it to another workspace that you are assigned. If you move a rule of credit to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a rule of credit:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Rules of Credit**.

4) In the table, select a rule of credit.

5) Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.

6) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.

7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

☒ **Scope**

Strategy Types Overview

Strategy types represent corporate-level strategy or goal categories that align with the mission and vision of the organization. For example, types defined could be Business Drivers, Strategic Themes, Objectives, Goals, or Initiatives.

A strategy type is assigned to each strategy defined in the application to determine which projects are aligned with the different strategy types and how they are performing.

Before you add strategies, you should define strategy types.

Add a Strategy Type

Add strategy types that represent corporate-level strategy or goal categories that align with the mission and vision of the organization.

To add a strategy type:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Strategy Types**.

4) In the **Name** column, enter a name for the strategy type.

5) In the **Icon** column, select an icon to represent the strategy. This icon displays on the **Strategy Scorecard** as a visual indicator for the strategy type.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ Select **Assign** to assign strategy types from the parent workspace to the current workspace.

▸ The sequence number determines the order in which strategy types appear for selection when adding strategies in the Strategic Alignment app. To change the order, select the ⚙ **Context** menu, and select **Move Up** or **Move Down**.

This setting is used in the following apps:

◎ **Strategic Alignment**

Update an Owning Workspace for a Strategy Type

Update the owning workspace of a strategy type to move it to another workspace that you are assigned. If you move the strategy type to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a strategy type:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Strategy Types**.

4) In the table, select a strategy type.

5) Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.

6) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.

7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

◎ **Strategic Alignment**

Units of Measure Overview

A unit of measure is a standardized way to define how materials or products are measured.

Assigning the unit of measure provides a means to identify how the quantity is evaluated. Units of measure can be defined for material resources, scope items, and actuals line items.

Add a Unit of Measure

Add units of measure labels to assign to material resources, scope items, and actuals line items.

To add a unit of measure:

1) *Navigate to the Units of Measure dictionary page* (see page 360).
2) In the **Abbreviation** field, enter a short name or code for the unit of measure.
3) In the **Name** field, enter the name for the unit of measure.
4) Save your changes:
   a. Select **Save**.

   b. In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

𝓡 **Resources**

▣ **Risk**

𝍢 **Schedule**

▦ **Scope**

Update Owning Workspace of a Unit of Measure

Update the owning workspace of a unit of measure to move it to another workspace that you are assigned. If you move the unit of measure to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a unit of measure:

a)   In the object selector, select a workspace.

b)   In the sidebar, select ⚙ **Summary & Settings.**

1)   On the **Summary & Settings** menu, select **Dictionaries**, and then select **Units of Measure**.

2)   In the table, select a unit of measure.

3)   Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.

4)   In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.

5)   Select **Save**.

6)   In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

🏃 **Resources**

🎲 **Risk**

🗐 **Schedule**

🗐 **Scope**

Defaults & Options Configuration

Configuring Defaults and Options Video

Oracle Primavera Cloud enables your organization to define a series of application-wide parameters and values that are available globally and to all projects in a workspace. Use these settings to customize the application to meet specific requirements and standards.

Field Labels Overview

Standard fields are the default fields found in Oracle Primavera Cloud. Fields can be used to store data, provide details, and accept user input. On many pages, fields can be added as columns in a table, used to sort or group data, or used as filters to reduce the number of items displayed on a page. They can also be found in dialog boxes, detail windows, and settings pages. Fields may be associated with a specific object. For example, the activity object is associated with various activity-related fields, such as *Start*, *Finish*, and *Duration*. These fields can be used on pages that support activities.

The Field Labels tab in the Defaults & Options section of the workspace Summary & Settings provides the default column name, column label, data type, and description of each field associated with an object. Labels are the field names displayed throughout the application. Default field labels may not reflect the terminology of your organization or industry. You can customize labels to meet the needs of your organization in any of the twelve supported languages.

Oracle Primavera Cloud documentation uses default field labels. If you change a field label in the application, it will no longer match the label used in documentation. Modified field labels can be reset back to their defaults.

Access a Standard Field Description

You can view the default column name, column label, data type, and description of any standard field in the application. The column label of each field can be modified to match the terminology used by your organization. Fields are associated with objects and can be used in pages that support that object.

To view the details of a standard field:

1) *Navigate to an object configuration page* (see page 361).
2) On the object page, select the **Field Labels** tab, and view the **Column Name**, **Column Label**, **Data Type**, and **Description** columns.

This setting is used in the following apps:

🏛 **Cost and Funds**

🗒 **Custom Logs**

🗁 **Files**

📊 **Portfolio Analysis**

👥 **Resources**

⬛ **Risk**

🗐 **Schedule**

🖽 **Scope**

◎ **Strategic Alignment**

🗒 **Tasks**

Change a Standard Field Label

Relabel Fields Video

You can update standard field labels in your native language or update labels in the Localization detail window to customize the field label in other languages. In the table of standard fields, the Column Name field specifies the original field name. The Column Label field specifies the custom label, entered by the user. By default it matches the original field name.

> **Note**: Oracle Primavera Cloud documentation uses default field labels. If you follow these steps to change a field label in the application, it will no longer match the label used in documentation.

To change a standard field label:

1) *Navigate to an object configuration page* (see page 361).
2) On the object page, select the **Field Labels** tab.
3) In the table, select a field.
4) In the **Column Label** field, enter a new label.
5) In the **Localization** detail window, select the **Column Label** field of the language, and enter a new label.
6) Save your changes:
   a. Select **Save**.

   b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ You can restore the default label of a standard field by selecting the ⚙ **Context** menu and then selecting **Reset Label**.

▸ New child workspaces inherit the field labels set in the parent workspace. To apply field labels to all existing child workspaces, select one or more fields, select the ⚙ **Context** menu, and then select **Apply Label to Child Workspace**.

This setting is used in the following apps:

🏛 **Cost and Funds**

▤ **Custom Logs**

📊 **Portfolio Analysis**

👥 **Resources**

▣ **Risk**

▤ **Schedule**

▦ **Scope**

◎ **Strategic Alignment**

▤ **Tasks**

Configured Fields Overview

Creating Configured Fields Video

Configured fields are user-created fields that allow you to define and maintain data specific to your organization. For example, you can track information such as Strategic Importance or Main Stakeholder.

Configured fields are created in the context of an object and can be used in views on pages that support that object. For example, you can create an Activity configured field and use it on the Activities page as a column, grouping band, sorting option, or filter criterion. Configured fields are global, so they can be used across all workspaces, projects, portfolios, programs, and ideas.

Oracle Primavera Cloud fields are categorized by data type, including: Boolean, cost, date, integer, list, number, or text. Multi-currency is supported only for data type cost for formula configured fields. For configured fields of data type cost, you can select the **Currency** tab in ✏ **Settings** to choose which currency to view cost data. For some types of data, you can define a formula or statement to calculate values for a field. For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency. For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency. For more information on creating or using custom formulas, consult the *Oracle Primavera Cloud Expression Language Guide* on Oracle Help Center. Configured fields have different character limitations depending on the purpose and type. For example, list configured fields have a character limit of 128, and text configured fields have a character limit of 255.

Documentation on adding a configured field to a specific object can be found under that object.

Restricted Configured Fields

A configured field that is designated as restricted can be viewed by anyone with access to the portfolio, program, or project, but only the users with workspace-level Restricted Configured Fields Edit privilege can edit it. Users with this privilege can restrict any configured field by selecting the Restricted check box when adding or updating a configured field in Summary and Settings for a program, project, or portfolio in a workspace. For example, if a configured field is updated as a result of a workflow decision, you can set the configured field to restricted to prevent users from updating the field. To learn more about permissions, contact your application administrator or see Permission Sets Overview in the Application Administration Guide.

Add an Activity Field

Add custom activity fields to enable users to enter or view information which is important to your organization.

Notes:

- On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

- New and updated configured field formulas are only recalculated in the current schedule or the open scenario. This excludes retired or closed scenarios. Run the scheduler in other scenarios, create a baseline, or make changes to a baseline to recalculate configured fields.

To add an activity field:

1) *Navigate to the Activity configuration page* (see page 361).

2) Select the **Configured Fields** tab.

3) In the table, select ✚ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

   e. (Optional) In the **Summary Calculation** field, specify how the app calculates summary rollup values for the field.

   In most tables where you can view a list of similar objects, you can also view the totals for the various values of these objects. For example, on the Activities table for a project, you can view rollup totals for numerical values like Planned Duration and Planned Labor Units at the top of the table.

   The **Summary Calculation** field enables you to specify how totals are determined for configured fields.

   If you selected **Cost**, **Date**, **Integer**, or **Number** as the **Data Type**, in the **Summary Calculation** column, select a simple calculation like Sum or Average, if applicable.

   Alternatively, if you set the **Type** field to **Formula**, you can set the **Summary Calculation** field to **Use Formula**. With this option selected, the app will use the formula defined in the **Formula** field to determine how the total rollup value is calculated for the field.

   f. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

   g. If you selected **Formula**, configure the **Formula** section. **Note:** When adding a null check to a formula, you must specify the null check at the beginning of the if condition statement.

4) Save your changes:

   a. Select **Save**.

   b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▶ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▶ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▶ Multi-currency is supported only in data type cost for formula configured fields.

▶ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▶ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

▶ Activity configured fields for all schedule versions only display in the detail panel and in schedule comparison panel if there are variances.

This setting is used in the following apps:

⚘ **Resources**

◼ **Risk**

☰ **Schedule**

▦ **Scope**

☰✓ **Tasks**

Add a Budget Field

Add custom project budget fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a project budget field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Budget**.

4) On the **Defaults & Options: Budget** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

    a. In the **Column Label** column, enter a name for the new field.

    b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

    c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

    d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

    e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

    f. If you selected **Formula**, configure the **Formula** section.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▸ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▸ Multi-currency is supported only in data type cost for formula configured fields.

▸ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▸ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

🏛 **Cost and Funds**

Add a Budget Changes Field

Add custom budget change details fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a budget change detail field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Budget Changes**.

4) On the **Defaults & Options: Budget Changes** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

   e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

   f. If you selected **Formula**, configure the **Formula** section.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▸ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▸ Multi-currency is supported only in data type cost for formula configured fields.

▸ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▸ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

🏛 **Cost and Funds**

Add a Budget Transfers Field

Add custom budget transfer details fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a budget transfer detail field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Budget Transfers**.

4) On the **Defaults & Options: Budget Transfers** page, select the **Configured Fields** tab.

5) In the table, select ✚ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

f. If you selected **Formula**, configure the **Formula** section.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▶ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▶ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▶ Multi-currency is supported only in data type cost for formula configured fields.

▶ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▶ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

🏛 **Cost and Funds**

Add a Budget Details Field

Add custom budget details fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a budget details field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Budget Details**.

4) On the **Defaults & Options: Budget Details** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

    c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

    d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

    e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

    f. If you selected **Formula**, configure the **Formula** section.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▸ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▸ Multi-currency is supported only in data type cost for formula configured fields.

▸ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▸ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

🏛 **Cost and Funds**

Add a Changes Field

Add custom changes fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a change field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Changes**.

4) On the **Defaults & Options: Changes** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

    a. In the **Column Label** column, enter a name for the new field.

    b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

    c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

    d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

    e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

    f. If you selected **Formula**, configure the **Formula** section.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▶ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

Add a Company Field

Add custom company fields at the root workspace to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a company field:

1) In the object selector, select the root workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Company**.

4) On the **Defaults & Options: Company** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

    a. In the **Column Label** column, enter a name for the new field.

    b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

    c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

    d. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

   e. (Optional) If you selected **Cost**, **Date**, **Integer**, or **Number** as the **Data Type**, in the **Summary Calculation** column, select a calculation if applicable.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

Add a Change Order Field

Add custom change order fields to enable users to enter or view information that is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a change order field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Change Order**.

4) On the **Defaults & Options: Change Order** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

   e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

   f. If you selected **Formula**, configure the **Formula** section.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

Add a Changes Estimates Field

Add custom changes estimates to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a change estimate field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Changes Estimates**.

4) On the **Defaults & Options: Changes Estimates** page, select the **Configured Fields** tab.

5) In the table, select ✚ **Add**.

    a. In the **Column Label** column, enter a name for the new field.

    b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

    c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

    d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

    e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

    f. If you selected **Formula**, configure the **Formula** section.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

This setting is used in the following apps:

🏛 **Cost and Funds**

Add a Commitment Field

Add custom commitment fields to enable users to enter or view information that is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a commitment field task:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Commitment**.

4) On the **Defaults & Options: Commitment** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

    a. In the **Column Label** column, enter a name for the new field.

    b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

    c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

    d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

    e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

    f. If you selected **Formula**, configure the **Formula** section.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

Add a Contract Field

Add custom contract fields to enable users to enter or view information that is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the

value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a contract field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Contract**.

4) On the **Defaults & Options: Contract** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

   e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

   f. If you selected **Formula**, configure the **Formula** section.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

Add a Custom Log Field

Add custom log fields to enable users to enter or view information that is important to your organization.

To add a custom log field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Custom Logs**.

4) On the **Defaults & Options: Custom Logs** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

    b. In the **View Column Name**, enter a name for the field as it will be seen in the database when creating logs.

    c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

    d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated based on a formula.

    e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

    f. If you selected **Formula** in the **Type** column, configure the **Formula** section.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▸ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🖉 **Settings**.

▸ Multi-currency is supported only in data type cost for formula configured fields.

▸ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▸ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

🖻 **Custom Logs**

Add a File Field

Add custom file fields to enable users to enter or view information which is important to your organization.

To add a file field:

1) *Navigate to the File configuration page* .

2) Select the **Configured Fields** tab.

3) In the table, select ＋ **Add**.

    a. In the **Column Label** column, enter a name for the new field.

    b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

    c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

    d. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

4) Save your changes:

    a. Select **Save**.

    b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▶ To delete a configured field, select the field, select ✿ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

This setting is used in the following apps:

🏛 **Cost and Funds**

🗁 **Files**

📊 **Portfolio Analysis**

👫 **Resources**

■ **Risk**

☰ **Schedule**

🗷 **Scope**

◎ **Strategic Alignment**

☷ **Tasks**

Add a Fund Field

Add custom fund fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a workspace fund field:

1) In the object selector, select a workspace.

2) In the sidebar, select ✿ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Fund**.

4) On the **Defaults & Options: Fund** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

    a. In the **Column Label** column, enter a name for the new field.

    b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

    c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

    d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

    e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

    f. If you selected **Formula**, configure the **Formula** section.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▸ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▸ Multi-currency is supported only in data type cost for formula configured fields.

▸ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▸ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

🏛 **Cost and Funds**

Add an Idea Field

Add custom idea fields to enable users to enter or view information that is important to your organization.

To add an idea field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Idea**.

4) On the **Defaults & Options: Idea** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

    a. In the **Column Label** column, enter a name for the new field.

    b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

    c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

d. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▸ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🗝 **Settings**.

▸ Multi-currency is supported only in data type cost for formula configured fields.

▸ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▸ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

Add a Payment Application Field

Add payment application fields to enable users to enter or view information that is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Payment Application**.

4) On the **Defaults & Options: Payment Application** page, select the **Configured Fields** tab.

5) In the table, select ✚ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

   e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

    f.   If you selected **Formula**, configure the **Formula** section.

6)   Select **Save**.

7)   In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

Add a Portfolio Field

Add custom portfolio fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a portfolio field:

1)   In the object selector, select a workspace.

2)   In the sidebar, select ⚙ **Summary & Settings**.

3)   On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Portfolio**.

4)   On the **Defaults & Options: Portfolio** page, select the **Configured Fields** tab.

5)   In the table, select ＋ **Add**.

    a. In the **Column Label** column, enter a name for the new field.

    b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

    c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

    d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

    e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

    f.   If you selected **Formula**, configure the **Formula** section.

    g. (Optional) Select the Restricted check box to designate the field as a restricted field. A configured field that is designated as restricted can be viewed by anyone with access to the portfolio, but only the users with workspace-level Restricted Configured Fields Edit privilege can edit it.

6)   Select **Save**.

7)   In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▶ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▶ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▶ Multi-currency is supported only in data type cost for formula configured fields.

▶ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▶ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

▶ Restricted configured fields and non-restricted configured fields can be included in formulas together.

This setting is used in the following apps:

📊 **Portfolio Analysis**

Add a Potential Change Order Field

Add custom potential change order fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a potential change order field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Portfolio**.

4) On the **Defaults & Options: Potential Change Order** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

    e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

    f. If you selected **Formula**, configure the **Formula** section.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▶ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

This setting is used in the following apps:

📈 **Portfolio Analysis**

Add a Program Field

Add custom program fields to enable users to enter or view information that is important to your organization.

To add a program field:

1) *Navigate to the Program configuration page* (see page 361).

2) Select the **Configured Fields** tab.

3) In the table, select ＋ **Add**.

    a. In the **Column Label** column, enter a name for the new field.

    b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

    c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

    d. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

    e. (Optional) Select the Restricted check box to designate the field as a restricted field. A configured field that is designated as restricted can be viewed by anyone with access to the program, but only the users with workspace-level Restricted Configured Fields Edit privilege can edit it.

4) Save your changes:

    a. Select **Save**.

    b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▶ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▶ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▶ Multi-currency is supported only in data type cost for formula configured fields.

▶ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▶ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

▶ Restricted configured fields and non-restricted configured fields can be included in formulas together.

Add a Project Field

Add custom project fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a project field:

1) *Navigate to the Project configuration page* (see page 361).

2) Select the **Configured Fields** tab.

3) In the table, select ＋ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

   e. (Optional) In the **Summary Calculation** field, specify how the app calculates summary rollup values for the field.

   In most tables where you can view a list of similar objects, you can also view the totals for the various values of these objects. For example, on the Activities table for a project, you can view rollup totals for numerical values like Planned Duration and Planned Labor Units at the top of the table.

   The **Summary Calculation** field enables you to specify how totals are determined for configured fields.

   If you selected **Cost**, **Date**, **Integer**, or **Number** as the **Data Type**, in the **Summary Calculation** column, select a simple calculation like Sum or Average, if applicable.

   Alternatively, if you set the **Type** field to **Formula**, you can set the **Summary Calculation** field to **Use Formula**. With this option selected, the app will use the formula defined in the **Formula** field to determine how the total rollup value is calculated for the field.

f. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

g. (Optional) Select the Restricted check box to designate the field as a restricted field. A configured field that is designated as restricted is viewable by anyone with access to the project, but the field is only editable by users that have Edit selected for the Restricted Configured Fields workspace privilege.

h. If you selected **Formula**, configure the **Formula** section. **Note:** When adding a null check to a formula, you must specify the null check at the beginning of the if condition statement.

4) Save your changes:

a. Select **Save**.

b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▸ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▸ Multi-currency is supported only in data type cost for formula configured fields.

▸ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▸ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

🏛 **Cost and Funds**

🗂 **Files**

📈 **Portfolio Analysis**

👥 **Resources**

◼ **Risk**

🗐 **Schedule**

🖾 **Scope**

◎ **Strategic Alignment**

🗒 **Tasks**

Add a Project Actuals Field

Add custom project budget fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a project budget field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Project Actuals**.

4) On the **Defaults & Options: Project Actuals** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

   e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

   f. If you selected **Formula**, configure the **Formula** section.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▸ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▸ Multi-currency is supported only in data type cost for formula configured fields.

▸ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▸ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

🏛 **Cost and Funds**

Add a Project Cost Sheet Field

Add custom project cost sheet fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a project cost sheet field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Project Cost Sheet**.

4) On the **Defaults & Options: Project Cost Sheet** page, select the **Configured Fields** tab.

5) In the table, select ✛ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

   e. (Optional) In the **Summary Calculation** field, specify how the app calculates summary rollup values for the field.

   In most tables where you can view a list of similar objects, you can also view the totals for the various values of these objects. For example, on the Activities table for a project, you can view rollup totals for numerical values like Planned Duration and Planned Labor Units at the top of the table.

   The **Summary Calculation** field enables you to specify how totals are determined for configured fields.

   If you selected **Cost**, **Date**, **Integer**, or **Number** as the **Data Type**, in the **Summary Calculation** column, select a simple calculation like Sum or Average, if applicable.

   Alternatively, if you set the **Type** field to **Formula**, you can set the **Summary Calculation** field to **Use Formula**. With this option selected, the app will use the formula defined in the **Formula** field to determine how the total rollup value is calculated for the field.

   f. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

   g. If you selected **Formula**, configure the **Formula** section. **Note:** When adding a null check to a formula, you must specify the null check at the beginning of the if condition statement.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▸ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▸ Multi-currency is supported only in data type cost for formula configured fields.

▸ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▸ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

🏛 **Cost and Funds**

Add a Resource Assignment Field

Add custom resource assignment fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a resource assignment field:

1) *Navigate to the Resource Assignment configuration page* (see page 362).

2) Select the **Configured Fields** tab.

3) In the table, select ＋ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

   e. (Optional) In the **Summary Calculation** field, specify how the app calculates summary rollup values for the field.

In most tables where you can view a list of similar objects, you can also view the totals for the various values of these objects. For example, on the Activities table for a project, you can view rollup totals for numerical values like Planned Duration and Planned Labor Units at the top of the table.

The **Summary Calculation** field enables you to specify how totals are determined for configured fields.

If you selected **Cost**, **Date**, **Integer**, or **Number** as the **Data Type**, in the **Summary Calculation** column, select a simple calculation like Sum or Average, if applicable.

Alternatively, if you set the **Type** field to **Formula**, you can set the **Summary Calculation** field to **Use Formula**. With this option selected, the app will use the formula defined in the **Formula** field to determine how the total rollup value is calculated for the field.

f. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

g. If you selected **Formula**, configure the **Formula** section. **Note:** When adding a null check to a formula, you must specify the null check at the beginning of the if condition statement.

4) Save your changes:

a. Select **Save**.

b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▶ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▶ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▶ Multi-currency is supported only in data type cost for formula configured fields.

▶ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▶ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

👥 **Resources**

◼ **Risk**

📃 **Schedule**

Add a Risk Field

Add custom risk fields to enable users to enter or view information which is important to your organization.

Note: On pages that support auto-save, configured field formulas will be

automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a risk field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Risk**.

