

Oracle  
**Primavera Cloud  
Ideas User Guide**

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Oracle Primavera Cloud Ideas User Guide

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## About This Guide

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This guide explains how to use Oracle Primavera Cloud to manage ideas.

Project managers, contractors, and users who want to submit, evaluate, and manage ideas should read this guide.

Ideas are created, managed, and evaluated using the Ideas context.

## Ideas Overview

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Primavera Cloud enables you to identify ideas worth accepting and potentially implementing as projects. Employees, contractors, and users submit new ideas for organizational goals or improvements, and the appropriate users make decisions to progress the idea through the designated idea workflow. The application provides powerful tools for idea processing and analysis, including evaluation categories and an investor map, that enable owners to make high-level quantitative comparisons between submitted ideas.

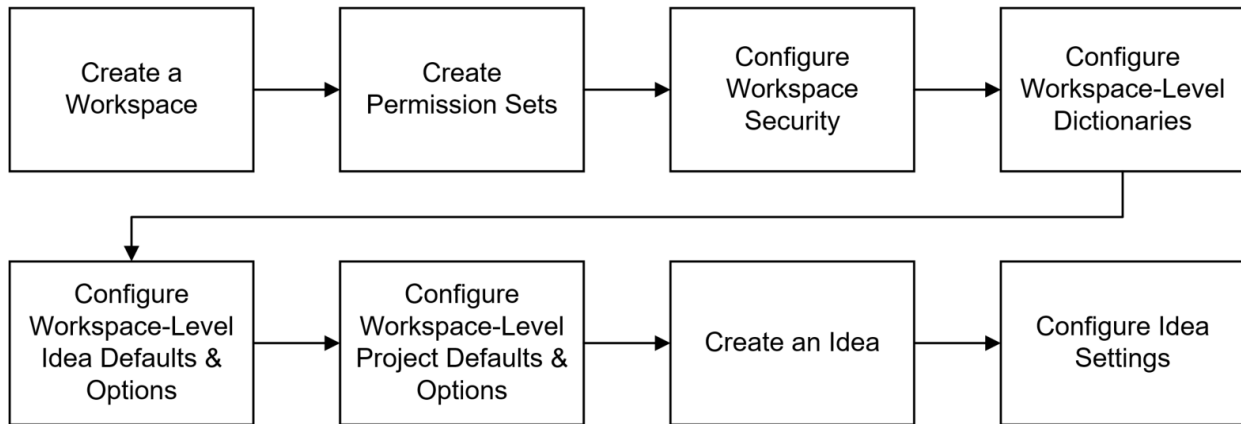
### Key Features

- ▶ Designate idea routers and owners at the workspace level.
- ▶ Create users in Global Admin with the Idea Submitter Only user type. These users do not need a license, but they will be able to log in to the application and submit new ideas for their companies.
- ▶ Ideas comes with default forms and a default idea workflow, but you can use the Workflows and Forms app at the workspace level to customize the ideas creation and workflow process. You can create new Add Idea and Edit Idea forms, or view and edit the system form. You can also use the Workflows and Forms app to create custom idea workflows, or view and edit the system workflow.
- ▶ You can create project proposals directly from approved ideas when using the default ideas workflow if a project proposal workflow is configured.
- ▶ Upload files using the Files app to provide further information about an idea.
- ▶ Determine an evaluation score for an idea to help with idea processing and decision making.
- ▶ Display configurable idea data on the Investor Map to assist idea owners as they evaluate and make a decision on an idea. Additionally, decision makers can use the Investor Map when deciding which ideas from a workspace to prioritize when implementing new projects.
- ▶ Use the Related Items app to link an idea to similar ideas and projects. Additionally, after a project proposal has been created from an accepted idea, use the Related Items app to link the idea to the new project proposal. Links are automatically generated when using the default ideas workflow to create a project proposal.

## Get Started With Ideas

This section details the basic configuration of settings you will need before using Ideas. Depending on how you plan to use Ideas, some of these settings may be optional. Most settings can be configured in any sequence.

Complete the following steps to get started with Ideas:



### Create a Workspace

Workspaces function as the hierarchical structure of your organization's projects, portfolios, programs, and ideas. Settings configured at the workspace level are inherited by the objects created within the workspace.

Ideas can only be created within the context of a workspace. To begin creating ideas, you should first create a workspace to contain your organization's ideas.

### Create Permission Sets

Permission sets are collections of permissions that can be assigned to individual users or user groups, granting them access to objects and functionality across Primavera Cloud. Created at the workspace level, permission sets determine the level of access within the workspace, including the workspace itself. Configure permission sets to grant users the ability to add, edit, delete, view, or enable objects and functionality. See ***Security Permissions for Ideas*** (on page 13) for more information on the permissions specific to Ideas.

### Configure Workspace Security

Assign the workspace permission sets that you created to determine a user's ability to perform certain functions related to ideas. See ***Assign a User or User Group Access to a Workspace*** (on page 24) for more information.

### Configure Workspace-Level Dictionaries

Dictionaries are repositories of items that can be used across the application, without having to create the same items for each object. Stored at the workspace level, dictionary items can be used in the objects within the workspace.

Use the following workspace-level data to organize and evaluate the ideas in a workspace:

- ▶ **Codes:** Codes provide the ability to categorize objects in Primavera Cloud. By setting the workspace-level codes for ideas, you can determine which codes will be available to assign to created ideas. You can create new codes for a workspace or assign codes from parent workspaces to be available in the child workspace. See **Codes Overview** (on page 26) for more information.
- ▶ **Evaluation Categories:** If users will be evaluating ideas to determine which ones in a workspace should be prioritized for project implementation, the evaluation score can help users rank their ideas. The evaluation score can be determined for all ideas using evaluation categories determined at the workspace level. See **Evaluation Categories Overview** (on page 29) for more information.

### Configure Workspace-Level Idea Defaults & Options

The Defaults & Options section specifies the default configuration of settings for each object in a workspace. Each new instance of a particular object in the workspace will inherit the attributes set in Defaults & Options.

Configure the following workspace-level idea defaults and options to determine the auto-numbering defaults and field labels, as well as to control the idea progression in a workspace:

- ▶ **Auto-Numbering:** Unique IDs are required for objects in Primavera Cloud. You can set the auto-numbering default values for ideas to determine the automatic ID pattern. See **Configure Auto Numbering Defaults for Ideas** (on page 31) for more information.
- ▶ **Routers and Owners:** Routers and owners are two important idea decision-makers that should be set at the workspace level before ideas are created and submitted. Routers receive submitted ideas and evaluate them to determine whether the idea should be progressed. If the idea is worth progression, then routers will assign an idea owner, who will then decide if an idea should be accepted and turned into a project proposal. See **Configure Routers and Owners for Ideas** (on page 31) for more information.
- ▶ **Field Labels:** You can access idea field labels and descriptions. You can also update field labels to suit your business needs. See **Access a Standard Field Description** (on page 32) for more information.
- ▶ **Configured Fields:** You can also create additional fields to use with an object if the existing fields do not suit your business needs. Configured fields are useful if you will be creating an idea to project field mapping that will determine the information carried from an accepted idea to a project proposal. See **Add an Idea Field** (on page 32) for more information.
- ▶ **Workflow Actions:** Ideas progress through a submission and approval workflow. You have several options for configuring the idea workflow actions in a workspace. Primavera Cloud comes with a default workflow that involves idea creation and submission, owner assignment, and a final decision on acceptance and a project proposal. However, you can also view and edit system workflows provided in the Workflows and Forms app, or you can create a completely custom idea workflow if the default and system workflows don't suit your business needs. Then, in the workspace Defaults & Options, you can set the workflow that you want to be initiated after an idea is submitted. See **Idea Workflow Overview** (on page 33) for more information.

- ▶ **Forms:** Set the Add Idea Form and the Edit Idea Form. The Add Idea Form will be the form that users must populate with information when they first create an idea. The Edit Idea Form is the form that users with the correct permissions will complete when they want to edit the information for the idea. This form is also the one that will appear on the Idea Home page. You have two options for the forms that you set for ideas: system forms that can be viewed and edited, or completely custom forms. See **Set the Add and Edit Idea Forms** (on page 52) for more information.

### Configure Workspace-Level Project Defaults & Options

If you intend on utilizing the default workflow in Primavera Cloud as well as the ability to create a project proposal from an accepted idea, then you should also configure the following workspace-level project defaults and options:

- ▶ **Field Mapping:** You must configure a project field mapping to determine the information that is carried over from an accepted idea to a project proposal, which will then be configured in the project proposal workflow created. See **Configure Project Field Mapping** (see "**Configure Project Field Mappings**" on page 54) for more information.
- ▶ **Workflow Actions:** The project proposal workflow actions determine the process that a project proposal will go through in order to become a project. In Primavera Cloud, a project proposal cannot be created unless you first configure the project proposal approval workflow actions. See **Configure the Approve Project Proposal Workflow Action** (on page 56) for more information.
- ▶ **Forms:** Determine the Add Project Proposal form that users will complete when a new project proposal is added. See **Set the Add Project Proposal Form** (on page 54) for more information.

### Create an Idea

Begin creating ideas within the workspace. See **Add an Idea** (on page 56) for more information.

### Configure Idea Settings

Configure a created idea's individual permission sets and codes before progressing it through the workflow.

- ▶ **Security:** Assign the idea and file permission sets for the idea. The available permission sets are the ones that you configured in the Idea and File permission sets of the workspace and the parent workspace that the idea is in, as well as the Administrator and View Only security permission. See **Assign a User or User Group Access to an Idea** (on page 66) for more information.
- ▶ **Codes:** Assign available workspace-level codes to the specific idea. See **Assign a Code to an Idea** (on page 67) for more information

After configuring the settings discussed in this topic, users should be ready to progress new ideas through the idea workflow. If you need to add or change settings, consult the topics contained in this section.

## Configure Permission Sets

Configure the idea and files permission sets to determine user access to specific ideas and their files. Configure permission sets for users in the workspace that will be using the ideas function. Relevant workspace-level permissions include the ability to add an idea in a workspace and the ability to create a project proposal if you are turning accepted ideas into project proposals

## Security Permissions for Ideas

The following security permissions provide users the ability to configure ideas in a workspace and enable access to the objects and functionality within Ideas. **Create a workspace permission set** (on page 17) to enable access to relevant workspace-level data, including dictionaries and object defaults that let you add, evaluate, and categorize the idea, as well as determine the idea workflow for a workspace. Note that only workspace administrators can add field mappings. **Create a file permission set** (on page 16) to enable users to add, edit, and download files and folders in the Files app of an idea. **Create an idea permission set** (on page 14) to enable users to view, edit, and progress an idea through an idea workflow.

To set up and use Ideas, users should have the following permissions:

### Workspace Permissions

Category	Permissions
Configuration	Codes, Configured Fields, Evaluation Categories, Field Labels, Forms, Workflow Configuration, Workflow Design, Workspaces (Edit)
General	Ideas, Project Proposals

### File Permissions

Category	Permissions
File	Download Files, Files, Folders


### Idea Permissions

Category	Permissions
Idea	Accept, Assign Owner, Evaluation, Idea, Reject, Reopen, Set As Draft

## 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**.

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### 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.

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## 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** (see "**Accept an Idea**" on page 62), **Withdraw an Accepted Idea workflow action** (see "**Withdraw an Accepted Idea**" on page 63)

### 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** (see "**Assign an Idea Owner**" on page 58)

### 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** (see "**Rank a Project, Program, or Idea Against Evaluation Categories**" on page 60)

### 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** (see "**Submit an Idea**" on page 57), **Related Items** (see "**Related Items Overview**" on page 82), **Idea Codes** (see "**Assign a Code to an Idea**" on page 67)

### Reject

Enables users to reject a submitted idea.

Applies to: **Reject Idea workflow action** (see "**Reject an Idea**" on page 59)

### Reopen

Enables users to reopen a rejected idea for reconsideration.

Applies to: **Reopen Idea workflow action** (see "**Reopen an Idea**" on page 59)

### Set As Draft


Enables users to set an idea as a draft.

Applies to: **Set Idea as Draft workflow action** (see "**Set an Idea as Draft**" on page 65)

## 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**.

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### 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.

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## 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.

## 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.

## **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.

## **Configure Workspace Security**

Set the workspace-level permission set that you created to apply to all users in the workspace that you will be creating ideas in.


## **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.

## Configure Dictionaries

Configure workspace-level dictionary settings that pertain to ideas. Codes can be created at the workspace level to later be assigned to individual ideas. Evaluation categories can be configured to evaluate ideas in a workspace and determine which ones to implement as ideas.

## 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 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

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 112).
- 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 112).
- 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**




## Evaluation Categories Overview

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.

### 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 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. Weight 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**

## Configure Defaults & Options



Configure idea Defaults & Options to determine idea organization, field labels, and progression through the idea workflow. Configure project Defaults & Options to enable the settings that will allow for a project proposal to be created from an accepted idea.

### Configure Idea Defaults & Options

#### 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 Routers and Owners for Ideas

Routers and owners are responsible for evaluating ideas and progressing them through your organization's idea workflow by assigning owners, accepting, and rejecting submitted ideas. You must assign users as idea routers and owners at the workspace level. The assigned users are responsible for processing and managing all of the ideas created in that workspace.

To set routers and owners 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** tab, in the **Routing** section, select the **Routers** and **Owners** fields to set users or user groups as the routers and owners for ideas in this workspace.
- 5) Select **Save**.
- 6) In the **Summary & Settings** panel, select **✕ Close**.

---

### 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 113).
- 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**

---

### 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.

### Idea Workflow Overview

Ideas are processed using a submission and approval workflow. Primavera Cloud provides users with three options for the idea workflow:

#### Default Idea Workflow

The default idea workflow is the workflow that comes set in Primavera Cloud. The default workflow represents the standard idea process workflow. The default workflow is first initiated when an idea is submitted. The submitted idea is sent to the idea router, who assigns an idea owner. The owner then decides whether the idea should be accepted and turned into a project proposal, or rejected.

#### System Idea Workflow

System workflows are workflows that the application provides in the Workflows and Forms app. The system idea workflow closely resembles the default idea workflow. However, unlike the default workflow, the system workflow can be viewed, duplicated, and customized before being set as the idea workflow for the workspace. To customize the system idea workflow, see ***Built-in System Forms, Workflow Design, and Workflow Configuration for Ideas*** (on page 35).

#### Custom Idea Workflow

Users also have the ability to create new idea workflows using the Workflows and Forms app. You might choose to create a custom idea workflow if the default and system workflows do not suit your business needs. To learn about custom idea workflows, see ***Custom Idea Workflow Overview*** (on page 38).

## Default Idea Workflow Overview

Primavera Cloud provides a default workflow for processing ideas. First, users, contractors, or other business contacts create an idea and specify the idea's business case. After an idea contains sufficient information, the idea creator can submit the idea for further processing by routers and owners. At any point during the default idea workflow, an idea status can be set as Draft, which allows you to either process the idea through the workflow again or delete the idea if it is no longer required. Only administrators can edit the idea details and idea evaluation score while it is progressing through the default idea workflow.

### Idea Routing

Submitted ideas are initially processed and evaluated by idea routers. Routers are responsible for screening submitted ideas and may delete an idea or reject an idea, providing a reason for the rejection. For example, a router might reject a submitted idea if it requires more information or if it is a duplicate of another idea in the system. If an idea is ready for further processing, the router assigns an idea owner who performs further idea evaluation and decides whether or not the idea should be accepted or rejected.

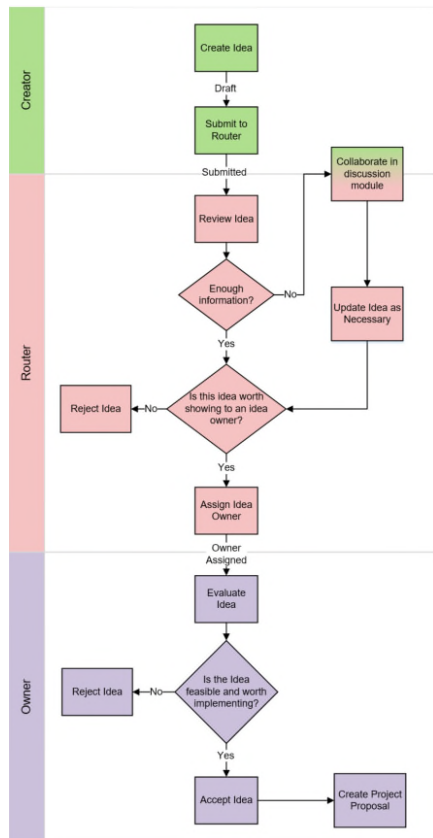
### Idea Approval

After an idea router assigns an owner to an idea, the idea owner is responsible for evaluating the idea further. After conducting an evaluation, the idea owner decides to accept, reject, or delete the idea. If an idea is accepted, your organization can begin to work on implementing the idea, or withdraw acceptance at a later date. If an idea is rejected it is considered infeasible by the assigned idea owner and can be opened for reconsideration later.

### Create Project Proposal

Accepted ideas can then be implemented into project proposals in the default idea workflow. In order to create a project proposal from an accepted idea, you must first **Configure Project Field Mappings** (on page 54), **Set the Add Project Proposal Form** (on page 54), and **Configure the Approve Project Proposal Workflow Action** (on page 56). If a project proposal workflow is not set, you will get an error when attempting to create a project proposal from an accepted idea.

The following diagram represents how an idea might progress through the default workflow:



### Built-in System Forms, Workflow Design, and Workflow Configuration for Ideas

In Primavera Cloud, the Workflows and Forms app enables you to customize the processes to create and edit certain objects using forms, workflow designs, and workflow configurations.

**Forms** are used to collect information from users and present information to users.

**Workflow designs** define the steps and tasks that workflows follow to update the objects that they run against.

**Workflow configurations** are like collections of settings that make workflow designs work. They're also where you tell the system which forms to use during various steps in workflows. A workflow design, plus a workflow configuration, plus any required forms, make up a complete workflow.

Some objects, like ideas, have built-in forms, workflow designs, and workflow configurations that you can view and customize. In the Workflows and Forms app, these built-in elements are indicated by "**(System)**". For example, in the **Workflows and Forms** app, on the **Form Design** page, you'll notice that some of the forms' names include "(System)". These are the built-in system forms that come with Primavera Cloud.

In Primavera Cloud, Ideas have all of these built-in elements—system forms, a system workflow design, and a system workflow configuration.

