

Oracle
Primavera Cloud
Progress User Guide

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Oracle Primavera Cloud Progress User Guide

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About This Guide

This guide explains how Progress users can manage their activities and timesheets in Primavera Cloud.

Users who are assigned the Oracle Primavera Progress Cloud Service license or the Oracle Primavera Schedule Service license should use this guide.

My Activities Overview

My Activities Overview Video

Use the My Activities pages to manage and update your activities.

In order for activities to appear as they should for resources and assignments, you must first set the default My Activities settings.

Activities and Assignments

In Primavera Cloud, projects are divided into activities. The work for activities can be distributed among resource assignments. Your manager can assign you to manage both activities and the resource assignments within activities.

As the owner of an activity, you can view and update information about it. This may include information about resource assignments within the activity. As the performer of a resource assignment, you can view and update information about that resource assignment.

For simplicity, the activities and resource assignments that appear in the My Activities pages are both just called *activities*.

Some activities allow you to provide incremental status updates. Others can only be marked complete. Activities that can only be marked complete are called *milestones*.

The My Activities Page

After your manager assigns you activities, you can use the My Activities page to:

- ▶ View your activities.
- ▶ Filter your activity list by project, WBS, status, and time frame.
- ▶ Search for your activities by ID, name, and project name.
- ▶ Start, complete, and update the progress of your activities.
- ▶ Flag activities to signify their importance to you.
- ▶ View activities that are related to your activities and contact resources associated with them.
- ▶ Print the grid view as a PDF.

The My Activities page has two views: the **Grid** view and the **List** view. The **Grid** view lists all of your activities on one grid, where you can choose which columns are shown, arrange them however you like, and sort your activities by any visible column. The **List** view is less customizable, but it provides visual indicators and enables you to quickly start and finish activities. The **Grid** or **List** view can display visual indicators for activities with an actual start, actual finish date, or an assigned constraint. Follow the steps in **Configure Activity Date Indicators** (on page 34) to enable indicators.

Filter Activities by Project, WBS, Status, and Time Frame

To filter your activities by project, status, WBS, and time frame:

- 1) In the header, select your username, and then select **My Activities**.
- 2) On the **My Activities** page, find the **Quick Filters** area.
This is where you select the options to filter your activities.
- 3) In the **Projects** list, select projects individually to view activities for those projects, or select **All** to view your activities for all projects.
- 4) In the **WBS** field, select a work breakdown structure (WBS) to view activities from only that WBS.
- 5) In the **Status** list, select one of the following status filters:
 - ▶ **Active**: Includes activities that are assigned to you that you have not yet started or that you have started but have not yet completed.
 - ▶ **Due**: Includes activities with *Finish By* dates that occur within the time frame specified by the Time Frame filter.
 - ▶ **Overdue**: Includes activities with *Finish By* dates prior to today, start milestones with *Start By* dates prior to today, or finish milestones with *Finish By* dates prior to today.
 - ▶ **Flagged**: Includes unfinished activities that you have marked as flagged.
 - ▶ **Completed**: Includes activities that you have completed in the last 30 days.
- 6) If the **Status** filter is set to **Active**, **Due**, or **Completed**, you can use the **Time Frame** filter to further refine your activity list. In the **Time Frame** field, you can select a preset, or you can select **Custom** and then enter dates in the **From** and **To** fields.

The effect of the Time Frame filter varies depending on which Status filter is applied. If the **Status** filter is set to:

- ▶ **Active**: Each Time Frame filter option shows activities that are in progress and all activities that have not started but are scheduled to start, finish, or be in progress during that time frame.

For example, if you set the Status filter to **Active** and the Time Frame filter to **Next Week**, the activity list shows all activities that are in progress and all activities that have not been started but are scheduled to start next week, end next week, or be in progress through next week.

- ▶ **Due**: The activity list includes activities that are scheduled to be completed within the time frame specified by the Time Frame filter.

Note: The Due list only shows activities that are due within the specified time frame. For example, if you set the Status filter to **Due** and the Time

Frame filter to **Next Week**, the activity list will not show activities that are due this week.

- ▶ **Completed:** The activity list includes activities that were completed within the time frame specified by the Time Frame filter.

For example, if you set the Status filter to **Completed** and the Time Frame filter to **Last Week**, the activity list only shows activities that were completed last week.