4) On the **Defaults & Options: Risk** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

   e. (Optional) In the **Summary Calculation** field, specify how the app calculates summary rollup values for the field.

      In most tables where you can view a list of similar objects, you can also view the totals for the various values of these objects. For example, on the Activities table for a project, you can view rollup totals for numerical values like Planned Duration and Planned Labor Units at the top of the table.

      The **Summary Calculation** field enables you to specify how totals are determined for configured fields.

      If you selected **Cost**, **Date**, **Integer**, or **Number** as the **Data Type**, in the **Summary Calculation** column, select a simple calculation like Sum or Average, if applicable.

      Alternatively, if you set the **Type** field to **Formula**, you can set the **Summary Calculation** field to **Use Formula**. With this option selected, the app will use the formula defined in the **Formula** field to determine how the total rollup value is calculated for the field.

   f. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

   g. If you selected **Formula**, configure the **Formula** section. **Note:** When adding a null check to a formula, you must specify the null check at the beginning of the if condition statement.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

This setting is used in the following apps:

■ **Risk**

≣ **Schedule**

Add a Scope Assignment Field

Add custom scope assignment fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a scope assignment field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Scope Assignment**.

4) On the **Defaults & Options: Scope Assignment** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

   e. (Optional) In the **Summary Calculation** field, specify how the app calculates summary rollup values for the field.

   In most tables where you can view a list of similar objects, you can also view the totals for the various values of these objects. For example, on the Activities table for a project, you can view rollup totals for numerical values like Planned Duration and Planned Labor Units at the top of the table.

   The **Summary Calculation** field enables you to specify how totals are determined for configured fields.

   If you selected **Cost**, **Date**, **Integer**, or **Number** as the **Data Type**, in the **Summary Calculation** column, select a simple calculation like Sum or Average, if applicable.

   Alternatively, if you set the **Type** field to **Formula**, you can set the **Summary Calculation** field to **Use Formula**. With this option selected, the app will use the formula defined in the **Formula** field to determine how the total rollup value is calculated for the field.

f. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

g. If you selected **Formula**, configure the **Formula** section. **Note:** When adding a null check to a formula, you must specify the null check at the beginning of the if condition statement.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▸ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▸ Multi-currency is supported only in data type cost for formula configured fields.

▸ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▸ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

📊 **Scope**

Add a Scope Item Field

Add custom scope item fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a scope item field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the ⚙ **Summary & Settings** menu, select **Defaults & Options**, and then select **Scope Item**.

4) On the **Scope Item** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

e. (Optional) In the **Summary Calculation** field, specify how the app calculates summary rollup values for the field.

In most tables where you can view a list of similar objects, you can also view the totals for the various values of these objects. For example, on the Activities table for a project, you can view rollup totals for numerical values like Planned Duration and Planned Labor Units at the top of the table.

The **Summary Calculation** field enables you to specify how totals are determined for configured fields.

If you selected **Cost**, **Date**, **Integer**, or **Number** as the **Data Type**, in the **Summary Calculation** column, select a simple calculation like Sum or Average, if applicable.

Alternatively, if you set the **Type** field to **Formula**, you can set the **Summary Calculation** field to **Use Formula**. With this option selected, the app will use the formula defined in the **Formula** field to determine how the total rollup value is calculated for the field.

f. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

g. If you selected **Formula**, configure the **Formula** section. **Note:** When adding a null check to a formula, you must specify the null check at the beginning of the if condition statement.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▸ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in ⚙ **Settings**.

▸ Multi-currency is supported only in data type cost for formula configured fields.

▸ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▸ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

🗗 **Scope**

Add a Strategy Field

Add custom strategy fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a strategy field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Strategy**.

4) On the **Defaults & Options: Strategy** page, select the **Configured Fields** tab.

5) In the table, select ✛ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

   e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

   f. If you selected **Formula**, configure the **Formula** section.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

This setting is used in the following apps:

◎ **Strategic Alignment**

Add a Submittal Field

Add custom submittal fields to enable users to enter or view information that is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be

automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a submittal field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Submittal**.

4) On the **Defaults & Options: Submittal** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

    a. In the **Column Label** column, enter a name for the new field.

    b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

    c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

    d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

    e. (Optional) In the **Summary Calculation** field, specify how the app calculates summary rollup values for the field.

    In most tables where you can view a list of similar objects, you can also view the totals for the various values of these objects. For example, on the Activities table for a project, you can view rollup totals for numerical values like Planned Duration and Planned Labor Units at the top of the table.

    The **Summary Calculation** field enables you to specify how totals are determined for configured fields.

    If you selected **Cost**, **Date**, **Integer**, or **Number** as the **Data Type**, in the **Summary Calculation** column, select a simple calculation like Sum or Average, if applicable.

    Alternatively, if you set the **Type** field to **Formula**, you can set the **Summary Calculation** field to **Use Formula**. With this option selected, the app will use the formula defined in the **Formula** field to determine how the total rollup value is calculated for the field.

    f. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

6) If you selected **Formula**, configure the **Formula** section. **Note:** When adding a null check to a formula, you must specify the null check at the beginning of the if condition statement.

7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

Add a Task Field

Add custom task fields to enable users to enter or view information which is important to your organization.

To add a task field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.
3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Task**.
4) On the **Defaults & Options: Task** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

   e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

6) If you selected **Formula**, configure the **Formula** section.

7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▸ To choose which currency to view cost in configured fields of data type cost, select the

   Currency tab in 🔧 **Settings**.

▸ Multi-currency is supported only in data type cost for formula configured fields.

▸ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▸ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

≝ **Tasks**

Add a WBS Field

Add custom WBS fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a WBS field:

1) *Navigate to the WBS configuration page* (see page 362).
2) Select the **Configured Fields** tab.
3) In the table, select ＋ **Add**.
    a. In the **Column Label** column, enter a name for the new field.
    b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.
    c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.
    d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.
    e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.
    f. If you selected **Formula**, configure the **Formula** section.
4) Select **Save**.
5) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.
▸ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in ⚲ **Settings**.
▸ Multi-currency is supported only in data type cost for formula configured fields.
▸ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.
▸ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

⚇ **Resources**
◼ **Risk**

⮧ **Schedule**

⮧ **Scope**

Add a Work Package Field

Add custom work package fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a work package field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Work Package**.

4) On the **Defaults & Options: Work Package** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

    a. In the **Column Label** column, enter a name for the new field.

    b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

    c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

    d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

    e. (Optional) In the **Summary Calculation** field, specify how the app calculates summary rollup values for the field.

    In most tables where you can view a list of similar objects, you can also view the totals for the various values of these objects. For example, on the Activities table for a project, you can view rollup totals for numerical values like Planned Duration and Planned Labor Units at the top of the table.

    The **Summary Calculation** field enables you to specify how totals are determined for configured fields.

    If you selected **Cost**, **Date**, **Integer**, or **Number** as the **Data Type**, in the **Summary Calculation** column, select a simple calculation like Sum or Average, if applicable.

    Alternatively, if you set the **Type** field to **Formula**, you can set the **Summary Calculation** field to **Use Formula**. With this option selected, the app will use the formula defined in the **Formula** field to determine how the total rollup value is calculated for the field.

    f. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

    g. If you selected **Formula**, configure the **Formula** section. **Note:** When adding a null check to a formula, you must specify the null check at the beginning of the if condition statement.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▶ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▶ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▶ Multi-currency is supported only in data type cost for formula configured fields.

▶ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▶ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

📃 **Schedule**

📊 **Scope**

Add a Workspace Cost Sheet Field

Add custom workspace cost sheet fields to enable users to enter or view information which is important to your organization.

> **Note**: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a workspace cost sheet field:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Workspace Cost Sheet**.

4) On the **Defaults & Options: Workspace Cost Sheet** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

    a. In the **Column Label** column, enter a name for the new field.

    b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

    c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

    d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

    e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

    f. If you selected **Formula**, configure the **Formula** section.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

▸ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▸ Multi-currency is supported only in data type cost for formula configured fields.

▸ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

▸ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

🏛 **Cost and Funds**

Change a Configured Field Label

You can update configured field labels in your native language or update labels in the Localization detail window to customize the field label in other languages. In the table of configured fields, the View Column Name field specifies the original field name. The Column Label field specifies the custom label, entered by the user. By default it matches the original field name.

To change a configured field label:

1) *Navigate to an object configuration page* (see page 361).

2) On the object page, select the **Configured Fields** tab.

3) In the table, select a field.

4) In the **Column Label** field, enter a new label.

5) In the **Localization** section, select the **Column Label** field of the language, and enter a new label.

6) Save your changes:

a. Select **Save**.

b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ You can restore the default label of a configured field by selecting the ⚙ **Context** menu and then selecting **Reset Label**.

▸ New child workspaces inherit the field labels set in the parent workspace. To apply field labels to all existing child workspaces, select one or more fields, select the ⚙ **Context** menu, and then select **Apply Label to Child Workspace**.

This setting is used in the following apps:

🏛 **Cost and Funds**

🗐 **Custom Logs**

🗁 **Files**

📊 **Portfolio Analysis**

👥 **Resources**

◼ **Risk**

🗐 **Schedule**

🗐 **Scope**

🗐 **Tasks**

Add a Formula-Based Configured Field: Example

This example demonstrates how to create a configured field to calculate and store the Estimated Final Cost of a project.

> **Note**: For information on creating advanced formulas for measures, refer to the *Oracle Primavera Cloud Expression Language Guide on Oracle Help Center.*

Let us assume that you will define the Estimated Final Cost of a project as Approved Budget plus Proposed Budget.

Creating a Configured Field

1) *Navigate to the Project configuration page* (see page 361).
2) On the **Project** page, select **Configured Fields**.
3) In the table, complete the following fields:

  a. In the **Column Label** column, enter *Estimated Final Cost*.

  b. In the **View Column Name** column, enter *EST_FINAL_COST*.

  c. In the **Data Type** column, select **Cost**.

  d. In the **Type** column, select **Formula**.

    e. In the **Summary Calculation** column, select **Sum**.

Defining a Formula

1) In the **Formula** detail window, in the **Field** list, select **Approved Budget**, and select **Insert Field**.

2) Select **+**.

3) In the **Field** list, select **Proposed Budget**, and select **Insert Field**.

4) Select **Validate Formula.**

5) In the **Formula validation passed** dialog box, select **OK**.

6) Save your changes:

    a. Select **Save**.

    b. In the **Summary & Settings** panel, select ✕ **Close**.

> **Note**: Multi-currency is supported only for data type cost for formula configured fields. For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency. For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

Tips

▸ To delete a configured field, select the field, select ⚙ **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

Update the Owning Workspace of a Configured Field

Update the owning workspace of a configured field to move it to another workspace that you are assigned. If you move the field to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a configured field:

1) *Navigate to an object configuration page* (see page 361).

2) On the object page, select the **Configured Fields** tab.

3) On the **Configured Fields** tab, select **Manage Shared Data**.

4) Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.

5) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.

6) Save your changes:

    a. Select **Save**.

    ▸ In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

⯐ **Custom Logs**

⯐ **Files**

⯐ **Portfolio Analysis**

⯐ **Resources**

⯐ **Risk**

⯐ **Schedule**

⯐ **Scope**

⯐ **Strategic Alignment**

⯐ **Tasks**

Defaults for Workspaces Overview

Configure defaults at the workspace level to define the defaults of the projects of that workspace. You can customize any defaults at the project level if a project will not follow the defaults of the workspace. You should create defaults in the workspace before creating any projects. Projects that were created prior to setting defaults will not follow the defaults of the workspace. They will retain their original project defaults.

Set the Details Page for Projects

Use Forms to Create a Custom Project Details Page Video

By default, the Details page shows basic information about the project. But you can replace the default Details page for all projects in a workspace with a custom form designed in the Form Editor.

Before you can set a custom Details page, you must have access to a published form that has a Context Type value of Project.

To choose a form as the Details page for all projects in a workspace:

1) *Navigate to the Project configuration page* (see page 361).
2) Select the **Forms** tab.
3) In the **Project Details Form** row, in the **Form** field, select the form that you want to use instead of the default Details page.
4) Select **Save**.
5) In the **Inherit Form Mapping** dialog box, select **Yes** or **No**.

   If the current form is already assigned in child workspaces, select **Yes** if you want to replace it with the new one. Otherwise, select **No**.

6) In the **Summary & Settings** panel, select ✕ **Close**.

Now users who open the Details page for any project in this workspace will see the form you chose here, not the default Details page.

Set the Details Page for Portfolios

By default, the Details page shows basic information about the portfolio. But you can replace the default Details page for all portfolios in a workspace with a custom form designed in the Form Editor.

Before you can set a custom Details page, you must have access to a published form that has a Context Type value of Portfolio.

To choose a form as the Details page for all portfolios in a workspace:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Portfolio**.

4) Select the **Forms** tab.

5) In the **Portfolio Details Form** row, in the **Form** field, select the form that you want to use instead of the default Details page.

6) Select **Save**.

7) In the **Inherit Form Mapping** dialog box, select **Yes** or **No**.

   If the current form is already assigned in child workspaces, select **Yes** if you want to replace it with the new one. Otherwise, select **No**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

Now users who open the Details page for any portfolio in this workspace will see the form you chose here, not the default Details page.

> **Note**: When a form contains Scenario Type fields for Content Type: Portfolio, the form cannot be used to replace the default Details page.

Configure Default Activity Settings for a Workspace

You can configure default system behavior for activities in a workspace.

To configure default activity settings for a workspace:

1) *Navigate to the Activity configuration page* (see page 361).

2) Select the **Defaults** tab.

3) In the **New Activities** section, configure default behavior for new activities:

   ‣ **Duration Type**: Determines how remaining duration, units, and units/time are calculated when you update an activity that has resources assigned.

      ▪ **Fixed Units/Time**: The resource units per time are constant when the activity duration or units are changed. Use this duration type when an activity has fixed resources with fixed productivity output per time period.

      ▪ **Fixed Units**: The activity units are constant when the duration or resource units per time are changed. Use this duration type when the total amount of work is fixed, and increasing the resources can decrease the activity duration.

- **Fixed Duration & Units**: The duration and units remain constant as the units/time is changed. Use this duration type when the activity must be completed within a fixed time period and the total amount of work is fixed.
- **Fixed Duration & Units/Time**: The activity duration is constant as the units or resource units per time are changed. Use this duration type when the activity must be completed within a fixed time period regardless of the resources assigned.

▸ **Percent Complete Type**: Determines the way in which the application calculates the percent complete for the activity. The type can be Physical, Duration, Units, or Scope.

- **Physical**: The user will enter the percent complete for the activity.
- **Duration**: The percent complete is calculated from the actual and remaining duration.
- **Units**: The percent complete is calculated from the actual and remaining units.
- **Scope**: The percent complete for the activity is derived from the scope percent complete of the linked scope assignment.

▸ **Activity Type**: Determines how duration and schedule dates are calculated for the activity.

- **Activity Dependent**: This type of activity indicates that assigned resources should be scheduled based on the activity's calendar, rather than the calendars of the resources.
- **Resource Dependent**: This type of activity indicates that resources should be scheduled based on their assigned calendars. Use this type when the activity duration may be affected by resource availability.
- **Level of Effort**: This type of activity indicates that it is ongoing with a duration determined by its dependent activities. The duration is calculated based on the schedule dates of its predecessors and successors. Administrative activities are typically designated as Level of Effort.
- **Start Milestone**: This type of activity indicates the beginning of an important project phase. Activities of this type have a duration of zero (0) with no resource assignments.
- **WBS Summary:** This type of activity comprises a group of activities that share a common WBS level. The duration is calculated based on its assigned calendar (the earliest and latest dates summarized from its activities).

▸ **Default duration for new activities**: Enter the default time duration, in hours, for new activities.

▸ **Increment Activity ID based on selected activity**: When disabled, new activity IDs follow the activity auto numbering rules set in the project settings. When enabled, new activity IDs are numbered based on the ID of the activities selected when the new activities are added. See Add an Activity for more information.

4) In the **New Assignments** section, configure default behavior for new activity assignments:

▸ **Drive activity dates by default**: Determines whether new resource or role assignments drive activity dates by default.

▸ **Resource can be assigned to same activity more than once**: Determines whether activities can be assigned to the same resource multiple times.

▸ **When adding or removing multiple resource assignments on activities**: Select an option to determine application behavior when activity resource assignments are adjusted:

- **Preserve the Units, Duration and Units/Time for existing assignments**: Select this option for units, durations, and units/time to remain constant when additional resources are assigned to any activity.

- **Recalculate the Units, Duration and Units/Time for existing assignments based on the activity Duration Type**: Select this option to calculate a resource assignment's remaining values based on the activity's duration type.

5) Save your changes:

  a. Select **Save**.

  b. In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

👥 **Resources**

▣ **Risk**

🗐 **Schedule**

🗗 **Scope**

Configure Default Activity Calculation Settings for a Workspace

You can configure default activity calculation settings for workspaces to specify how the application computes values for activities within that workspace.

To configure default activity calculation settings for workspaces:

1) *Navigate to the Activity configuration page* (see page 361).

2) Select the **Defaults** tab, and then review the sections under **Calculations**.

3) In the **Activities** section, configure calculation settings for project activities:

▸ **When changing an activity to not started**: Determines how units and duration are handled if activity progress is removed.

- **Reset planned duration and units to remaining**: Select this option to reset planned unit spreads to match the remaining units.

- **Reset remaining duration and units to planned**: Select this option to reset remaining unit spreads to match the planned units.

▸ **Link planned and remaining/at completion for not started activities**: When enabled, ensures that the planned and at completion values remain in sync when changes are made to activities that have not started. When disabled, each field's values are calculated independently.

▸ **Define critical activities as**: Select a method to identify critical activities:

- **Total Float less than or equal to**: Select this option to identify critical activities based on the lack of flexibility in their scheduled dates. Enter a minimum float duration. When the project is scheduled, activities with total float values less than or equal to this value are marked critical.

- **Longest Path**: Select this option to define critical activities based on the sequence of driving activities that determine the project end date.

4) In the **Units and Costs** section, configure calculation settings for units and costs:

‣ **When updating actual units or cost**: Determines how the application handles changes to the actual units or actual costs on an activity or activity assignment.

- **Add actual to remaining**: Select this option to calculate a new at completion value when the remaining units or actual units change.

- **Subtract actual from at completion**: Select this option to calculate a new remaining units value when the at completion or actual units change.

‣ **Recalculate actual units and costs when Duration Percent Complete changes**: Select this option to recalculate actual units and costs when the duration percent complete is updated.

5) In the **Scope Items** section, select a default method for calculating scope completion percentages. Scope completion percentage can be calculated using cost, quantity, hours, or manually entered values.

6) Save your changes:

a. Select **Save**.

b. In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

⚘ **Resources**

▨ **Risk**

☰ **Schedule**

▤ **Scope**

Set the Default Calendar

There is one default calendar per workspace. The calendar set as the default calendar in the workspace-level Calendars dictionary is automatically assigned to new projects, resources, and roles when they are created. The calendars of existing projects, resources, or roles are not affected. Any calendar in the workspace can be assigned as the default calendar. One calendar must always be defined as the default.

The default calendar is automatically made available to projects, resources, and roles. This can only be changed if you set a different calendar as the default. The application has a built-in default calendar. The settings in this calendar cannot be changed. After another calendar has been assigned as the default, this calendar can be deleted.

You can also set the default calendar on the **Project** page in the workspace Defaults & Options. Choose from a list of calendars that are available to the Project object. This will also make the calendar available to resources and roles.

To set the default workspace calendar:

1) *Navigate to the Calendars dictionary page* (see page 360).

2) In the list of calendars, select the **Default** option for a calendar.

3) Save your changes:

   a. Select **Save**.

   b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▶ If the calendar you selected was only available to Project or Resource/Role, then both options are automatically selected when you select a new default calendar.

This setting is used in the following apps:

🏛 **Cost and Funds**

👥 **Resources**

◼ **Risk**

🗐 **Schedule**

🖾 **Scope**

🗒 **Tasks**

Set the Default Print Layout for a Workspace or Project (Deprecated)

Before you can print a print layout report, you must set a default print layout for your object at the workspace or project level. Setting a default print layout at the workspace level affects all child workspaces and projects that do not have a default. Default print layouts set at a child workspace or project level will not be overwritten if changes are made at a higher level. Each of the objects compatible with print layouts can be assigned a different print layout.

The following objects support print layouts:

▶ Change Orders
▶ Commitments
▶ Contracts
▶ Payment Applications
▶ Submittals

To set a default print layout for a workspace (Primavera Cloud only):

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.
3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select an object.
4) Select the **Defaults** tab.
5) In the **Print Layout** section, in the **Default** field, select a print layout.
6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

To set a default print layout for a project:

1) *Navigate to the project settings page* (see page 359).

2) Select the **Print Layouts** tab.

This setting is used in the following apps:

⬚ **Reports**

Set the Default My Activities Settings

You can configure default My Activities settings for a workspace to determine how web and mobile users update their project activities for any project in that workspace by default.

To configure default My Activities settings for a workspace:

1) *Navigate to the Project configuration page* .
2) Select the **Defaults** tab.
3) In the **Team members are assigned to activities as** section, select a method for how team members are assigned to activities.
   ▸ **Resource Assignments**: Each user who is assigned a resource assignment can view that assignment and update its progress.
   ▸ **Activity Owners**: Each user who is assigned to an activity as its Owner can view the activity and update its progress.
   ▸ **Both**: Resource assignments can view and update their assignments, and activity owners can view and update their activities. Users who have activities and resource assignments will see entries for both.
4) In the **Select the fields team members can update** section, add the fields you want team members to view and use to update their progress.
   ▸ **Assignment Fields**: Add the fields you want team members assigned as resource assignments to use to status their activities.
   ▸ **Activity Fields**: Add the fields you want team members assigned as activity owners to use to status their activities. If a team member who owns an activity also has a resource assignment for that activity, then the team member will be able to view and update both the assignment and the activity.
   ▸ **Codes and Configured Fields**: Add codes and configured fields that you want activity owners or resource assignment performers to view or use to update their activities. To make any code or configured field read-only, select **Read Only** by the field. In order for a user to update Cost-type codes or configured fields, the user needs the Project Costs/Financials privilege on the project.
   ▸ (Optional) Select **Team member can update progress of other resource assignments on activity** if you want activity owners to be able to update the progress of all resource assignments for their activities.
5) Save your changes:
   a. Select **Save**.
   b. In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

⚘ **Resources**

◧ **Risk**

≡ **Schedule**

⊞ **Scope**

≡✓ **Tasks**

Configure Auto Numbering Defaults for Budget Changes

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Budget Changes**.