## System Idea Workflow Design

On the **Form Design** page of the Workflows and Forms app, you can view the built-in **Idea Workflow Design (System)**. This workflow design defines a sequence of steps and tasks that Primavera Cloud can use to set up an idea.

## System Idea Workflow Configuration

On the **Workflow Configuration** page of the Workflows and Forms app, you can view the built-in **Idea Workflow Configuration (System)**. This workflow configuration defines the settings required to make the system Idea Workflow Design work.


## System Idea Forms

On the **Form Design** page of the Workflows and Forms app, you can view several system idea forms:

- ▶ **Add Idea Form (System)**: This is the form that appears when a user adds an idea to the idea list.
- ▶ **Edit Idea Form (System)**: This is the form that appears when a user edits an idea on the Idea Home page.
- ▶ **New Project Form (System)**: This form is used in the Idea Workflow Configuration (System) to create a project from an approved idea. It is linked to the Create Project task in the Create Project Step of the Idea Workflow Configuration (System).
- ▶ **Idea Amend Form (System)**: This form is linked to the Edit Form task in the Edit Idea Step of the Idea Workflow Configuration (System).
- ▶ **Idea Decision Form (System)**: This form is linked to the Accept, Reject or Review Idea task in the Owner Review Idea Step of the Idea Workflow Configuration (System).
- ▶ **Idea Owner Form (System)**: This form is linked to the Idea Owner Form task in the Assign Owner Step of the Idea Workflow Configuration (System).

## Assigning System Forms and Workflows

Although a complete system idea workflow is included with Primavera Cloud, it is not the default workflow that runs when a user sets up an idea.

To set the system ideas workflow, navigate to the workspace where you want to set the system workflow, and select  **Summary & Settings**. Under **Defaults & Options**, select **Idea**, and then select the **Workflow Actions** tab.

By default, the **Submit** workflow action is set to **Default**. Unlike the **Idea Workflow Configuration (System)** workflow, you cannot view the steps of this workflow, but the **Idea Workflow Configuration (System)** workflow closely replicates it. The system workflow gives you the ability to view every aspect of the process and to adjust it as needed. To set the Idea Workflow Configuration (System) workflow to run instead of the Default workflow, change the **Workflow** setting from **Default** to **Idea Workflow Configuration (System)**.



## Customize the System Idea Workflow

In Primavera Cloud, certain objects and actions are managed by built-in workflows. One of these is *the workflow that runs when a user submits a new idea* (see "**Default Idea Workflow Overview**" on page 34). This workflow routes the new idea among users who are likely to be involved in the process to decide whether the idea should be implemented. By creating a custom workflow to take its place, you can have the idea routed among different users, change which fields are required at certain stages, and specify how the system itself should manage the proposed idea at each stage.

The process to customize a system workflow design has four basic parts:


- 1) Duplicate the system workflow design.  
This step isn't strictly necessary in the root workspace, where you can directly edit system workflow designs to make new, customized versions. Duplicating system workflow designs first, however, enables you to customize them in any workspace where you have the required security permissions. It also allows you to more easily preserve default system workflow design settings.
- 2) Edit and publish the new duplicate workflow design.
- 3) Configure the new duplicate workflow design to create a complete workflow.
- 4) In **Summary & Settings**, set the newly customized workflow as the workflow associated with the action.

### Duplicate the system workflow design

- 1) In the object selector, select a workspace.
- 2) In the sidebar, hover over  **Workflows and Forms**, and select **Workflow Design**.
- 3) On the **Workflow Design** page, find the workflow design titled **Idea Workflow Design (System)**.
- 4) Next to the **Idea Workflow Design (System)** row, select the  **Context** menu, and then select **Duplicate**.  
This creates a new customizable workflow design titled **Idea Workflow Design (System)-1**. (Notice the "-1".)
- 5) Select **Save**.

### Edit and publish the new duplicate workflow design

- 1) On the **Workflow Design** page, open the new **Idea Workflow Design (System)-1** workflow design.

Either select the title of the workflow design, or select **Edit** from the  **Context** menu by the workflow design row.

- 2) In the **Workflow Design Editor**, customize the workflow design.

Here you can add task steps, manual decision steps, and automatic decision steps. You can also delete steps and the connector lines that define how steps are related.

For example, you may want to add a new manual decision step that presents the idea to a user who isn't normally involved in the idea proposal process. Similarly, you may want to add an automatic decision step that checks a particular field in ideas before deciding how to proceed.

- 3) When you are done modifying the workflow design, select **Validate** to check it for errors and possible issues.
- 4) Select **Publish**.

### Configure the new duplicate workflow design to create a complete workflow

- 1) If you're still in the **Form Editor**, select **✕ Close** so you can access the sidebar.
- 2) In the sidebar, hover over **🔗 Workflows and Forms**, and select **Workflow Configuration**.
- 3) On the **Workflow Configuration** page select **+ Add**.
- 4) In the **Select Workflow** step of the wizard, select the customized workflow design that you published, and then select **Next**.
- 5) In the **Configure Workflow** step of the wizard, define the properties of the workflow and each workflow element.

Select **Show Diagram** to view the workflow diagram alongside the list of steps and tasks.

Select the name of the workflow design, each step, and each task to view and edit its properties. Every task step and manual decision step must be assigned to at least one user, every update field task must have fields and field values defined, and the workflow itself must be assigned a manager.

See Workflow Configuration for more information about editing workflow configurations.

- 6) When you are done editing the configuration settings for the workflow, select **Validate** to check the workflow configuration for errors and warnings.
- 7) Select **Publish**.

### Set the new, customized workflow as the workflow associated with the action

- 1) If you're still on the **Configure Workflow** page, select **✕ Close** so you can access the sidebar.
- 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 **Workflow Actions** tab.
- 5) In the **Workflow** field of the **Submit** row, select the customized workflow that you published.
- 6) Select **Save**.
- 7) In the **Summary & Settings** panel, select **✕ Close**.

Now, when users add ideas in this workspace, the customized workflow will run instead of the default workflow.

### Custom Idea Workflow Overview

In Primavera Cloud, the Workflows and Forms app enables you to customize the processes to create and edit certain objects using forms, workflow designs, and workflow configurations.

**Workflow designs** define the steps and tasks that workflows follow to update the objects that they run against.

**Workflow configurations** are like collections of settings that make workflow designs work. They're also where you tell the system which forms to use during various steps in workflows. A workflow design, plus a workflow configuration, plus any required forms, make up a complete workflow.

Primavera Cloud allows you to use the Workflows and Forms app to create and set custom workflows for the idea submission and approval process. You would want to create a custom idea workflow in order to best represent the practices in your organization. For example, you might want to add additional forms to be completed before idea approval, or simplify the idea workflow process to eliminate the router role and send submitted ideas directly to an idea owner.

Idea details and idea evaluation scores can't be modified by any user while an idea is being progressed through a custom idea workflow.

To view an example of creating a custom idea workflow, see ***Custom Idea Workflow: Example*** (on page 39).

### **Custom Idea Workflow: Example**

This example demonstrates how to create a custom Idea workflow that can be used to create project proposals from accepted ideas. This example will provide you with a better understanding of how to create workflows for ideas using the Workflows and Forms app.

#### **Before you begin—**

- ▶ In the workspace where you plan to work through this example, make sure you have these workspace-level security permissions:
  - ▶ Workflow Design: Add, Edit, Delete, View
  - ▶ Workflow Configuration: Add, Edit, Delete, View
  - ▶ Forms: Add, Edit, Delete, View
  - ▶ Ideas: Add
  - ▶ Projects: Add
  - ▶ Project Proposal: Add
- ▶ In the workspace where you plan to work through this example, make sure you have these idea-level security permissions:
  - ▶ Accept: Enable
  - ▶ Assign Owner: Enable
  - ▶ Evaluation: Edit, View
  - ▶ Idea: Edit
  - ▶ Reject: Enable
  - ▶ Reopen: Enable
  - ▶ Set as Draft: Enable
- ▶ Make sure that you set the idea routers and owners for the workspace. For the sake of this example, you should set yourself as router and owner, so that you can test the custom workflow after this example is completed.
- ▶ You must set an approve project proposal workflow in order to create a project proposal. Otherwise, you will get an error when attempting to create a project proposal from an accepted idea.

To complete this example, follow these steps in order:

- 1) **Configure Problem Statement Field** (on page 40)
- 2) **Configure Project and Idea Field Mapping Settings**
- 3) **Design a New Idea Review Form** (on page 42)
- 4) **Design a Project Proposal Form**
- 5) **Design an Idea Workflow**
- 6) **Configure the Idea Workflow**
- 7) **Configure Idea Workflow Settings**

The following apps are used in this example:

### Workflows and Forms

#### *Configure Problem Statement Field*


---

**Note:** This topic is part of the **Custom Idea Workflow: Example** (on page 39) series.


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Field mappings specify correspondences between the fields of different types of objects. A field mapping between projects and ideas establishes relationships between idea and project fields that can be used in workflows for tasks such as project creation.

Because projects do not have a default field label for the problem or opportunity, a field must be configured to map the problem from the idea to the project proposal. When the project proposal form is completed, the problem or opportunity that influenced the idea will be prepopulated on that form.

- 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**.
- 4) Select the **Configured Fields** tab.
- 5) On the **Configured Fields** table, select **+ Add**, and complete the following fields:
  - ▶ In the **Column Label** field, enter *Problem Statement*.
  - ▶ In the **View Column Name** field, enter *PROBLEM\_STATEMENT*.
  - ▶ In the **Data Type** field, select **Text**.
  - ▶ In the **Type** field, select **Manual**.
  - ▶ In the **Summary Calculation** field, select **None**.
  - ▶ In the **Field Length** field, enter 255.
- 6) Select **Save**.
- 7) In the **Summary & Settings** panel, select **✕ Close**.

#### Tips

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- To delete a configured field, select the field, select  **Context**, and then select **Delete**. You cannot delete a configured field if it is used



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in a form, workflow, or field mapping.

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*Configure Project and Idea Field Mapping Settings*

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**Note:** This topic is part of the **Custom Idea Workflow: Example** (on page 39) series.

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To map certain fields from an idea to a project, a field mapping needs to be configured. By completing this step, the name, ID, problem, and evaluation score from the idea will automatically populate onto the project proposal created at the end of this example. However, you can choose to map any existing or configured field, such as business case, forms, dates, or more.

- 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**.
- 4) Select the **Field Mapping** tab.
- 5) On the **Field Mapping** tab, in the table, select **+ Add Field Mapping**.
- 6) In the **Name** field, enter *Idea to Project Proposal*.
- 7) In the **ID** field, enter *IP01*.
- 8) In the **Source Object** field, select **Idea**.
- 9) In the detail window, in the table, select **+ Add** to specify a field mapping between project fields and idea fields.
- 10) In the **Project Field** column, select the following fields:
  - ▶ Name
  - ▶ ID
  - ▶ Problem Statement
  - ▶ Evaluation Score
- 11) In the **Idea Field** column, select the corresponding fields:
  - ▶ Name
  - ▶ ID
  - ▶ Problem or Opportunity
  - ▶ Evaluation Score
- 12) Select **Save**.
- 13) Select **X Close**.

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**Note:** The Evaluation Score of the Idea will populate onto the project proposal form as Read Only. The evaluation score of the project proposal is calculated with its own Evaluation Matrix.

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*Design a New Idea Review Form*

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**Note:** This topic is part of the **Custom Idea Workflow: Example** (on page 39) series.

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After an idea has been submitted, the workflow initiator will complete additional information about the idea on the New Idea Review form. This form will also require that the workflow initiator assign an owner to make a decision on the idea.

The New Idea Review form will again be displayed to the idea owner to give context about the idea before the owner makes a decision on the idea.

To create the New Idea Review form:

- 1) In the object selector, select a workspace.
  - 2) In the sidebar, hover over  **Workflows and Forms**, and select **Form Design**.
  - 3) On the **Form Design** page, select **+ Add** to open a new form in the Form Editor.
  - 4) In the **Properties: Form** area, in the **Name** field, enter *New Idea Review*.
  - 5) In the **Context Type** field, select **Idea**.  
Select **Yes** in the Change Context Type dialog box. The form shouldn't include any fields that are invalidated by changing the context type.
  - 6) In the **Sharing Method** field, select **Manual**.
  - 7) Add the following fields to the form using the form toolbar:
    - ▶ Name
    - ▶ ID
      - Select **Required** in the **Properties: Field** area.
    - ▶ Owner
      - Select **Required** in the **Properties: Field** area.
    - ▶ Problem or Opportunity
      - Select **Required** in the **Properties: Field** area.
    - ▶ Status
  - 8) Add the following tables to the form using the form toolbar:
    - ▶ Evaluation Table
      - In the **Select Fields** dialog box, add **Name**, **Description**, **Rank**, and **Score** to the **Selected** list, and then select **Select**.
- 
- Note:** The Evaluation Matrix for the workspace must be added and have an Active status before users can complete the Evaluation Table. See Evaluation Matrix Overview for more information.
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- 9) Select **Validate**, and correct any errors.
- 10) Select **Save**.
- 11) Select **Publish**.

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### *Design a Project Proposal Creation Form*


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**Note:** This topic is part of the **Custom Idea Workflow: Example** (on page 39) series.

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In this custom workflow, when an idea is accepted, it will become a project proposal. When the Project Proposal Form is displayed, it will be prepopulated with the fields designated in the Idea to Project Proposal field mapping settings. It will also include additional fields to be completed, such as workspace and project currency. After this form is submitted, the idea becomes a project proposal.

To create the Project Proposal Creation Form:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, hover over  **Workflows and Forms**, and select **Form Design**.
- 3) On the **Form Design** page, select **+ Add** to open a new form in the Form Editor.
- 4) In the **Properties: Form** area, in the **Name** field, enter *Project Proposal Creation*.
- 5) In the **Context Type** field, select **Project**.
- 6) In the **Sharing Method** field, select **Manual**.
- 7) In the **Field Mapping** field, select **Idea to Project Proposal**.

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**Note:** Mapped fields will copy from the idea to the project proposal even if the field is not added to the **Create Project Proposal** form.

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- 8) Add the following fields to the form using the Form toolbar:
  - ▶ **Name**
  - ▶ **ID**
  - ▶ **Workspace**
  - ▶ **Project Currency**
  - ▶ **Problem Statement**
  - ▶ **Evaluation Score**
  - ▶ **Status**
    - In the **Properties: Field** area, in the **Default Value** field, select **Proposal**.
- 9) Select **Validate**, and correct any errors.
- 10) Select **Save**.
- 11) Select **Publish**.

### *Design an Idea Workflow*

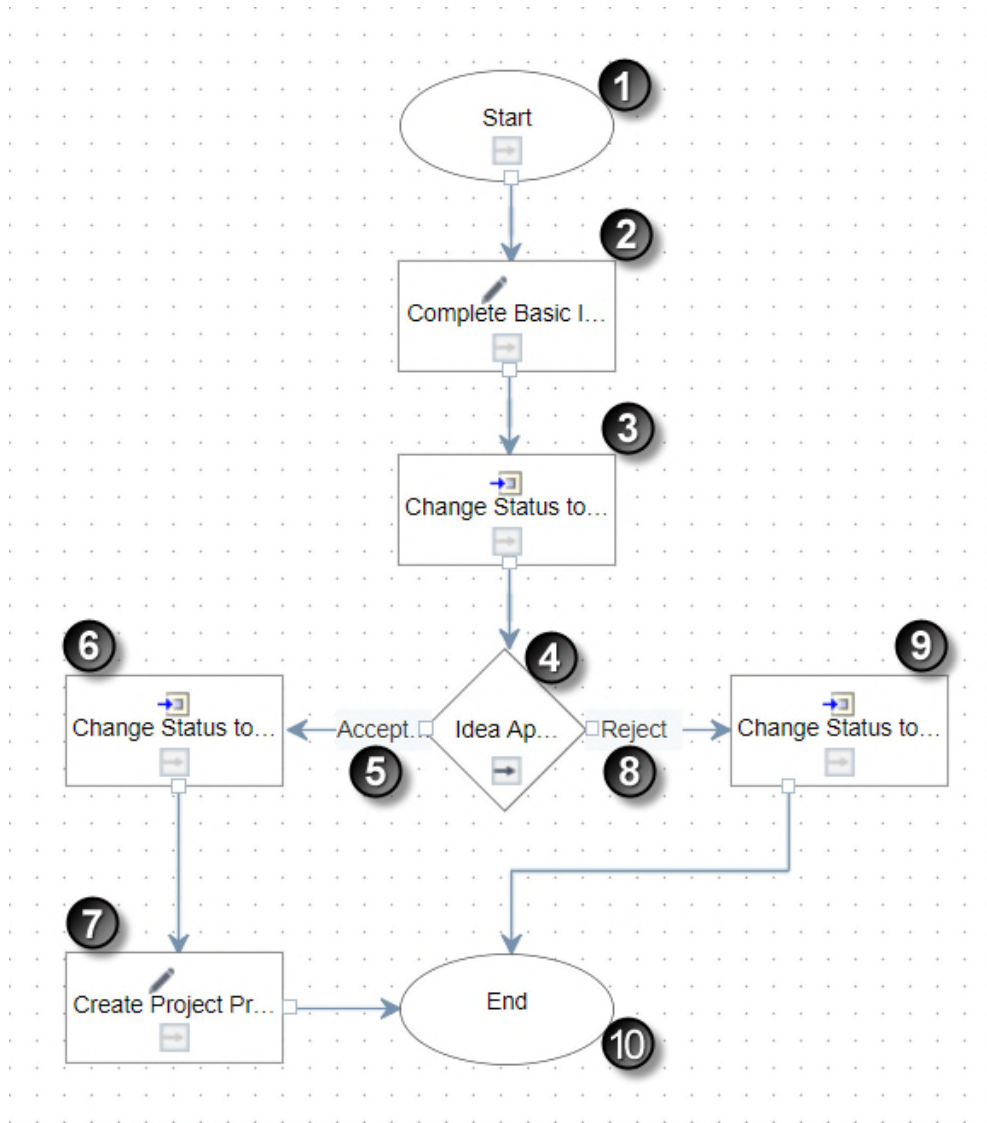
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**Note:** This topic is part of the **Custom Idea Workflow: Example** (on page 39) series.