7) Select **Apply**.

Tips

- ▶ To remove all filters, select **Clear All** in the Quick Filters area.

Filter Activities by Configured Fields and Codes

Each of your activities can contain configured fields and codes. You can view and edit the specific fields and codes associated with an activity in the My Activities window.

To view and edit configured fields and codes:

- 1) In the header, select your username, and then select **My Activities**.
- 2) Select **Grid** to enter the Grid view or **List** to enter the **List** view.
- 3) In the activity list, select an activity.
- 4) In the **Codes and Configured Fields** panel, view and update the values for previously configured codes and fields.
- 5) Select **Save**.

Search for Activities

You can search for your activities by name, ID, and project name.

Note: Search only includes activities that are already visible in the activity list. It does not include activities that have been filtered out by settings in the Quick Filters area.

To search for your activities:

- 1) In the header, select your username, and then select **My Activities**.
- 2) On the **My Activities** page, in the **Q Search** field, enter your search text.
The page automatically returns results as you type.

Tips

- ▶ To cancel the search and clear the search text, select **✕ Clear** in the **Search** field.

Start an Activity

You must mark your activities as started before you can update their progress.

To mark an activity as started:

- 1) In the header, select your username, and then select **My Activities**.
- 2) Select **List** to enter the List view.
- 3) Find the activity that you want to start, and then select **Start**.
- 4) Select **Save**.

Tips

- ▶ You can also mark an activity as started in the **Grid** view. Find the activity that you want to start and then change its **Status** value from Not Started to **In Progress**.

Updating Activity Progress Overview

To determine how a project is performing and what work remains to be done, updates on its progress should be regularly communicated by project team members. Using the My Activities feature, team members can provide status updates on the progress of activities to which they have been assigned.

When you assign an activity to a user, the activity appears on the My Activities page. From the page, users can mark activities as started or completed, and update other details to provide the current status of the activity.

The project manager can configure which fields are available on the My Activities page to be updated by team members. Updates to an activity's status can be viewed by the project manager from the Activities page.

You can assign activities to users for progress updates in three ways:

- ▶ Activity Owners
- ▶ Resource Assignments
- ▶ Both

Activity owners are users tasked with the responsibility of updating the status and other details for project activities. Activity owners are typically used when resource assignments are not used for reporting status on activities or when one person is responsible for reporting for a team.

You can also use resource assignments to designate project team members as responsible for updating the status of activities. Using resource assignments, you can assign more than one resource as responsible for an activity. When you assign an activity to multiple resources, the activity appears on the My Activities page for each assigned resource. From the list of assigned resources, you can designate a single person as the primary resource responsible for all status updates for the activity.

Tips

- ▶ A project must have a status of active in order for activities to appear on the **My Activities** page for project team member updates.
- ▶ Configure your activity progress update options on the **My Activities** tab of the **Settings** page in the project **Summary & Settings**.

- ▶ If your project is configured to use both methods for assigning activities and a user is assigned as both an activity owner and a resource assignment on an activity, the activity will appear twice on the **My Activities** page.

Update Progress of an Activity

You can update the progress of your activities after you have marked them as started.

To update the progress of an activity:

- 1) In the header, select your username, and then select **My Activities**.
- 2) Select **List** to enter the List view.
- 3) In the activity list, select the activity that you want to update.
- 4) In the activity details area, use the available status fields to update the status of the activity. Your manager determines which fields are available to view and edit. Some fields are automatically updated to reflect changes to other fields. For example, Time Left is automatically updated when you update Time Spent. Activities that have asterisks (*) next to their names have been modified, but their changes have not been saved.
- 5) Select **Save**.

Tips

- ▶ You can also update an activity in the **Grid** view. Select the activity you want to update and then select and update any editable status field like Activity Percent Complete.

My Activities Fields

The below fields shown on the My Activities page can be added by you from the page's view settings or by your manager using the Summary and Settings My Activities tab. Some general fields that are generic across the application, such as name or status, may not be included in this list.

Fields added by you are available for use across all of your projects and activities while fields added by your manager vary by project.

User Menu: My Activities page

Fields listed below are configurable by you through the user menu on the **My Activities** (see "**My Activities Overview**" on page 7) page.

Dates

BL Finish

The current finish date for the activity in the baseline.

The following baselines have unique names and values for this field: Original and Current.