4) On the **Defaults & Options: Budget Changes** page, select the **Defaults** tab.

5) In the **Auto Numbering** section, define the auto numbering default values.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

Configure Auto Numbering Defaults for Budget Transfers

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Budget Transfers**.

4) On the **Defaults & Options: Budget Transfers** page, select the **Defaults** tab.

5) In the **Auto Numbering** section, define the auto numbering default values.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

Configure Auto Numbering Defaults for a Change Order

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Change Order**.

4) On the **Defaults & Options: Change Order** page, select the **Defaults** tab.

5) In the **Auto Numbering** section, define the auto numbering default values.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Configure Auto Numbering Defaults for a Change

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Changes**.

4) On the **Defaults & Options: Changes** page, select the **Defaults** tab.

5) In the **Auto Numbering** section, define the auto numbering default values.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Configure Auto Numbering Defaults for a Commitment

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Commitment**.

4) On the **Defaults & Options: Commitment** page, select the **Defaults** tab.

5) In the **Auto Numbering** section, define the auto numbering default values.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Configure Auto Numbering Defaults for a Contract

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Contract**.

4) On the **Defaults & Options: Contract** page, select the **Defaults** tab.

5) In the **Auto Numbering** section, define the auto numbering default values.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Configure Auto Numbering Defaults for Ideas

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system.

To set the auto numbering defaults for ideas:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Idea**.

4) On the **Defaults & Options: Idea** page, select the **Defaults** tab.

5) In the **Auto Numbering** section, define the auto numbering default values.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Configure Auto Numbering Defaults for a Payment Application

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Payment Application**.

4) On the **Defaults & Options: Payment Application** page, select the **Defaults** tab.

5) In the **Auto Numbering** section, define the auto numbering default values.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Adjust the Default Retainage Percentage for Payment Applications

Retainage is the percentage of a payment that is withheld until a job is fully complete.

When you add a payment application, you can adjust the retainage for each payment, but you can also adjust the default retainage percentage for every new payment application in a workspace.

To adjust the default retainage percentage:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) In the **Defaults & Options** list, select **Payment Application**.

4) On the **Defaults & Options: Payment Application** page, select the **Defaults** tab.

5) In the **Retainage** field, enter the new default retainage rate.

6) Select **Save**.

Adjust the Default Period To Value for Payment Applications

The Period To value is the billing period of a payment application.

When you add a payment application, you can adjust the period to value for each payment, but you can also adjust the default period to value for every new payment application in a workspace.

To adjust the default Period To value:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) In the **Defaults & Options** list, select **Payment Application**.

4) On the **Defaults & Options: Payment Application** page, select the **Defaults** tab.

5) In the **Period To** field, enter the new default retainage rate.

6) Select **Save**.

Configure Auto Numbering Defaults for a Project Actual

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Project Actuals**.

4) On the **Defaults & Options: Project Actuals** page, select the **Defaults** tab.

5) In the **Auto Numbering** section, define the auto numbering default values.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

🏛 **Cost and Funds**

Configure Auto Numbering Defaults for a Risk

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Risk**.

4) On the **Defaults & Options: Risk** page, select the **Defaults** tab.

5) In the **Auto Numbering** section, define the auto numbering default values for project or program risks.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

■ **Risk**

▤ **Schedule**

Configure Auto Numbering Defaults for a Scope Change Request

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

1) *Navigate to the Project configuration page* (see page 361).

2) Select the **Defaults** tab.

3) In the **Auto Numbering** section, define the auto numbering default values for **Change Request** and **Change Item**.

4) Save your changes:

    a. Select **Save**.

    b. In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ Users can manually overwrite the default values when adding these objects in the application.

This setting is used in the following apps:

⊞ **Scope**

Configure Auto Numbering Defaults for a Scope Assignment

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Scope Assignment**.

4) Select the **Defaults** tab.

5) In the **Auto Numbering** section, define the auto numbering default values.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ Users can manually overwrite the default values when adding these objects in the application.

This setting is used in the following apps:

⊞ **Scope**

Configure Auto Numbering Defaults for a Scope Item

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

1) In the object selector, select a project.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Scope Item**.

4) Select the **Defaults** tab.

5) In the **Auto Numbering** section, define the auto numbering default values.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ Users can manually overwrite the default values when adding these objects in the application.

▸ When importing scope items, if the ID column in the import template is left blank, the Scope Item ID fields are populated with the auto numbering defaults.

This setting is used in the following apps:

▣ **Scope**

Configure Auto Numbering Defaults for a Potential Change Order

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Potential Change Order**.

4) On the **Defaults & Options: Potential Change Order** page, select the **Defaults** tab.

5) In the **Auto Numbering** section, define the auto numbering default values.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Configure Auto Numbering Defaults for a Task

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Task**.

4) On the **Defaults & Options: Task** page, select the **Defaults** tab.

5) In the **Auto Numbering** section, define the auto numbering default values.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

This setting is used in the following apps:

≣✓ **Tasks**

Configure Task Color Defaults for a Task

This setting will determine the attribute used to color task cards and tasks bars. This setting will be used as the default Color Tasks by setting for new projects and workspaces under this workspace. It can be changed at the project level. Changes to the workspace Color Tasks by setting will not change the Color Tasks by setting of any existing projects.

To set task color defaults:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Task**.

4) On the **Defaults & Options: Task** page, select the **Defaults** tab.

5) In the **Task Color** section, in the **Color Tasks by** list, select one of the following:

   ▸ **Company**: Individual company colors specified at the project level only. At a workspace level, a list of all project companies with randomized colors are displayed. Color associations are read-only. To edit project level settings go to Configure Task Color at the Project-level.

   ▸ **Workspace level activity codes**: Code value colors specified at the workspace level.

   ▸ **Workspace level task codes**: Code value colors specified at the workspace level.

   > **Note**: Only workspace codes enabled for both the Activity and Task are available for selection in the **Color Tasks by** list.

6) Select the color square for a specific code value, and then select a new color from the color selector.

   > **Note**: Changes to color associations for code values will affect colors for tasks, activities, and other objects that use these codes across projects.

7) Select **Save**.

8) In the **Summary & Settings** panel, select ✕ **Close**.

Tips:

▸ Code values are set in the Defaults & Options: Task page in the workspace.

Configure Auto Numbering Defaults for Work Packages

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Work Package**.

4) Select the **Defaults** tab.

5) In the **Auto Numbering** section, define the auto numbering default values.

6) Select **Save**.

7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

▸ Users can manually overwrite the default values when adding these objects in the application.

This setting is used in the following apps:

⊟ **Schedule**

⊞ **Scope**

Assign a Custom Workflow at the Workspace Level

In the Workflows and Forms app, you can create custom workflows that let you specify exactly how these objects are managed:

▸ Budgets
▸ Budget changes
▸ Budget transfers
▸ Changes
▸ Change orders
▸ Commitments
▸ Contracts
▸ Ideas
▸ Potential Change Orders
▸ Projects
▸ Project Risks
▸ Submittals

After you have created a custom workflow, you can assign it to an object and action at the workspace level to have your custom workflow run every time the action occurs in a project within the workspace.

> **Note**: In order for workspace-level workflow assignments to take effect in projects, you must have the privileges required to edit the projects. Similarly, in order for workspace-level workflow assignments to take effect in child workspaces, the corresponding workflows must be shared with the child workspaces.

To assign a custom workflow at the workspace level:

1) *Navigate to an object configuration page* (see page 361).
2) On the **Workflow Actions** tab, find the row that represents the action to which you want to assign the custom workflow.
3) In the corresponding **Workflow** field, choose a custom workflow.

   Only forms with the relevant Context Type value are available here. For example, you can only assign a Risk workflow to manage risks.

4) Select ⊞ **Save**.
5) In the **Confirm** dialog box, select **Yes** if you want all workspaces, projects, and programs within the workspace to inherit the selected workflow, if applicable.
6) In **Primavera Cloud**, in the **Summary & Settings** panel, select ✕ **Close**.

Integration Overview

Integration is a bi-directional movement of data between Primavera Cloud and external applications. During integration, business objects and their data fields are transferred between applications. Field mapping templates list the objects and fields to be transferred and how they should be mapped from fields in the source application to fields in the destination application. A business flow is a specific set of field mapping templates that fulfill a particular data transfer requirement. The data contained in a business flow is transferred by running the business flow from the Synchronize page of the workspace or project-level Integration app. You can run the business flows on demand or schedule them to run at regular intervals.

A variety of integration solutions enable you to synchronize and share data between Oracle Primavera Cloud and external applications. You can create new projects using existing P6 EPPM or Microsoft Project data, or use Primavera Gateway to define your own business flows for integration with other external sources. There are two integration methods that you can use:

▶ **Direct Integration**: The direct integration method requires minimal configuration to set up and provides default business flows to support the most common data migration requirements. Use this method if your organization does not require additional customization. Direct integration is performed from within Primavera Cloud.

▶ **Integration using Primavera Gateway**: Use this method if your organization requires customized solutions beyond the default options provided by Primavera Cloud. Primavera Gateway provides you an option to create new business flows if the available flows don't fit your needs. You can also use Primavera Gateway to create connections to P6 and Primavera Cloud. After these connections are established, you can run synchronizations from Primavera Gateway. You can also add the synchronizations from Primavera Gateway to your Primavera Cloud deployment and run the synchronizations from Primavera Cloud.

Consult the ***Primavera Gateway (https://docs.oracle.com/en/industries/construction-engineering/primavera-gateway/index.html***) documentation for a comprehensive selection of Gateway information including user administration, end user help documentation, custom business flow and synchronization configurations, connecting P6 and Primavera Cloud applications, and transferring data between P6 and Primavera Cloud. The use of Gateway requires a Gateway license.

After your Gateway deployment is connected to P6 and Primavera Cloud and you have created the necessary business flows and synchronizations, you can add and run the synchronizations from Primavera Cloud. See the ***Integrate Gateway (https://docs.oracle.com/cd/E80480_01/help/en/user/139422.htm***) section of the *Primavera Cloud Help* for more information

Initial Configuration Considerations

If you are configuring Primavera Cloud integration for the first time, it may take up to 14 days to set everything up and get it running. This assumption is based on whether the system you are integrating with is on the cloud or on-premises and whether you are using Secure Socket Layer (SSL). The process may take time as it may involve adding ports and URLs to the allowlist. These ports and URLs are opened and on the allowlist as needed to keep the system secured for users.

Here are the various scenarios:

▶ Using Primavera Gateway:

If Primavera Gateway is on the cloud then you may have to check if it is on Oracle Cloud or an external cloud. If it is on Oracle Cloud then it will be accessible. If it is on an external cloud, contact support.

If Primavera Gateway is on-premises, contact support to add the URL to the allowlist.

▶ Using Oracle Primavera Cloud:

If P6 EPPM is on the cloud then you may have to check and see if it is on Oracle Cloud or an external cloud. This will have to be handled differently based on the cloud hosting the P6 environment. Contact support in either case.

If P6 EPPM is on-premises, contact support to add the URL to the allowlist.

▶ Using SSL:

This requires extra steps to import certificates and therefore adds time to the process of adding the URL to the allowlist. Contact support to enable SSL.

Key Features

▶ Connection: A connection is set up between the source and destination application to integrate data.

▶ Field Mapping Template: A field mapping template lists the objects and fields to be transferred and how they should be mapped from fields in the source application to fields in the destination application.

▶ Business Flow: A business flow is a combination of one or more field mapping templates containing one or more business objects and fields that fulfills a particular data transfer requirement.

▶ Synchronization: Data is transferred between the source and destination application using synchronization. Each synchronization relies on a business flow to transfer the data from the source application to the destination application.

Setting up an Integration User Account

An integration user account is a generic user account that is used to manage integrations between Oracle Primavera Cloud and other applications. Based on the needs of your organization, you can have a dedicated integration user or a tenant administrator who manages integrations with an alias account. Creating an integration user is optional but recommended to keep track of the data modified through integrations and to prevent integration failures upon inadvertent changes to the shared user account. Use your identity domain to create the integration account and later associate this account with an owning company in Primavera Cloud.

To create an integration user account:

1) Log in to your identity domain. In the **Admin Console**, select **Users**, and then select **Add Users**.

2) In the **Add User** dialog box, enter the **First Name**, **Last Name**, and **User Name / Email** for the integration user account.

> **Note**: If an existing user manages integrations, then provide an alias email address in the **User Name / Email** field.

3) Ensure to check the **Use the email address as the user name** check box.

4) Select **Finish**.

5) On the **Account Information** page, provide a valid email address in the **Email** and **Recovery Email** fields.

6) In Primavera Cloud, add this integration user account to the owning company and assign it to the Application Administrator user type. See ***Add a User*** (see Add a User - ***https://docs.oracle.com/cd/E80480_01/English/admin/app_admin_guide/90890.htm***) for more information.

Tips

The integration user account should only be invited to the owning tenant.

Integrate P6 EPPM

Setting Up P6 Integration Video

Integrate P6 EPPM with Primavera Cloud to transfer project data between the two applications. To transfer the data, you first need to add a P6 EPPM connection and then enable the required business flows. You can also modify the business flows by adding new fields or deleting existing ones. Additionally, you can modify the advanced settings to set the authentication method of the connection and encrypt data transfers between Primavera Cloud and P6 EPPM.

To set up a P6 EPPM integration, do the following:

- ▶ **Add a P6 EPPM Connection** (on page 256)
- ▶ **Enable or Disable a P6 EPPM Business Flow** (on page 258). See **P6 EPPM Default Business Flow Reference** (on page 269) for information about available business flows.

Additionally, you can also do any of the following:

- ▶ **Modify a P6 EPPM Business Flow** (on page 258)
- ▶ **Modify P6 EPPM Integration Advanced Settings** (on page 257)
- ▶ **Delete Cross-references for a P6 EPPM Connection** (on page 261)

    Data sent from a source application is tracked by a flow using cross-references. You can delete the history of all data sent and received using a specific P6 EPPM connection by deleting cross-references. Use this option only if you want to reset *all* cross-references related to this connection, and want all data to be regarded as new data by the destination application when you run the next flow.

    > **Note**: You can also delete cross-references for a specific job from the Monitoring page.

Once you have set up your P6 EPPM and Primavera Cloud connection and enabled the required business flows, use the **Synchronize** page of the workspace or project-level **Integration** app to run the business flows. For more information, see **Run a Project Business Flow from a Project** (on page 266) or **Run a Global or Project Business Flow from a Workspace** (on page 266).

Add a P6 EPPM Connection

Add a P6 EPPM connection to synchronize Primavera Cloud and P6 EPPM projects. Import project data from P6 EPPM to Primavera Cloud, or export Primavera Cloud project data to P6 EPPM.

> **Note**: If your P6 EPPM environment is hosted on-premises, your P6 EPPM server name and the port used must be listed on the allowlist on the Oracle Cloud to open up a connection with Primavera Cloud. To do this, submit a service request through My Oracle Support.

To add a P6 EPPM connection:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⌁ **Integrations**.

3) In the **P6 EPPM** tile, select **Integrate**.

4) Select the **Connect** tab, and then select + **Add Connections**.

5) Complete the following fields:

- ▸ **What do you want to name your connection?**: A unique name for this P6 EPPM connection.
- ▸ **Server URL**: The URL, in the form of `http://<server>:<port>/p6ws/services/SyncServiceV1` on which your P6 EPPM instance is hosted.
- ▸ **Username**: The username of a user you want to use to connect to P6 EPPM when running synchronizations.
- ▸ **Password**: The password for the user specified in the **Username** field.
- ▸ **Workspace**: Select one or more Primavera Cloud workspaces to which this connection applies. Data from this P6 EPPM connection can only be synchronized with projects in the selected workspaces.

6) Select **Test Connection**. If the connection fails, verify that the connection information you entered is correct.

7) Expand business flow sections, such as **Global** or **Project**, to view a list of synchronization options available for this connection. Select or deselect business flows to enable or disable them for the workspaces associated with this connection.

8) Select **Save**.

Modify P6 EPPM Integration Advanced Settings

Modify P6 EPPM connection Advanced Settings to configure additional properties of your P6 EPPM connection, such as the P6 Webservices authentication type, P6 database ID, P6 Currency, and encryption options.

To modify advanced settings:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⊿ **Integrations**.

3) In the **P6 EPPM** tile, select **Integrate**.

4) Select the **Connect** tab.

5) Select a P6 EPPM connection, and then expand **Advanced Settings**.

6) Complete the following fields:

- ▸ **P6 Webservices authentication type**: Determines the method of authentication used for this connection.
- ▸ (Optional) **SAML2.0 token file**: If the selected P6 Webservices authentication type is SAML2.0 Token, select and upload a SAML2.0 token file to use to authenticate the connection.
- ▸ **P6 database instance ID**: The ID of the P6 EPPM instance database used by this connection. If your P6 EPPM instance supports multiple databases, select the database that contains the project and global data you want to synchronize with Primavera Cloud.
- ▸ **P6 Currency**: The currency type in the P6 EPPM instance.

7) Select **Enable Encryption** to encrypt data exchanged between Primavera Cloud and P6 EPPM using a Java keystore.

8) Complete the following fields:

  ▸ **Keystore File**: Select and upload a Java keystore (.jks) file to use to encrypt data transfers for this connection.

  ▸ **Keystore Password**: If your Java keystore is password protected, enter the password required to use the keystore.

  ▸ **Certificate Alias**: The alias used to access the provided Java keystore.

9) Select **Save**.

> **Notes**:
>
> ▪ If SAML2.0 Token is selected as the **P6 Webservices authentication type**, a SAML2.0 token file will be used to authenticate the connection instead of the password field.
>
> ▪ To learn more about generating a Java keystore of SAML2.0 Token file for P6 EPPM, see P6 EPPM Documentation

Enable or Disable a P6 EPPM Business Flow

You can enable or disable business flows for your P6 EPPM connections.

To enable or disable business flows:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⌂ **Integrations**.
3) In the **P6 EPPM** tile, select **Integrate**.
4) Select the **Connect** tab, and then select a P6 EPPM connection.
5) Expand business flow sections, such as **Global** or **Project**.
6) Select the business flows to enable.
7) Select **Save**.

Tips
▸ To enable or disable all business flows in the table, select the check box next to the **Business Flow Name** table header .

Modify a P6 EPPM Business Flow

You can modify business flows for your P6 EPPM connection by adding new fields or deleting existing ones. You can also revert the modifications by resetting to the default mappings.

To modify a business flow:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⌂ **Integrations**.
3) In the **P6 EPPM** tile, select **Integrate**.
4) Select the **Connect** tab, and then select a P6 EPPM connection.

5) Expand the **Global** or **Project** business flow section.

6) In the table, select a business flow.

> **Note**: You can only select a business flow if it is enabled. To learn more about enabling and disabling business flows, see ***Enable or Disable a P6 EPPM Business Flow*** (on page 258).

7) In the business flow dialog box:

   1. On the **Mappings** tab:

   a. Select an object row, select the ⚙ **Context** menu, and then select **Add field**.

      - In the **Primavera Cloud Field Name** column, select a Primavera Cloud field.
      - In the **P6 Field Name** column, select a P6 EPPM field to synchronize with the selected Primavera Cloud field.

   > **Note**: For a detailed field list and descriptions, see the   P6 EPPM Data Dictionary (Integration App) and the Primavera Cloud Data Dictionary (Integration App).

   2. On the **Parameters** tab, select or deselect the parameters, if available.

   > **Note**: The options available in the **Source** and **Destination Parameters** sections change based on whether you are sending data from P6 to Primavera Cloud or from Primavera Cloud to P6.

   a. In the **Source Parameters** section, select the following:

      - **Summarize project(s) before synchronization?**: Select this parameter if you want to summarize projects before running a synchronization. This option is available only while sending data from P6 to Primavera Cloud.
      - **Automatically include**: Select **Project Codes**, **Activity Codes**, or **Resource Codes** to automatically import codes that are assigned to a project, activity, or resource.

   > **Note**: You do not need to manually add the project, activity, or resource codes to the mappings or create them at the destination if you choose to include them automatically.

   b. In the **Destination Parameters** section, select or deselect parameters, if available, to apply them to the business flow:

      - **Compare Flag**: Select this parameter to compare the source and destination data to identify changed, deleted, and added objects so that the system can synchronize data efficiently.
      - **Delete data that no longer exists in the source application?**: Select this parameter to delete data from the destination application if it no longer exists in the source application. Use this parameter in conjunction with the **Compare Flag**.
      - **Save data to P6 to if there are errors?**: Select this parameter to save data to P6 even if there are errors while importing data from Primavera Cloud to P6.

- **Save data to Primavera Cloud if there are errors?:** Select this parameter to save data to Primavera Cloud even if there are errors while importing data from P6 to Primavera Cloud.
- **EPS Location**: Enter the name of the EPS node of the project when it is transferred to P6 EPPM. This option is available only while sending data from Primavera Cloud to P6.
- **Schedule project(s) after synchronization?**: Select this parameter if you want to schedule projects after running a synchronization. This option is available only while sending data from P6 to Primavera Cloud.

3. On the **Add field** tab, add new fields to the objects listed under the **Mappings** tab for the business flow. Complete the following fields:

a. **Object**: The primary object associated with the field you want to add to the business flow.

b. **Name**: The name of the field.

c. **Type**: The type of data stored in the field. Valid values are String, Int, Double, Boolean, and DateTime.

d. **Category**: The category to which the field belongs. The following values are valid categories:

- **Code:** Defines the field as a code on the selected object.
- **UDF:** Defines the field as a User Defined Field (UDF) on the selected object.
- **Note:** An additional category for capturing additional information during synchronization.

e. **Description**: A short summary of the fields purpose.