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You must design an Idea workflow to designate how you want to progress your idea through workflow actions. This workflow design will take the idea through submission, owner assignment, acceptance or rejection, and generation of a project proposal upon idea acceptance

Here is an image of the Idea to Project Proposal custom workflow you will design in this example:



### Workflow Example Image Highlights

Item	Description
1	<b>Start step:</b> Every workflow begins with the Start step. This workflow starts when an idea has been submitted.
2	<b>Complete Basic Information step:</b> Square steps designate a task step. After an idea is submitted, additional information about the idea must be completed. To progress the workflow, the workflow initiator must complete the required fields on the New Idea Review, which includes assigning an idea owner and evaluation ranks.

3	<b>Change Status to Owner Assigned:</b> After the New Idea Review form is completed, this step will automatically update the status of the idea to Owner Assigned.
4	<b>Idea Approval Decision step:</b> Diamond icons without gears in them designate a manual decision step. At this step, the idea owner decides whether the idea will be rejected or accepted and turned into a project proposal. The idea owner is first presented with the New Idea Review form that was completed in the Complete Basic Information step. After the owner reviews the form and makes any necessary updates, the owner will then make a decision on the idea.
5	<b>Accept:</b> If the idea is accepted, then the workflow will follow the connector line to the Change Status to Accepted step.
6	<b>Change Status to Accepted:</b> The idea owner has accepted the idea, so this step automatically changes the status of the idea to Accepted.
7	<b>Create Project Proposal:</b> Since the idea has been accepted, it will now be turned into a project proposal. The user assigned to complete this step will review and complete a project proposal form that has been mapped from the New Idea Review form. After submitting the form, the project proposal based on the idea is created, and the workflow ends.
8	<b>Reject:</b> If the idea is rejected, then the workflow will follow the connector line to the Change Status to Rejected step.
9	<b>Change Status to Rejected:</b> The idea owner has rejected the idea, so this step changes the status of the idea to Rejected, and the workflow ends.
10	<b>End:</b> The end of the workflow. No further actions can be taken on the idea.

The following tasks describe the procedure for creating the Create Project Proposals from Idea workflow design in the Workflow Design Editor:

- 1) **Add the Create Proposal from Idea Workflow** (on page 45)
- 2) **Add the Complete Basic Information Task Step** (on page 46)
- 3) **Add the Change Status to Owner Assigned Task Step** (on page 46)
- 4) **Add the Idea Approval Decision Step** (on page 47)
- 5) **Add the Change Status to Accepted Task Step** (on page 47)
- 6) **Add the Create Project Proposal Task Step** (on page 48)
- 7) **Add the Change Status to Rejected Task Step** (on page 48)
- 8) **Validate and Publish the Workflow Design** (on page 49)

*Add the Create Proposal from Idea Workflow*

**Note:** This topic is part of the **Custom Idea Workflow: Example** (on page 39) series.

To add the Create Proposal from Idea workflow:

- 1) In the sidebar, hover over  **Workflows and Forms**, and select **Workflow Design**.

- 2) On the **Workflow Design** page, select **+ Add**.
- 3) In the **Workflow** area, in the **Name** field, enter *Create Proposal from Idea*.
- 4) In the **Description** field, enter *Custom workflow to create a project proposal from an accepted idea*.
- 5) Select **Save**.

*Add the Complete Basic Information Task Step*


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**Note:** This topic is part of the **Custom Idea Workflow: Example** (on page 39) series.

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This step in the workflow will begin as soon as an idea is submitted. The person assigned to this step, designated in the workflow configuration, will receive a workflow action to complete the New Idea Review form.

To add the Complete Basic Information Task step:

- 1) On the **Workflow Design** toolbar, select  **Add a task step**, and drag it onto the workflow design canvas.
- 2) Position the new step beneath the **Start** step icon.
- 3) In the **Step** area, in the **Name** field, enter *Complete Basic Information*.
- 4) Select **+ Add ▼**, and then select **Form Task**.
- 5) In the **Form Task Details** dialog box, in the **Name** field, enter *New Idea Review form*, and then select **OK**.
- 6) On the workflow design canvas, in the **Start** step icon, select  **Draw connector line**, and then select the **Complete Basic Information** step icon.
- 7) Select **Save**.

*Add the Change Status to Owner Assigned Task Step*


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**Note:** This topic is part of the **Custom Idea Workflow: Example** (on page 39) series.

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After the New Idea Review form has been completed, an owner has been assigned. This step, immediately following the completion of the form, will update the status of the idea to Owner Assigned.

To add the Change Status to Owner Assigned Task step:

- 1) On the **Workflow Design** toolbar, select  **Add a task step**, and drag it onto the workflow design canvas.
- 2) Place the new step below the **Complete Basic Information** step icon.
- 3) In the **Step** area, in the **Name** field, enter *Change Status to Owner Assigned*.
- 4) Select **+ Add ▼**, and then select **Update Field Task**.
- 5) In the **Update Field Task Details** dialog box, in the **Name** field, enter *Status Change to Owner Assigned*, and then select **OK**.
- 6) On the workflow design canvas, in the **Complete Basic Information** step icon, select  **Draw connector line**, and then select the **Change Status to Owner Assigned** step icon.

7) Select **Save**.

*Add the Idea Approval Decision Step*

---



**Note:** This topic is part of the **Custom Idea Workflow: Example** (on page 39) series.

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At this step, the idea owner will make a decision on the idea.

The idea owner has two options: accept the idea and create a project proposal, or reject the idea. The idea owner will receive a workflow task to view the New Idea Review form, make changes if necessary, and then accept or reject the idea. If the idea is rejected, the workflow ends. If the idea is accepted, then the idea progresses to a project proposal.

To add the Idea Approval step:

- 1) On the **Workflow Design** toolbar, select  **Add a manual decision step**, and drag it onto the workflow design canvas.
- 2) Position the new step below the **Change Status to Owner Assigned** step icon.
- 3) In the **Manual Decision** area, in the **Name** field, enter *Idea Approval*.
- 4) In the **Task Name** field, enter *Idea Approval Decision*.
- 5) In the **Decision Question** field, enter *Accept and turn into project proposal, or reject this idea?*
- 6) On the workflow design canvas, in the **Change Status to Owner Assigned** step icon, select  **Draw connector line**, and then select the **Idea Approval** step icon.
- 7) Select **Save**.

*Add the Change Status to Accepted Task Step*





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**Note:** This topic is part of the **Custom Idea Workflow: Example** (on page 39) series.

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If the idea is accepted, the workflow will reach this step, which will automatically update the idea status to Accepted.

To add the Change Status to Accepted Task step:

- 1) On the **Workflow Design** toolbar, select  **Add a task step**, and drag it onto the workflow design canvas.
- 2) Place the new step to the left of the **Idea Approval** step icon.
- 3) In the **Step** area, in the **Name** field, enter *Change Status to Accepted*.
- 4) Select  **Add** , and then select **Update Field Task**.
- 5) In the **Update Field Task Details** dialog box, in the **Name** field, enter *Status Change to Accepted*, and then select **OK**.
- 6) On the workflow design canvas, in the **Idea Approval** step icon, select  **Draw connector line**, and then select the **Change Status to Accepted** step icon.
- 7) Select the **Idea Approval** step icon.
- 8) In the **Manual Decision** area, in the **Exit Options** table, select **Option 1**, and then enter *Accept and Create Project Proposal*.

9) Select **Save**.

*Add the Change Status to Rejected Task Step*



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**Note:** This topic is part of the **Custom Idea Workflow: Example** (on page 39) series.

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If the idea owner rejected the idea in the Idea Approval Decision step, the workflow will reach this step, which will automatically update the idea status to Rejected. This will then end the workflow and no further action can be taken on the idea.

To add the Change Status to Rejected Task step:

- 1) On the **Workflow Design** toolbar, select  **Add a task step**, and drag it onto the workflow design canvas.
- 2) Position the new step to the right of the **Idea Approval** step icon.
- 3) In the **Step** area, in the **Name** field, enter *Change Status to Rejected*.
- 4) Select **+ Add ▼**, and then select **Update Field Task**.
- 5) In the **Update Field Task Details** dialog box, in the **Name** field, enter *Status Change to Rejected*, and then select **OK**.
- 6) On the workflow design canvas, in the **Idea Approval** step icon, select  **Draw connector line**, and then select the **Change Status to Rejected** step icon.
- 7) On the workflow design canvas, in the **Change Status to Rejected** step icon, select  **Draw connector line**, and then select the **End** step icon.
- 8) Select the **Idea Approval** step icon.
- 9) In the **Manual Decision** area, in the **Exit Options** table, select **Option 1**, and then enter *Reject*.
- 10) Select **Save**.

*Add the Create Project Proposal Task Step*

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**Note:** This topic is part of the **Custom Idea Workflow: Example** (on page 39) series.



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After the idea is accepted, then the next step is to create a project proposal from the idea. The user assigned to this step will complete the Create Project Proposal form, and then a new project proposal will be created. After the project proposal is created, the idea workflow will end.

To add the Create Project Proposal Task step:

- 1) On the **Workflow Design** toolbar, select  **Add a task step**, and drag it onto the workflow design canvas.
- 2) Position the new step below the **Change Status to Accepted** step icon.
- 3) On the **Step** area, in the **Name** field, enter *Create Project Proposal*.
- 4) Select **+ Add ▼**, and then select **Form Task**.
- 5) In the **Form Task Details** dialog box, in the **Name** field, enter *Create Project Proposal Form*, and then select **OK**.



- 6) On the workflow design canvas, in the **Change Status to Accepted** step icon, select  **Draw connector line**, and then select the **Create Project Proposal** step icon.
- 7) On the workflow design canvas, in the **Create Project Proposal** step icon, select  **Draw connector line**, and then select the **End** step icon.
- 8) Select **Save**.

*Validate and Publish the Workflow Design*

---

**Note:** This topic is part of the *Custom Idea Workflow: Example* (on page 39) series.

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In order to configure a workflow for use, it must be free of errors. Validate the workflow design and correct any errors to publish it.

To validate and publish the workflow design:

- 1) In the Workflow Design Editor, select **Validate**.  
The **Validation Errors and Warnings** dialog box should list no warnings or errors.
- 2) In the **Validation Errors and Warnings** dialog box, select **Close**.
- 3) In the **Workflow Design Editor**, select **Publish**.

The Create Proposal from Idea workflow is now ready to be configured for use.

*Configure the Idea Workflow*


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**Note:** This topic is part of the *Custom Idea Workflow: Example* (on page 39) series.

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After you design a workflow, you must configure it for use within the Idea context. The workflow should take the user through completing the New Idea Review form, assigning an owner, and acceptance or rejection. The workflow should also contain a step with a project context that uses a form with a project to idea field mapping. This step is also responsible for pulling data from the idea on which the workflow is run and using it to prepopulate the contents of the project proposal.

To configure the Create Project Proposals from Ideas workflow:

- 1) In the sidebar, hover over  **Workflows and Forms**, and select **Workflow Configuration**.
- 2) Select **+ Add**.
- 3) In the table, select **Create Proposal from Idea**, and then select **Next**.
- 4) In the **Workflow Settings** section, complete the following fields:
  - ▶ **Configuration Name:** Enter *Proposal Creation Configuration*.
  - ▶ **Context Type:** Select **Idea**.
  - ▶ **Manager:** Select **Set as Workflow Initiator**.
- 5) In the workflow step list, expand **Complete Basic Information**, then select **New Idea Review form**. In the **Task Options** section, complete the following fields:
  - ▶ **Context Type:** Select **Same as Step**.
  - ▶ **Form:** Select **New Idea Review**.

- ▶ **Performers:** Select **Set as Workflow Initiator**.
- 6) In the workflow step list, expand **Change Status to Owner Assigned**, then select **Status Change to Owner Assigned**. In the **Task Options** section, complete the following fields:
    - ▶ **Context Type:** Select **Same as step**.
    - ▶ **Update Field:** Select **Status**.
    - ▶ **Update Value:** Select **Owner Assigned**.
  - 7) In the workflow step list, expand **Idea Approval**, then select **Idea Approval Decision**. In the **Task Options** section, complete the following fields:
    - ▶ **Context Type:** Select **Same as step**.
    - ▶ **Form:** Select **New Idea Review**.
    - ▶ **Performers:** Under **User Fields**, select **Owner**.
  - 8) In the workflow step list, expand **Change Status to Accepted**, then select **Status Change to Accepted**. In the **Task Options** section, complete the following fields:
    - ▶ **Context Type:** Select **Same as step**.
    - ▶ **Update Field:** Select **Status**.
    - ▶ **Update Value:** Select **Accepted**.
  - 9) In the workflow step list, expand **Change Status to Rejected**, then select **Status Change to Rejected**. In the **Task Options** section, complete the following fields:
    - ▶ **Context Type:** Select **Same as step**.
    - ▶ **Update Field:** Select **Status**.
    - ▶ **Update Value:** Select **Rejected**.
  - 10) In the workflow step list, expand **Create Project Proposal**, then select **Create Project Proposal Form**. In the **Task Options** section, complete the following fields:
    - ▶ **Context Type:** Select **Project**, and then select **Create New Object**.
    - ▶ **Form:** Select **Project Proposal Creation**.
    - ▶ **Performers:** Select **Set as Workflow Initiator**.
  - 11) Select **Validate**, and fix any errors.
  - 12) Select **Save**.
  - 13) Select **Publish**.
  - 14) Select **✕ Close**.


*Configure Idea Workflow Settings*

---

**Note:** This topic is part of the **Custom Idea Workflow: Example** (on page 39) series.

---

Configure idea settings to use the workflow you designed. Using the workflow actions tab, you can specify an idea's related action, such as idea submission, on which to initiate the workflow. In this case, initiating your workflow will start the process of creating a project proposal based on idea data.

- 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) Select the **Workflow Actions** tab.
- 5) In the **Submit** action row, in the **Workflow** column, select **Proposal Creation Configuration**.
- 6) Select **Save**.
- 7) In the **Summary & Settings** panel, select **✕ Close**.

*Complete Project Proposal Form*

---

**Note:** This topic is part of the **Custom Idea Workflow: Example** (on page 39) series.

---

When users submit ideas, the workflow you created throughout this example will run. When the workflow's Project context form task is started, the form should contain data from the idea on which the workflow is run, corresponding to the specified Project to Idea field mapping the form is using. In the case of this example, the form's name field will be prepopulated with the name of the submitted idea.

After your workflow settings have been configured, you can now create project proposals from submitted ideas.

After adding, submitting, and accepting an idea, complete the following steps to complete the project proposal:

- 1) In the header, select **🔔 View notifications**.
- 2) In the **Notification** panel, select **View All in Inbox**.
- 3) View workflow task **Create Project Proposal Form**.
- 4) Complete the **Project Proposal Creation** form.
- 5) Select **Submit**.

A project proposal has now been created from the initial idea.

### Set the Idea Workflow Actions

Primavera Cloud provides a default workflow for an idea to progress through. In the Workflows and Forms app, you can create or edit workflows to replace the default workflow. After that, you can set the workflow for all ideas in a workspace to progress through.

To specify workspace idea workflow actions:

- 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 **Workflow Actions** tab.

This tab shows a list of workflows to start after the action in the Action Name column.

- ▶ **Submit:** Select the workflow to begin when an idea is submitted.

Workflows that are appended with "(System)" are provided by the application.

- 5) In the row that represents the workflow that you want to replace, specify the custom workflow.

- 6) Select **Save**.
- 7) In the **Confirm** dialog box, select **Yes** to enable **Inherit Workflow Mapping**.  
This way, all workspaces and projects within the workspace will be assigned this workflow too.
- 8) In the **Summary & Settings** panel, select **✕ Close**.

---

**Note:** Only configured and published workflows with a **Context Type** of **Idea** can be configured for use with the ideas.

---

---

### Set the Add and Edit Idea Forms

By default, Primavera Cloud provides the forms that users use to add or edit ideas. In the Workflows and Forms app, you can create forms to replace these default forms. After that, you can choose which forms appear when users add or edit ideas.

To specify which forms appear when users add or edit 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 **Forms** tab.

This tab shows a list of forms used at various stages in an idea's lifecycle.

- ▶ **Add:** The form to use when users add an idea to this workspace. Users must complete this form in order to add a new idea to the workspace.
- ▶ **Edit:** The form to use when users modify or view idea details. This form will be displayed on the **Idea Home** page.

Forms that are appended with "(System)" are provided by the application.

- 5) In the row that represents the form that you want to replace, specify the custom form.
- 6) Select **Save**.

---

In the **Summary & Settings** panel, select **✕ Close**. **Note:** Only published forms with a **Context Type** of **Idea** can be configured for use with the ideas. Forms must also contain all required fields for the action they are associated with, and they must be valid.

---

### Customize the System Add Idea Form

In Primavera Cloud, custom forms can be used to replace some default pages and forms. Among these is the form that appears when users add an idea. By default, the add idea form asks the user who is setting up the new idea to provide some basic information. By creating a custom form to take its place, you can have the idea creator provide different information, change which fields are required, and leave out fields that may not be important.



The process to customize a system form has three basic parts:

- 1) Duplicate the system form.


This step isn't strictly necessary in the root workspace, where you can directly edit system forms to make new, customized versions. Duplicating system forms first, however, enables you to customize them in any workspace where you have the required security permissions. It also allows you to more easily preserve default system form settings.

- 2) Edit and publish the new duplicate form.
- 3) In **Summary & Settings**, set the newly customized form as the form associated with the **Add** idea action.


### Duplicate the system form

- 1) In the object selector, select a workspace.
- 2) In the sidebar, hover over  **Workflows and Forms**, and select **Form Design**.
- 3) On the **Form Design** page, find the form titled **Add Idea Form (System)**.
- 4) Next to the **Add Idea Form (System)** row, select the  **Context** menu, and then select **Duplicate**.  
This creates a new customizable form titled **Add Idea Form (System)-1**. (Notice the "-1".)
- 5) Select **Save**.

### Edit and publish the new duplicate form

- 1) On the **Form Design** page, open the new **Add Idea Form (System)-1** form.  
Either select the title of the form, or select **Edit** from the  **Context** menu by the form row.
- 2) In the **Form Editor**, customize the form, but don't change its **Context Type** value from **Idea** or remove any required fields.  
Here you can edit properties for the entire form, add elements to the form, remove elements from the form, and customize form elements.  
For example, you can change the name of the form. If you've already highlighted a form element like a field, select the outermost edge of the form to reveal the **Properties: Form** area. Then, in the **Name** field, replace the default name, **Add Idea (System)-1** with a name of your choice. Something like **Custom Add Idea** form might make sense.  
Another common customization is to make certain fields required. For example, you may want to require any user who adds an idea to also explain its benefits. To do this, select the **Benefits** field. Then, in the **Properties: Field** area, make sure the **Required** option is checked.
- 3) Select **Validate** to check the form for errors and possible issues.  
This step helps you make sure the form includes all required fields and is free of errors.
- 4) Select **Publish**.  
Select **Yes** in the **New Version** dialog box.