BL Start

The current start date for the activity in the baseline.

The following baselines have unique names and values for this field: Original and Current.

Finish

The current finish date for the activity.

Start

The current start date of the activity.

For started activities, this is the actual start date. For not started activities, this is the planned start date until the project is scheduled. When scheduled, the start date field is set to the remaining early start date.

Durations

Total Float

The amount of time the activity can be delayed before delaying the project finish date. Calculated as Late Start minus Early Start or as Late Finish minus Early Finish.

Units

Planned Units

The planned units for the work scheduled to be completed by a specified project date.

Summary & Settings Project Settings: My Activities Tab

Fields listed below are configured by your manager on the My Activities tab in the project Summary & Settings. Up to three Assignment Fields and three Activity fields can be displayed per project.

Assignment Fields

These fields may be visible for activities that you are assigned as a resource:

Remaining Duration

The remaining working time for the assignment, from the current date to the scheduled assignment finish date.

Actual Units

The amount of work that you have performed on the assignment.

Remaining Units

The amount of work to be performed on the assignment.

Activity Fields

These fields describe information about the overall activity. These activity fields may be visible for activities that you are assigned as an activity owner:

Expected Finish

The date you expect work on the activity to finish.

Remaining Duration

The total working time from the activity remaining start date to the remaining finish date.

Actual Nonlabor Units

The number of nonlabor units that have been expended on the activity.

Remaining Nonlabor Units

The remaining units for all nonlabor resources assigned to the activity.

The remaining units reflect the work remaining to be done for the activity. Before the activity is started, the remaining units are the same as the planned units. After the activity is completed, there are zero remaining units.

Activity Percent Complete

The percentage of the activity that has been completed.

Remaining Labor Units

The remaining units for all labor resources assigned to the activity.

The Remaining Labor Units reflect the work remaining to be done for the activity. Before the activity is started, the remaining units are the same as the planned units. After the activity is completed, the remaining units are zero.

Actual Labor Units

The number of units expended for all labor resources assigned to the activity.

Complete an Activity or Milestone


You can mark your milestones and in-progress activities as complete.

Note: After you mark an activity or milestone as complete and then save it, you cannot revert its status to in-progress on the My Activities page. This can only be done on the Activities page, usually by a manager.

To mark a milestone or activity as complete:

- 1) In the header, select your username, and then select **My Activities**.
- 2) Select **List** to enter the List view.
- 3) In the activity list, select the activity or milestone that you want to complete.
- 4) Select **Mark Activity Complete**.
- 5) Select **Save**.


Tips

- ▶ You can also mark an activity as complete in the **Grid** view. Select the  **Context** menu for the row that represents an activity that you want to complete, and then select **Complete Activity**.

Flag an Activity

You can flag your activities. This designates them as important. It also makes them available with the **Flagged** status filter.

To flag an activity:

- 1) In the header, select your username, and then select **My Activities**.
- 2) Select the **Grid** or **List** view.
- 3) In the activity list, select  **Flag** in an activity row.
- 4) Select **Save**.

Tips

- ▶ To remove a flag, select  **Flag**.

View a Related Activity

Each of your activities can be associated with predecessor and successor activities. You can view information about these related activities and see which other resources are associated with them.

To view information about related activities:

- 1) In the header, select your username, and then select **My Activities**.
- 2) Select **Grid** to enter the Grid view.
- 3) In the activity list, select an activity.
- 4) In the **Related Activities** area, view information about predecessor and successor activities.

Tips

- ▶ You can also view related activities in the **List** view. After you select an activity that has related activities, the **Related Activities** link appears. Select it to open the **Related Activities** dialog box, where you can view information about predecessor and successor activities.

Send an Email About an Activity

On the My Activities page, you can send an email message with basic information about an activity to any valid email address.

To send an email about an activity:

- 1) In the header, select your username, and then select **My Activities**.
- 2) Select **List** to enter the List view.
- 3) In the activity list, select an activity.
- 4) In the activity row, select **Email this activity**.
- 5) In the **Send Email** dialog box, fill in the **To**, **Cc**, and **Bcc** fields.

For each of these, you can choose one or more Primavera Cloud users, or you can enter one or more custom email addresses.

To use a custom email address, enter the address in the field and then select the (*New Value*) option that appears.