> **Note**: For detailed field list and descriptions, see the P6 EPPM Data Dictionary (Integration App).

8) Select **Add**.

9) Select **Save**, and then select ✕ **Close.**

Tips

▶ A value of **Yes** in the **Custom Mappings** column indicates a modified business flow.

▶ To revert the modifications to an object, in the business flow dialog box, on the **Mappings** tab, select the ⚙ **Context** menu for the object, and then select **Reset to default mapping**.

▶ To delete an existing field, select **Delete** from the ⚙ **Context** menu next to the field name.

▶ You can choose to synchronize the codes manually, automatically, or both automatically and manually on the **Mappings** and the **Parameters** tab.

Modify the Migrate Project Data from P6 to Primavera Cloud Business Flow

Use the Migrate Project Data from P6 to Primavera Cloud business flow to migrate data from P6 to Primavera Cloud automatically, without the need to run the P6 import process manually. You can run this business flow at the workspace level to synchronize project data for multiple projects at once, or you can run it directly at the project level to synchronize project data for a specific project. You can also modify the flow to specify how you want to import the baselines.

To modify the Migrate Project Data from P6 to Primavera Cloud Business Flow:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⌂ **Integrations**.
3) In the **P6 EPPM** tile, select **Integrate**.
4) Select the **Connect** tab, and then select a P6 EPPM connection.
5) Expand the **Project** business flow section, and then select the **Migrate Project Data from P6 to Primavera Cloud** business flow.
6) On the **Parameters** tab, in the **Source Parameters** section, select how you want to import the baselines:
   ‣ **No Baseline**: No baseline will be imported.
   ‣ **Baseline Names**: Only the baseline names you specify will be imported. Enter the baseline names in the **Baseline Names** field.
   ‣ **Project Baseline**: Only the project baseline will be imported.
   ‣ **All Baselines**: All baselines will be imported.
7) Select **Save**, and then select ✕ **Close**.

> **Note**: Use the workspace or project-level Integration app to run a synchronization job to transfer the data contained in the business flows. For more information, see *Run a Project Business Flow from a Project* (on page 266) or *Run a Global or Project Business Flow from a Workspace* (on page 266).

Delete Cross-references for a P6 EPPM Connection

Primavera Cloud tracks data using cross-references between P6 EPPM and Oracle Primavera Cloud. It uses cross-references to determine if the data is new data or an update to the previously sent data. Deleting cross-references deletes the history of all data sent to the destination application using this connection.

To delete *all* cross-references for a P6 EPPM connection:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⌂ **Integrations**.
3) In the **P6 EPPM** tile, select **Integrate**.
4) Select the **Connect** tab, and then select a P6 EPPM connection.
5) Select **Delete cross-reference**.

> **Note**: The **Delete cross-reference** option only deletes the
> cross-references of the data and not the data itself. Data previously sent
> using this cross-reference will continue to exist in the destination
> application.

6) Select **Yes** on the Confirmation dialog box.

Integrate Gateway

Integrate Primavera Cloud and Gateway to synchronize Primavera Cloud data with data from external providers.

To set up Gateway integration:

1) ***Add a Gateway Connection*** (on page 262)
2) ***Add Gateway Synchronizations*** (on page 263)

Add a Gateway Connection

Using Primavera Gateway Video

Set up a Gateway connection to integrate Primavera Cloud with an instance of Gateway and set Primavera Cloud business flows between Primavera Cloud and other providers configured in Gateway.

> **Note**: If your Gateway environment is hosted on-premises, your
> Gateway server name and the port used must be listed on the allowlist
> on the Oracle Cloud to open up a connection with Primavera Cloud. To
> do this, submit a service request through My Oracle Support.

To add a Gateway connection:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⌂ **Integrations**.
3) In the **Oracle, Gateway** tile, select **Integrate**.
4) Select the **Connect** tab.
5) Complete the following fields:
   ‣ **Server URL**: The URL, in the form of `http://<server>:<port>/gatewayapi`, on which your Gateway instance is hosted.
   ‣ **Username**: The username of a user you want to use to connect to Gateway when running synchronizations.
   ‣ **Password**: The password for the user specified in the **Username** field.
   ‣ **Primavera Cloud Deployment Name**: The name of the Primavera Cloud deployment to which this connection applies. The Gateway connection can only be used to transfer data from or to the selected Primavera Cloud deployment.
6) Select **Test Connection**. If the connection fails, verify that the connection information you entered is correct.

7) Select **Save**.

> **Note**: If a workspace is assigned to a connection, the business flows in that connection will override any synchronizations defined in Gateway.

Add Gateway Synchronizations

Add synchronizations to your Gateway connection to provide business flows users can run to synchronize Primavera Cloud data with external providers configured through Gateway.

To add a Gateway synchronization:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⟁ **Integrations**.

3) In the **Oracle, Gateway** tile, select **Integrate**.

4) Select the **Connect** tab, and then select ＋ **Add**.

5) In the **Add Synchronization** dialog box, select one of the following options:
    ‣   **Import**: This synchronization will import data into Primavera Cloud from an external application.
    ‣   **Export**: This synchronization will export data from Primavera Cloud to an external application.

6) In the **Type** list, select a type for the synchronization.

7) In the **Synchronization Name** list, select a synchronization.

8) Select **Add.**

9) Select **Save.**

> **Note**: Only synchronizations configured in Gateway are available for selection as synchronizations in Primavera Cloud. To create synchronizations for use in your Primavera Cloud and Gateway connection, you must add synchronizations in Gateway. To learn more about Gateway synchronizations see ***Gateway Documentation https://docs.oracle.com/en/industries/construction-engineering/primavera-gateway/index.html***

Integrate Microsoft Project

Integrate Microsoft Project Video

Integrate Microsoft Project with Primavera Cloud to synchronize project data, such as resources and activities, between the two applications.

To set up a Microsoft Project integration:

‣   ***Add a Microsoft Project Connection*** (on page 264)

Modify business flows to customize the data synchronized between Microsoft Project and Primavera Cloud for each business flow:

▶ ***Modify a Microsoft Project Business Flow*** (on page 264)

Add a Microsoft Project Connection

Set up a Microsoft Project integration to use existing data from Microsoft Project to create projects in Oracle Primavera Cloud.

To add a Microsoft Project connection:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⌸ **Integrations**.
3) In the **Microsoft Project** tile, select **Integrate**.
4) Select the **Connect** tab.
5) Complete either of the following steps:

   ▶ Select **Enable Import/Export for all Workspaces** to enable or disable the Microsoft Project connection for every workspace in the application.

   ▶ In the **Workspaces** field, select one or more Primavera Cloud workspaces to which this connection applies. Data from this Microsoft Project connection will only be available for the selected workspaces.

   > **Note**: You can only select workspaces in the **Workspaces** field if the **Enable Import for all Workspaces** switch is disabled.

6) Select **Save**.

Modify a Microsoft Project Business Flow

You can modify business flows for your Microsoft Project (MSP) connection.

To modify a business flow:

1) In the object selector, select ⊘ **Global Admin**.

2) In the sidebar, select ⌸ **Integrations**.
3) In the **Microsoft Project** tile, select **Integrate**.
4) Select the **Connect** tab, and then select a Microsoft Project connection.

5) Select the ⚙ **Context** menu next to a business flow, and then select **Edit**.
6) In the business flow dialog box, on the **Mappings** tab, do the following to create new field mappings:

   a. Select an object row, select the ⚙ **Context** menu, and then select **Add field**.
   b. In the **Primavera Cloud Field Name** column, from the drop-down list, select a Primavera Cloud field.
   c. In the **MSP Field Name** column, from the drop-down list, select a Microsoft Project field to synchronize with the selected Primavera Cloud field.

   > **Note**: If the fields you want are not available from the drop-down list in

the **MSP Field Name** column, you can add them by completing steps 8 and 9 first.

7) On the **Parameters** tab, do the following to configure parameters:

   a. In the **Source Parameters** section, select or deselect parameters, if available, to apply them to the business flow.

   - **Automatically include**: Select **Activity Codes** or **Resource Codes** to automatically import codes that are assigned to an activity or resource.

     Note: If you choose to automatically include the activity or resource codes, you will not need to create the codes manually while importing the data. By selecting the check boxes, you can also skip adding the activity or resource codes manually to the mappings.

   b. In the **Destination Parameters** section, select or deselect parameters, if available, to apply them to the business flow.

   - **Save data to Primavera Cloud if there are errors?**: Select this parameter to save data to Primavera Cloud even if there are errors while importing data from Microsoft Project to Primavera Cloud.
   - **Schedule project(s) after synchronization?**: Select this parameter if you want to schedule projects after running a synchronization.

8) On the **Add field** tab, complete the following fields to add new objects and fields to the business flow:

   a. **Object**: The primary object associated with the field you want to add to the business flow.

   b. **Name**: The name of the field.

   c. **Type**: The type of data stored in the field. Valid values are String, Int, Double, Boolean, and DateTime.

   d. **Category**: The category to which the field belongs. The following values are valid categories:

   - **Code:** Defines the field as a code on the selected object.
   - **UDF:** Defines the field as a configured field on the selected object.

   e. (Optional) **Description**: A short summary of the fields purpose.

9) Select **Add**.

10) Select **Save**, and then select ✕ **Close.**

After you are done adding fields and modifying the Microsoft Project Business Flow, navigate to the workspace where you want to import the MSP XML file and follow the steps in the ***Import Microsoft Project Data into Oracle Primavera Cloud*** (on page 347) topic to import the file to Primavera Cloud.

Run a Global or Project Business Flow from a Workspace

Run a global or project business flow directly from a workspace to synchronize global or project data between Primavera Cloud and other applications. You can synchronize the project data for a new project or an existing project in the workspace. You can select a variety of filters to synchronize data for a new project without creating the project in the workspace.

To run a global or project business flow from a workspace:

1) In the object selector, select a workspace.

2) In the sidebar, hover over ⇄ **Integration**, and select **Synchronize**.

3) On the business flow row, select the ⚙ **Context** menu, and then select **Run**.

   For workspace-level business flows, you will receive a notification when the synchronization job starts and another notification when the job completes.

4) For project-level business flows, in the dialog box, select one or more projects that you want to synchronize.

   a. In the **Filter Type** list, select the method for identifying projects.

      ▪ **Project Ids** or **Project Code**: Select if you want to run a business flow for one or more specific projects.

      ▪ **EPS Ids**: Select if you want to run a business flow for all projects associated with an EPS.

   b. **Filter Value**: Enter the values for your selection in the previous step. You can enter more than one comma-separated values if you want to run the business flow for more than one project.

   > **Note**: A project does not need to currently exist in Primavera Cloud before synchronizing. A project will be created during the synchronization process.

5) Select **Add**.

6) Select **Run**.

   > **Notes**:
   >
   > ▪ You will receive a notification when the synchronization job starts and another notification when the job completes.
   >
   > ▪ Select **Cancel** if you want to run the business flow later. Your selected filter types and filter values will not be deleted if you choose to cancel.

Run a Project Business Flow from a Project

Run a project business flow from a project to synchronize data between Primavera Cloud and external applications.

> **Note**: After importing P6 project data into Primavera Cloud, you must

reschedule the project and recalculate costs before making any project updates.

To run a project business flow from a project:

1) In the object selector, select a project.

2) In the sidebar, hover over ⌂ **Integration**, and select **Synchronize**.

3) Select a business flow row, select the ⚙ **Context** menu, and then select **Run**.

> **Note**: You will receive a notification when the synchronization job starts and another notification when the job completes. You can view the list of running and completed synchronization jobs on the **Monitor** page of the **Integration** app.

Tips

▸ Select a business flow name to view the objects and fields that will be synchronized when you run the business flow.

> **Note**: Viewing synchronized objects and fields associated with a business flow is not supported for Gateway connections. To view Gateway business flow details, access the business flow definitions in Gateway.

▸ Select ↻ **Refresh** to view the current list of synchronizations available for the project.

▸ Select ⌕ **Search** to search for a synchronization.

Schedule a Business Flow Synchronization Job

Schedule integration jobs to set them to run automatically at a specified time on a daily, weekly, or monthly interval.

> **Note**: After importing P6 project data into Primavera Cloud, you must reschedule the project and recalculate costs before making any project updates.

To schedule an integration job:

1) In the object selector, select a project or workspace.

2) In the sidebar, hover over ⌂ **Integration**, and select **Synchronize**.

3) Select a business flow row, select the ⚙ **Context** menu, and then select **Schedule**.

4) In the **Schedule Synchronization** dialog box, complete the following fields:

▸ **Run Report**: Determines the interval at which the job will run. For example, if Weekly is selected, the job will run at the specified time once a week.

▸ **Starts**: The date on which the job schedule will begin to be applied. The selected integration job will run automatically based on the specified schedule after this date.

> ▶ **Time**: The time at which the integration job will be initiated when launched by the schedule.
>
> ▶ **Ends**: The date on which the schedule no longer applies. If an end date is provided, jobs will no longer be automatically initiated by the schedule after this date.

5) Select **Schedule**.

Monitor a Synchronization Job

Monitor running or completed synchronization jobs to determine the status of synchronizations and view their corresponding business flow step details. The **Monitor** page is only available for workspaces with a configured P6 EPPM or Microsoft Project connection.

> **Note**: If you are using the Safari browser, before you download, you should first access your browser preferences and deselect the option to open safe files after downloading.

To monitor a synchronization job:

1) In the object selector, select a project or workspace.

2) In the sidebar, hover over ⌂ **Integration**, and select **Monitor**.

3) Expand a job to view the status of each step of the job.

4) Expand a job step, and then select a format, request, or response to view more detailed information.

Tips

▶ To view job details, download a zip file containing the job details, delete a job, or delete cross-references related to the job, select the ⚙ **Context** menu next to a job.

> **Notes**:
>
> ▪ The **Delete cross-reference** option only deletes the cross-references of the data related to this *job*, and not the data itself. Data previously sent using this cross-reference will continue to exist in the destination application.
>
> ▪ You can also delete *all* cross-references for data sent using a specific P6 EPPM connection.

▶ For failed jobs, select **Failed** in the **Status** column to view further details about a job failure, including any captured error messages.

▶ Select ↻ **Refresh** to view the current list of synchronization jobs available for the project or workspace.

▶ Select ⌕ **Search** to search for a synchronization job.

View Synchronization Job Details

View synchronization job details to access further information about synchronization jobs, such as the business flow, parameters, and deployments used when running the synchronization.

To view synchronization job details:

1) In the object selector, select a project or workspace.

2) In the sidebar, hover over ⌂ **Integration**, and select **Monitor**.

3) Select an integration job, select the ⚙ **Context** menu, and then select **Job Details**.

4) Use the **Job Detail** dialog box to view information about the selected job. Select **Download** to download an html file containing the synchronization job details.

5) Select **Close**.

Default Business Flow Reference

Primavera Cloud provides default business flows for many of its product integrations. The following sections detail the purpose of each default business flow, as well as their field mappings.

P6 EPPM Default Business Flow Reference

A business flow is a specific set of field mapping templates and parameters that fulfill a particular data transfer requirement. The data contained in a business flow is transferred by running the business flow from the **Synchronize** page of the workspace or project-level **Integration** app. Primavera Cloud's default P6 EPPM business flows enable you to synchronize P6 EPPM project schedule, risk, scope, resource and role, risk, and other data with Primavera Cloud. You can also use data from either application to scaffold new projects in the other application. The following sections lists field mappings for the default business flows for Primavera Cloud and P6 EPPM.

> **Note**: After importing P6 project data into Primavera Cloud, you must reschedule the project and recalculate costs before making any project updates.

Global

The following sections detail field mappings between Primavera Cloud and P6 EPPM for each global business flow available for a P6 EPPM connection.

Send Resources to Primavera Cloud Field Mappings

The following tables list the field mappings for the **Send Resources to Primavera Cloud** business flow. Use this business flow to import resources and calendar data from a connected P6 environment to a Primavera Cloud workspace.

Calendar

Primavera Cloud Field Name	P6 Field Name
calendarCode	ObjetcId
calendarExceptions	HolidayorExceptions
calendarName	Name
projectId	ProjectObjetId
standardWorkWeek	StandardWorkWeek

Resource

Primavera Cloud Field Name	P6 Field Name
calendarId	CalendarObjectId
calendarName	CalendarName
dafaultUnitsPerHour	DefaultUnitsPerTime
emailAddress	EmailAddress
employeeNumber	EmployeeId
isActive	isActive
officePhoneNumber	OfficePhone
otherPhoneNumber	OtherPhone
parentId	ParentObjectId
resourceCode	Id
resourceName	Name
resourceTitleName	Title
resourceType	ResourceType

Send Roles to Primavera Cloud Field Mappings

The following table lists the field mappings for the **Send Roles to Primavera Cloud** business flow. Use this business flow to import roles data from the connected P6 environment to a Primavera Cloud workspace.

Role

Primavera Cloud Field Name	P6 Field Name
parentId	ParentObjectId
roleCode	Id

Primavera Cloud Field Name	P6 Field Name
roleName	Name

Create EPS Code in Primavera Cloud Field Mappings

The following table lists the field mappings for the **Create EPS Code in Primavera Cloud** business flow. Use this business flow to create a new workspace code called EPS in Primavera Cloud and import the EPS codes in the connected P6 environment as code values.

EPS

Primavera Cloud Field Name	P6 Field Name
codevalueCode	Id
codeValueName	Name
sequenceNumber	SequenceNumber

Create Workspace Code in P6 Field Mappings

The following tables list the field mappings for the **Create Workspace Code in P6** business flow. Use this business flow to export a Primavera Cloud workspace code into the connected P6 environment.

Project Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjectId
codeTypeName	CodeTypeName
codeValueCode	CodeValue
description	Description
parentId	ParentObjectId
sequenceNumber	SequenceNumber

Project Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeName	Name
length	Length

Send Resources and Roles to Primavera Cloud Field Mappings

The following tables list the field mappings for the **Send Resources and Roles to Primavera Cloud** business flow. Use this business flow to import resources, roles, and calendar data from the connected P6 environment into a Primavera Cloud workspace.

Calendar

Primavera Cloud Field Name	P6 Field Name
calendarCode	ObjectId
calendarExceptions	HolidayOrExceptions
calendarName	Name
projectId	ProjectObjeectId
standardWorkWeek	StandardWorkWeek

Resource

Primavera Cloud Field Name	P6 Field Name
calendarId	CalendarObjectId
calendarName	CalendarName
deafultUnitsPerHour	DefaultUnitsPerTime
emailAddress	EmailAddress
emloyeeNumber	EmployeeId
isActive	IsActive
officePhoneNumber	OfficePhone
otherPhoneNumber	OtherPhone
parentId	ParentObjectId
resourceCode	Id
reasourceName	Name
resourceTitleName	Title
resourceType	ResourceType

Role

Primavera Cloud Field Name	P6 Field Name
parentId	ParentObjectId
roleCode	Id
roleName	Name

Project

The following sections detail field mappings between Primavera Cloud and P6 EPPM for each project business flow available for a P6 EPPM connection.

Create Project Header - P6 to Primavera Cloud Field Mappings

The following tables list the field mappings for the **Create Project Header - P6 to Primavera Cloud** business flow. Use this business flow to create a synchronized project in Primavera Cloud using a subset of P6 project data, such as name, status, and planned start date.

Project

Primavera Cloud Field Name	P6 Field Name
description	Description
manager	OwnerResourceId
planEndDate	MustFinishByDate
planStartDate	PlannedStartDate
projectCode	Id
projectName	Name
status	Status

Project Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjetcId
codeValueCode	CodeValue
codeValueName	CodeVAlue
parentId	ParentObjectId

Project Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name
codeTypeName	Name

Create Project Header - Primavera Cloud to P6 Field Mappings

The following tables list the field mappings for the **Create Project Header - Primavera Cloud to P6** business flow. Use this business flow to create a synchronized project in P6 using a subset of the Primavera Cloud project data, such as name, status, and planned budget.

Project

Primavera Cloud Field Name	P6 Field Name
description	Description
manager	OwnerResourceId
planEndDate	MustFinishByDate
planStartDate	PlannedStartDate
projectCode	Id
projectName	Name
status	Status

Project Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjetcId
codeValueCode	CodeValue
parentId	ParentObjectId

Project Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name

Send P6 Project Data to Primavera Cloud for Risks Field Mappings

The following tables list the field mappings for the **Send P6 Project Data to Primavera Cloud for Risks** business flow. Use this business flow to import risk data, such as risk matrices, risk thresholds, and activity risks from the connected P6 environment into a Primavera Cloud project.