### Set the new, customized form as the form associated with the Add idea action

- 1) If you're still in the **Form Editor**, select **✕ Close** so you can access the sidebar.
- 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 **Forms** tab.

- 5) In the **Form** field of the **Add** row, select the customized form that you published.
- 6) Select **Save**.
- 7) In the **Summary & Settings** panel, select **✕ Close**.

Now, when users add ideas in this workspace, they are presented with the newly customized form.

## Configure Project Defaults & Options

---

### Configure Project Field Mappings

Field mappings specify correspondences between the fields of different types of objects. For example, a field mapping between projects and ideas establishes relationships between idea and project fields that can be used in workflows for various tasks, such as creating a project proposal using idea data.

- 1) **Navigate to the Project configuration page** (see page 113).
- 2) Select the **Field Mapping** tab.
- 3) On the **Field Mapping** tab, in the table, select **+ Add Field Mapping**, and then complete the following fields:
  - ▶ **Name:** The name of the field mapping.
  - ▶ **ID:** A unique identifier for the field mapping.
  - ▶ **Source Object:** The object that project fields will be mapped against. The field mapping specifies correspondences between project fields and the available fields of the selected object.
- 4) In the detail window, in the table, select **+ Add** to specify a field mapping between projects and the selected source object.
- 5) In the **Project Field** column, select a project field.
- 6) In the **Source Field** column, select an available field from the source object.
- 7) Save your changes:
  - a. Select **Save**.
  - b. In the **Summary & Settings** panel, select **✕ Close**.

### Tips

- ▶ Select **Assign** to assign a set of field mappings available for the object as a field mapping for objects of that type contained in the workspace.

### Set the Add Project Proposal Form

When users create project proposals, a form appears that enables them to enter all of the required information. You can replace the default Add Project Proposal form with a form that you create in the Workflows and Forms app.

## Prerequisites

Before you can set a custom Add Project Proposal form, it must meet the following criteria:

**Access:** You must have access to the form.

**Context type:** The form must have a **Context Type** value of **Project**.

**Required fields:** The form must include the following fields:

- ▶ **ID**
- ▶ **Name**
- ▶ **Project Currency**
- ▶ **Status**
- ▶ **Workspace**

All of these fields must be editable. This means the fields and the form itself must have the **Editable data** option selected.

**Invalid elements:** The form must not include the following form elements:

- ▶ Document grids
- ▶ Cover images
- ▶ Evaluation tables
- ▶ Cost UDFs

When you have a valid form, follow these steps to use it in place of the default Add Project Proposal form:

- 1) **Navigate to the Project configuration page** (see page 113).
- 2) Select the **Forms** tab.
- 3) In the **Add Project Proposal** row, in the **Form** field, select the form that you want to use instead of the default Add Project Proposal form.
- 4) Save your changes:
  - a. Select **Save**.
  - b. In the **Summary & Settings** panel, select **✕ Close**.

Now, when a user adds a project proposal, the custom form that you selected will be used in place of the default proposal form.

---

**Note:** When a form has certain conditions for Content Type: Project, the form cannot be used to create a project or proposal. These conditions are:

- Mandatory fields are missing in the form.
  - All fields are individually set as read-only.
  - The form is set to read-only (even if fields are editable).
  - The following fields are added to the form: Document Grid, Image, Scenario, or Cost UDFs.
-

## Configure the Approve Project Proposal Workflow Action

The Approve Project Proposal workflow action setting is used to specify which workflow to use when creating a project proposal. A project proposal can be created from the context of a project or from an approved idea.

To set the project proposal workflow:

- 1) **Navigate to the Project configuration page** (see page 113).
- 2) Select the **Workflow Actions** tab.
- 3) In the **Approve Project Proposal** row, in the **Workflow** field, select the workflow that you want to use.
- 4) Save your changes:
  - a. Select **Save**.
  - b. In the **Summary & Settings** panel, select **✕ Close**.
- 5) In the **Confirm** dialog box, choose whether to enable **Inherit Workflow Mapping**.  
If you select **Yes**, all workspaces and projects within the workspace will be assigned this workflow too.

## Creator Actions

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The idea creator is the user that creates the idea.

The creator completes the following actions:

- 1) **Add an Idea** (on page 56)
- 2) **Submit an Idea** (on page 57)

### Add an Idea

Add ideas to capture and evaluate potential projects and other business endeavors.

To add an idea:

- 1) In the object selector, select **Ideas**, and then select **+ Add Idea**.
- 2) In the **Add Idea** dialog box, complete the following fields:

---

**Note:** The following fields apply to the default form for adding ideas. If your application administrator has changed the Ideas Add Form setting, the fields available in the Add Idea dialog box may differ from the following list.

---

- ▶ **Name:** The name of the idea.
- ▶ **ID:** A unique identifier for the idea. The ID is generated automatically based on workspace settings. Adjust as needed.
- ▶ **Problem or Opportunity:** A description of the issue or business opportunity the idea addresses.



- ▶ **Proposed Solution:** A description of the ways in which the idea resolves a problem or realizes an opportunity.
  - ▶ **Benefits:** A description of the anticipated benefits of implementing the idea.
- 3) Select **Add** to save the idea to the **Ideas List** as a draft.  
Select **Add and Submit** to progress the idea through the idea workflow.


You can also add an idea from the Idea List page.

- 1) In the object selector, select **Ideas**, and then select **View All Ideas**.
- 2) In the table, select the workspace where you want to store the idea.
- 3) Select **+ Add**.

## Submit an Idea

Submit an idea to progress it through the idea workflow and indicate it is ready for evaluation by routers and owners.

To submit an idea:

- 1) In the object selector, select an idea.
- 2) In the sidebar, select  **Home**.
- 3) Select the **Action** ▼ menu, and then select **Submit**.
- 4) (Optional) In the **Submit** dialog box, complete the following fields:
  - ▶ **Notify Users:** One or more users to notify upon the submission of the idea.
  - ▶ **Comment:** A short description or note that will be sent to notified users.
- 5) Select **Submit**.

**Note:** The status of the idea is automatically changed to **Submitted** upon submission unless the idea was previously set as draft through the **Set as Draft** workflow action. If an idea was assigned an owner before being **Set as Draft** during a default workflow, then the status of the idea will change to **Owner Assigned** upon submission.

### Tips

- ▶ You can also submit an idea using the  **Context** menu in the table on the **Idea List** page.

## Router Actions

Routers are responsible for reviewing submitted ideas and assigning an appropriate owner. They are assigned at the workspace level.


As a router, if you believe that an idea does not have enough information, you can reject the idea and then reach out to the creator in the discussion module to collaborate and update the idea with more information. After the idea has enough information, you can reopen it.

If you believe that an idea is worth considering, then you can assign an idea owner, who will then make a decision on the idea. Otherwise, you can reject the idea.


## Add a Discussion

Discussions provide a way for team members to communicate and exchange information on a wide variety of objects including activities, costs, resources, risks, scope assignments, tasks, and more. Comments are saved with the object and are available to all team members with the required security privileges. You can use the Discussion feature to collaborate throughout the application.

To add a discussion:

- ▶ Select  **Discuss** to open the Discussion panel.

---

**Note:** If no comments have been posted to the Discussion panel, the  **Discuss** icon is empty.

---


To post a new comment:

- ▶ In the **Post a comment** field, enter a comment, and select **Post**.

To reply to a comment:

- ▶ Select **Comment**.
- ▶ In the **Post a reply** field, enter a reply, and select **Reply**.


### Tips

- ▶ A user mention sends a notification to the user inviting them to join the discussion. To mention a user, enter `@<FirstNameLastName>` or `@<username>` and select the user.
- ▶ You can resize the Discussion panel by selecting the left edge of the panel and dragging to the desired size.
- ▶ You cannot edit or delete a posted comment.
- ▶ Select **Like** to show that you approve or support a comment. Select **Unlike** to remove your Like.
- ▶ You can choose to show or hide the discussion icon in a table. Select the  **Settings** icon and, in the **Standard Column Options** section, select the **Show Discussion Indicator** option.

## Assign an Idea Owner

Assign owners to ideas to specify the user responsible for evaluating and accepting or rejecting the idea.

To assign an idea owner:

- 1) In the object selector, select an idea.
- 2) In the sidebar, select  **Home**.
- 3) Select the **Action** ▼ menu, and then select **Assign Owner**.
- 4) In the **Assign Owner** dialog box, complete the following:

- ▶ **Select User:** The owner assigned to an idea. The idea owner is responsible for accepting or rejecting ideas.
- ▶ (Optional) **Notify Users:** One or more users to notify upon assigning the idea owner.
- ▶ (Optional) **Comment:** A short description or note that will be sent to notified users.


5) Select **Assign Owner**.

---

**Notes:**

- Only users configured as idea owners can be assigned as idea owners. For more information about configuring idea owners, see ***Configure Routers and Owners for Ideas*** (on page 31)
  - The status of the idea is automatically changed to **Owner Assigned** upon owner assignment.
  - The user assigned as owner of the idea will receive a notification upon assignment.
- 


**Tips**

- ▶ You can also assign an idea owner using the  **Context** menu on the **Idea List** page.

## Reject an Idea

Reject ideas to prevent further development and indicate they are not worth pursuing.

To reject an idea:

- 1) In the object selector, select an idea.
- 2) In the sidebar, select  **Home**.
- 3) Select the **Action** ▼ menu, and then select **Reject**.
- 4) (Optional) In the **Reject** dialog box, complete the following fields:
  - ▶ **Reason:** A justification for rejecting the idea.
  - ▶ **Notify Users:** One or more users to notify upon idea rejection.
  - ▶ **Comment:** A short description or note that will be sent to notified users.
- 5) Select **Reject**.

---

**Note:** The status of the idea is automatically changed to **Rejected** upon rejection.

---


**Tips**

- ▶ You can also reject an idea using the  **Context** menu on the **Idea List** page.

## Reopen an Idea

You can reopen a rejected idea for reevaluation. Rejected ideas must be reopened before they can be processed further.

To reopen a rejected idea:


- 1) In the object selector, select an idea.
- 2) In the sidebar, select  **Home**.
- 3) Select the **Action** ▼ menu, and then select **Reopen**.
- 4) (Optional) In the **Reopen** dialog box, complete the following fields:
  - ▶ **Reason**: A justification for reopening the idea.
  - ▶ **Notify Users**: One or more users to notify upon reopening the idea.
  - ▶ **Comment**: A short description or note that will be sent to notified users.
- 5) Select **Reopen**.

---

**Note:** The status of the idea is automatically changed to **Owner Assigned** upon reopening.

---

### Tips

- ▶ You can also reopen an idea using the  **Context** menu on the **Idea List** page.

## Owner Actions

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The idea owner is responsible for evaluating the idea and making a decision on it.


As an idea owner, you can use the evaluation categories and the investor map to evaluate the idea. After evaluation, you can choose to either accept or reject the idea.

If you accept an idea, you can withdraw acceptance at a later point. If you reject an idea, you can reopen it later for reconsideration.

### Rank a Project, Program, or Idea Against Evaluation Categories

Rank a project, program, or idea against evaluation subcategories, depending on the applicability of the project, program, or idea to a subcategory, that justifies alignment with the organization.

To rank a project, program, or idea:

- 1) In the object selector, select a project, program, or idea.
- 2) In the sidebar, hover over  **Strategic Alignment**, and select **Evaluation**.
- 3) Select a **Rank** for each applicable evaluation subcategory. You can review the ranking descriptions in the **Ranks** detail window.
- 4) Select **Save**.

---

**Note:** You can only rank submitted ideas.

---


### Tips

- ▶ If the project or program belongs to a portfolio, this task can also be completed on the **Prioritization Matrix** page at the portfolio level. Values entered on the **Evaluation** page are synchronized with values on the **Prioritization Matrix** page.
- ▶ To quickly clear multiple rank values at the same time, select one or more rank values, and then press **Shift + Delete**.
- ▶ When an evaluation subcategory Source is set to Thresholds, the Rank cell is set to read-only and cannot be edited.




## Review Evaluation Scores for a Project, Program, or Idea

Review the individual evaluation category scores and overall score for projects, programs, ideas.

To review evaluation scores:

- 1) In the object selector, select a project, program, or idea.
- 2) In the sidebar, hover over  **Strategic Alignment**, and select **Evaluation**.
- 3) Review the evaluation scores.
  - ▶ **Score:** The subcategory score formula is calculated as the selected Rank Weight % multiplied by the given subcategory Weight % divided by 100.  
The category score formula is calculated as the sum of the subcategory Scores. If a given subcategory does not have a score, its score is 0.
  - ▶ **Total Score:** The score based off all ranked categories.
- 4) Select **Save**.

### Tips

- ▶ If the project or program belongs to a portfolio, its evaluation score can also be reviewed on the **Prioritization Matrix** page at the portfolio level. Values entered on the **Evaluation** page are synchronized with values on the **Prioritization Matrix** page.
- ▶ When an evaluation subcategory Source is set to Thresholds, the Rank cell is set to read-only and cannot be edited.
- ▶ The  **Score is out of sync** icon indicates the evaluation matrix has been updated. Select  **Re-Evaluate Score** to recalculate scores using the updated matrix. If new evaluation categories or subcategories were added, update as needed.
- ▶ To remove all evaluation scores, select the  **Reset Scores** button. You must have the Edit privilege.
- ▶ An Evaluation Matrix must have an Active status to be used for Evaluation. See Evaluation Matrix Overview for more information.

## Analyze Ideas Using the Investor Map

The Ideas investor map allows you to view ideas in a workspace configured by idea data. By configuring the bubbles by data important to decision makers, such as evaluation categories and status, decision makers can determine which ideas in a workspace to prioritize when creating project proposals.

To configure the investor map:

- 1) In the object selector, select **Ideas**, and then select **View All Ideas**.
- 2) Select a workspace from the list on the left.
- 3) Select the **Investor Map** tab.
- 4) Configure chart data:
  - a. X-Axis and Y-axis: Select data to analyze across ideas.
  - b. (Optional) Bubble Size: Select data that is used to determine the size of the idea bubbles.
  - c. (Optional) Bubble Color: Select data that is used to determine the color of bubbles meeting certain criteria.
- 5) In the **View** section, select options to further customize the chart display.
- 6) Select **Apply** to view your changes.
- 7) Select **Save View** to save the view on the investor map.  
Select **Save View As** to save the view to the **View list**.


### Tips

- ▶ Hover over bubbles to view idea details.
- ▶ Select **Reset View** after modifying the bubble chart settings to restore a view to its previous configuration.

## Accept an Idea

Accept ideas to progress them through your organization's workflow and prepare them for further investment and processing.


To accept an idea:

- 1) In the object selector, select an idea.
- 2) In the sidebar, select  **Home**.
- 3) Select the **Action** ▼ menu, and then select **Accept** or **Accept and Create Project Proposal**.
- 4) (Optional) In the **Accept** or **Accept and Create Project Proposal** dialog box, complete the following fields:
  - ▶ **Reason**: A justification for accepting the idea.
  - ▶ **Notify Users**: One or more users to notify upon the acceptance of the idea.
  - ▶ **Comment**: A short description or note that will be sent to notified users.
- 5) Select **Accept** or **Accept and Create Project Proposal**.

**Note:**

- The idea owner or another user who is accepting the idea must have the appropriate security privileges to accept the idea. You must also have the permissions to add project proposals if choosing the option to Accept and Create Project Proposal.
- The status of the idea is automatically changed to **Accepted** when the idea is accepted.


**Tips**

- ▶ You can also accept an idea using the  **Context** menu on the **Idea List** page.

**Withdraw an Accepted Idea**

Withdraw an idea acceptance to open it for reevaluation and return it to a status of Owner Assigned.

To withdraw idea acceptance:

- 1) In the object selector, select an idea.
- 2) In the sidebar, select  **Home**.
- 3) Select the **Action** ▼ menu, and then select **Withdraw Acceptance**.
- 4) (Optional) In the **Withdraw Acceptance** dialog box, complete the following fields:
  - ▶ **Reason:** A justification for withdrawing the acceptance of the idea.
  - ▶ **Notify Users:** One or more users to notify upon the acceptance withdrawal.
  - ▶ **Comment:** A short description or note that will be sent to notified users.
- 5) Select **Withdraw Acceptance**.

**Note:** The status of the idea is automatically changed to **Owner Assigned** upon withdrawal of an accepted idea.


**Tips**

- ▶ You can also withdraw an accepted idea using the  **Context** menu on the **Idea List** page.

**Reject an Idea**

Reject ideas to prevent further development and indicate they are not worth pursuing.

To reject an idea:

- 1) In the object selector, select an idea.
- 2) In the sidebar, select  **Home**.
- 3) Select the **Action** ▼ menu, and then select **Reject**.
- 4) (Optional) In the **Reject** dialog box, complete the following fields:
  - ▶ **Reason:** A justification for rejecting the idea.

- ▶ **Notify Users:** One or more users to notify upon idea rejection.
- ▶ **Comment:** A short description or note that will be sent to notified users.

5) Select **Reject**.

---

**Note:** The status of the idea is automatically changed to **Rejected** upon rejection.

---


### Tips

- ▶ You can also reject an idea using the  **Context** menu on the **Idea List** page.

## Reopen an Idea

You can reopen a rejected idea for reevaluation. Rejected ideas must be reopened before they can be processed further.

To reopen a rejected idea:


- 1) In the object selector, select an idea.
- 2) In the sidebar, select  **Home**.
- 3) Select the **Action** ▼ menu, and then select **Reopen**.
- 4) (Optional) In the **Reopen** dialog box, complete the following fields:
  - ▶ **Reason:** A justification for reopening the idea.
  - ▶ **Notify Users:** One or more users to notify upon reopening the idea.
  - ▶ **Comment:** A short description or note that will be sent to notified users.
- 5) Select **Reopen**.

---

**Note:** The status of the idea is automatically changed to **Owner Assigned** upon reopening.

---


### Tips

- ▶ You can also reopen an idea using the  **Context** menu on the **Idea List** page.

## Delete an Idea

Delete ideas that are no longer relevant to your business processes or initiatives.