To choose a Primavera Cloud user, enter part of the username in the field and select the user from the list that appears, or select **...** **Select**, choose the user or users from the **Select Email** dialog box, and then select **Assign**.

- 6) Select **Send**.

Tips

- ▶ You can also send email about activities in the **Grid** view. In the row for the activity that you want to send an email about, select the  **Context** menu and then select **Email**.

Update a Resource Assignment for Other Resources

If you are an activity owner, you can update the statuses of other resource assignments on your activities, provided those activities have been marked as Started and your manager has enabled the **Team member can update the progress of other resource assignments on activity** setting for the project.

To update activities for other resources:

- 1) In the header, select your username, and then select **My Activities**.
- 2) Select **List** to enter the List view.
- 3) Select an activity that has other resource assignments.

If an activity that you own is assigned to other resources, the **Status Other Resources** link appears when you select it.

- 4) Select **Status Other Resources**.
- 5) In the **Resources** dialog box, find the resource whose progress you want to update and update the progress fields or mark the assignment as Complete.

Even if you can view other resources here, you can only update their progress if the activity is already marked as Started.

- 6) Select **OK**.
- 7) Select **Save**.

Tips

- ▶ You can also status other resources in the Grid view. Select an activity with other resources and then select the **Resources** detail window.


Contact a Related Activity Resource

From the My Activities page, you can contact resources associated with activities that are related to your activities.


To contact related activity resources:

- 1) In the header, select your username, and then select **My Activities**.
- 2) Select **List** to enter the List view.
- 3) In the activity list, select an activity, and then select **Related Activities**.

The Related Activities link is only available if the activity has one or more related activities.

- 4) In the **Related Activities** dialog box, select the activity whose resources you want to contact.
- 5) Do one of the following:
 - ▶ Select the  **Context** menu, and then select **Email All** to email all resources assigned to the activity.
 - ▶ In the **Resource Name** column, select the username of the user you want to contact.
If there is only one resource associated with the activity, then the name of that user will appear in the **Resource Name** column. If multiple resources are associated with the activity, the **Resource Name** column will show the number of resources associated with the activity. Select that number to view a list of resources and then select the resource who you want to contact.
- 6) In the **To**, **Cc**, and **Bcc** fields, enter any additional email addresses to which you want to send your message.
For each of these fields, you can enter a complete email address, or you can choose an application user. To choose a user, enter part of the username in the field and select the user from the list that appears, or select **... Select**, choose the user or users from the **Select Email** dialog box, and then select **Assign**.
- 7) In the **Send Email** dialog box, customize the **Subject** and body text with your own subject and message.
The subject line of the email automatically includes the activity name and ID. The email body automatically includes the name of the project, the name of the activity, and the activity ID. You can overwrite or edit both fields.
- 8) Select **Send**.



Tips

- ▶ You can also contact related activity resources in the Grid view. After you select an activity, select the **Related Activities** detail window. In the **Predecessors** or **Successors** list, find the related activity whose resources you want to contact. Either select the  **Context** menu and then select **Email All**, or scroll to the **Resource Name** column and select a user.

View Overdue Activities in the Inbox

The Inbox page displays projects with overdue activities that you are assigned.

To view overdue activities on the Inbox page:

- 1) In the header, select  **View notifications**.
- 2) In the **Notifications** panel, select  **View All in Inbox**.
- 3) On the **Inbox** page, select the **All** or **Action Required** tab.
- 4) Select a row that represents a project with overdue activities that you are assigned.
- 5) Select **Update Progress** to navigate to the My Activities page, where you can update the progress of your activities.

Tips

- ▶ Set the time frame filter to **Overdue** to have the activity list only show overdue activities.
- ▶ An overdue activity notification is triggered when you are linked to a resource that is assigned to an activity that is overdue. These overdue activities are included in the Inbox so you can review and progress them.

Timesheets Overview

Timesheets enable users to enter hours worked against projects. Project hours are logged against resource assignments for activities. As a Progress user, you will access timesheets as either a timesheet user or timesheet supervisor:

- ▶ **Timesheet Users** can manage their own timesheets. They can create timesheets, log time against activities on projects, and submit them for approval.
- ▶ **Timesheet Supervisors** can create their own timesheets and enter time. They can also create timesheets for the resources assigned to the projects for which they are the timesheet supervisors. They can enter time on behalf of the resources and submit their timesheets for approval.