Activity

Primavera Cloud Field Name	P6 Field Name
activityCode	Id
activityName	Name
activityPercentComplete	PercentComplete
activityStatus	Status
activityType	Type
actualFinishDate	ActualFinishDate
actualStartDate	ActualStartDate
calendarId	CalendarObjectId
calendarCode	CalendarObjectId
calendarName	CalendarName
constraintDate	PrimaryConstraintDate
constraintType	PrimaryConstraintType
durationType	DurationType
earlyFinishDate	EarlyFinishDate
earlyStartDate	EarlyStartDate
expectedFinishDate	ExpectedFinishDate
finishDate	FinishDate
isWorkPackage	IsWorkPackage
lateFinishDate	LateFinishDate
lateStartDate	LateStartDate

Primavera Cloud Field Name	P6 Field Name
maximumRemainingDuration	MaximumDuration
minimumRemainingDuration	MinimumDuration
mostLikelyRemainingDuration	MostLikelyDuration
percentCompleteType	PercentCompleteType
plannedDuration	PlannedDuration
plannedFinishDate	PlannedFinishDate
plannedStartDate	PlannedStartDate
projectCode	ProjectId
projectId	ProjectObjectId
remainingDuration	RemainingDuration
remainingFinishDate	RemainingEarlyFinishDate
remainingLateFinishDate	RemainingLateFinishDate
remainingLateStartDate	RemainingLateStart
remainingStartDate	RemainingEarlyStartDate
resumeDate	ResumeDate
secondaryConstraintDate	SecondaryConstraintDate
secondaryConstraintType	SecondaryConstraintType
startDate	StartDate
suspendDate	SuspendDate
wbsCode	WBSCode

Activity Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue

codeValueName	CodeValue
parentId	ParentObjectId

Activity Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name
codeTypeName	Name
projectId	ProjectObjectId
scope	Scope

Activity Risk

Primavera Cloud Field Name	P6 Field Name
activityCode	ActivityId
activityId	ActivityObjectId
projectCode	ProjectId
projectRiskId	RiskObjectId
riskCode	RiskId

Calendar

Primavera Cloud Field Name	P6 Field Name
calendarExceptions	HolidayOrExecptions
calendarName	Name
projectId	ProjectObjectId
standardWorkWeek	StandardWorkWeek

Project

Primavera Cloud Field Name	P6 Field Name
calculateFloatBasedOnFinishDate	CalculateFloatBasedOnFinishDate

Primavera Cloud Field Name	P6 Field Name
calendarId	ActivityDefaultCalendarObjectId
computeTotalFloatType	ComputeTotalFloatType
criticalActivityPathType	CriticalActivityPathType
criticalDuration	CriticalActivityFloatThreshold
dataDate	DataDate
description	Description
finishDate	FinishDate
ignoreOtherProjectRelationships	IgnoreOtherProjectRelationships
makeOpenEndedActivitiesCritical	MakeOpenEndedActivitiesCritical
manager	OwnerResourceId
mustFinishByDate	MustFinishByDate
outOfSequenceScheduleType	OutOfSequenceScheduleType
planStartDate	PlannedStartDate
primaveraWorkspace	PrimaveraWorkspace
projectCode	Id
projectName	Name
relationshipLagCalendar	RelationshipLagCalendar
riskMatrixId	RiskMatrixObjectId
riskMatrixName	RiskMatrixName
startDate	StartDate
startToStartLagCalculationType	StartToStartLagCalculationType
status	Status
strgyPriorityNum	StrategicPriority
useExpectedFinishDates	UseExpectedFinishDates

Primavera Cloud Field Name	P6 Field Name
websiteURL	WebSiteURL

Project Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
codeValueName	CodeValue
parentId	ParentObjectId

Project Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name
codeTypeName	Name

Relationship

Primavera Cloud Field Name	P6 Field Name
lagHours	Lag
predActivityCode	PredecessorActivityId
predActivityId	PredecessorActivityObjectId
predActivityType	PredecessorActivityType
predProjectCode	PredecessorProjectId
relationshipType	Type
succActivityCode	SuccessorActivityId
succActivityId	SuccessorActivityObjectId
succActivityType	SuccessorActivityType
succProjectCode	SuccessorProjectId

Resource

Primavera Cloud Field Name	P6 Field Name
calendarId	CalendarObjectId
calendarName	CalendarName
defaultUnitsPerHour	DefaultUnitsPerTime
emailAddress	EmailAddress
employeeNumber	EmployeeId
isActive	IsActive
officePhoneNumber	OfficePhone
otherPhoneNumber	OtherPhone
parentId	ParentObjectId
resourceCode	Id
resourceName	Name
resourceTitleName	Title
resourceType	ResourceType

Resource Assignment

Primavera Cloud Field Name	P6 Field Name
activityCode	ActivityId
activityId	ActivityObjectId
activityType	ActivityType
actualUnits	ActualUnits
atCompletionUnits	AtCompletionUnits
plannedDuration	PlannedDuration
plannedLag	PlannedLag
plannedUnits	PlannedUnits

plannedUnitsPerHour	PlannedUnitsPerTime
projectCode	ProjectId
remainingUnits	RemainingUnits
remainingUnitsPerHour	RemainingUnitsPerTime
resourceCode	ResourceId
resourceId	ResourceObjectId
resourceRoleCode	RoleId
resourceRoleId	RoleObjectId

Resource Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
codeValueName	CodeValue
parentId	ParentObjectId

Resource Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name
codeTypeName	Name

Risk

P6 EPPM Fields	Primavera Cloud Fields
cause	Cause
description	Description
effect	Effect
identifiedDate	IdentifiedDate

P6 EPPM Fields	Primavera Cloud Fields
projectCode	ProjectId
projectId	ProjectObjectId
projectRiskStatus	Status
riskCode	Id
riskName	Name
riskType	Type

Risk Impact

Primavera Cloud Field Name	P6 Field Name
projectRiskId	RiskObjectId
riskCode	RiskId
riskScoreThresholdCode	RiskThresholdLevelCode
riskScoreThresholdId	RiskThresholdLevelObjectId
riskScoreTypeId	RiskThresholdObjectId
riskScoreTypeName	RiskThresholdName

Risk Matrix

Primavera Cloud Field Name	P6 Field Name
matrixDescription	Description
matrixName	Name
riskScoringMatrixMethod	RiskScoringMethod

Risk Matrix Score

Primavera Cloud Field Name	P6 Field Name
matrixName	RiskMatrixName
probabilityThresholdLevel	ProbabilityThresholdLevel

riskMatrixId	RiskMatrixObjectId
severityOne	Severity1
severityOneLabel	Severity1Label
severityTwo	Severity2
severityTwoLabel	Severity2Label
severityThree	Severity3
severityThreeLabel	Severity3Label
severityFour	Severity4
severityFourLabel	Severity4Label
severityFive	Severity5
severityFiveLabel	Severity5Label
severitySix	Severity6
severitySixLabel	Severity6Label
severitySeven	Severity7
severitySevenLabel	Severity7Label
severityEight	Severity8
severityEightLabel	Severity8Label
severityNine	Severity9
severityNineLabel	Severity9Label

Risk Matrix Threshold

Primavera Cloud Field Name	P6 Field Name
matrixName	RiskMatrixName
riskMatrixId	RiskMatrixObjectId
riskScoreTypeId	RiskThresholdObjectId
riskScoreTypeName	RiskThresholdName

Risk Response Action

Primavera Cloud Field Name	P6 Field Name
activityCode	ActivityId
finishDate	FinishDate
plannedFinishDate	PlannedFinishDate
plannedStartDate	PlannedStartDate
projectCode	ProjectId
projectRiskCode	RiskId
riskMitigationCode	Id
riskMitigationName	Name
riskMitigationStatus	Status
riskResponsePlanCode	RiskResponsePlanId
score	Score
startDate	StartDate

Risk Response Action Impact

Primavera Cloud Field Name	P6 Field Name
projectCode	ProjectId
riskCode	RiskId
riskMitigationCode	RiskResponseActionId
riskMitigationId	RiskResponseActionObjectId
riskScoreThresholdCode	RiskThresholdLevelCode
riskScoreTypeName	RiskThresholdName

Risk Response Plan

Primavera Cloud Field Name	P6 Field Name
isActive	IsActive
projectCode	ProjectId

Primavera Cloud Field Name	P6 Field Name
projectRiskId	RiskObjectId
responseType	ResponseType
riskCode	RiskId
riskResponsePlanCode	Id
riskResponsePlanName	Name

Risk Threshold

Primavera Cloud Field Name	P6 Field Name
riskScoreTypeName	Name
scoreType	ThresholdType

Risk Threshold Level

Primavera Cloud Field Name	P6 Field Name
color	Color
costRange	CostRange
level	Level
probabilityRange	ProbabilityRange
range	Range
riskScoreThresholdCode	Code
riskScoreThresholdName	Name
riskScoreTypeId	RiskThresholdObjectId
riskScoreTypeName	RiskThresholdName
scheduleRange	ScheduleRange
thresholdType	ThresholdType

Primavera Cloud Field Name	P6 Field Name
toleranceRange	ToleranceRange

Role

Primavera Cloud Field Name	P6 Field Name
parentId	ParentObjectId
roleCode	Id
roleName	Name

WBS

Primavera Cloud Field Name	P6 Field Name
isWorkPackage	IsWorkPackage
parentId	ParentObjectId
projectCode	ProjectId
projectId	projectObjectId
sequenceNumber	SequenceNumber
wbsCode	Code
wbsName	Name

Send P6 Project Data to Primavera Cloud for Schedule Field Mappings

The following tables list the field mappings for the **Send P6 Project Data to Primavera Cloud for Schedule** business flow. Use this business flow to import schedule data, such as activitiy, WBS, relationships, and resource assignments from the connected P6 environment into a Primavera Cloud project.

Activity

Primavera Cloud Field Name	P6 Field Name
activityCode	Id
activityName	Name

Primavera Cloud Field Name	P6 Field Name
activityPercentComplete	PercentComplete
activityStatus	Status
activityType	Type
actualDuration	ActualDuration
actualFinishDate	ActualFinishDate
actualStartDate	ActualStartDate
calendarId	CalendarObjectId
calendarName	CalendarName
constraintDate	PrimaryConstraintDate
constraintType	PrimaryConstraintType
durationType	DurationType
earlyFinishDate	EarlyFinishDate
earlyStartDate	EarlyStartDate
expectedFinishDate	ExpectedFinishDate
finishDate	FinishDate
lateFinishDate	LateFinishDate
lateStartDate	LateStartDate
percentCompleteType	PercentCompleteType
plannedDuration	PlannedDuration
plannedFinishDate	PlannedFinishDate
plannedStartDate	PlannedStartDate
projectCode	ProjectId
projectId	ProjectObjectId
remainingFinishDate	RemainingEarlyFinishDate

Primavera Cloud Field Name	P6 Field Name
remainingDuration	RemainingDuration
remainingLateFinishDate	RemainingLateFinishDate
remainingLateStartDate	RemainingLateStart
remainingStartDate	RemainingEarlyStartDate
resumeDate	ResumeDate
secondaryConstraintDate	SecondaryConstraintDate
secondaryConstraintType	SecondaryConstraintType
startDate	StartDate
suspendDate	SuspendDate
wbsCode	WBSCode
wbsId	WBSObjectId

Activity Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
codeValueName	CodeValue
parentId	ParentObjectId

Activity Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name
codeTypeName	Name
projectId	ProjectObjectId
scope	Scope

Calendar

Primavera Cloud Field Name	P6 Field Name
calendarExceptions	HolidayOrExecptions
calendarName	Name
projectId	ProjectObjectId
standardWorkWeek	StandardWorkWeek

Project

Primavera Cloud Field Name	P6 Field Name
calculateFloatBasedOnFinishDate	CalculateFloatBasedOnFinishDate
calendarId	ActivityDefaultCalendarObjectId
computeTotalFloatType	ComputeTotalFloatType
criticalActivityPathType	CriticalActivityPathType
criticalDuration	CriticalActivityFloatThreshold
dataDate	DataDate
description	Description
finishDate	FinishDate
ignoreOtherProjectRelationships	IgnoreOtherProjectRelationships
makeOpenEndedActivitiesCritical	MakeOpenEndedActivitiesCritical
manager	OwnerResourceId
mustFinishByDate	MustFinishByDate
outOfSequenceScheduleType	OutOfSequenceScheduleType
planStartDate	PlannedStartDate
primaveraWorkspace	PrimaveraWorkspace
projectCode	Id
projectName	Name

Primavera Cloud Field Name	P6 Field Name
relationshipLagCalendar	RelationshipLagCalendar
riskMatrixId	RiskMatrixObjectId
riskMatrixName	RiskMatrixName
startDate	StartDate
startToStartLagCalculationType	StartToStartLagCalculationType
status	Status
strgyPriorityNum	StrategicPriority
useExpectedFinishDates	UseExpectedFinishDates
websiteURL	WebSiteURL

Project Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
codeValueName	CodeValue
parentId	ParentObjectId

Project Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name
codeTypeName	Name

Relationship

Primavera Cloud Field Name	P6 Field Name
lagHours	Lag
predActivityCode	PredecessorActivityId
predActivityId	PredecessorActivityObjectId
predActivityType	PredecessorActivityType

Primavera Cloud Field Name	P6 Field Name
predProjectCode	PredecessorProjectId
relationshipType	Type
succActivityCode	SuccessorActivityId
succActivityId	SuccessorActivityObjectId
succActivityType	SuccessorActivityType
succProjectCode	SuccessorProjectId

Resource

Primavera Cloud Field Name	P6 Field Name
calendarId	CalendarObjectId
calendarName	CalendarName
defaultUnitsPerHour	DefaultUnitsPerTime
emailAddress	EmailAddress
employeeNumber	EmployeeId
isActive	IsActive
officePhoneNumber	OfficePhone
otherPhoneNumber	OtherPhone
parentId	ParentObjectId
resourceCode	Id
resourceName	Name
resourceTitleName	Title
resourceType	ResourceType

Resource Assignment

Primavera Cloud Field Name	P6 Field Name
activityCode	ActivityId

activityId	ActivityObjectId
activityType	ActivityType
actualUnits	ActualUnits
atCompletionUnits	AtCompletionUnits
plannedDuration	PlannedDuration
plannedLag	PlannedLag
plannedUnits	PlannedUnits
plannedUnitsPerHour	PlannedUnitsPerTime
projectCode	ProjectId
remainingUnits	RemainingUnits
remainingUnitsPerHour	RemainingUnitsPerTime
resourceCode	ResourceId
resourceId	ResourceObjectId
resourceRoleCode	RoleId
resourceRoleId	RoleObjectId

Resource Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
codeValueName	CodeValue
parentId	ParentObjectId

Resource Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name
codeTypeName	Name

Role

Primavera Cloud Field Name	P6 Field Name
parentId	ParentObjectId
roleCode	Id
roleName	Name

WBS

Primavera Cloud Field Name	P6 Field Name
parentId	ParentObjectId
projectCode	ProjectId
projectId	projectObjectId
sequenceNumber	SequenceNumber
wbsCode	Code
wbsName	Name

Send P6 Project Data to Primavera Cloud for Scope Field Mappings

The following tables list the field mappings for the **Send P6 Project Data to Primavera Cloud for Scope** business flow. Use this business flow to import scope data, such as WBS, activities, and resource assignments from the connected P6 environment into a Primavera Cloud project.

Activity

Primavera Cloud Field Name	P6 Field Name
activityCode	Id
activityName	Name
activityPercentComplete	PercentComplete
activityStatus	Status
activityType	Type
actualDuration	ActualDuration

Primavera Cloud Field Name	P6 Field Name
actualFinishDate	ActualFinishDate
actualStartDate	ActualStartDate
calendarId	CalendarObjectId
calendarName	CalendarName
constraintDate	PrimaryConstraintDate
constraintType	PrimaryConstraintType
durationType	DurationType
earlyFinishDate	EarlyFinishDate
earlyStartDate	EarlyStartDate
expectedFinishDate	ExpectedFinishDate
finishDate	FinishDate
lateFinishDate	LateFinishDate
lateStartDate	LateStartDate
percentCompleteType	PercentCompleteType
plannedDuration	PlannedDuration
plannedFinishDate	PlannedFinishDate
plannedStartDate	PlannedStartDate
projectCode	ProjectId
projectId	ProjectObjectId
remainingFinishDate	RemainingEarlyFinishDate
remainingDuration	RemainingDuration
remainingLateFinishDate	RemainingLateFinishDate
remainingLateStartDate	RemainingLateStart
remainingStartDate	RemainingEarlyStartDate

Primavera Cloud Field Name	P6 Field Name
resumeDate	ResumeDate
secondaryConstraintDate	SecondaryConstraintDate
secondaryConstraintType	SecondaryConstraintType
startDate	StartDate
suspendDate	SuspendDate
wbsCode	WBSCode
wbsId	WBSObjectId

Activity Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
codeValueName	CodeValue
parentId	ParentObjectId

Activity Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name
codeTypeName	Name
projectId	ProjectObjectId
scope	Scope

Calendar

Primavera Cloud Field Name	P6 Field Name
calendarExceptions	HolidayOrExecptions
calendarName	Name
projectId	ProjectObjectId
standardWorkWeek	StandardWorkWeek

Project

Primavera Cloud Field Name	P6 Field Name
calculateFloatBasedOnFinishDate	CalculateFloatBasedOnFinishDate
calendarId	ActivityDefaultCalendarObjectId
computeTotalFloatType	ComputeTotalFloatType
criticalActivityPathType	CriticalActivityPathType
criticalDuration	CriticalActivityFloatThreshold
dataDate	DataDate
description	Description
finishDate	FinishDate
ignoreOtherProjectRelationships	IgnoreOtherProjectRelationships
makeOpenEndedActivitiesCritical	MakeOpenEndedActivitiesCritical
manager	OwnerResourceId
mustFinishByDate	MustFinishByDate
outOfSequenceScheduleType	OutOfSequenceScheduleType
planStartDate	PlannedStartDate
primaveraWorkspace	PrimaveraWorkspace
projectCode	Id
projectName	Name
relationshipLagCalendar	RelationshipLagCalendar
riskMatrixId	RiskMatrixObjectId
riskMatrixName	RiskMatrixName
startDate	StartDate
startToStartLagCalculationType	StartToStartLagCalculationType
status	Status

Primavera Cloud Field Name	P6 Field Name
strgyPriorityNum	StrategicPriority
useExpectedFinishDates	UseExpectedFinishDates
websiteURL	WebSiteURL

Project Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
codeValueName	CodeValue
parentId	ParentObjectId

Project Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name
codeTypeName	Name

Relationship

Primavera Cloud Field Name	P6 Field Name
lagHours	Lag
predActivityCode	PredecessorActivityId
predActivityId	PredecessorActivityObjectId
predActivityType	PredecessorActivityType
predProjectCode	PredecessorProjectId
relationshipType	Type
succActivityCode	SuccessorActivityId
succActivityId	SuccessorActivityObjectId
succActivityType	SuccessorActivityType
succProjectCode	SuccessorProjectId

Resource

Primavera Cloud Field Name	P6 Field Name
calendarId	CalendarObjectId
calendarName	CalendarName
defaultUnitsPerHour	DefaultUnitsPerTime
emailAddress	EmailAddress
employeeNumber	EmployeeId
isActive	IsActive
officePhoneNumber	OfficePhone
otherPhoneNumber	OtherPhone
parentId	ParentObjectId
resourceCode	Id
resourceName	Name
resourceTitleName	Title
resourceType	ResourceType

Resource Assignment

Primavera Cloud Field Name	P6 Field Name
activityCode	ActivityId
activityId	ActivityObjectId
activityType	ActivityType
actualUnits	ActualUnits
atCompletionUnits	AtCompletionUnits
plannedDuration	PlannedDuration
plannedLag	PlannedLag
plannedUnits	PlannedUnits

plannedUnitsPerHour	PlannedUnitsPerTime
projectCode	ProjectId
remainingUnits	RemainingUnits
remainingUnitsPerHour	RemainingUnitsPerTime
resourceCode	ResourceId
resourceId	ResourceObjectId
resourceRoleCode	RoleId
resourceRoleId	RoleObjectId

Resource Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
codeValueName	CodeValue
parentId	ParentObjectId

Resource Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name
codeTypeName	Name

Role

Primavera Cloud Field Name	P6 Field Name
parentId	ParentObjectId
roleCode	Id
roleName	Name

WBS

Primavera Cloud Field Name	P6 Field Name
isWorkPackage	IsWorkPackage
parentId	ParentObjectId
projectCode	ProjectId
projectId	projectObjectId
sequenceNumber	SequenceNumber
wbsCode	Code
wbsName	Name

Send Planned Budget & Plan Dates from P6 to Primavera Cloud Field Mappings

The following tables list the field mappings for the **Send Planned Budget & Plan Dates from P6 to Primavera Cloud** business flow. Use this business flow to import project budget and plan dates from the connected P6 environment into a Primavera Cloud project.

Project

Primavera Cloud Field Name	P6 Field Name
description	Description
manager	OwnerResourceId
planEndDate	MustFinishByDate
plannedBudget	SummaryPlannedCost
planStartDate	PlannedStartDate
projectCode	Id
projectName	Name
status	Status

Project Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue

codeValueNAme	CodeValue
parentId	ParentObjectId

Project Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name
codeTypeName	Name

Send Primavera Cloud Project Data to P6 Field Mappings

The following tables list the field mappings for the **Send Primavera Cloud Project Data to P6** business flow. Use this business flow to send activity, project, and WBS data from Primavera Cloud to P6.

Activity

Primavera Cloud Field Name	P6 EPPM Field Name
activityCode	Id
percentCompleteType	PercentCompleteType
postPessimisticFinishDate	PostResponsePessimisticFinish
postPessimisticStartDate	PostResponsePessimisticStart
prePessimisticFinishDate	PreResponsePessimisticFinish
prePessimisticStartDate	PreResponsePessimisticStart
projectCode	ProjectId
projectId	ProjectObjectId
scopePercentComplete	ScopePercentComplete
wbsId	WBSObjectId
workPackageCode	WorkPackageId
workPackageName	WorkPackageName

Activity Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
parentId	ParentObjectId

Activity Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name
projectId	ProjectObjectId
scope	Scope

Project

Primavera Cloud Field Name	P6 EPPM Field Name
description	Description
locationName	LocationName
manager	OwnerResourceId
mustFinishByDate	MustFinishByDate
P6EPS	ParentEPSId
plannedBudget	PlannedBudget
planStartDate	PlannedStartDate
projectCode	Id
projectName	Name
status	Status
strgyPriorityNum	StrategicPriority
websiteURL	WebSiteURL

Project Code

websiteURL	WebSiteURL
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
parentId	ParentObjectId

Project Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name

Resource Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	codeTypeObject Id
codeValueCode	CodeValue
parentID	ParentObjectId

Resource Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name

WBS

Primavera Cloud Field Name	P6 Field Name
isWorkPackage	IsWorkPackage
parentId	ParentObjectId
projectCode	ProjectId
projectId	ProjectObjectId
sequenceNumber	SequenceNumber
wbsCode	Code
wbsName	Name

Send Project Actual Cost & Progress from P6 to Primavera Cloud Field Mappings

The following tables list the field mappings for the **Send Project Actual Cost & Progress from P6 to Primavera Cloud** business flow. Use this business flow to import project cost and progress dates, such as actual start date and actual finish date from P6 to a Primavera Cloud project.