To delete an idea:

- 1) In the object selector, select **Ideas**, and then select **View All Ideas**.
- 2) In the table, select an idea row.
- 3) Select the  **Context** menu, and then select **Delete**.
- 4) In the **Confirm** dialog box, select **Yes**.
- 5) Select **Save**.



---

**Note:** You can only delete ideas that are in the draft status. Submitted, accepted, and rejected ideas cannot be deleted. You must withdraw acceptance from an idea or reopen it before it can be deleted.

---

## Create a Project Proposal from an Approved Idea


After an idea has been approved, if you are using the default workflow, you can create a project proposal directly from the approved idea.

---


**Note:** Project proposals cannot be created in Primavera Cloud unless an approve project proposal workflow has been set. To set a project proposal workflow, see **Configure the Approve Project Proposal Workflow Action** (on page 56).

---

To create a project proposal:

- 1) In the object selector, select an idea.
- 2) In the sidebar, select  **Home**.
- 3) Select the **Action** ▼ menu, and then select **Create Project Proposal**.
- 4) Complete the form.

### Tips

- ▶ As idea owner, you can also create a project proposal at the same time that you approve an idea. To do this, select the **Action** ▼ menu, and then select **Accept and Create Project Proposal**.
- ▶ You can also do this from the **Idea List** page. Select the  **Context** menu, and then select **Create Project Proposal**.

## Additional Idea Actions

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Ideas have features that all users can use to add context to and keep track of an idea.

Users with the correct permissions can assign a code and user access to an idea, or add files.


The idea creator, routers, and owners can use the Related Items app to link an idea to similar ideas. After an idea owner has promoted an idea to a project proposal, the idea owner can then link the project proposal to the idea.

## Set an Idea as Draft

Setting an idea as draft allows you to restart the idea workflow from the draft state. Users might want to set an idea as draft when they want to update idea information or progress the idea through a custom workflow again.

An idea can be set as draft whenever there are no custom workflows running. An idea can be set as draft at any point during the default workflow. Set as Draft is an option in custom workflows only when the workflow is completed or stopped.

To set an idea as draft:

- 1) In the object selector, select an idea.
- 2) In the sidebar, select  **Home**.
- 3) Select the **Action** ▼ menu, and then select **Set as Draft**.
- 4) (Optional) In the **Set as Draft** dialog box, complete the following fields:
  - ▶ **Reason:** A justification for setting the idea as draft.
  - ▶ **Notify Users:** One or more users to notify upon setting the idea as draft.
  - ▶ **Comment:** A short description or note that will be sent to notified users.
- 5) Select **Set as Draft**.

---



**Notes:**

- An idea retains all of its information when it is **Set as Draft**.
  - The status of the idea is automatically changed to **Draft** upon setting the idea as draft.
- 

## Assign a User or User Group Access to an Idea

You can assign users or user groups access to your ideas. Each user or user group must be assigned an idea permission set. A user group may have been configured with a default permission set. Assigned permission sets can be changed at any time.


To assign user access to an idea:

- 1) In the object selector, select an idea.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the  **Ideas Summary and 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 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.

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- 8) Add any other optional permission sets applicable to that user or group.
- 9) Select **Assign**.
- 10) Select **Save**.
- 11) In the **Summary & Settings** panel, select  **Close**.




## Tips

- ▶ To revoke idea access from an assigned user or group, select a table row, select the  **Context menu**, and then select **Remove**.
- ▶ 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.

## Assign a Code to an Idea

Assign codes to ideas to organize and categorize them based on shared characteristics.

To assign a code to an idea:

- 1) In the object selector, select an idea.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the  **Ideas Summary and Settings** menu, select **Codes**.
- 4) Select **Assign**.
- 5) In the **Select Code** dialog box, in the **Available** section, select codes and select **Add from Available** to add them to the **Selected** section.
- 6) Select **Select**.
- 7) Select **Save**.
- 8) In the **Summary & Settings** panel, select  **Close**.

## Files Overview

A file is a document or work product that you create and add to your work environment. You and your team can add, edit, maintain, annotate, discuss, and delete files based on your application privilege settings. You can also limit the visibility of certain files and folders by applying permission sets directly to the file or folder. Create standard folder structures and files across your organization using the folder template feature. Upload as many files as your project requires; there is no file storage limit by project or user. Individual files cannot exceed 2GB.

---

**Note:** You should not apply File permission sets at the project level for users who need limited access to specific files and folders.

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You can upload files in over 500 supported file types including video and audio. Virtually all document file types are supported, but you cannot upload executable, script, or markup files such as .exe, .html, or .vbx files.

With files functionality, you can check in and check out files to avoid version conflicts, track file version history, preview files without downloading them, and download files for use offline. Built-in virus scanning functionality automatically scans your files during upload and check in. If an issue is detected with a file, you are notified and the contents of the file are deleted from the database. You can upload another version of the file that is not corrupted. Files that are still pending virus scan can be downloaded or checked out. The application will ask you to confirm before you download or check out an unscanned file.

## Accessing Files

You can access files from a variety of areas within the application, including projects, portfolios, programs, and ideas. The File List pages and Files detail windows provide file control functionality such as uploading, downloading, organizing, previewing, and checking out files.

### Access the File List Page

Access, preview, add, delete, check in, and check out files within your projects, portfolios, programs, and ideas.

Use the detail windows on the File List page to assign file access, view file version information and file fields, specify file locations, and add annotations to your files.

To access the projects, portfolios, programs, or ideas File List page:

- 1) In the object selector, select a project, portfolio, program, or idea.
- 2) In the sidebar, hover over  **Files**, and select **File List**.

### Tips

- ▶ When files are added to Field objects, system folders are created in the project File List folder structure to organize these files. System folders and Field object files cannot be modified or deleted.

### Access a Files Detail Window

Use the Files detail window to access, preview, add, link, unlink, check in, and check out the files associated with your data. Files detail windows can be found on pages whose objects support files.

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**Note:** A screen reader will read the Files detail window as **File Attachments**.

---

The following objects support the Files detail window:

- ▶ Activities
- ▶ Funds
- ▶ Logs
- ▶ PBSs
- ▶ Portfolio Funds
- ▶ Projects

- ▶ Project Funds
- ▶ Risks
- ▶ Scope Assignments
- ▶ Scope Items
- ▶ Strategies
- ▶ Submittals
- ▶ Tasks
- ▶ Task Constraints
- ▶ WBSs
- ▶ Work Packages

---

## Annotating Files

Annotations are graphic markers and review remarks that you can add to a file preview. They provide a way for team members to communicate information that is specific to a part of a file without impacting version changes. Multiple team members can mock up a file at the same time using the drawing toolbar. If you are the file owner, you will receive a notification when a user annotates your file or replies to an annotation on your file.

Annotations are specific to the file preview and do not appear on downloaded or printed files. You can manage annotations from the Annotations detail window or in the file preview. You can filter annotations by username, or jump to any page of the file that has an annotation.

You cannot annotate audio or video files.

### Add a File Annotation






Add annotations to specific sections of a file to highlight discussion areas. For example, you can add a pushpin marker and enter a comment about the file where the pushpin is placed.



---

**Note:** Users with View Only (System) permission set for files can also add an annotation to a file. They can delete the annotation if it was created by them and if it has no additional comments.

---

To add an annotation:

- 1) **Navigate to the files page** (see page 111).
- 2) In the table, select the name of a file.
- 3) On the drawing toolbar, select the  **Color Selector** and choose a color for the annotation.
- 4) On the drawing toolbar, select one of the following drawing tools:
  - a.  **Pin:** Use the Pin to post an annotation to a pinpointed location.
  - b.  **Rectangle:** Use the Rectangle tool to draw a rectangle.
  - c.  **Ellipse:** Use the Ellipse tool to draw an ellipse.
  - d.  **Highlight:** Use the Highlighter tool to create a free-form highlight.

- e.  **Polygon**: Use the Polygon tool to create a free form polygon shape. You must create at least three points.
- 5) Enter a name.
- 6) Select  **Save**.


### Tips

- ▶ Select the annotation on the file to enter comments in the annotation **Discussion** panel.
- ▶ When using the pin to annotate a file, click the location you want to annotate.
- ▶ When using drawing tools to annotate a file, click and drag them to surround or highlight the area you want to annotate. Drawing tools include the highlighter, the rectangle, and the ellipse.


### Add a Discussion

Discussions provide a way for team members to communicate and exchange information on a wide variety of objects including activities, costs, resources, risks, scope assignments, tasks, and more. Comments are saved with the object and are available to all team members with the required security privileges. You can use the Discussion feature to collaborate throughout the application.

To add a discussion:

- ▶ Select  **Discuss** to open the Discussion panel.

---

**Note:** If no comments have been posted to the Discussion panel, the  **Discuss** icon is empty.

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To post a new comment:

- ▶ In the **Post a comment** field, enter a comment, and select **Post**.

To reply to a comment:

- ▶ Select **Comment**.
- ▶ In the **Post a reply** field, enter a reply, and select **Reply**.

### Tips

- ▶ A user mention sends a notification to the user inviting them to join the discussion. To mention a user, enter @<FirstNameLastName> or @<username> and select the user.
- ▶ You can resize the Discussion panel by selecting the left edge of the panel and dragging to the desired size.
- ▶ You cannot edit or delete a posted comment.
- ▶ Select **Like** to show that you approve or support a comment. Select **Unlike** to remove your Like.
- ▶ You can choose to show or hide the discussion icon in a table. Select the  **Settings** icon and, in the **Standard Column Options** section, select the **Show Discussion Indicator** option.

## View a File Annotation

You can keep track of file mark ups and key discussion points using the Annotations detail window, which provides a list of the annotations in the file. You can view the discussion panel from the list or select an annotation to go to it in the file.

To view a file annotation:

- 1) **Navigate to the files page** (see page 111).
- 2) In the table, select a file row, and then select the **Annotations** detail window.
- 3) Do one of the following:
  - ▶ Select **Discuss** to view the Discussion panel.
  - ▶ Select the name of the annotation to view the file and discussion.
  - ▶ Select the name of the annotation and add additional annotations to the file. Enter a new name in the **Name** field to save the file as a new annotation.

## Adding Files

You can add files from a variety of areas within the application. The File List pages enable you to add files and folders to projects, portfolios, programs, and ideas. Use Files detail windows to add or link files to a variety of objects.

Use the Summary & Settings panel to add files to certain Field objects.

**Note:** You will receive an error message if you attempt to upload a file that—

- Is an unsupported file type
- Exceeds 2GB in size
- Has a filename that contains the following special characters:  
?\*<>\_:\|'%"
- Has a filename that exceeds 255 characters

## Add a File to the File List

Add relevant files, such as costing spreadsheets, contracts, specifications, and audio and video files, to your projects, portfolios, programs, or ideas to support your organization's data. There is no limit to the number of files that can be stored for a given project or by a specific user.

To add a file to the File List:

- 1) **Navigate to the files page** (see page 111).
- 2) In the table, select a folder, and then select **+ Add File**.
- 3) In the **Upload File** dialog box, select one or more files, and then select **OK**. Individual files cannot exceed 2GB.

## Tips

- ▶ You can also drag and drop a file to the File List page.

- ▶ Built-in virus scanning functionality automatically scans your files during upload and check in. If an issue is detected with a file, you are notified and the contents of the file are deleted from the database. You can upload another version of the file that is not corrupted. You can't preview a file until virus scanning is completed and you refresh the page.
- ▶ When files are grouped by codes or when you drag and drop a file to the File List page, you can select the destination folder in the Upload File dialog box.

---

### Add a File in a Files Detail Window

Use the Files detail window to add relevant files that support your data. For example, you might add architectural drawings, pictures, or product specifications to activities on the Activities page.

The following objects support the Files detail window:

- ▶ Activities
- ▶ Funds
- ▶ Logs
- ▶ PBSs
- ▶ Portfolio Funds
- ▶ Projects
- ▶ Project Funds
- ▶ Risks
- ▶ Scope Assignments
- ▶ Scope Items
- ▶ Strategies
- ▶ Submittals
- ▶ Tasks
- ▶ Task Constraints
- ▶ WBSs
- ▶ Work Packages

To add a file in a Files detail window:

- 1) Navigate to a page whose object supports files.
- 2) In the table, select an object row, and then select the **Files** detail window.

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**Note:** A screen reader will read the Files detail window as **File Attachments**.

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- 3) In the **Files** detail window, select **+ Add**.
- 4) In the **Add File** dialog box, in the **Select Folder** section, select a folder in the project library.
- 5) In the **File** field, select **... Browse**, and then select one or more files. There is no limit to the number of files that can be stored for a given project.
- 6) Select **Upload**. Individual files cannot exceed 2GB.



## Tips

- ▶ Use the projects inventory panel to add files at the project level. This enables you to link a file to one or more objects in the project, such as activities, WBSs, or risks.
- ▶ Files that you add in the **Files** detail window can also be accessed from the project **File List** page.
- ▶ Built-in virus scanning functionality automatically scans your files during upload and check in. If an issue is detected with a file, you are notified and the contents of the file are deleted from the database. You can upload another version of the file that is not corrupted. You can't preview a file until virus scanning is completed and you refresh the page.

## Link a File to an Object

You can link existing files to objects contained within a project instead of adding them to each object. Linking ensures the same version of a file is used everywhere that it is linked. The application enables you to associate files in the Files detail window of the object. The files are still available from the File List page at the project level.

The following objects support the Files detail window:

- ▶ Activities
- ▶ Funds
- ▶ Logs
- ▶ PBSs
- ▶ Portfolio Funds
- ▶ Projects
- ▶ Project Funds
- ▶ Risks
- ▶ Scope Assignments
- ▶ Scope Items
- ▶ Strategies
- ▶ Submittals
- ▶ Tasks
- ▶ Task Constraints
- ▶ WBSs
- ▶ Work Packages


To link a file to an object:

- 1) Navigate to a page whose object supports files.
- 2) In the table, select an object row, and then select the **Files** detail window.

---


**Note:** A screen reader will read the Files detail window as **File Attachments**.

---

- 3) In the **Files** detail window, select  **Link**.
- 4) In the **Link File** dialog box, select a file, and select **> Add from Available**.  
You can select one or more files to link.

5) Select **OK**.


### Tips

- ▶ Use the projects inventory panel to add files at the project level. This enables you to link a file to one or more objects in the project, such as activities, WBSs, or risks.
- ▶ To remove a linked file, select the file, select the  **Context** menu, and select **Unlink**.

## Add a Folder

Establish an organizational hierarchy for your files by creating folders. Each folder hierarchy can have a maximum of 30 folders. Folders can be added on the File List page.

To add a folder:

- 1) **Navigate to the files page** (see page 111).
- 2) On the **File List** page, select  **Add Folder**.
- 3) In the **Add Folder** dialog box, enter a name for the folder and select **Add**.



### Tips

- ▶ You cannot delete or rename the root folder.

## Cut and Paste a Folder or File

Cut and paste folders and files to move them to and from folders. Cutting and pasting a folder also moves any child folders and files. To cut and paste a file from one folder to another, you need the Delete privilege for the source folder and the Add privilege for the destination folder in a Files permission set.

To cut and paste a folder or file on the File List page:

- 1) **Navigate to the files page** (see page 111).
- 2) In the table, select the folder or file.
- 3) Select the  **Context** menu, and select **Cut**.
- 4) Select a new folder row.
- 5) Select the  **Context** menu, and select **Paste**.

### Select Save. Tips

- ▶ You cannot modify system folders or files added to Field objects.
- ▶ You cannot cut files that are checked out.

## Apply a Folder Template

Apply folder templates to project, portfolio, program, or idea folders to copy a folder structure and file set. You can delete any files or folders that are not applicable without affecting the template.

To apply a folder template:

- 1) **Navigate to the files page** (see page 111).
- 2) On the **File List** page, select a folder, select the  **Context** menu, and then select **Apply Template**.
- 3) In the **Apply Template to Selected Folder** dialog box, select a template, and select **OK**.  
You will receive a notification when the template application is complete.

### Tips

- ▶ Folder templates are added in the workspace settings or in the **Files** app at the workspace level.

## Preview a File

Preview a file in the application before deciding if you want to check out and edit the file. You can preview a file from anywhere in the application by selecting the name of the file.

### Tips

- ▶ Oracle Primavera Cloud supports the preview of .mp4 and .ogg video file types and .mp3 and .wav audio file types. You must download other video and audio file types to preview them.
- ▶ Virus scanning is completed on all files uploaded or checked in to the application. You can't preview a file until virus scanning is completed and you refresh the page.



## Check Out a File

Because files are shared, you are required to check them out and in to make updates to them. Checking out a file enables you to download it to your local machine where you can make edits and create a new version of the file. When you are finished updating the file, you can check it in so the new version of the file is saved to the project, portfolio, program, or idea library and available to other team members. You can check out a file from the File List page or a Files detail window.

To check out a file:

- ▶ In a file row, select the  **Context** menu, and then select **Check Out**.


### Tips

- ▶ Files are downloaded or opened depending on the file opening procedures of your browser. Files that are still pending virus scan can be downloaded or checked out. The application will ask you to confirm before you download or check out an unscanned file.
- ▶ All users may view a checked out file, but only the user who has checked out the file may modify it until it is either checked in or check out is canceled.
- ▶ When files are checked out,  **Checked Out** displays next to the filename.
- ▶ The person who checked out a file or the project-level File Administrator can cancel a check out. When a check out is canceled, the file will reflect no changes. To cancel a file check out, select the  **Context** menu and select **Cancel Check Out**.

## Check In a File

After you have finished editing a checked-out file, you must check it in to save the new version of the file to the project, portfolio, program, or idea library. You can check in a file from the File List page or a Files detail window.

To check in a file:

- 1) In a file row, select the  **Context** menu, and then select **Check In**.
- 2) In the **Check In** dialog box, select **... Browse**, select the file, and then select **Upload**.

### Tips

- ▶ You can add comments about the file in the **Check In** dialog box from the **File List** page. For example, you may want to record the changes you made to the file.
- ▶ After you check in a file, you can view previous versions of it in the **Versions** detail window on the **File List** page.
- ▶ Built-in virus scanning functionality automatically scans your files during upload and check in. If an issue is detected with a file, you are notified and the contents of the file are deleted from the database. You can upload another version of the file that is not corrupted. You can't preview the most recent version of the file until virus scanning is completed and you refresh the page.

## Download a File

Download files from the application to work with them offline. Changes that you make to downloaded files that are not checked out will not be reflected in the application. You can download a file from the File List page or a Files detail window.