Timesheets are processed using a submission and approval workflow. First, users, supervisors, or approvers add a timesheet and enter hours. After the timesheet is submitted, all stakeholders receive a notification. Approvers can now access the timesheets created by the users and supervisors. Upon submission, only the supervisors and approvers can make changes to the submitted timesheets. All additional changes made by the supervisors or approvers are auto-submitted. Users whose timesheets are updated receive a notification in their email and Oracle Primavera Cloud Inbox. Next, the approvers can approve or reject the timesheets. If the timesheet is approved, the approved hours are added to the timesheet actual hours for the assignments for which the timesheet was created. If the timesheet is rejected, the workflow is triggered again.

Note: Only users with the Schedule license can be timesheet approvers.

Timesheet User Actions

Use Timesheets to Track and Log Hours Video

Timesheet users own their timesheets and use them to record progress on activities to which they have been assigned as a resource. They enter hours worked against activities for a project on the timesheet and submit it to the timesheet approver for approval. Timesheet users can view a list of timesheets created by them on the Timesheets page.

Timesheet supervisors and approvers are considered timesheet users for the timesheets that they own.

Add a Timesheet

Add a timesheet to enter hours worked against activities to which you have been assigned as a resource.

To add a timesheet:

- 1) In the header, select your username.
- 2) On the **User** menu, select **Timesheets**.
- 3) On the **Timesheets** page, select **+ Add**.
- 4) In the **Add Timesheet** dialog box, select a timesheet.

Note: Clear the **Auto-populate timesheet with project assignments for selected time period** option if you do not want to auto-populate the timesheet with your project assignments for the selected time period.

- 5) Select **Add**.

Add a Project to a Timesheet

Timesheet users can add a project to a timesheet if it has not been automatically populated. You can add any project to the timesheet that you have access to even if you are not assigned as a resource to the activities in that project.

To add a project:

- 1) In the header, select your username.
- 2) On the **User** menu, select **Timesheets**.
- 3) On the **Timesheets** page, select **My Timesheets** from the **View** menu on the toolbar.
- 4) On the **Timesheets** page, select a timesheet from the **Name** column.
- 5) On the **Timesheet Details** page, select **+ Add**.
- 6) In the **Add Project** dialog box, select a project, and then select **> Add from Available** to move it to the selected list.
- 7) Select **OK**.

Tips


- ▶ Projects can only be added to the timesheets that have a status of Not Submitted or Rejected.
- ▶ To delete a project from a timesheet, select a project from the **Timesheet Details** page, select **⚙ Context**, and then select **Delete**.

Add Hours to an Activity on a Timesheet

Timesheet users can log hours against activities for a project on their timesheets on the Timesheet Details page. You can log hours against any activity from a project that you have access to even if you are not assigned as a resource to that activity.

To log hours against an activity on a project:


- 1) In the header, select your username.
- 2) On the **User** menu, select **Timesheets**.
- 3) On the **Timesheets** page, select **My Timesheets** from the **View** menu on the toolbar.

- 4) On the **Timesheets** page, select a timesheet from the **Name** column.
- 5) On the **Timesheet Details** page, select a project, select the  **Context** menu, and then select **Add Hours**.
- 6) In the new row, select an activity.
- 7) (Optional) Add a **Project Supervisor** if a default supervisor has not been added for the project.
- 8) (Optional) In the **Hour Type** column, select the type of hours for which you are logging time, such as overtime or holiday time.
- 9) Enter hours for each day in the time period.
- 10) Select **Save**.

Delete an Activity from a Project

Timesheet users can delete an activity from a project if it is no longer needed.


To delete an activity:

- 1) In the header, select your username.
- 2) On the **User** menu, select **Timesheets**.
- 3) On the **Timesheets** page, select **My Timesheets** from the **View** menu on the toolbar.
- 4) On the **Timesheets** page, select a timesheet from the **Name** column.
- 5) On the **Timesheet Details** page, expand a project row to view the activities added to it.
- 6) Select an activity, select the  **Context** menu, and then select **Delete**.
- 7) Select **Save**.

Delete a Project from a Timesheet

Timesheet users can delete a project from a timesheet if they no longer need to log time on it.