Project

Primavera Cloud Field Name	P6 Field Name
actualCost	SummaryActualTotalCost
actualFinishDate	SummaryActualFinishDate

actualStartDate	SummaryActualStartDate
description	Description
manager	OwnerResourceId
percentComplete	SummarySchedulePercentComplete
projectCode	Id
projectName	Name
status	Status

Project Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjetcId
codeValueCode	CodeValue
codeValueName	codeValue
parentId	ParentObjectId

Project Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name
codeTypeName	

Send Proposed Budget & Plan Dates from Primavera Cloud to P6 Field Mappings

The following tables list the field mappings for the **Send Proposed Budget & Plan Dates from Primavera Cloud to P6** business flow. Use this business flow to export the proposed budget data for a Primavera Cloud project into the connected P6 environment.

Project

Primavera Cloud Field Name	P6 Field Name
description	Description
manager	OwnerResourceId
planEndDate	MustFinishByDate
planStartDate	PlannedStartDate
projectCode	Id
projectName	Name

proposedBudget	ProposedBudget
status	Status

Project Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
parentId	ParentObjectId

Project Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name

Send Approved Budget & Plan Dates from Primavera Cloud to P6 Field Mappings

The following tables list the field mappings for the **Send Approved Budget & Plan Dates from Primavera Cloud to P6** business flow. Use this business flow to export the approved budget data for a Primavera Cloud project into the connected P6 environment.

Project

Primavera Cloud Field Name	P6 Field Name
currentApprovedBudget	CurrentBudget
description	Description
manager	OwnerResourceId
planEndDate	MustFinishByDate
planStartDate	PlannedStartDate
projectCode	Id
projectName	Name
status	Status

Project Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
parentId	ParentObjectId

Project Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name

Send P6 Project Data to Primavera Cloud Field Mappings

The following tables list the field mappings for the **Send P6 Project Data to Primavera Cloud** business flow. Use this business flow to import P6 project data into a Primavera Cloud project.

Activity

Primavera Cloud Field Name	P6 Field Name
activityCode	Id
activityName	Name
activityPercentComplete	PercentComplete
activityStatus	Status
activityType	Type
actualFinishDate	ActualFinishDate
actualStartDate	ActualStartDate
calendarCode	CalendarObjectId
calendarId	CalendarObjectId
calendarName	CalendarName
constraintDate	PrimaryConstraintDate
constraintType	PrimaryConstraintType
durationType	DurationType
earlyFinishDate	EarlyFinishDate
earlyStartDate	EarlyStartDate
expectedFinishDate	ExpectedFinishDate
finishDate	FinishDate
isWorkPackage	IsWorkPackage
lateFinishDate	LateFinishDate
lateStartDate	LateStartDate
maximumRemainingDuration	MaximumDuration
minimumRemainingDuration	MinimumDuration

mostLikelyRemainingDuration	MostLikelyDuration
percentCompleteType	PercentCompleteType
plannedDuration	PlannedDuration
plannedFinishDate	PlannedFinishDate
plannedStartDate	PlannedStartDate
projectCode	ProjectId
projectId	ProjectObjectId
remainingFinishDate	RemainingEarlyFinishDate
remainingLateFinishDate	RemainingLateFinishDate
remainingLateStartDate	RemainingLateStartDate
remainingStartDate	RemainingEarlyStartDate
resumeDate	ResumeDate
secondaryConstraintDate	SecondaryConstraintDate
secondaryConstraintType	SecondaryConstraintType
startDate	StartDate
suspendDate	SuspendDate
wbsCode	WBSCode

Activity Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjetcId
codeValueCode	CodeValue
codeValueName	CodeValue
parentId	ParentObjectId

Activity Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name
codeTypeName	Name
projectId	ProjectObjectId
scope	Scope

Activity Risk

Primavera Cloud Field Name	P6 Field Name
activityCode	ActivityId
activityId	ActivityObjectId
projectCode	ProjectId
projectRiskId	RiskObjectId
riskCode	RiskId

Calendar

Primavera Cloud Field Name	P6 Field Name
calendarExceptions	HolidayOrExecptions
calendarName	Name
projectId	ProjectObjectId
standardWorkWeek	StandardWorkWeek

Project

Primavera Cloud Field Name	P6 Field Name
actualCost	SummaryActualTotalCost
actualFinishDate	SummaryActualFinishDate
actualStartDate	SummaryActualStartDate
annualDiscountRate	AnnualDiscountRate

atCompletionCost	SummaryAtCompletionTotalCost
calculateFloatBasedOnFinishDate	CalculateFloatBasedOnFinishDate
calendarId	ActivityDefaultCalendarObjectId
computeTotalFloatType	ComputeTotalFloatType
costPerfIndex	SummaryCostPerformanceIndexByCost
costVariance	SummaryTotalCostVariance
criticalActivityFloatThreshold	CriticalActivityFloatThreshold
criticalActivityPathType	CriticalActivityPathType
criticalDuration	CriticalActivityFloatThreshold
dataDate	DataDate
description	Description
earnedValueCost	SummaryEarnedValueByCost
estAtCompleteCost	SummaryEstimateAtCompletionByCost
estToCompleteCost	SummaryEstimateToCompleteByCost
finishDate	FinishDate
finishDateVariance	SummaryFinishDateVariance
ignoreOtherProjectRelationships	IgnoreOtherProjectRelationships
locationName	LocationName
makeOpenEndedActivitiesCritical	MakeOpenEndedActivitiesCritical
manager	OwnerResourceId
maximumMultipleFloatPoints	MaximumMultipleFloatPoints
multipleFloatPathsEnabled	MultipleFloatPathsEnabled
multipleFloatPathsEndingActivityObjectId	MultipleFloatPathsEndingActivityObjectId
multipleFloatPathsUseTotalFloat	MultipleFloatPathsUseTotalFloat
mustFinishByDate	MustFinishByDate

netPresentValue	NetPresentValue
outOfSequenceScheduleType	OutOfSequenceScheduleType
paybackPeriod	PaybackPeriod
planDuration	SummaryPlannedDuration
plannedBudget	SummaryPlannedCost
plannedValueCost	SummaryPlannedValueByCost
planStartDate	PlannedStartDate
primaveraWorkspace	PrimaveraWorkspace
projectCode	Id
projectName	Name
relationshipLagCalendar	RelationshipLagCalendar
remainingDuration	SummaryRemainingDuration
returnInvestment	ReturnOnInvestment
riskMatrixName	RiskMatrixName
schedPerfIndex	SummarySchedulePerformanceIndexByCost
scheduleCostVariance	SummaryScheduleVarianceByCost
startDate	StartDate
startDateVariance	SummaryStartDateVariance
startToLagCalculationType	StartToLagCalculatonType
status	Status
strgyPriorityNum	StrategicPriority
useExpectedFinishDates	UseExpectedFinishDates
websiteUrl	WebSiteURL

Project Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjetcId
codeValueCode	CodeValue
codeValueName	CodeValue
parentId	ParentObjectId

Project Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name
codeTypeName	Name

Relationship

Primavera Cloud Field Name	P6 Field Name
lagHours	Lag
predActivityCode	PredecessorActivityId
predActivityId	PredecessorActivityObjectId
predActivityType	PredecessorActivityType
predProjectCode	PredecessorProjectId
relationshipType	Type
succActivityCode	SuccessorActivityId
succActivityId	SuccessorActivityObjectId
succActivityType	SuccessorActivityType
succProjectCode	SuccessorProjectId

Resource

Primavera Cloud Field Name	P6 Field Name
calendarCode	CalendarObjectId

Primavera Cloud Field Name	P6 Field Name
calendarId	CalendarObjectId
calendarName	CalendarName
defaultUnitsPerHour	DefaultUnitsPerTime
emailAddress	EmailAddress
employeeNumber	EmployeeId
isActive	IsActive
officePhoneNumber	OfficePhone
otherPhoneNumber	OtherPhone
parentId	ParentObjectId
resourceCode	Id
resourceName	Name
resourceTitleName	Title

Resource Assignment

Primavera Cloud Field Name	P6 Field Name
activityCode	ActivityId
activityId	ActivityObjectId
activityType	ActivityType
actualUnits	ActualUnits
atCompletionUnits	AtCompletionUnits
plannedDuration	PlannedDuration
plannedLag	PlannedLag
plannedUnits	PlannedUnits
plannedUnitsPerHour	PlannedUnitsPerTime
projectCode	ProjectId

remainingUnits	RemainingUnits
remainingUnitsPerHour	RemainingUnitsPerTime
resourceCode	ResourceId
resourceId	ResourceObjectId
resourceRoleCode	RoleId
resourceRoleId	RoleObjectId

Resource Code

Primavera Cloud Field Name	P6 Field Name
codeValueCode	CodeValue
codeValueName	codeValue

Resource Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name

Risk

P6 EPPM Fields	Primavera Cloud Fields
cause	Cause
description	Description
effect	Effect
identifiedDate	IdentifiedDate
projectCode	ProjectId
projectId	ProjectObjectId
projectRiskStatus	Status
riskCode	Id
riskName	Name

P6 EPPM Fields	Primavera Cloud Fields
riskType	Type

Risk Impact

Primavera Cloud Field Name	P6 Field Name
projectRiskId	RiskObjectId
riskCode	RiskId
riskScoreThresholdCode	RiskThresholdLevelCode
riskScoreThresholdId	RiskThresholdLevelObjectId
riskScoreTypeId	RiskThresholdObjectId
riskScoreTypeName	RiskThresholdName

Risk Matrix

Primavera Cloud Field Name	P6 Field Name
matrixDescription	Description
matrixName	Name
riskScoringMatrixMethod	RiskScoringMethod

Risk Matrix Score

Primavera Cloud Field Name	P6 Field Name
matrixName	RiskMatrixName
probabilityThresholdLevel	ProbabilityThresholdLevel
riskMatrixId	RiskMatrixObjectId
severityOne	Severity1
severityOneLabel	Severity1Label
severityTwo	Severity2
severityTwoLabel	Severity2Label

severityThree	Severity3
severityThreeLabel	Severity3Label
severityFour	Severity4
severityFourLabel	Severity4Label
severityFive	Severity5
severityFiveLabel	Severity5Label
severitySix	Severity6
severitySixLabel	Severity6Label
severitySeven	Severity7
severitySevenLabel	Severity7Label
severityEight	Severity8
severityEightLabel	Severity8Label
severityNine	Severity9
severityNineLabel	Severity9Label

Risk Matrix Threshold

Primavera Cloud Field Name	P6 Field Name
matrixName	RiskMatrixName
riskMatrixId	RiskMatrixObjectId
riskScoreTypeId	RiskThresholdObjectId
riskScoreTypeName	RiskThresholdName

Risk Response Action

Primavera Cloud Field Name	P6 Field Name
activityCode	ActivityId
finishDate	FinishDate
plannedFinishDate	PlannedFinishDate
plannedStartDate	PlannedStartDate
projectCode	ProjectId

Primavera Cloud Field Name	P6 Field Name
projectRiskCode	RiskId
riskMitigationCode	Id
riskMitigationName	Name
riskMitigationStatus	Status
riskResponsePlanCode	RiskResponsePlanId
score	Score
startDate	StartDate

Risk Response Action Impact

Primavera Cloud Field Name	P6 Field Name
projectCode	ProjectId
riskCode	RiskId
riskMitigationCode	RiskResponseActionId
riskMitigationId	RiskResponseActionObjectId
riskScoreThresholdCode	RiskThresholdLevelCode
riskScoreTypeName	RiskThresholdName

Risk Response Plan

Primavera Cloud Field Name	P6 Field Name
isActive	IsActive
projectCode	ProjectId
projectRiskId	RiskObjectId
responseType	ResponseType
riskCode	RiskId
riskResponsePlanCode	Id
riskResponsePlanName	Name

Risk Threshold

Primavera Cloud Field Name	P6 Field Name
riskScoreTypeName	Name
scoreType	ThresholdType

Risk Threshold Level

Primavera Cloud Field Name	P6 Field Name
color	Color
costRange	CostRange
level	Level
probabilityRange	ProbabilityRange
range	Range
riskScoreThresholdCode	Code
riskScoreThresholdName	Name
riskScoreTypeId	RiskThresholdObjectId
riskScoreTypeName	RiskThresholdName
scheduleRange	ScheduleRange
thresholdType	ThresholdType
toleranceRange	ToleranceRange

Role

Primavera Cloud Field Name	P6 Field Name
parentId	ParentObjectId
roleCode	Id
roleName	Name

WBS

Primavera Cloud Field Name	P6 Field Name
isWorkPackage	IsWorkPackage
parentId	ParentObjectId
projectCode	ProjectId
projectId	projectObjectId
sequenceNumber	SequenceNumber
wbsCode	Code
wbsName	Name

WBS Spread

Primavera Cloud Field Name	P6 Field Name
ActualTotalCost	ActualTotalCost
AtCompletionTotalCost	AtCompletionTotalCost
EndDate	EndDate
PeriodType	PeriodType
PlannedTotalCost	PlannedTotalCost
StartDate	StartDate

Send Primavera Cloud Project Data to P6 for Task Field Mappings

The following tables list the field mappings for the **Send Primavera Cloud Project Data to P6 for Task** business flow. Use this business flow to send activity, task, project, and WBS data from Primavera Cloud to P6.

Activity

Primavera Cloud Field Name	P6 Field Name
activityCode	Id
activityWorkManagerTaskDateStatus	TaskStatusDates

activityWorkManagerTaskStatus	TaskStatusCompletion
activityWorkManagerTaskStatusIndicator	TaskStatusIndicator
projectCode	ProjectId
projectId	ProjectObjectId
wbsId	WBSObjectId

Activity Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
parentId	ParentObjectId

Activity Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name
projectId	ProjectObjectId
scope	Scope

Project

Primavera Cloud Field Name	P6 EPPM Field Name
description	Description
locationName	LocationName
manager	OwnerResourceId
mustFinishByDate	MustFinishByDate
P6EPS	ParentEPSId
plannedBudget	PlannedBudget
planStartDate	PlannedStartDate
projectCode	Id
projectName	Name
status	Status
strgyPriorityNum	StrategicPriority
websiteURL	WebSiteURL

Project Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
parentId	ParentObjectId

Project Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name

Resource Code

Primavera Cloud Field Name	P6 Field Name
codeTypeId	codeTypeObjectId
codeValueCode	CodeValue
parentID	ParentObjectId

Resource Code Type

Primavera Cloud Field Name	P6 Field Name
codeTypeCode	Name

WBS

Primavera Cloud Field Name	P6 Field Name
isWorkPackage	IsWorkPackage
parentId	ParentObjectId
projectCode	ProjectId
projectId	ProjectObjectId
sequenceNumber	SequenceNumber
wbsCode	Code
wbsName	Name

Work Manager Task (Lean Task)

Primavera Cloud Field Name	P6 Field Name
activityCompleteStatus	StatusCompletion

activityDateStatus	StatusDate
activityId	ActivotyObjetcId
companyName	Company
completeDate	CompleteDate
durationHours	Duration
favorite	Flag
itemCode	LeanTaskId
overdue	IsOverdue
startDate	StartDate
status	Status
tentativeDate	DueDate
type	TaskType
useCalendar	IsUseOnlyWorkDays
workManagerTaskName	Name

Microsoft Project Default Business Flow Reference

Primavera Cloud's default Microsoft Project business flows enable you to use existing Microsoft Project data to create projects in Primavera Cloud and export Primavera Cloud projects for use in Microsoft Project.

Import MSP Project Data to Primavera Cloud Field Mappings

The following tables list the field mappings for the **Import MSP Project Data to Primavera Cloud** business flow. Use this business flow to import existing Microsoft Project data to create or update a project in Primavera Cloud.

Activity Fields

Primavera Cloud Field Name	MSP Field Name
activityCode	ID
actvityName	Name
activityPriority	Priority
activityStatus	Status
activityType	Type
actualDuration	ActualDuration

Primavera Cloud Field Name	MSP Field Name
actualFinishDate	ActualFinish
actualLaborUnits	ActualWork
actualStartDate	ActualStart
atCompletionLaborUnits	Work
calendarCode	CalendarCode
calendarID	CalendarUID
constraintDate	ConstraintDate
constraintType	ConstraintType
durationPercentComplete	PercentComplete
durationType	DurationType
earlyFinishDate	EarlyFinish
earlyStartDate	EarlyStart
expectedFinishDate	Deadline
finishDate	Finish
lateFinishDate	LateFinish
lateStartDate	LateStart
percentCompleteType	PercentCompleteType
physicalPercentComplete	PhysicalPercentComplete
plannedDuration	Duration
plannedFinishDate	Finish
plannedStartDate	Start
projectCode	ProjectId
projectID	ProjectObjectId
remainingDuratioin	RemainingDuration
remainingLaborUnits	RemainingWork
startDate	Start
unitsPercentComplete	PerecentWorkComplete
wbsCode	WBS
wbsID	SummaryTaskkObjectID

Activity Code Fields

Primavera Cloud Field Name	MSP Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
codeValueName	CodeValue
parentId	ParentObjectId

Activity Code Type Fields

Primavera Cloud Field Name	MSP Field Name
codeTypeCode	Name
codeTypeName	Name
projectId	ProjectObjectId
scope	Scope

Calendar Fields

Primavera Cloud Field Name	MSP Field Name
caldendarCode	Name
calendarExceptions	HolidayOrExceptions
calendarName	Name
dayHourCount	HoursPerDay
monthHourCount	HoursPerMonth
standardWorkWeek	StandardWorkWeek
weekHourCount	HoursPerWeek
yearHourCount	HoursPerYear

Project Fields

Primavera Cloud Field Name	MSP Field Name
calendarId	CalendarUID
dataDate	StatusDate
finishDate	FinishDate
planEndDate	FinishDate
planStartDate	StartDate

Primavera Cloud Field Name	MSP Field Name
projectCode	Name
projectDefaultDurationType	DefaultTaskType
projectName	Name
startDate	StartDate

Relationship Fields

Primavera Cloud Field Name	MSP Field Name
lagHours	Lag
predActivityCode	PredecessorTaskId
predActivityId	PredecessorTaskObjectId
relationshipType	Type
succActivityCode	SuccessorTaskId
succActivityId	SuccessorTaskObjectId

Resource Fields

Primavera Cloud Field Name	MSP Field Name
calendarCode	CalendarUID
calendarId	CalendarUID
emailAddress	EmailAddress
isActive	IsActive
parentId	ParentObjectId
resourceCode	Name
resourceName	Name
resourceType	Type
unitOfMeasureId	UOMObjectId

Resource Assignment Fields

Primavera Cloud Field Name	MSP Field Name
activityid	TaskObjectId
activityType	TaskType
actualFinishDate	ActualFinish

Primavera Cloud Field Name	MSP Field Name
actucalStartDate	ActualStart
actualUnits	ActualWork
assignmenntCode	ObjectId
atCompletionUnits	Work
curveName	WorkContour
finishDate	Finish
plannedFinishDate	Finish
plannedLag	Delay
plannedStartDate	Start
plannedUnits	BudgetWork
plannedUnitsPerHour	Units
projectCode	ProjectId
remainingUnits	RemainingWork
remainingUnitsPerHour	RemainingUnitsPerHour
resourceCode	ResourceId
resoourceId	ResourceObjectId
startDate	Start

Resource Code Fields

Primavera Cloud Field Name	MSP Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
codeValueName	CodeValue
parentId	ParentObjectId

Resource Code Type Fields

Primavera Cloud Field Name	MSP Field Name
codeTypeCode	Name
codeTypeName	Name

Resource Rate Fields

Primavera Cloud Field Name	MSP Field Name
effectiveStartDate	RatesFrom
maxUnitsPerTime	MaxUnits
pricePerUnit1	StandardRate
pricePerUnit2	OvertimeRate
resourceID	ResourceObjectId

Unit Of Measure Fields

Primavera Cloud Field Name	MSP Field Name
UnitOfMeasure	UnitOfMeasure
Key	MaterialLabel

WBS Fields

Primavera Cloud Field Name	MSP Field Name
parentId	ParentObjectId
projectId	ProjectObjectId
sequenceNumber	SequenceNumber
wbsCode	WBS
wbsName	Name

Export Primavera Cloud Project Data to MSP Field Mappings

The following table lists field mappings for the **Export Primavera Cloud Project Data to MSP** business flow. Use this business flow to export project data from Primavera Cloud to Microsoft Project.