---


**Note:** Files that are still pending virus scan can be downloaded or checked out. The application will ask you to confirm before you download or check out an unscanned file.

---

To download a single file:

- ▶ In a file row, select the  **Context** menu, and then select **Download**.

To download one or more files in a zip file:

- 1) Use **Ctrl + Click** to select one or more file rows. If you want to download a folder and its contents, select the folder row.
- 2) On one of the selected rows, select the  **Context** menu and then select **Download as .zip**.

## View a File Version

You can use the Versions detail window on the File List page to keep track of the changes made to a file and access previous versions. The Versions detail window is not accessible from a Files detail window.

To view a file version:

- 1) **Navigate to the files page** (see page 111).
- 2) In the table, select a file row, and then select the **Versions** detail window.
- 3) In the **Versions** detail window, in the **Version** column, select a version number to view the selected version of the file.

## Assign a Location to a File

Assign locations to files so you can later produce reports based on geographical location and filter views by location.

To assign a location to a file:

- 1) **Navigate to the files page** (see page 111).
- 2) In the table, select a file row, and then select the **Location** detail window.
- 3) Choose an existing location, or enter a new location.
- 4) To choose an existing location:
  - a. In the **Name** field, select **... Select**.
  - b. In the **Select Location** dialog box, choose a location, and select **OK**.
- 5) To add a new location:
  - a. In the **Name** field, enter a name for the new location.
  - b. Enter the address, and select **Locate**. Alternatively, you can enter the **Latitude** and **Longitude** and select **Locate**.

### 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.
- c. To save this location to the Locations dictionary at the workspace level, select **Save location for future use**.
- 6) (Optional) In the **Description** field, enter a description of the location. The location must be saved for future use to enter a description.
  - 7) Select **Save**.

## Annotating Files

Annotations are graphic markers and review remarks that you can add to a file preview. They provide a way for team members to communicate information that is specific to a part of a file without impacting version changes. Multiple team members can mock up a file at the same time using the drawing toolbar. If you are the file owner, you will receive a notification when a user annotates your file or replies to an annotation on your file.

Annotations are specific to the file preview and do not appear on downloaded or printed files. You can manage annotations from the Annotations detail window or in the file preview. You can filter annotations by username, or jump to any page of the file that has an annotation.

You cannot annotate audio or video files.

---

### Add a File Annotation








Add annotations to specific sections of a file to highlight discussion areas. For example, you can add a pushpin marker and enter a comment about the file where the pushpin is placed.

---

**Note:** Users with View Only (System) permission set for files can also add an annotation to a file. They can delete the annotation if it was created by them and if it has no additional comments.

---

To add an annotation:

- 1) **Navigate to the files page** (see page 111).
- 2) In the table, select the name of a file.
- 3) On the drawing toolbar, select the  **Color Selector** and choose a color for the annotation.
- 4) On the drawing toolbar, select one of the following drawing tools:
  - a.  **Pin**: Use the Pin to post an annotation to a pinpointed location.
  - b.  **Rectangle**: Use the Rectangle tool to draw a rectangle.
  - c.  **Ellipse**: Use the Ellipse tool to draw an ellipse.
  - d.  **Highlight**: Use the Highlighter tool to create a free-form highlight.
  - e.  **Polygon**: Use the Polygon tool to create a free form polygon shape. You must create at least three points.
- 5) Enter a name.
- 6) Select  **Save**.

### Tips

- ▶ Select the annotation on the file to enter comments in the annotation **Discussion** panel.
- ▶ When using the pin to annotate a file, click the location you want to annotate.
- ▶ When using drawing tools to annotate a file, click and drag them to surround or highlight the area you want to annotate. Drawing tools include the highlighter, the rectangle, and the ellipse.


---

### View a File Annotation

You can keep track of file mark ups and key discussion points using the Annotations detail window, which provides a list of the annotations in the file. You can view the discussion panel from the list or select an annotation to go to it in the file.

To view a file annotation:


- 1) **Navigate to the files page** (see page 111).

- 2) In the table, select a file row, and then select the **Annotations** detail window.
- 3) Do one of the following:
  - ▶ Select  **Discuss** to view the Discussion panel.
  - ▶ Select the name of the annotation to view the file and discussion.
  - ▶ Select the name of the annotation and add additional annotations to the file. Enter a new name in the **Name** field to save the file as a new annotation.

## Assign a Code to a File

Assign codes to files to help track them based on attributes they share.

To assign a code to a file:

- 1) **Navigate to the files page** (see page 111).
- 2) In the table, select a file row, and then select the **Codes** detail window.
- 3) Select **Assign**.
- 4) In the **Select Code** dialog box, in the **Available** section, select codes and select **Add from Available** to add them to the **Selected** section.
- 5) Select **Select**.
- 6) Select  **Save**.


### Tips

- ▶ You can also assign codes to files by adding code columns to the page from the **Settings** panel and selecting a code value for the file row.


## Add a Discussion

Discussions provide a way for team members to communicate and exchange information on a wide variety of objects including activities, costs, resources, risks, scope assignments, tasks, and more. Comments are saved with the object and are available to all team members with the required security privileges. You can use the Discussion feature to collaborate throughout the application.

To add a discussion:

- ▶ Select  **Discuss** to open the Discussion panel.

---

**Note:** If no comments have been posted to the Discussion panel, the  **Discuss** icon is empty.

---


To post a new comment:

- ▶ In the **Post a comment** field, enter a comment, and select **Post**.

To reply to a comment:

- ▶ Select **Comment**.
- ▶ In the **Post a reply** field, enter a reply, and select **Reply**.

## Tips

- ▶ A user mention sends a notification to the user inviting them to join the discussion. To mention a user, enter @<FirstNameLastName> or @<username> and select the user.
- ▶ You can resize the Discussion panel by selecting the left edge of the panel and dragging to the desired size.
- ▶ You cannot edit or delete a posted comment.
- ▶ Select **Like** to show that you approve or support a comment. Select **Unlike** to remove your Like.
- ▶ You can choose to show or hide the discussion icon in a table. Select the  **Settings** icon and, in the **Standard Column Options** section, select the **Show Discussion Indicator** option.

## News Feeds Overview

News feeds enable you to view the daily activity of the workspaces, projects, and ideas that you are assigned. Using news feeds, you can easily monitor and review projects and ideas.

### User Profile News Feed

The user profile news feed captures the activity of the applicable user such as updates that person has made to projects or workspaces. The user news feed also displays the updates of any users and projects that you follow. All users have their own user profiles and news feeds where they can view their own activity.

### Workspace News Feed

The workspace news feed captures activity within the workspace including when projects are added and removed to a workspace.

### Project News Feed

The project news feed captures activity surrounding fields, risks, costs, schedules, role assignments, and scope items of a project.


### Idea News Feed

The idea news feed captures the activity within the idea.

## Access an Idea News Feed


There are two ways that users can access an idea news feed.

Access an idea news feed from Summary & Settings:

- 1) In the object selector, select an idea.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **News Feed**.

The Idea News Feed can also be accessed on the Idea Home page:



- 1) In the object selector, select an idea.
- 2) In the sidebar, select  **Home**.

### Filter a News Feed

Filter a news feed to refine the news feed and find the information most relevant to you.

To filter a news feed by object:

Select the **All** or **Updates** tab.

**Note:** The idea news feed on the **Idea Home** page cannot be filtered by **All** or **Updates**.



To filter a news feed by time period:

Under **Quick Filters**, select **Most Recent** ▼, and select an option depending on how you want to filter the news feed.

### Access Files from a News Feed

You can access files added to objects from the News Feed pages. Quick filters enable you to filter by files added during a specific time frame.

To access files from a news feed:

- 1) In the object selector, select a workspace, project, or idea.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **News Feed**.
- 4) On the **News Feed** page, select the **Files** tab.
- 5) In the **Summary & Settings** panel, select  **Close**.

### Follow a User or Project

Follow the users and projects you work with to more effectively collaborate on projects. You can only follow projects that you have the required security privileges to access or view.


To follow a user:

- 1) In the Global Search bar:
  - a. Enter part or all of a user's login name or personal name.
  - b. Select a user.
- 2) On the user's **News Feed** page, select **Follow**.

You will now appear on the list of followers for that user.

To follow a project:

- 1) In the object selector, select a project.

- 2) In the sidebar, select  **Home**.
- 3) On the **Project Home** page, select **Follow**.  
You will now appear on the list of followers for that project.

### Tips

- ▶ You can manage the projects and users you follow from your **News Feed** page. You can also view who is following you from this page.

## Related Items Overview

The Related Items app allows you to link between similar ideas and projects.

### Related Item List

The Related Items List page displays all of the links for the open idea. Links are organized by ideas and projects. A user can view the status and workspace of the idea or project that is linked.

### Linking Ideas


Linking ideas allows you to keep track of similar or duplicate ideas. Linked ideas will show up on the Related Items List for both ideas, and unlinked ideas will disappear from the Related Items List for both ideas.

### Linking Ideas and Projects

Keep track of projects that are similar to an idea by linking the project to the idea. Project proposals that are created using the default workflow are automatically linked to the ideas they were created from. These links cannot be removed.

## Link an Idea or Project

Link an idea to similar ideas or projects.

- 1) In the object selector, select an idea.
- 2) In the sidebar, hover over  **Related Items**, and select **Related Item List**.
- 3) Select the **Link** ▼ menu and then select **Idea** or **Project**.
- 4) In the **Available** list, select an idea or project, and then select > **Move Right** to move it to the **Selected** list.  
You can add multiple ideas or multiple projects at once.
- 5) Select **Link**.
- 6) Select **Save**.

---

**Note:** When you link an idea to another idea, the link will appear in the **Related Items List** of both ideas.



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### Tips

- ▶ A link from an idea to a project proposal is created automatically if the project proposal is created through the default workflow. This link cannot be removed.

### Unlink an Idea or Project

Unlink an idea from ideas or projects.

- 1) In the object selector, select an idea.
- 2) In the sidebar, hover over  **Related Items**, and select **Related Item List**.
- 3) In the table, select the  **Context** menu for the idea or project to be unlinked, and then select **Unlink**.
- 4) In the **Confirm** dialog box, select **Yes**.
- 5) Select **Save**.

---

**Note:** When you unlink an idea from another idea, the idea will unlink in the **Related Items List** of both ideas.

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## Idea List Page Overview

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Ideas are grouped by workspace in Oracle Primavera Cloud.

Add Idea List views or configure Idea List filters to customize the Idea List page. You can also complete workflow actions from the Idea List page if you have the correct permissions.

### Add an Idea List View

Add a view to the Idea List page to customize the display of idea data. Column, filter, grouping, and formatting options enable you to create views that present idea data in precise and meaningful ways. The Idea List page supports two types of views, personal and workspace. Personal views are private and only accessible to the user who created them. Workspace views are available to all members of the workspace. Your security privileges determine your ability to work with workspace views.

To add an Idea List view:

- 1) In the object selector, select **Ideas**, and then select **View All Ideas**.
- 2) In the view list, select **Manage Views**.
- 3) In the navigation tree, select a level, select the  **Context** menu, and then select **Add**.
- 4) Enter a name for the new view.
- 5) Use the following tabs to customize the view:

- a. **Columns:** Select the columns that are displayed on the page when using this view.
  - b. **Saved Filters:** Select filters to apply to the view to include and exclude ideas on the based on filter criteria.
  - c. **Grouping:** Select a field and sort order to use to group ideas when using this view.
  - d. **Formatting:** Select formatting options to customize the visual display of the view.
- 6) Select **Save**, and then select **Apply**.

### Tips

- ▶ On the **Idea List** page, select a view name from the view list to apply a saved view.

## Configure an Idea List Filter

Add filters to the Idea List page to reduce the number of ideas displayed on the page based on specified criteria. The Idea List page supports two types of filters, personal and workspace. Personal filters are private and only accessible to the user who created them. Workspace filters are available to all members of the workspace. Your security privileges determine your ability to work with workspace filters.

To add an Idea List filter:

- 1) In the object selector, select **Ideas**, and then select **View All Ideas**.
- 2) Select **Filters**, and then select **Manage Filters**.
- 3) In the navigation tree, select a view type (**Workspace** or **Personal**), select the **Context** menu, and then select **Add**.
- 4) Enter a name for the new filter.
- 5) Do the following to define the filter criteria:
  - a. In the **Match** list, select an option to define the filter conditions:
    - **All of the following:** Only ideas that match all of the filter rules will be displayed when this filter is applied.
    - **Any of the following:** Only ideas that match at least one of the filter rules will be displayed when this filter is applied.
  - b. Select **+ Add a filter condition**.
  - c. In the first empty row, use the following fields to define a filter rule:
    - **Field:** The field to which the filter rule is applied.
    - **Operator:** The comparison operation for the filter rule.
    - **Value:** The value against which the filter rule compares the value of the selected field of each idea.
  - d. Add rows for each filter rule you want to define.
  - e. Add filter groups to define additional sets of conditions.
- 6) Select **Save**.
- 7) In the **Manage Filters** panel, select **× Close**.

## Tips

- ▶ On the **Idea List** page, select **Filters** to apply saved filters to the current view.

## Complete a Workflow Action

Complete idea workflow actions assigned to you directly from the Idea List page. The Actions column displays the total number of available workflow actions associated with ideas and provides access to current workflow actions pending completion.

To complete an idea workflow action:

- 1) In the object selector, select **Ideas**, and then select **View All Ideas**.
- 2) In the table, in the **Actions** column, select an idea workflow action.
- 3) Follow the workflow's step instructions to complete the workflow action.

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**Note:** You must be assigned as the performer of the workflow action in order to complete it.

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## Tips

- ▶ You can also complete a workflow action from the Idea Home page.

# Configure View Settings

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A view is a configured visual layout of a page.

The following section contains view options common throughout Oracle Primavera Cloud. Available options will vary by page.

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**Note:** Certain page view settings are not maintained when the page is refreshed using the Safari browser.

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## Views Overview

A view is a configured visual layout of a page. Views allow you to customize content and layout choices such as column selection, filtering, grouping, and sorting. Some pages support additional view options, such as Gantt charts, Gantt bars, and spreadsheet rows. Selecting the best view for your needs can facilitate the process of managing data in Primavera Cloud.

Some pages support the ability to save named views. Named views can be saved as one of the three following types: Personal, Project, and Workspace. Personal views are private and only accessible to the user who created them. Project views are saved at the project level and can be accessed by other members of the project. Likewise, workspace views are saved at the workspace level and are available to all users in the workspace. Available view types may vary by page. A fourth named view type, standard, can be found on the Activities and Budget Planning pages. Standard views are views that come with Primavera Cloud and contain pre-configured view options. They are read-only, but you can modify the view options and save the modifications as a new view.

On pages that support named views, you can create any number of views necessary to display your layouts. Personal, project, and workspace named views can be added, modified, and deleted in the Manage Views panel on a page. On pages without named views, available view options are configured in the Settings panel and are applied and saved to the page.

For pages that support named views and autosave, you can configure if view changes to those pages are saved manually or automatically by configuring the **Save Views** options in Preferences.

Available view options will vary by page. The title of the  **Settings** icon may be specific to the grid or detail window that the icon pertains to. For example, the title of the icon for the Activities grid is Activities Grid Settings.

## Add a View

Some pages support the ability to add and save named views. Named views can be configured and applied at any time. Add multiple views to display different layouts.

There are four types of named views:



- ▶ **Standard:** Accessible by all users. Available on the Activities and Budget Planning pages. You cannot add, edit, or delete standard views, but you can modify the view and save the changes as a new view of another type.
- ▶ **Project:** Accessible by other members of the project.
- ▶ **Workspace:** Accessible by all members of the workspace.
- ▶ **Personal:** Only accessible to the user who created them.

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### Notes:


- Your security privileges determine your ability to create project and workspace views.
  - View options may vary per page.
- 

To add a view:

- 1) Navigate to a page, and then select the  **Settings** icon.
- 2) In the **Manage Views** panel, select a view type, select the  **Context** menu, and then select **Add**.
- 3) Enter a name for the new view.
- 4) Add the view:
  - In the **Manage Views** panel:
    - a. Select **Save**.

- b. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save the view select **Save** in the **View** list.
- c. Select **Reset**. Reset deletes the view that was previously added.

### Tips



- ▶ On the  **Context** menu next to an existing view, you can cut, copy, and paste the view into any of the view types. Select **Delete** to delete the view. Select **Set Active** to apply the view to the page.

## Apply a View

Select a view to apply its display settings to a page.

**Note:** You can only apply a view on pages that support named views.

To apply a view:


- 1) Navigate to a page, and then select the  **Settings** icon.
- 2) In the **Manage Views** panel, select a view.
- 3) Select the  **Context** menu, and then select **Set Active**.

### Tips


- ▶ For quicker selection, the **View** list displays a list of the five most recently applied views. Select a view to apply it.
- ▶ When edits are made to a view and the **Save Views** preference is set to manual, a warning icon is displayed in the **View** list and you will have the option to reset the view, save the view, or save the changes as a new view directly from the **View** list.

## Configure a Column

Configure columns to select and position the columns of data that appear on a page.




**Note:** View options may vary per page. The title of the  **Settings** icon may be specific to the grid or detail window that the icon pertains to.

To configure a column:

- 1) Navigate to a page, and then select the  **Settings** icon.
- 2) In the **Manage Views** or **Settings** panel, select the **Columns** tab.
- 3) In the **Available Columns** section, select columns and select **Add Column to Selected Columns** to add them to the **Selected Columns** section.
- 4) To position the columns in the **Selected Columns** section by:
  - a. Using the up and down arrows to change the positioning of the columns.

- b. Dragging columns between the pinned and unpinned sections or by dragging the **Pinned Columns Above** slider up or down. Pinned columns are displayed in a section at the beginning of the table and will not move when the rest of the table is scrolled horizontally. Pinned columns are not available on every page.
- 5) Apply the view:
- In the **Manage Views** panel:
- a. Select **Save**. When selected, you are saving all changes to the current view.
  - b. Select **Save As**. When selected, you can create a new Personal, Project, or Workspace view with a new name in the **Save View as** window.
  - c. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save changes select **Save** or **Save As** in the View list.
  - d. Select **Reset**.
  - e. Select **✕ Close**.
- In the **Settings** panel:
- ▶ Select **Save**.

## Tips

- ▶ You can choose to show or hide the discussion icon in a table. Select the  **Settings** icon and, in the **Standard Column Options** section, select the **Show Discussion Indicator** option.
- ▶ Expand or collapse hierarchical data for an object in a single table row from the row's  **Context** menu. To expand all or collapse all hierarchical data for all object rows, use the  **Context** menu in the table header.
- ▶ Collapse a selection to a certain grouping band level by selecting the Collapse To option, and then selecting the grouping band you want to collapse in the current layout. The selection available in the list is based on the grouping bands displayed in the current view.

---

**Note:** Expand All/Collapse All row settings can be saved to a view; however, individual Expand/Collapse row settings can only be maintained in the active view. If you switch views after expanding/collapsing hierarchical data in individual rows, you will need to readjust when you return to that view.

---

## Configure a Saved Filter


Filters reduce the data displayed on a page without deleting or otherwise removing it. Data that has been filtered out is still used for all calculations and reports. Some pages offer saved filters, which enable you to create multiple filters and apply them later.



Filters can be saved as one of three types: Workspace, Project, or Personal. Workspace filters are accessible to all users in the workspace. Project filters are accessible to all users in a project. Personal filters are private and only accessible to the user who created them. Users can view and edit all visible filters for a page, but can only apply a filter if it is accessible by the current view. For example, workspace views can only apply workspace filters, but personal views can apply workspace, project, and personal filters. Project views can apply project and personal views, if applicable. To apply a filter that is not accessible by the current view, you can cut or copy it to a type that is accessible to the view. A fourth filter type, standard, contains read-only filters that come with Primavera Cloud. Standard filters cannot be added, edited, or deleted, but then can be copied to a different type of filter and then modified.



Applied filters are saved to the selected view. On a page without named views, saved filters are saved and applied to the page.

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**Note:** View options may vary per page. The title of the  **Settings** icon may be specific to the grid or detail window that the icon pertains to.

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
To configure a saved filter:

- 1) Navigate to a page, and then select the  **Settings** icon.
- 2) In the **Manage Views** or **Settings** panel, select the **Saved Filters** tab, and then select **Manage Filters**.
- 3) In the **Manage Filters** panel, in the navigation tree, select a filter type, select the  **Context** menu, and then select **Add**.

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**Note:** Filters applied in the Manage Filters panel are applied to the currently active view. To change the active view, in the **Manage Views** panel, select the  **Context** menu next to a view, and then select **Set Active**.

---

- 4) Enter a name for the new filter.
- 5) Do the following to define the filter criteria:
  - a. In the **Match** list, select an option to define the filter conditions:
    - **All of the following:** Data is filtered only if it matches all the specified rules.
    - **Any of the following:** Data is filtered if it matches any of the specified rules.
  - b. Select  **Add a filter condition**.
  - c. In the first empty row, use the following fields to define a filter rule:
    - **Field:** The data field to which the rule is applied.
    - **Operator:** The comparison operation for the rule.
    - **Value:** The value against which the rule compares the data field.
  - d. Add rows for each filter rule you want to define.
  - e. Add filter groups to define additional sets of conditions.
- 6) Apply the view:
 

In the **Manage Views** panel:

- a. Select **Save**. When selected, you are saving all changes to the current view.
- b. Select **Save As**. When selected, you can create a new Personal, Project, or Workspace view with a new name in the **Save View as** window.
- c. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save changes select **Save** or **Save As** in the View list.
- d. Select **Reset**.
- e. Select **✕ Close**.

In the **Settings** panel:

- 7) Select **Save**.

### Tips

- ▶ On the page, select **∨ Filters** to open the **Manage Filters** panel, apply a recently used filter, or clear filters currently in use.
- ▶ For information on applying a saved filter, see **Apply a Saved Filter** (on page 90).

## Apply a Saved Filter

Apply a filter to reduce the data displayed on a page without deleting or otherwise removing it. Data that has been filtered out is still used for all calculations and reports. Saved filters enable you to create multiple filters and apply them later.

Applied filters are saved to the selected view. On a page without named views, applied filters are saved to the page. For information on configuring a saved filter, see **Configure a Saved Filter** (on page 88).

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**Note:** View options may vary per page. The title of the **⚙ Settings** icon may be specific to the grid or detail window that the icon pertains to.

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To apply a saved filter:

- 1) Navigate to a page, and then select the **⚙ Settings** icon.
- 2) In the **Manage Views** or **Settings** panel, select the **Saved Filters** tab.
- 3) In the **Manage Views** panel, select the view to which you want to apply the filter.

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**Note:** In the **Settings** panel, applied filters are saved directly to the page.


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- 4) In the **Match** field, select an option to define the filter application conditions:
  - **All applied:** Data is filtered only if it matches all of the selected filters.
  - **Any applied:** Data is filtered if it matches any of the selected filters.
- 5) In the filters tree, select the filters to apply to the view.

---

**Note:** If you want to edit a filter before you apply it, select **Manage Filters**. Any filter in the **Manage Filters** panel can be edited, but you can

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only apply a filter if it is accessible by the currently active view. To change the active view, in the **Manage Views** panel, select the  **Context** menu next to a view, and then select **Set Active**.

6) Apply the view:


In the **Manage Views** panel:

- a. Select **Save**. When selected, you are saving all changes to the current view.
- b. Select **Save As**. When selected, you can create a new Personal, Project, or Workspace view with a new name in the **Save View as** window.
- c. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save changes select **Save** or **Save As** in the View list.
- d. Select **Reset**.
- e. Select **✕ Close**.

In the **Settings** panel:

- ▶ Select **Save**.

### Tips

- ▶ Some pages include several standard filters, preconfigured for your use. You can apply them to your view at any time.
- ▶ On the page, select  **Filters** to open the **Manage Filters** panel, apply a recently used filter, or clear filters currently in use.
- ▶ When you apply a filter to a view, the filter icon changes to indicate that the data on the page has a filter applied.

## Configure and Apply Filtering


On pages without saved filters, you can configure and apply filtering options as part of the current view. Filters reduce the data displayed on a page without deleting or otherwise removing it. Data that has been filtered out is still used for all calculations and reports.

On pages with named views, you can configure a different set of filtering options for each view. On pages without named views, filtering options are applied to the page.

### Notes:

- For information on configuring a saved filter, see **Configure a Saved Filter** (on page 88).
- View options may vary per page.

To configure and apply filtering options:

- 1) Navigate to a page, and then select the  **Settings** icon.
- 2) In the **Manage Views** or **Settings** panel, select the **Filtering** tab.
- 3) In the **Manage Views** panel, select the view to which you want to apply the filter.

---

**Note:** In the **Settings** panel, filtering options are configured and applied directly to the page.

---

- 4) Add a filter:
  - a. In the **Match** list, select an option to define the filter conditions:
    - **All of the following:** Data is filtered only if it matches all the specified rules.
    - **Any of the following:** Data is filtered if it matches any of the specified rules.
  - b. Select **+ Add a filter condition**.
  - c. In the first row, use the following fields to define a filter rule:
    - **Field:** The data field to which the rule is applied.
    - **Operator:** The comparison operation for the rule.
    - **Value:** The value against which the rule compares the data field.
  - d. Add rows for each filter rule you want to define.
  - e. Add filter groups to define additional sets of conditions.

5) Apply the view:

In the **Manage Views** panel:

- a. Select **Save**. When selected, you are saving all changes to the current view.
- b. Select **Save As**. When selected, you can create a new Personal, Project, or Workspace view with a new name in the **Save View as** window.
- c. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save changes select **Save** or **Save As** in the View list.
- d. Select **Reset**.
- e. Select **✕ Close**.

In the **Settings** panel:

- ▶ Select **Save**.

In addition to the standard filtering options, the Work Plan, Hand-offs, Task List, and Constraints pages in the Tasks app also support the ability to configure and apply planning period options from the Filtering tab. On the Work Plan, Hand-offs, and Task List pages, you are filtering activities and tasks based on their start and finish dates. On the Constraints page, you are filtering task constraints based on their dates needed, promised dates, and assigned task start and finish dates.

To configure planning period filtering options:


- 1) On the **Filtering** tab, in the **Planning Period** section, select one of the following:
  - ▶ **All Weeks:** Select to display all objects regardless of their dates.
  - ▶ **Rolling Time Frame:** Select to filter objects according to a planning period:
    - **Weeks Before:** Display any object whose dates occur within the specified number of weeks before the current date.
    - **Weeks After:** Display any object whose dates occur within the specified number of weeks after the current date.

## Tips


- ▶ Tasks that fall outside the planning period may still be visible if any of the following are true:
  - ▶ Any of its dates occur within the period.
  - ▶ Assigned activity dates occur within the period.
  - ▶ It is part of a hand-off chain that occurs within the period.
- ▶ Depending on the fields selected in the standard filtering options, the Work Plan, Hand-offs, and Task List pages support the filtering of tasks by a variety of task values, including the activities and WBS nodes with which the tasks may be associated.
- ▶ You can also update Planning Period settings directly from the Work Plan, Hand-offs, Task List, or Constraints page.


## Configure Grouping Options

Configure grouping options for views to specify how data is grouped on a page. You can customize the color and appearance of your grouping bands by level.

**Note:** View options may vary per page. The title of the  **Settings** icon may be specific to the grid or detail window that the icon pertains to.

To configure grouping:


- 1) Navigate to a page, and then select the  **Settings** icon.
- 2) In the **Manage Views** or **Settings** panel, select the **Grouping** tab.
- 3) To configure the grouping options, select the **Configure** tab and do the following:
  - a. In the **Group By** section, select your grouping options:
    - **Group By:** Defines how data is grouped together on the page.
    - **Sort Order:** Defines how data is sorted within groupings.
    - **Grouping Interval:** Specifies an interval by which to separate your groupings. This field is only available when grouping by hierarchical fields.

**Note:** To add grouping rows, select the  **Context** menu, and select **Add Above** or **Add Below**.

- b. In the **Band Options** section, select view options:
      - **Show field title:** Displays the title of the field by which data is grouped in a band.
      - **Show field rollups:** Displays the calculated total of all data in a grouping band.
      - **Hide if empty:** Hides grouping bands that do not contain any data.
      - In the **Display text in band using** field, select an option to specify the text to appear in the band.

**Note:** This field only applies to group by fields that have both an ID and name.

- 4) To configure grouping band color options, select the **Theme** tab and do the following:

- a. In the **Style** list, select a grouping style.
  - b. In the **Colors** list, select a default or custom color theme.
  - c. To add a custom theme, select **Add Custom Colors**, and then choose up to six colors for the custom theme. Each color corresponds to a grouping band level. You can create multiple custom color themes and select them in the **Colors** list. After choosing a custom theme from the list, you can edit its individual colors or select  **Remove Custom Colors** to delete the theme.
- 5) Apply the view:
- In the **Manage Views** panel:
- a. Select **Save**. When selected, you are saving all changes to the current view.
  - b. Select **Save As**. When selected, you can create a new Personal, Project, or Workspace view with a new name in the **Save View as** window.
  - c. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save changes select **Save** or **Save As** in the View list.
  - d. Select **Reset**.
  - e. Select **✕ Close**.
- In the **Settings** panel:
- ▶ Select **Save**.

#### Tips

- ▶ Use the **Show/Hide empty groups** toggle on the **Activities** page or the **Schedule Comparison** page to automatically show or hide grouping bands that do not have any data.
- ▶ All resource assignments in a group must be the same type (labor or nonlabor) to be included in grouping bands. Materials are not calculated together because there may be different units of measure.
- ▶ WBS items have an additional sorting option for grouping on the Task List page. Select **Hierarchy** on the Grouping tab to apply a hierarchical sort order when managing views.

## Configure the Schedule Variance Analysis Panel

Configure comparison options to determine what is displayed on the Schedule Variance Analysis panel.


To configure the Schedule Variance Analysis panel tab options:

- 1) **Navigate to the Schedule Comparison page** (see page 109)
- 2) In the **Settings** panel, select the **Comparison Panel** tab.
- 3) To configure the comparison panel, select from the following:
  - a. In the **New** section, select the new items to display:
    - **New Activities**
    - **New Relationships**
    - **New Resources Assignments**
    - **New Risk Mappings**



- b. In the **Deleted** section, select the deleted items to display:
    - **Deleted Activities**
    - **Deleted Relationships**
    - **Deleted Resource Assignments**
    - **Deleted Risk Mappings**
  - c. In the **Changed** section, select the changed items to display:
    - **Changed Scheduler Settings**
    - **Changed Project Values**
    - **Changed Entered Values**
    - **Changed Calculated Values**
    - **Changed Relationships**
    - **Changed Resources Assignments**
- 4) Select **Apply**.

## Configure Sorting Options

Configure sorting options to specify how data is arranged on a page.

**Note:** View options may vary per page. The title of the  **Settings** icon may be specific to the grid or detail window that the icon pertains to.

To configure sorting options on a page:

- 1) Navigate to a page, and then select the  **Settings** icon.
- 2) In the **Manage Views** or **Settings** panel, select the **Sorting** tab.
- 3) Complete the following fields to define a sort order:
  - ▶ **Sort By:** Select a column by which to order the data.
  - ▶ **Order:** Select a direction in which to arrange the sorted data.
- 4) To define additional levels of sorting, select the  **Context** menu, and then select **Add Above** or **Add Below**.
- 5) Apply the view:
 

In the **Manage Views** panel:

  - a. Select **Save**. When selected, you are saving all changes to the current view.
  - b. Select **Save As**. When selected, you can create a new Personal, Project, or Workspace view with a new name in the **Save View as** window.
  - c. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save changes select **Save** or **Save As** in the View list.
  - d. Select **Reset**.
  - e. Select **✕ Close**.

In the **Settings** panel:

- ▶ Select **Save**.



## Configure Gantt Bars

To visually distinguish the different bars displayed in the Gantt chart, you can configure bar settings for the Gantt chart view on a page. Some bars, such as the Current bar on the Activities page, have additional configuration options.

You can configure Gantt bars on the following pages:

- ▶ Activities
- ▶ Task List

To configure Gantt chart bars:

- 1) Navigate to a page, and then select the  **Settings** icon.
- 2) In the **Manage Views** or **Settings** panel, select the **Bars** tab.
- 3) To add a new bar, do the following:
  - a. Select **+ Add ▼**, and then select **Bar**.
  - b. In the **Bar Type** list, select one of the available bar types.
  - c. In the **Height** list, specify a bar height.
  - d. In the **Bar Color** list, use the color picker to select a color for the bar. Optionally you can select a theme from the **Theme** list to apply a pre-configured color theme for all bars in the Gantt chart.
  - e. Click and drag one or more bars to change the order in which they appear.
- 4) To configure the Current bar for the **Activities** list, navigate to the **Bar Type** list, and select **Current**. Apply any of the following options:
  - ▶ Select **Show Progress** to show activity progress as a separate bar color. Select a **Progress Color** from the list.
  - ▶ If you want to color your activities according to their assigned code values, select the check box next to **Color by Activity Code**, and then select a workspace-level or project-level activity code. The code's values and their associated colors are shown below the list. Select **Configure** to configure the code value colors in the corresponding Codes dictionary. If Show Progress is enabled, you can configure the same options for **Progress Color by Activity Code**. Other bars also support the ability to color by activity code.
  - ▶ Select  **Swap Colors** to switch the positions of the bar and progress colors or the bar and progress activity codes.
  - ▶ In the **Progress Style** list, select a progress style.
  - ▶ Select **Show Critical** to represent critical activities with a red bar instead of the colors selected for the Current bar.
- 5) To configure labels for a bar, do the following:
  - a. Select the bar, select **+ Add ▼**, and then select **Label**.
  - b. In the **Label Field** list, select a label for the bar.
  - c. In the **Color** list, use the color selector to select a font color.



- d. In the **Height** list, select a font height.
  - e. Click and drag the label to position it next to or inside the bar.
- 6) Apply the view:
- In the **Manage Views** panel:
- a. Select **Save**. When selected, you are saving all changes to the current view.
  - b. Select **Save As**. When selected, you can create a new Personal, Project, or Workspace view with a new name in the **Save View as** window.
  - c. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save changes select **Save** or **Save As** in the View list.
  - d. Select **Reset**.
  - e. Select **× Close**.
- In the **Settings** panel:
- ▶ Select **Save**.

### Tips

- ▶ Select the **Summary Bar**. Enable **Show Expanded Summary Bars** to show summary bars for each expanded and collapsed grouping band in the Gantt view. When this option is disabled, a summary bar will only be displayed if its corresponding grouping band is collapsed.
- ▶ To preview how your Gantt chart bars will look, select **Preview**.
- ▶ To reset your Gantt chart settings to the default configuration, select **Reset**.


## Configure Gantt Chart Settings

Configure Gantt chart settings to determine how the chart will display.

You can configure Gantt chart settings on the following pages:


- ▶ Activities
- ▶ Task List

---

**Note:** View options may vary per page. The title of the  **Settings** icon may be specific to the grid or detail window that the icon pertains to.


---

To configure Gantt chart settings:

- 1) Navigate to a page, and then select the  **Settings** icon.
- 2) In the **Manage Views** or **Settings** panel, select the **Gantt** tab.
- 3) In the **Show** section, define your chart display options:
  - ▶ **Data date line:** Determines whether to show the project data date in the Gantt chart.
  - ▶ **Relationship lines:** Determines whether to show activity relationship lines in the Gantt chart.
    - **Critical relationships:** Determines whether to show relationships for activities that must start or finish on time to ensure the project completes on schedule.

- **Non-driving relationships:** Determines whether to show relationships for activities not on the longest path to project completion.
  - ▶ **Sight Lines:** Determines whether to show lines of demarcation for the selected timescale.
  - ▶ **Non-working time shading:** Determines whether to gray out time periods in which no work will be performed, as defined by the project calendar.
  - ▶ **Progress Spotlight:** Enables the Progress Spotlight highlighting feature in the Gantt chart.
- 4) In the **Timescale** section, define your timescale options:
- ▶ In the Timescale list, select a timescale for the Gantt chart:
    - **Week/Day:** The Gantt chart is divided into weeks which are then divided into days.
    - **Month/Week:** The Gantt chart is divided into months which are then divided into weeks.
    - **Quarter/Month:** The Gantt chart is divided into quarters which are then divided into months.
    - **Year/Month:** The Gantt chart is divided into years which are then divided into months.
    - **Year/Quarter:** The Gantt chart is divided into years which are then divided into quarters.
    - **Reporting Period:** The Gantt chart is divided into the units set by the reporting cycle. This option is only available in a project view on the Activities page, and a reporting cycle must be defined for the project.
  - ▶ (Reporting Period timescale only) For the **Reporting Period Label** option, select **Custom label only** to display the reporting period as the label on the Gantt chart (such as WK3). When deselected, the label uses the dates (such as Sat 24 - Fri 30).
- 5) Apply the view:
- In the **Manage Views** panel:
- a. Select **Save**. When selected, you are saving all changes to the current view.
  - b. Select **Save As**. When selected, you can create a new Personal, Project, or Workspace view with a new name in the **Save View as** window.
  - c. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save changes select **Save** or **Save As** in the View list.
  - d. Select **Reset**.
  - e. Select **× Close**.
- In the **Settings** panel:
- ▶ Select **Save**.