Activity Fields

Primavera Cloud Field Name	MSP Field Name
activityCode	ID
actvityName	Name
activityPriority	Priority
activityStatus	Status

Primavera Cloud Field Name	MSP Field Name
activityType	Type
actualDuration	ActualDuration
actualFinishDate	ActualFinish
actualLaborUnits	ActualWork
actualStartDate	ActualStart
atCompletionLaborUnits	Work
calendarCode	CalendarCode
calendarId	CalendarUID
constraintDate	ConstraintDate
constraintType	ConstraintType
durationPercentComplete	PercentComplete
durationType	DurationType
earlyFinishDate	EarlyFinish
earlyStartDate	EarlyStart
expectedFinishDate	Deadline
finishDate	Finish
lateFinishDate	LateFinish
lateStartDate	LateStart
percentCompleteType	PercentCompleteType
physicalPercentComplete	PhysicalPercentComplete
plannedDuration	Duration
plannedFinishDate	Finish
plannedStartDate	Start
projectCode	ProjectId
projectId	ProjectObjectId
remainingDuratioin	RemainingDuration
remainingLaborUnits	RemainingWork
startDate	Start
unitsPercentComplete	PerecentWorkComplete
wbsCode	WBS

Primavera Cloud Field Name	MSP Field Name
wbsID	SummaryTaskObjectID

Activity Code Fields

Primavera Cloud Field Name	MSP Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
parentId	ParentObjectId

Activity Code Type   Fields

Primavera Cloud Field Name	MSP Field Name
codeTypeCode	Name
projectId	ProjectObjectId

Calendar Fields

Primavera Cloud Field Name	MSP Field Name
caldendarCode	Name
calendarExceptions	HolidayOrExceptions
dayHourCount	HoursPerDay
monthHourCount	HoursPerMonth
standardWorkWeek	StandardWorkWeek
weekHourCount	HoursPerWeek
yearHourCount	HoursPerYear

Project Fields

Primavera Cloud Field Name	MSP Field Name
calendarId	CalendarUID
dataDate	StatusDate
finishDate	FinishDate
planEndDate	FinishDate
planStartDate	StartDate
projectCode	Name

Primavera Cloud Field Name	MSP Field Name
projectDefaultDurationType	DefaultTaskType
projectName	Name
startDate	StartDate

Relationship Fields

Primavera Cloud Field Name	MSP Field Name
lagHours	Lag
predActivityCode	PredecessorTaskId
predActivityId	PredecessorTaskObjectId
relationshipType	Type
succActivityCode	SuccessorTaskId
succActivityId	SuccessorTaskObjectId

Resource Fields

Primavera Cloud Field Name	MSP Field Name
calendarCode	CalendarUID
calendarId	CalendarCode
emailAddress	EmailAddress
isActive	IsActive
parentId	ParentObjectId
resourceCode	Name
resourceName	Name
resourceType	Type
unitOfMeasureId	UOMObjectId

Resource Assignment Fields

Primavera Cloud Field Name	MSP Field Name
activityid	TaskObjectId
activityType	TaskType
actualFinishDate	ActualFinish
actucalStartDate	ActualStart

Primavera Cloud Field Name	MSP Field Name
actualUnits	ActualWork
assignmenntCode	ObjectId
atCompletionUnits	Work
curveName	WorkContour
finishDate	Finish
plannedFinishDate	Finish
plannedLag	Delay
plannedStartDate	Start
plannedUnits	BudgetWork
plannedUnitsPerHour	Units
projectCode	ProjectId
remainingUnits	RemainingWork
remainingUnitsPerHour	RemainingUnitsPerHour
resourceCode	ResourceId
resoourceId	ResourceObjectId
startDate	Start

Resource Code Fields

Primavera Cloud Field Name	MSP Field Name
codeTypeId	CodeTypeObjectId
codeValueCode	CodeValue
codeValueName	CodeValue
parentId	ParentObjectId

Resource Code Type Fields

Primavera Cloud Field Name	MSP Field Name
codeTypeCode	Name
codeTypeName	Name

Resource Rate Fields

Primavera Cloud Field Name	MSP Field Name
effectiveStartDate	RatesFrom
maxUnitsPerTime	MaxUnits
pricePerUnit1	StandardRate
pricePerUnit2	OvertimeRate
resourceID	ResourceObjectId

Unit Of Measure Fields

Primavera Cloud Field Name	MSP Field Name
Key	MaterialLabel

WBS Fields

Primavera Cloud Field Name	MSP Field Name
parentId	ParentObjectId
projectId	ProjectObjectId
sequenceNumber	SequenceNumber
wbsCode	WBS
wbsName	Name

Note: The cost configured fields always export to MSP in Primavera Cloud project currency. You can append project at the end of cost configured field names to make them similar to the regular cost field names.

Tips

▸ To ensure that the WBS order in MSP is same as that of Primavera Cloud after importing a Primavera Cloud project into MSP, follow the steps outlined in the My Oracle Support article (*Doc ID 2913326.1* (*https://support.oracle.com/epmos/faces/DocumentDisplay?_afrLoop=229934264123186&id=2913326.1&_afrWindowMode=0&_adf.ctrl-state=s2qqbfgtk_4*))

Import/Export Overview

Primavera Cloud offers a few options for importing and exporting workspace data and projects.

Use the Import/Export Configuration Data feature to copy workspace data from one environment to another. You can either export and import whole workspaces, or you can create configuration sets to specify the data.   View the Import/Export Log on the Workspaces inventory panel to keep track of the configuration data imports and exports.

Import and export projects between Primavera Cloud and P6, Microsoft Project, or other Primavera Cloud environments. When importing, you can use this feature to update existing projects or create new projects. An integration connection to Microsoft Project is required for importing or exporting Microsoft Project data.

Primavera Cloud also supports the ability to import Excel spreadsheets to create or update projects in the application. Download an Excel spreadsheet template from the Projects inventory panel, complete the spreadsheet with the required project information, and then import the spreadsheet back into Primavera Cloud.

Import/Export Configuration Data Overview

The import and export Primavera Cloud configuration data feature enables you to copy a configuration set from one workspace to another. You can select to export all data, or you can create a custom data set. You should create your ideal environment in test before moving to production. If you want to export and import workspaces, you must select all data. Customized data sets can only be imported in existing workspaces.

> **Note**: You need to be an application administrator to export or import configuration data.

You can export and import the following items:

▶ Analysis Views
▶ Calendars
▶ Charts
▶ Codes
▶ Configured Fields
▶ Cost Categories
▶ Curve Profile
▶ Currencies
▶ Custom Form Mapping
▶ Custom Logs
▶ Custom Log Types
▶ Custom Workflow Mapping
▶ Dashboards
▶ Evaluation Matrix
▶ Field Labels
▶ Field Mapping Sets
▶ Folder Templates
▶ Forms
▶ Holiday Lists

▸ Locations

▸ Measures

▸ Named Views

    ▸ Activity

    ▸ Portfolio

    ▸ Portfolio Summary Scorecard

    ▸ Project

    ▸ Risk

    ▸ Strategy Summary Scorecard

    ▸ Submittal

    ▸ Task

▸ Permissions

    ▸ Files

    ▸ Ideas

    ▸ Portfolios

    ▸ Programs

    ▸ Projects

    ▸ Reports

    ▸ Workspaces

▸ Portfolios

▸ Print Layouts

▸ Programs

▸ Reasons

▸ Report Layouts

▸ Reports

▸ Restricted Configured Fields

▸ Risk Matrix Templates

▸ Risk Threshold Templates

▸ Rules of Credit

▸ Strategies

▸ Strategy Types

▸ Units of Measure

▸ User Groups

▸ Workflow Configuration

▸ Workflow Design

▸ Workspace Auto-Numbering Settings

▸ Workspace Security

▸ Workspace Settings

Notes

▸ Customized data options do not support the import or export of workspaces or CBSs.

▶ Any risk matrixes with risk thresholds from other workspaces will not be exported.

▶ If you export and then import a workflow configuration that is associated with a non-current workflow design, you may not be able to track changes between designs. To prevent unexpected behavior, update any configurations that are flagged as being associated with non-current designs before exporting data.

▶ Users without Edit permissions for restricted configured fields will receive an error message when attempting to import/export a program.

▶ When projects are imported, any restricted or non-restricted configured fields that correspond to existing configured fields will maintain their status.

Compare Workspace Import/Export and Workspace Copy

There are two main ways to create a workspace based off of data from another workspace. You can utilize the import or export of configuration data or directly copy data from one workspace to a new workspace. There are some key differences in the workspace data impacted by each option, and those differences are shown in the Workspace Data Impacts Table.

Workspace Configuration Import/Export

The import and export Primavera Cloud configuration data feature enables application administrators to copy a configuration set from one workspace to another. You can select to export all data, or you can create a custom data set. If you want to export and import workspaces, you must select all data. Customized data sets can only be imported in existing workspaces.

Workspace Copy

When creating a new workspace, the workspace copy feature enables you to create a new workspace with data from an existing workspace.

Workspace Data Impacts Table

Workspace Data	Import/Export Workspace Configuration	Create Workspace from another Workspace - Copy
Analysis Views	Yes	Yes
Calendars/Holiday Lists	Yes	Yes
CBS	No	No
Codes	Yes	Yes
Configured Fields	Yes (Excluding the fields listed in the note below)	Yes (Excluding the fields listed in the note below)
Companies	No	No
Cost Categories	Yes	No
Currencies	Yes	Yes
Curve Profiles	Yes	Yes

Custom Form Mappings	Yes	No
Custom Log Types	Yes	No
Custom Workflow Mappings	Yes	No
Dashboards & Charts	Yes	Yes
Evaluation Categories	Yes	No
Evaluation Matrix	Yes	No
Forms	Yes	No
Folder Templates	Partial Structure	Yes
Locations	Yes	Yes
Notebook Topics	No	No
Measures	Yes	Yes
Permission Sets	Yes (Excluding Custom Logs)	No
Portfolios	Yes	No
Programs	No	No
Projects	No	No
Print Layouts	Yes	No
Reasons	Yes	No
Reporting Cycles	No	Yes
Workspace Reports and Report Layouts	Yes	No
Resources	No	No
Restricted Configured Fields	Yes (Excluding the fields listed in the note below)	Yes (Excluding the fields listed in the note below)
Risk Matrix Templates	Yes	Yes
Risk Threshold Templates	Yes	Yes
Roles	No	No
Rules of Credit	Yes	Yes
Strategies	Yes	No
Strategy Types	Yes	No
Units of Measure	Yes	Yes
User Groups	Yes	No

Views and Layouts	▸ Activities ▸ Portfolios ▸ Portfolio Summary Scorecard ▸ Projects ▸ Strategy Summary Scorecard ▸ Submittals ▸ Tasks	No
Workflow Configuration and Design	Yes	No
Workspace Auto-number Settings	Yes	Yes
Workspace Field Labels	Yes	Yes
Workspace Field Mapping Set	Yes	Yes
Workspace Hierarchy (child workspaces)	No	No
Workspace ID and Name	No	Yes
Workspace Security Assignments	Yes	No
Workspace Settings	Yes	Yes

Note:

- Some configured fields are not part of Workspace Import/Export or Workspace Copy.
- Configured fields not included in Workspace Copy: Funds, Project Actuals, Budget, Budget Changes, Budget Details, Budget Transfers, Task.
- Configured fields not included in both Workspace Import/Export and Workspace Copy: Company, Program Cost Sheet, Program Budget, Program Budget Changes, Program Budget Details, Program Budget Transfers, Task Constraint.
- Restricted configured fields are only available for projects, portfolios, and programs.

Export All Configuration Data from Primavera Cloud

You should export all data if you want to export workspaces and all other supported data types including CBSs. You can only import all data into a new Primavera Cloud environment.

> **Note**: If you are using the Safari browser, before you download, you should first access your browser preferences and deselect the option to open safe files after downloading.

To export all data:

1) In the object selector, select **Workspaces**, and then select **View All Workspaces**.

2) In the table, select the root workspace row, select the ⚙ **Context** menu, and then select **Export All Configuration Data**.

3) In the **Export Data Package** dialog box, review the summary and log of exported objects, and select **Download**.

   Data is saved in a file named ConfigData.zip by default and can be renamed.

Import Configuration Data to Primavera Cloud

Import data in your production environment using zip files exported from another Primavera Cloud environment. If duplicate objects are found during the import, you will be prompted to keep the existing object, update the existing object, or create a new object.

To import data:

1) In the object selector, select **Workspaces**, and then select **View All Workspaces**.

2) In the table, select a workspace row, select the ⚙ **Context** menu, and then select **Import Configuration Data**.

3) In the **Import** dialog box, select **⋯ Browse**, select a zip file, and select **Import**.

4) In the **Import Data Package** dialog box, select the objects you want to import.

5) Choose one of the following actions to take if duplicate objects are found during the import for each data type you are importing:

   ▸ **Keep Existing**: Keeps the existing object and ignores the object from the import.
   ▸ **Update**: Updates the existing object with the object from the import.
   ▸ **Create**: Creates a new object and keeps the existing object.

6) Select **Import**, and then select **OK**.

Export Customized Configuration Data from Primavera Cloud

You can export customized data sets by specifying which objects you want to export. Customized data sets do not export workspaces or CBSs. If you want to export workspaces or CBSs, you must select all data.

> **Note**: If you are using the Safari browser, before you download, you should first access your browser preferences and deselect the option to open safe files after downloading.

To export customized data:

1) In the object selector, select **Workspaces**, and then select **View All Workspaces**.

2) In the table, select a workspace row, select the ⚙ **Context** menu, and then select **Export Configuration Data**.

3) In the **Export Configuration Data** dialog box:

   a. Select the objects you want to export, and select **Next**.

   > **Note**: When selecting specific forms or workflow configurations, the objects directly associated with the form or configuration are also exported.

   b. Review the summary and log of exported objects, and select **Download**.

   Data is saved in a zip file named ConfigData.zip by default and can be renamed.

View the Import/Export Configuration Data Log

You can view activity logs to access information on successful and failed configurations. In the Success section, you can view information on the workspace, the action attempted, and the action taken. In the Failure section, you can view an error message explaining the cause of failure.

To view the import/export log:

1) In the object selector, select **Workspaces**, and then select **View All Workspaces**.

2) In the **Import/Export Log** detail window, select an instance, select the ⚙ **Context** menu, and then select **View Log**.

3) In the **View Log** dialog box, view the successful and failed imports and exports data.

4) (Optional) Select **Download** to download the log.

   The log is saved in a file named logData.json.

Download the Import/Export Configuration Data Log

You can download activity logs to review data on successful and failed imports and exports. You can view information on the workspace, the action attempted, and the action taken for successful actions, and you can view an error message explaining the cause of failure for failed actions.

To download the import/export log:

1) In the object selector, select **Workspaces**, and then select **View All Workspaces**.

2) In the **Import/Export Log** detail window, select an instance, select the ⚙ **Context** menu, and then select **Download Log.**

3) **Open** or **Save** the file.

   The log is opened and saved in a file named logData.json.

Import/Export to P6 Overview

Oracle Primavera Cloud enables you to share project data between P6 and Primavera Cloud using the *Import from P6* and *Export to P6* features.

The Export to P6 feature allows you to export Primavera Cloud projects to P6 and the Import from P6 feature allows you to import P6 projects, including their baselines and scenarios, into Primavera Cloud.

Primavera Cloud supports project data import and export through P6 XML and XER files. XER refers to Oracle Primavera Proprietary Exchange Format (XER). It is a proprietary file format used by the P6 EPPM application.

Primavera Cloud supports baselines and scenarios exported as part of their current schedule or individual projects in XML format. Baselines and scenarios can only be exported from Primavera Cloud as individual projects in XER format.

When importing data into Primavera Cloud, you can import a valid P6 XML or XER file. Alternatively, for improved performance, you can import a compressed file containing the P6 XML or XER file. Uploading multiple P6 XML or XER files within a compressed file is not supported, and the maximum file size for import is limited to 1 GB.

While exporting, you can export multiple projects from the same workspace as an XML, XER, or a compressed XML or XER file. Once the export process completes, you can download the exported file using the Download button in the system notifications panel or Manage Services page.

You can view an import log to view details about your imported files. Access the import log from the system notifications panel or the Manage Services page.

Notes:

- After importing P6 project data into Primavera Cloud, you must reschedule the project and recalculate costs before making any project updates.
- The **Download** link for the exported file remains accessible for up to 30 days after the export job is complete. The exported file will not be available beyond 30 days.

Import P6 XML or XER Data into Oracle Primavera Cloud

Import P6 data from a P6 XML or XER file into your Oracle Primavera Cloud environment. For each project included in the file, you can specify whether you want to create a new project, update an existing project, update the selected baselines or scenarios of the project, or skip importing the project. For projects you choose to import, you can specify how individual workspace and project object types are imported into the application. When the import is complete, you can view a log file to see the results of the process. Before you import a project, ensure you have the required workspace security privileges to import and add a new project into the workspace and the required project security privilege to edit existing projects.

The P6 XML and XER import process supports a variety of P6 data objects and import actions for transferring your data to Primavera Cloud. Each import action has its own set of rules to describe how your data is impacted during the process. Refer to the P6 XML/XER Import Objects and P6 XML/XER Import Actions topics for detailed information on import objects and actions.

This topic describes the import process and the project import actions in the *Import From P6* wizard. The import process includes two main steps:

1) **Import File**: In this step, choose the file to import and specify the project import actions and import details.

2) **Configuration**: In this step, for the projects you selected to import, specify how individual workspace and project object types should be imported into the application. You can also specify conflict actions, that is, the actions to take when multiple matches are found in the application for the same kind of data.

Before You Begin

▸ If you are importing an XER file into Primavera Cloud, ensure the decimal symbol setting for currency values in P6 is set to dot(.) instead of comma(,).

▸ If you use the Standard Data Exchange Format (SDEF), use the SDEF conversion utility to convert your SDEF files to XER before importing them to Primavera Cloud. To learn how to convert SDEF files to XER, see My Oracle Support article (DOC ID: ***902710.1*** (***https://support.oracle.com/epmos/faces/DocumentDisplay?id=902710.1***)).

To import project data from a P6 XML or XER file:

1) In the object selector, select ⚒ **Projects**, and then select **View All Projects**.

2) In the **Projects** inventory panel, in the workspace tree, select a destination workspace for the imported project.

> **Notes**:
>
> ▪ You must be within the context of the workspace where you want to import the file. Selecting a workspace name in the grid will not change the workspace context.

3) Select **Actions** ▼, and then select **Import from P6**.

4) In the **Import From P6** wizard, complete the following steps:

   I. In the **Import File** step, in the **Select an XML or XER File** field, select a file to import.

   2. (Optional for XER) From the **Locale** drop-down list, select your preferred locale (language), if the locale setting in Primavera Cloud does not match your browser language setting.

      Selecting the appropriate locale encodes and preserves the content from the XER file while importing it.

      > **Note**: You can upload a valid P6 XML or XER file, or, for faster performance, upload a compressed file containing the P6 XML or XER file. Uploading multiple P6 XML or XER files within a compressed file is not supported. The maximum file size that you can import is 1 GB.

   3. In the **Project Import Actions** section, specify an **Import Action** for each project (current schedule) and any baselines and scenarios in the file.

   a. **Current Schedule**:

      ▪ **Import As**: Select either **Project**, **Baseline**, **Scenario**, or **Do Not Import**.

b. **Baseline**:
- **Import with Project**: Select the check box to indicate whether you want to import the baseline along with the project.
- **Import As**: Select either **Baseline**, **Scenario**, **Project**, or **Do Not Import**.

c. **Scenario**:
- **Import with Project**: Select the check box to indicate whether you want to import the scenario along with the project.
- **Import As**: Select either **Baseline**, **Scenario**, **Project**, or **Do Not Import**.

4. In the **Import Details** panel, depending on your chosen import option for current schedule, specify its import details.
- **Project**: Select to create a new project, update an existing one, or update the selected baselines or scenarios only, and then specify the project ID.
- **Baseline**: Select to create a new baseline or update an existing one, and then select the project with which the baseline should be imported and specify the baseline name.
- **Scenario**: Select to create a new scenario or update an existing one, and then select the project with which the scenario should be imported and specify the scenario name.
- **Do Not Import**: The project will not be imported.

Notes:
- Because of differences in how data is managed in P6 and Primavera Cloud, you cannot revert changes made to a baseline if that baseline was imported from a P6 XML file.
- Baseline categories can only be imported using P6 XML. This allows you to migrate projects and project baselines from P6 while retaining any categories that might be assigned, and to make them available to assign to other baselines in the workspace. A baseline must be imported as a baseline for baseline categories to migrate successfully. Users must have the workspace level Import XML privilege to import objects.

5) Select **Next**.
6) In the **Configuration** step, complete the following steps:
   I. In the **Workspace Data** section, specify the following for each item:
   - **Import Action**: Select an import action for each workspace item.
   - **Conflict Action**: Select an alternate action to take when multiple matches are found in the application.

Notes:
- Because configured fields must be unique across the application for each object type, they do not support promotion or conflict actions. The conflict action is set to *Not Applicable* for configured fields.
- Because workspace-level codes can be associated with multiple

object types, importing code types with different import actions may interfere with new and existing codes. For example, assume an existing code is associated with both activities and resources. Choosing to insert new activity codes and update existing resource codes may cause unintended changes to the existing code. To prevent these unintended changes, all workspace-level code import actions and conflict actions are synchronized during the import process. This ensures that all codes are imported consistently.

- Conflict action options are available for workspace data items with an import action of *Update Existing* or *Keep Existing*.

2. In the **Project Data** section, specify the following for each item:
   - **Import Action**: Select an import action for each project item.
   - **Remove from Projects**: Select this option to remove objects in Oracle Primavera Cloud that do not exist in the P6 XML or XER file. This option is available for the activities, relationships, and resources and roles project data items.

   Note: Configuration options of projects do not apply to baselines and scenarios. If baselines or scenarios are selected to be imported, the data is automatically updated during the import.

7) (Optional) Select **Save Configuration** to retain these settings for future use.
8) Start the import process:
   a. Select **Finish**.

   b. In the inventory panel, select ✕ **Close**.

   After the import process completes, you can review the import log to view data and statistics about the process, as well as any errors encountered that need to be resolved. You can access the import log from the system notification you receive when the process is complete or from the **Manage Services** page.
9) Reschedule the project and recalculate costs before making any project updates.

Export Oracle Primavera Cloud Data to P6 XML or XER

Export one or more projects and their baselines or scenarios from Primavera Cloud to a single P6 XML or XER file. You must have the required global privilege to use the export functionality. The list of projects available for export depends on the workspace or project selected in the table.

   Note: XER refers to Oracle Primavera Proprietary Exchange Format (XER). It is a proprietary file format used by the P6 EPPM application. Primavera Cloud supports baselines and scenarios exported as part of their current schedule or individual projects in XML format. Baselines and scenarios can only be exported from Primavera Cloud as individual projects in XER format.

To export project data to a P6 XML or XER file:

1) In the object selector, select ⚑ **Projects**, and then select **View All Projects**.

2) In the table, select a workspace or project row.

3) Select the **Actions** ▼ menu, and then select **Export to P6**.

4) In the **Export to P6** dialog box, in the **Select Project** field, select one or more projects.

5) From the **Export As** drop-down list, select the file type of the file you are exporting - **Compressed XML**, **XML**, **Compressed XER**, or **XER**.

> **Notes**:
>
> - The **Project ID** and the **Project Name** columns are automatically populated for your selected projects.
> - Baselines and scenarios are exported as individual projects if you export as an XER or a Compressed XER file. The **Export Baseline or Scenario Only** check box is read-only with this option.

6) (For XER or Compressed XER) In the **Export Version** section, select **15.2+** for Primavera Cloud versions between 15.2 and 20.4, and **20.4+** for versions 20.4 and above.

7) (Optional for XER) From the **Locale** drop-down list, select your preferred locale (language) if the locale setting in Primavera Cloud does not match with your browser language setting.

Selecting the appropriate locale encrypts and preserves the content from the XER file while exporting it.

8) (Optional) Select the **Scenario** column to export scenarios along with the project.

a. In the **Select Scenario** dialog box, from the **Available** column, select one or more scenarios.

b. Select ❯ **Add from Available** to add the scenarios to the **Selected** section.

9) (Optional) Select the **Baseline** column to export baselines along with the project.

a. In the **Select Baseline** dialog box, from the **Available** column, select one or more baselines.

b. Select ❯ **Add from Available** to add the baselines to the **Selected** section.

> **Notes**:
>
> - Primavera Cloud supports baselines and scenarios exported as part of their current schedule or individual projects in XML format. Baselines and scenarios can only be exported from Primavera Cloud as individual projects in XER format.
> - You can export up to 20 baselines and scenarios per project. The **Supplementary**, **Original**, and **Current** baselines are selected by default.
> - Project Baselines that are exported from the Projects Inventory page are exported with baseline categories included, if they have been assigned.
> - Baselines that are exported directly from a Baselines page or from the **Manage Baselines** dialog box are exported as projects, so there is no baseline or baseline category included.

10) (Optional) Select the check box in the **Export Baseline or Scenario Only** column if you want to export only the project baseline or scenario.

   If the check box is left unchecked, the current project schedule and any selected baselines or scenarios are exported.

11) Start the export process:

   a. Select **Export**.

   b. In the inventory panel, select ✕ **Close**.

      You will receive a system notification when the export process is complete.

12) Select **Download File** in the notification to download the exported file. You can also download the file from the **Inbox** or **Manage Services** pages.

> **Note**: The **Download** link for an exported file is available for up to 30 days after the export job is complete. The file will not be available beyond 30 days from the **Download** link.

Tips

- You can export multiple projects from the same workspace. When the export process completes, you can download the P6 XML or XER file that is generated. The file is named after the first project in the export list.
- You can export project data to an XML or XER file for an individual project by selecting the ⚙ **Context** menu next to the project, and then selecting **Export to P6**.

Differences Between XML and XER File Import

The XML and XER file import process is the same in Primavera Cloud; however, the following objects cannot be imported through XER file import.

- Risk Impact
- Risk Response Plans and Actions
- Risk Response Action Impact

- ▸ Risk Matrix
- ▸ Risk Thresholds Levels
- ▸ Risk Thresholds
- ▸ Risk Matrix Scores
- ▸ Risk Matrix Thresholds
- ▸ Baselines
- ▸ Baseline Types

Create Projects by Excel Import

You can bulk import a group of projects into the application using Microsoft Excel. Download a pre-formatted template, follow the instructions in the spreadsheet, and then import the completed template into Oracle Primavera Cloud. Using data from an outside system can save you time from manual entry. The same template can also be used to update the data of existing projects.

Download an Import Template for Importing Projects

Download a pre-formatted Microsoft Excel template to use when importing projects. The template contains all project codes and configured fields that are available to the workspace where you downloaded the template. After you download the template, enter the name, ID, and details of each project you want to import. When you are finished, you can import the updated template to create the projects in Oracle Primavera Cloud. The template can also be used to update data in projects that already exist in Primavera Cloud.

To download an import template:

1) In the object selector, select ⚬ **Projects**, and then select **View All Projects**.

2) Select **Actions** ▼ menu, and then select **Download Import Template**.

Tips
- ▸ The import template is downloaded as a Microsoft Excel file with the default file name ProjectsImportTemplate.
- ▸ The top two rows of each worksheet are required when importing data from a spreadsheet. You can delete unused optional columns, but do not change the data in these rows.
- ▸ Review the Instructions worksheet on the first tab of the spreadsheet for helpful tips on populating the import template.

Import Projects from Microsoft Excel

You can bulk import projects into the application from a Microsoft Excel (.xls or .xlsx) file. After downloading the import template, follow the instructions to create or update projects in the spreadsheet. The import will fail if there are any invalid values in the spreadsheet. You can download the spreadsheet file to view and fix the errors indicated in the error column at the end of each worksheet, and then import the file again.

You must have sufficient workspace privileges to import projects from Microsoft Excel.

To import projects from Microsoft Excel:

1) In the object selector, select ♣ **Projects**, and then select **View All Projects**.

2) In the workspace tree, select a destination workspace for the imported project.

> **Note**: You must be within the context of the workspace where you want to import the file. Selecting a workspace name in the grid will not change the workspace context.

3) Select the **Actions** ▼menu, and then select **Import**.

4) In the **Import Projects** dialog box, select ••• **Browse**, select a file, and select **Import**.

Tips

▶ You will receive a notification when the process is complete.

▶ Projects are imported with the workspace currency by default.

Microsoft Project Import/Export Overview

You can import Microsoft Project projects into your Oracle Primavera Cloud environment and export Primavera Cloud projects for use in Microsoft Project. An ***integration connection to Microsoft Project*** (see "***Add a Microsoft Project Connection***" on page 264) is required for importing or exporting Microsoft Project data.

During the import process, you have the option to create a new project using the data in the Microsoft Project XML, update an existing project, or automatically detect which action to take based on the XML filename. Imported data includes project configuration and setting data associated with the project, such as activities, calendars, relationships, resource assignments, and WBS. Microsoft Project external dependencies are not imported by Primavera Cloud.

During the export process, you can select a project from the workspace where you chose to export. The full list of data imported or exported between Primavera Cloud and Microsoft Project can be reviewed in the ***Microsoft Project Default Business Flow Reference*** (on page 321) (*Oracle Primavera Cloud Help* only).

To run the import process, you must have the required workspace security privileges to import and add new projects, and the required project security privilege to edit projects. To export a project from the application, you must have the **Export Projects** global security privilege enabled.

When the import process is complete, you can review the integration details on the Manage Services page. When the export process completes, you can download the Microsoft Project XML file that is generated from the system notification.

Only one project can be imported at a time.

Import Microsoft Project Data into Oracle Primavera Cloud

Import a Microsoft Project XML file to create a project in Oracle Primavera Cloud containing Microsoft Project activity, resource assignment, and general project data. Only one project can be imported at a time.

> **Note**: The parent workspace for the project must have a Microsoft Project connection to enable importing Microsoft Project data.

To import data from a Microsoft Project XML file:

1) In the object selector, select ♣ **Projects**, and then select **View All Projects**.
2) Configure the view settings to group by workspace.

   a. Select 🔧 **Settings**.
   b. In the **Manage Views** panel, select the **Grouping** tab.
   c. In the **Group By** list, select **Workspace**.
   d. Select **Save**.

   e. In the **Manage Views** panel, select ✕ **Close**.
3) In the workspace tree, select a destination workspace for the imported project.

4) Select **Actions** ▼, and then select **Import/Export - Microsoft Project**.
5) In the **Import/Export - Microsoft Project** dialog box, select the **Import** tab.
6) In the **Select File** field, select a Microsoft Project XML file.
7) In the **Import Action** field, select one of the following options:
   ‣ **Auto-Detect**: Select to allow the application to detect whether a new project should be created or an existing project should be updated.

   > **Notes**:
   > - The XML file name is the project ID. This ID is used to determine which action to take.
   > - If you want to update a project that has a different project ID, then select the Update Existing option.

   ‣ **Create New**: Select to create a new project using the data from the Microsoft Project XML file.
     In the **New Project ID** field, enter a unique ID for the project.
   ‣ **Update Existing**: Select to update an existing project.
     In the **Import To** field, select the project to update.

   > **Caution**: Ensure you choose the correct project. Selecting a non-related project may corrupt the data in your existing project.

8) Start the import process:
   a. Select **Import**.

   b. In the inventory panel, select ✕ **Close**.

Export Oracle Primavera Cloud Data to Microsoft Project XML

Export a project and its data from Oracle Primavera Cloud for use in Microsoft Project. The data is exported as a Microsoft Project XML file. You must have the required global privilege to use the export functionality. The list of projects available for export depends on the workspace or project selected in the table.

To export project data to Microsoft Project XML:

1) In the object selector, select ⬡ **Projects**, and then select **View All Projects**.
2) In the table, select a workspace or project row.
3) Select **Actions** ▼, and then select **Import/Export - Microsoft Project**.
4) In the **Import/Export - Microsoft Project** dialog box, select the **Export** tab.
5) In the **Select Project** field, select a project, and then select **Select**.
6) Start the export process:
   a. Select **Export**.

   ▸ In the inventory panel, select ✕ **Close**.

Tips

▸ When the export process is complete, you will receive a system notification. Select **Download MSP File** in the notification to download the Microsoft Project XML file. You can also download the XML file from the **Manage Services** page.

▸ You can also export project data to Microsoft Project XML file for an individual project by selecting the ⚙ **Context** menu next to the project, and then selecting **Export to MSP**.

Manage Services Overview

The Manage Services page lists the user-initiated processes in the application that are in progress or have completed. This page consists of the Service Status and Recurring Services tabs. The Service Status tab shows the status of the background services triggered manually from various contexts or triggered automatically as recurring services and the workflow instance details. The Recurring Services tab enables you to configure services that need to run at regular intervals.

Monitor Service Status

The Service Status tab on the Manage Services page provides a summary of the progress and completion of background services initiated by the users. It also provides the summary of recurring services configured to run automatically in the background. Background services include schedule, level, risk analysis, global change, set as current schedule, import, export, measures, recalculate cost, and integration service types. You can filter for a service type using the predefined filters in the filter panel or specify additional filtering criteria in the Filter By section. View a quick summary of the selected service type, context, start and end date, and the status in the grid. Use the preview panel to view additional details about the service, such as its frequency, or to terminate a running service.

To monitor the service status:

1) *Navigate to the Manage Services page* (see page 362).
2) Select the **Service Status** tab, and then select a service.

> **Note**: You can apply filters to reduce the number of services displayed on the page. For more information, see *Manage Services Filters* (on page 350).

Tips

▶ To terminate a service while it is still running, select a service that is in progress, select **Terminate** in the preview panel, and then select **Yes** in the confirmation dialog box. You can terminate the following services: import, export, level, risk analysis, measures, and schedule.

▶ Application administrators can view all background services that all users have initiated. Users who are not application administrators can only view the background services they have initiated.

▶ Many background services that are complete include a log you can view to see additional details about the service. To view the details of the completed service, select **View Log** or **View Details** in the preview panel .

▶ To quickly set up a recurring service, select **Set up recurring schedule** in the **Schedule** field in the preview panel, or select 🖉 **Edit** to edit the recurring service schedule if it was scheduled already.

Configure Recurring Services

Select the Recurring Services tab on the Manage Services page to configure recurring services that need to run at regular intervals for schedule, level, and risk analysis. You can configure schedule recurring services and level and risk analysis services for projects. You can define the frequency of the service and view the run history and log on this page.

You can also view recurring service details for measures on the Recurring Services tab, including general service information and job history. The configuration of measure recurring services must be done in the workspace Measures dictionary.

To configure a recurring service:

1) *Navigate to the Manage Services page* (see page 362).

2) Select the **Recurring Services** tab.

3) Select ╋ **Add**.

4) In the **Add Recurring Service** wizard, complete the following steps:

   ▸ In the **General** step, enter general information for the service type, such as name and frequency, including the day and time of recurrence, and then select **Next**.

   ▸ In the **Assign Projects** step, select the projects on which the service is scheduled to run, and then select **Next**.

   ▸ In the **Options** step:

     ▪ For schedule service type, specify the **Schedule Settings** and **Data Date** options, and then select **Add**.

     ▪ For level service type, specify the **Schedule Settings**, and then select **Add**.

     Note: The Options step is only available for schedule and level service types.

Tips

▸ Use the preview panel to view the details for the selected recurring service. The following tabs are available:

   ▸ **General**: Use this tab to view general information about the service, such as its schedule and recurrence settings.

   ▸ **Projects**: Use this tab to view the project on which the service type is scheduled to run.

   ▸ **Service Details**: Use this tab to view the service details, such as the **Schedule Settings** and the **Data Date** of the scheduled service type.

   ▸ **Job History**: Use this tab to view the run history and log of the service type.

▸ When multiple risk analyses as recurring services are triggered simultaneously for a large number of projects, the analysis may fail and need to be retried. If the risk analysis failed but is being automatically retried, the job will display RETRIED status.

▸ To terminate a recurring service while it is still running, navigate to the **Job History** tab of the preview panel, select the ⚙ **Context** menu for a service that is in progress, select **Terminate**, and then select **Yes** in the confirmation dialog box. You can terminate the following services: import, export, level, risk analysis, and schedule.

▸ You can apply filters to reduce the number of recurring services displayed on the page. For more information, see *Manage Services Filters* (on page 350).

Manage Services Filters

Filter for a service type on the Manage Services page using the filter panel on the Service Status or Recurring Services tabs. You can use a predefined filter or specify additional filtering criteria in the Filter By section.

Filtering options for **Service Status**:

a) Predefined filters:

   ▸ **All**: Shows all the available services. This is selected by default.

   ▸ **In Progress:** Shows the services that are currently running.

‣ **Completed**: Shows the services that are completed.

‣ **Baselines & Scenarios**: Shows the baselines and scenarios that are imported or exported.

‣ **Global Change**: Shows all global change services.

‣ **Export**: Shows all project export services. You can also download a project export service.

‣ **Evaluation**: Shows all evaluation score services.

> **Note**: If you are using the Safari browser, before you download, you should first access your browser preferences and deselect the option to open safe files after downloading.

‣ **Import**: Shows all import services for a project or other objects.

‣ **Integration**: Provides a list of running, complete, or failed integration jobs for each integration type, such as P6 EPPM or Microsoft Project. You can also download an integration job.

> **Note**: If you are using the Safari browser, before you download, you should first access your browser preferences and deselect the option to open safe files after downloading.

‣ **Level**: Shows all level services.

‣ **Measures**: Shows all measure services.

‣ **Recalculate Cost**: Shows all recalculate cost services.

‣ **Recalculate Project Usage**: Shows all recalculate project usage services for activities, resources, and roles.

‣ **Replace Resource**: Shows all replace resource task services.

‣ **Request Spread Data**: Shows all requests for spread data services.

‣ **Risk Analysis**: Shows all the risk analysis services.

‣ **Schedule**: Shows all the schedule services.

‣ **Merge**: Shows the results of all Merge service processes.

‣ **Set as Current Schedule**: Shows all the set as current schedule services.

‣ **Store Period Performance**: Shows all the stored period performance services.

‣ **Sync CBS**: Shows details of CBS Sync service for projects with a CBS different from their workspace CBS.

‣ **Move Workspace**: Shows details for move workspace to another workspace.

‣ **Currency Rate**: Shows the results of an exchange rate recalculation service.

‣ **Move Project**: Shows details for a project move.

b) **Filter By** options:

‣ **Project**: Applies to the services in the project context and shows all projects to which the user has access.

‣ **Portfolio**: Applies to the services in the portfolio context and shows all portfolios to which the user has access.

▸ **Timeframe**: Filters data by time frame. View service status for all dates, today, last 7 days, last 30 days, or set your custom time frame.

▸ **Subject Area**: Applies to imports. Shows all entities that support Microsoft Excel and P6 XML import.

▸ **Business Flow**: Applies to integration jobs. Shows all business flows available for P6 EPPM or Microsoft Project integrations.

▸ **Integration Type**: Applies to integration type services. Choose either P6 EPPM or Microsoft Project.

Filtering options for **Recurring Services**:

a) Predefined filters:

▸ **All**: Shows all services that are configured to occur periodically. This is selected by default.

▸ **Enabled**: Shows all the enabled services.

▸ **Schedule**: Shows all schedule services.

▸ **Level**: Shows all level services.

▸ **Risk Analysis Log**: Shows all risk analysis services.

▸ **Measures**: Shows all measure services.

▸ **Evaluation**: Shows all evaluation score services.

b) **Filter By** options:

▸ **Project**: Shows all projects to which the user has access.

▸ **Added By**: Shows all users who added the services.

Test Network Speed

You can run a network test to determine network speed and latency. This information is used to troubleshoot network issues and might be required when you contact My Oracle Support.

The network test analyzes two network impacts:

Speed: The average data rate for the transfer of a file in megabits per second (Mbps).

Latency: The amount of time in milliseconds (msec) before the transfer of data begins.

To test your network:

1) In the header, select your username.
2) On the **User** menu, select **Network Test**.
3) In the **Network Test** dialog box, select **Start Network Test**.

Set the Locale

The default language is determined by the browser locale of the user.

To change the language setting:

1) Enter the URL for the application in your browser.

2) At the end of the URL, enter: **?locale**=*<locale code>*

   If the URL already contains a question mark, use an ampersand instead. For example: **&locale**=*<locale code>*

   The locale codes are as follows:

   ‣ de = German
   ‣ en = English
   ‣ es = Spanish
   ‣ fr = French
   ‣ it = Italian
   ‣ ja = Japanese
   ‣ ko = Korean
   ‣ nl = Dutch
   ‣ pt_BR = Brazilian Portuguese
   ‣ ru= Russian
   ‣ zh_CN = Simplified Chinese
   ‣ zh_TW = Traditional Chinese

   For example, to change the language to German, the URL would be
   https://servername:port/web/p/inbox?ctx=none&app=inbox&locale=de.

3) Bookmark this URL for future access.

> **Note**: When you navigate to a different page from the one referenced with the locale parameter, the parameter is removed from the URL. However, it will be remembered for the rest of the login session.

Appendices

Appendix of Referenced Navigation Steps

Navigate to the WBS page

a) In the object selector, select a project.

b) In the sidebar, hover over ▤ **Schedule** or ▧ **Scope**, and select **WBS**.

Navigate to the Activities page

1) In the object selector, select a project or program.

2) In the sidebar, hover over ▤ **Schedule**, and select **Activities**.

Navigate to the project Activities page

1) In the object selector, select a project.

2) In the sidebar, hover over ▤ **Schedule**, and select **Activities**.

Navigate to the Baselines page

a) In the object selector, select a project.

b) In the sidebar, hover over ▧ **Scope** or ▤ **Schedule**, and select **Baselines**.

Navigate to the Baselines or Activities page

1) In the object selector, select a project.

2) In the sidebar, hover over ▧ **Scope** and select **Baselines,** or hover over ▤ **Schedule** and select **Baselines** or **Activities**.

Navigate to the Schedule Comparison page

1) In the object selector, select a project.

2) In the sidebar, hover over ▤ **Schedule**, and select **Schedule Comparison**.

Navigate to the workspace resource page

a) In the object selector, select a workspace.

b) In the sidebar, hover over ⚮ **Resources**, and select **Resource List**.

Navigate to the project resources page

a) In the object selector, select a project.

b) In the sidebar, hover over ⧉ **Resources**, and select **Resource List**.

Navigate to the workspace or project resources page

a) In the object selector, select a workspace or project.

b) In the sidebar, hover over ⧉ **Resources**, and select **Resource List**.

Navigate to the workspace role page

a) In the object selector, select a workspace.

b) In the sidebar, hover over ⧉ **Resources**, and select **Role List**.

Navigate to the project roles page

a) In the object selector, select a project.

b) In the sidebar, hover over ⧉ **Resources**, and select **Role List**.

Navigate to the workspace or project roles page

a) In the object selector, select a workspace or project.

b) In the sidebar, hover over ⧉ **Resources**, and select **Role List**.

Navigate to the workspace resource assignments page

a) In the object selector, select a workspace.

b) In the sidebar, hover over ⧉ **Resources**, and select **Assignment List**.

Navigate to the project or program resource assignments page

a) In the object selector, select a project or program.

b) In the sidebar, hover over ⧉ **Resources** or ⧉ **Schedule**, and select **Assignment List**.

Navigate to the workspace resource analysis page

a) In the object selector, select a workspace.

b) In the sidebar, hover over ⧉ **Resources**, and select **Analysis**.

Navigate to the project or program resource analysis page

a) In the object selector, select a project or program.

b) In the sidebar, hover over ⧉ **Resources**, and select **Analysis**.

Navigate to the files page

a) In the object selector, select a project, portfolio, program, or idea.

b) In the sidebar, hover over ⌂ **Files**, and select **File List**.

Navigate to the project files page

a) In the object selector, select a project.

b) In the sidebar, hover over ⌂ **Files**, and select **File List**.

Navigate to the project or portfolio files page

a) In the object selector, select a project or portfolio.

b) In the sidebar, hover over ⌂ **Files**, and select **File List**.

Navigate to the project Details page

a) In the object selector, select a project.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Details**.

Navigate to the project settings page

a) In the object selector, select a project.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Settings**.

Navigate to the program settings page

1) In the object selector, select a program.

2) In the sidebar, select ⚙ **Summary & Settings**.

a) On the **Summary & Settings** menu, select **Settings**.

Navigate to the program codes page

1) In the object selector, select a program.

a) In the sidebar, select ⚙ **Summary & Settings**.

b) On the **Summary & Settings** menu, select **Codes**.

Navigate to a dictionary page

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Dictionaries**, and then select a dictionary item.

Navigate to the Calendars dictionary page

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Calendars**.

Navigate to the Codes dictionary page

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Codes**.

Navigate to the Curve Profiles dictionary page

1) In the object selector, select a workspace.

2) In the sidebar, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Curve Profiles**.

Navigate to the Units of Measure dictionary page

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings.**

c) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Units of Measure**.

Navigate to the Locations dictionary page

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Locations**.

Navigate to the Currencies dictionary page

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Currencies**.

Navigate to the project Calendars dictionary page

a) In the object selector, select a project.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Calendars**.

Navigate to the project Codes dictionary page

a) In the object selector, select a project.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Codes**.

Navigate to an object configuration page

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Defaults & Options**, and then select an object.

Navigate to the Activity configuration page

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Activity**.

Navigate to the File configuration page

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **File**.

Navigate to the Project configuration page

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Project**.

Navigate to the Program configuration page

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Program**.

Navigate to the Resource/Role configuration page

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Resource/Role**.

Navigate to the Resource Assignment configuration page

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Resource Assignment**.

Navigate to the WBS configuration page

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **WBS**.

Navigate to the Manage Services page

a) In the header, select your username.

b) On the **User** menu, select **Manage Services**.

Navigate to the Preferences page

a) In the header, select your username.

b) On the **User** menu, select **Preferences**.