## Tips

- ▶ You can also enable some or all of these options by selecting  **Gantt Settings** under the Gantt chart.
- ▶ Tasks bars are colored by specific attributes. Go to Project Settings to modify this option.


## Configure Network Settings

The Activity Network is a view that displays a full diagram of the activities and relationships in your project. Configure the number of activity-related fields to display in each activity box.

You can configure network settings on the following pages:

- ▶ Activities

To configure Activity Network settings:

- 1) Navigate to a page, and then select the  **Settings** icon.
- 2) In the **Manage Views** or **Settings** panel, select the view to configure.
- 3) Select the **Network Setting** tab.
- 4) In the **Customize Activity Box Fields** section, display up to eight additional fields across two columns. Select **One field per line** to limit the display to a single column of four fields.
- 5) In the **Preview** section, you can preview the display of an activity box based on your selected fields.
- 6) Apply the view:
 

In the **Manage Views** panel:

  - a. Select **Save**. When selected, you are saving all changes to the current view.
  - b. Select **Save As**. When selected, you can create a new Personal, Project, or Workspace view with a new name in the **Save View as** window.
  - c. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save changes select **Save** or **Save As** in the View list.
  - d. Select **Reset**.
  - e. Select **✕ Close**.

In the **Settings** panel:

  - ▶ Select **Save**.


## Configure Quick Filters

You can use quick filters to reduce the number of visible items on a page.

### Notes:

- View options may vary per page.
- Due to slight differences in functionality, some pages in the application have their own set of help topics for quick filters.

To configure quick filters:

- 1) Navigate to a page, and then select the  **Settings** icon.
- 2) In the **Manage Views** or **Settings** panel, select the **Quick Filters** tab.
- 3) In the **Show** section, select up to three quick filters to apply to the view.
- 4) Apply the view:

In the **Manage Views** panel:

- a. Select **Save**. When selected, you are saving all changes to the current view.
- b. Select **Save As**. When selected, you can create a new Personal, Project, or Workspace view with a new name in the **Save View as** window.
- c. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save changes select **Save** or **Save As** in the View list.
- d. Select **Reset**.
- e. Select **× Close**.

In the **Settings** panel:

- ▶ Select **Save**.

## Apply a Quick Filter

You can use quick filters to refine the data displayed on a page. In a filter list, select one or more values on which to filter. Use multiple quick filters to further reduce how much data is displayed. Clear a filter to show more results. Quick filter selections are not saved with the view.

### Notes:

- View options may vary per page.
- Due to slight differences in functionality, some pages in the application have their own set of help topics for quick filters.

To apply a quick filter to a page:

- 1) In the **Quick Filters** list, select applicable filter values.
- 2) To remove a filter, expand a filter list, and select **Clear Filter**.


## Configure Task Counts

Task counts display the number of tasks of a specific status that are assigned to an activity. Use the Task Counts tab to configure which task counts are displayed in the activity details popover. Activity details provide additional information about the activities in your project, including associated WBS, start and finish dates, and activity percent complete. All task counts are enabled by default. Task counts are for public tasks only and do not include private tasks.

You can configure task counts on the following pages:


- ▶ Work Plan
- ▶ Hand-offs
- ▶ Task List

---

**Note:** View options may vary per page. The title of the  **Settings** icon may be specific to the grid or detail window that the icon pertains to.

---

To configure task counts:

- 1) Navigate to a page, and then select the  **Settings** icon.
- 2) In the **Manage Views** or **Settings** panel, select the **Task Counts** tab.
- 3) Select the task counts that you want to display:
  - ▶ **Total Tasks:** The total number of tasks assigned to the activity.
  - ▶ **Unplanned tasks:** Tasks without a due date.
  - ▶ **Planned tasks, not completed:** Tasks with a due date or committed date that are not complete.
  - ▶ **Planned tasks, completed:** Tasks with a due date or committed date that are marked as complete.
  - ▶ **Planned tasks outside of activity dates:** Tasks with a due date before the activity start date or after the activity finish date.
  - ▶ **Tasks hidden by filters and security:** Tasks that are not visible due to the planning period, enabled task filters or quick filters, or due to the current user's security settings. Tasks with assigned activities that occur within the planning period dates are visible.

---

**Note:** The **Unplanned tasks**; **Planned tasks, not completed**; and **Planned tasks, completed** task counts contain the total number of tasks associated with the selected activity. The **Planned tasks outside of activity dates** and **Tasks hidden by filters and security** task counts contain tasks already counted in the other categories.

---

- 4) Apply the view:
 

In the **Manage Views** panel:

  - a. Select **Save**. When selected, you are saving all changes to the current view.
  - b. Select **Save As**. When selected, you can create a new Personal, Project, or Workspace view with a new name in the **Save View as** window.
  - c. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save changes select **Save** or **Save As** in the View list.
  - d. Select **Reset**.
  - e. Select **✕ Close**.


In the **Settings** panel:

  - ▶ Select **Save**.

## Configure a Timescale


Configure the timescale interval for a page.

---

**Note:** View options may vary per page. The title of the  **Settings** icon may be specific to the grid or detail window that the icon pertains to.

---

To configure a timescale:

- 1) Navigate to a page, and then select the  **Settings** icon.
- 2) On the **Manage Views** or **Settings** panel, select **Timescale**.
- 3) In the **Timescale Standards Settings** section, select a timescale interval.
- 4) Apply the view:
  - In the **Manage Views** panel:
    - a. Select **Save**. When selected, you are saving all changes to the current view.
    - b. Select **Save As**. When selected, you can create a new Personal, Project, or Workspace view with a new name in the **Save View as** window.
    - c. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save changes select **Save** or **Save As** in the View list.
    - d. Select **Reset**.
    - e. Select **✕ Close**.
  - In the **Settings** panel:
    - ▶ Select **Save**.

---

**Note:** If you are changing the timescale on the **Time Phase** view of the **Fund Sources** page, remember this: You can only distribute quantities for a time-phased fund if the **Timescale** setting you choose here matches that fund's **Distribution Type** value. For example, if you want to distribute quantities for a fund that has a **Distribution Type** value of **Yearly**, you must first set the **Timescale** value to **Yearly**.

---


### Tips

- ▶ You can also change the timescale interval by right-clicking on the timescale on a page and selecting an option.

## Configure Spreadsheet Rows


Configure spreadsheet rows to show summary and spread values for each item in a table. For example, a resource spreadsheet lists all of the available resources in a project. Each resource may display separate rows for demand hours, commitment hours, demand costs, and commitment costs. Each field row can show values across a timescale and rolled up to a summary level.

---

**Note:** View options may vary per page. The title of the  **Settings** icon may be specific to the grid or detail window that the icon pertains to.

---

To configure a spreadsheet row:

- 1) Navigate to a page, and then select the  **Settings** icon.
- 2) In the **Manage Views** or **Settings** panel, select the **Spreadsheet Rows** tab.
- 3) In the **Available Spreadsheet Rows** section, select rows and select **Add Row to Selected Rows** to add them to the **Selected Spreadsheet Rows** section.
- 4) Use the up and down arrows to change the positioning of the columns in the **Selected Spreadsheet Rows** section.
- 5) Apply the view:
  - In the **Manage Views** panel:
    - a. Select **Save**. When selected, you are saving all changes to the current view.
    - b. Select **Save As**. When selected, you can create a new Personal, Project, or Workspace view with a new name in the **Save View as** window.
    - c. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save changes select **Save** or **Save As** in the View list.
    - d. Select **Reset**.
    - e. Select **× Close**.
  - In the **Settings** panel:
    - ▶ Select **Save**.



## Customize Task Cards

The Work Plan page and the Hand-offs page support the display of multiple task card types. The **basic task card** shows a task's name, type, and status icons. The color of the card indicates the company assigned to work on the task. When the size of the planning board columns are decreased, a smaller, more generic task card may be shown. You can also enable **configurable task cards** to display task information most important to you. Customize configurable task cards with task fields and status icons. Just like basic task cards, configurable task cards are colored according to their assigned company.

When configurable task card are enabled, you can double-click a basic task card to display configurable task information. Quickly rename a task by editing the task name in the card header. Select a status icon on the card or select a field with an edit icon to modify its value. On non-touchscreen devices, this icon is shown when you hover over an editable field. On touchscreen devices, this icon will always be shown on editable fields. Read-only fields will not have this icon. The right-click menu functions the same for both basic and configurable task cards. Configurable task cards do not support group selection functionality.

If you want to access all of a task's information, you can select the Task Details icon in the card header to open the Task Details dialog box. When configurable task cards are disabled, double-clicking a basic task card will open the Task Details dialog box directly.

To customize basic and configurable task cards:



- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Tasks**, and select **Work Plan** or **Hand-offs**.
- 3) Select  **Settings**.

- 4) In the **Manage Views** panel, select the **Task Cards** tab. Modify task card settings and view the changes in each **Preview** section.
- 5) In the **Basic Task Card** section, select any of the following:
  - ▶ **Show Task Icons**: Display icons on basic task cards on the planning board.
  - ▶ **Wrap Text on Tasks**: Wrap long task names to the next line of a basic task card.

---

**Note:** The **Basic Task Card** section is not available when configuring the Hand-offs page.

---

- 6) In the **Configurable Task Card** section, select **Enable Configurable Task Card**, and then do any of the following:
  - ▶ Select **Add section**  to add a blank section to the task card. You can add up to eight sections.
    - In each section, select up to three fields. Each field can only be used once.
    - Select **Hide Label** to hide the selected field's name. Some labels cannot be hidden.
    - Click and drag section dividers to resize the height and width of each section.
    - Select  **Delete** to delete a section.
- 7) In the **Icons** list, choose to show task icon at the top of the card, bottom of the card, or not at all.
- 8) In the **Font Size** list, choose to show a standard font size across all fields or enable each field value to fit the available cell space.
- 9) Select **Apply**.
- 10) All changes made to this page are saved automatically.

### Tips


- ▶ To open the Task Details dialog box from a configurable task card, double-click a basic task card, and then select  **Task Details** in the configurable task card header, or select the constraints, predecessor, or successors count to open the Task Details dialog box to the respective tab.
- ▶ To modify the other view options in the Manage Views panel, see **Configure View Settings** (on page 85).

## Configure Currency Settings

Configure the currency display settings on a page. Currency settings are user-specific and are saved across views.

On project-level pages that support currencies, you can choose to view your costs in terms of the application's base currency, the workspace currency, or the project currency.


---

**Note:** View options may vary per page. The title of the  **Settings** icon may be specific to the grid or detail window that the icon pertains to.

---

To configure a currency view:



- 1) Navigate to a page, and then select the  **Settings** icon.
- 2) On the **Manage Views** or **Settings** panel, select **Currency**.
- 3) Configure the following settings:
  - ▶ Select **Show currency symbols** to display the symbol of the currency.
 

---

**Note:** This option is only enabled if the **Show currency symbol** option is also enabled in the user preferences. See [Configure the Currency Format](#) for more information.

---
  - ▶ Select **Show currency banner** to display the chosen currency in the page toolbar.
  - ▶ In the **In what currency do you want to view costs?** section, choose which currency to view costs. If all available currencies are the same, this field is disabled. Currencies that can be edited are labeled Editable.
 

---

**Note:** If workspace currency is selected but is not supported, cost data will display in the base currency. For more information on workspace currency, see [Workspace Currency Overview](#).

---
- 4) Apply the view:
 

In the **Manage Views** panel:

  - a. Select **Save**. When selected, you are saving all changes to the current view.
  - b. Select **Save As**. When selected, you can create a new Personal, Project, or Workspace view with a new name in the **Save View as** window.
  - c. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save changes select **Save** or **Save As** in the View list.
  - d. Select **Reset**.
  - e. Select **✕ Close**.

In the **Settings** panel:


  - ▶ Select **Save**.

## Configure Formatting

Configure the formatting on a page.


The Work Plan page in the Tasks app contains additional page formatting options.

---

**Note:** View options may vary per page. The title of the  **Settings** icon may be specific to the grid or detail window that the icon pertains to.

---

To configure the formatting:

- 1) Navigate to a page, and then select the  **Settings** icon.
- 2) In the **Manage Views** or **Settings** panel, select the **Formatting** tab.

- 3) In the **Read-only Styling** section, select **Highlight Read-only cells** to highlight read-only cells on the page.
- 4) (Work Plan page only) Do any of the following:
  - ▶ In the **Band Options** section, select **Hide if empty on Hopper** or **Hide if empty on Planning Board** to hide empty grouping bands in the hopper or planning board for activities that have not been assigned any tasks.
  - ▶ In the **Planning Board Options** section, select **Show Info Bar** to display details for the selected task or activity below the planning board.
- 5) Apply the view:
  - In the **Manage Views** panel:
    - a. Select **Save**. When selected, you are saving all changes to the current view.
    - b. Select **Save As**. When selected, you can create a new Personal, Project, or Workspace view with a new name in the **Save View as** window.
    - c. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save changes select **Save** or **Save As** in the View list.
    - d. Select **Reset**.
    - e. Select **✕ Close**.
  - In the **Settings** panel:
    - ▶ Select **Save**.

### Tips

- ▶ Configure formatting specific to list table elements by navigating to the Activities List page or the Task List page. See **Configure Cell, Column, and Row Formatting** (on page 106).


## Configure Cell, Column, and Row Formatting

Configure cell, column, and row formatting to determine how a table will display. Apply a different font color, add a background color, or use filter options to create conditional formatting.

You can customize table formatting on the following pages:

- ▶ Activities
- ▶ Task List

To customize table formatting:

- 1) In the object selector, select a project or a program.
- 2) Navigate to the Activities or Task List page. Find the cell, column, or row in the table that you would like to format.
  - ▶ **Columns:** Right-click a column header, then select **Format** to change formatting options for a column, a column using a filter, or a row using a filter.
  - ▶ **Rows:** From the item  **Context** menu, select **Format Row**.

---

**Note:** You can apply filters to rows from the format options in the column headers.

---



- ▶ **Cells:** Right-click the cell that you would like to format and select **Format Cell** or **Format Cell by Filter**.
- 3) Select an option to make needed formatting adjustments:
- ▶ **Format Cell/Column/Row:** Opens a formatting menu with basic font styles and color preset options. Select **Apply** to keep your changes, or select **Clear** to discard them.
  - ▶ **Format Cell/Column/Row by Filter:** Select **Add** to open a formatting menu and create a custom filter for conditional formatting based on specified criteria, such as a text color preset option. For example, if you want only rows that meet certain criteria to display red, you could create a filter specifying those details here. Select **Add** to add your filter to the selected table element.

---

**Notes:**

- Formatting changes are saved with the current Named view and display on all printing outputs with the option to turn them on or off. You can view your selected formatting options from the Settings page.
  - Formatting selections are processed sequentially, and some changes overlap, depending on the type of change you apply. Row formatting applies first, followed by column formatting, and then cell formatting. Each type displays basic formatting in order of creation, followed by conditional formatting—by filter—in order of creation. For example, if you apply green as an alternating background color for rows, but then apply a yellow background color to a cell, the cell will have a yellow background color.
- 

**Tips**

- ▶ Include a hyperlink that directs team members to an internal or external site with more information than the grid can provide. See [Create a Hyperlink in a Grid](#).
- ▶ Expand or collapse hierarchical data within a table row from the row's  **Context** menu. To expand or collapse hierarchical data for every row, use the  **Context** menu in the table header.
- ▶ Collapse a selection to a certain grouping band level by selecting the Collapse To option, and then selecting the grouping band you want to collapse in the current layout. The selection available in the list is based on the grouping bands displayed in the current view.

---


**Note:** Expand All/Collapse All row settings can be saved to a view; however, individual Expand/Collapse row settings can only be maintained in the active view. If you switch views after expanding/collapsing hierarchical data in individual rows, you will need to readjust when you return to that view.

---

## Configure Plan By Options

Configure your plan by options for the Hand-offs page to specify what grouping options are available in the **Plan By** drop down. The options available for selection are Activity, Company, Codes, and WBS.

To configure Plan By grouping:

- 1) Navigate to the Hand-offs page, and then select the  **Settings** icon.
- 2) In the **Manage Views** panel, select the **Plan By** tab.
- 3) In the **Available** section, select the options you want to appear in the **Plan By** filters list.
- 4) When an option is selected, drag and drop the option to the **Selected** section or use the arrow buttons to move the selected options between **Available** and **Selected**.

---

**Note:** The codes category lists all codes that apply to both tasks and activities.

---

- 5) (Optional) To display WBS and Code value grouping bands hierarchically select **Display lanes for WBS and Code values hierarchically**.
- 6) Apply the view:  
In the **Manage Views** panel:
  - a. Select **Save**.
  - b. Select **Save As**. When selected, you can create a new Personal, Project, or Workspace view with a new name in the **Save View as** window.
  - c. Select **Apply**. When selected, you are returned to the grid. The grid displays any changes you have made; however, those changes are not saved. To save changes select **Save** or **Save As** in the View list.
  - d. Select **Reset**.
  - e. Select **Close**.



### Tips

- ▶ For more information on how to configure codes, review the **Codes Overview** (on page 26) topic.
- ▶ The WBS Plan by grouping option can be set to any WBS level such as the children or parent level.
- ▶ All child levels under the WBS are displayed by default. You can use the WBS quick filter options to control the child WBS levels displayed on the Hand-offs page.
- ▶ The WBS Plan by grouping option will display all WBS options including those that do not have an activity associated with them.
- ▶ If you're planning by an activity or task and no activities have been created or assigned to those tasks, they will not display in the schedule.
- ▶ Right-click a selection of one or more tasks, and then select **Assign Activity** to assign the same activity to all of the selected tasks. In the **Assign Activity** dialog box, leave the **Activity** field blank to remove any existing activity assignment from the selected tasks.


# 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**.