To delete a project from a timesheet:


- 1) In the header, select your username.
- 2) On the **User** menu, select **Timesheets**.
- 3) On the **Timesheets** page, select **My Timesheets** from the **View** menu on the toolbar.
- 4) On the **Timesheets** page, select a timesheet from the **Name** column.
- 5) On the **Timesheet Details** page, select a project, select the  **Context** menu, and then select **Delete**.
- 6) Select **Save**.

Note: Projects can only be deleted from the timesheets that have a status of Not Submitted or Rejected.

Submit a Timesheet

Submitting a timesheet notifies the timesheet supervisor and approver. The timesheet approver then triggers the approval or rejection process for the timesheet.

To submit a timesheet:

- 1) In the header, select your username.
- 2) On the **User** menu, select **Timesheets**.
- 3) On the **Timesheets** page, select a timesheet row, select the  **Context** menu, and then select **Submit**. Optionally, select the check box next to the timesheet, select the **Actions** ▼ menu from the toolbar, and then select **Submit**.

An email and Primavera Cloud Inbox notification are sent to the supervisor and approver.

Note:

- After a timesheet is submitted, all non-submitted entries in the timesheet get automatically submitted and no further actions can be taken on them.
 - Users are notified if a supervisor or approver makes any updates to their submitted timesheets.
-


Timesheets can also be submitted from the Timesheet Details page:

- 1) In the header, select your username.
- 2) On the **User** menu, select **Timesheets**.
- 3) On the **Timesheets** page, select **My Timesheets** from the **View** menu on the toolbar.
- 4) On the **Timesheets** page, select a timesheet from the **Name** column.
- 5) On the **Timesheet Details** page, select the **Actions** ▼ menu, and then select **Submit**.

Delete a Timesheet

Delete a timesheet if it is no longer needed.

To delete a timesheet:

- 1) In the header, select your username.
- 2) On the **User** menu, select **Timesheets**.
- 3) On the **Timesheets** page, select a timesheet row, select the  **Context** menu, and then select **Delete**.
- 4) Select **Save**.

Note: Only the timesheets with a status of Not Submitted can be deleted.

Timesheet Supervisor Actions

Timesheet supervisors can view a list of their own timesheets on the Timesheets page. They can also view a list of timesheets of the resources who are assigned to the projects that they supervise on this page. Timesheet supervisors can perform all actions as a timesheet user on their own timesheets using the My Timesheets view and can add timesheets for other resources using the Supervisor's Timesheets view.

Timesheets View for Supervisors

Timesheet supervisors can view a list of their own timesheets and the list of timesheets for the resources assigned to the projects that they supervise.

To change the view for the Timesheets page:

- 1) In the header, select your username.
- 2) On the **User** menu, select **Timesheets**.
- 3) On the **Timesheets** page, from the **View** menu on the toolbar:
 - ▶ Select **My Timesheets** to view a list of your own timesheets.
 - ▶ Select **Supervisor's Timesheets** to view a list of timesheets for the resources assigned to your projects.

Note: Timesheet supervisors can perform all timesheet user actions in the **My Timesheets** view.

Add a Timesheet for a Resource

On the Timesheets page, timesheet supervisors can add timesheets on behalf of the resources assigned to the projects that they supervise.


To add a timesheet for a resource:

- 1) In the header, select your username.
- 2) On the **User** menu, select **Timesheets**.
- 3) On the **Timesheets** page, select **Supervisor's Timesheets** from the **View** menu on the toolbar.
- 4) Select **+ Add**.
- 5) In the **Add Timesheet** dialog box:
 - a. In the **Choose Timesheet Period** step, select a timesheet, and then select **Add**.
 - b. In the **Add Employees** step, select a project to view the resources added to it, select a resource, select **> Move Right** to move it to the selected list, and then select **Select**.

Add a Resource to a Project

Timesheets supervisors can add resources to the projects that they supervise as project supervisors and log time against resource assignments. All employees who have access to the project are available to be selected.


To add a resource to a project:

- 1) In the header, select your username.
- 2) On the **User** menu, select **Timesheets**.
- 3) On the **Timesheets** page, select **Supervisor's Timesheets** from the **View** menu on the toolbar.
- 4) Select a timesheet from the **Name** column.
- 5) On the **Timesheet Details** page, select a project, select the  **Context** menu, and select **Add Employee**.
- 6) In the **Add Employee** dialog box, select a resource, and then select **> Add from Available** to add it to the selected list.
- 7) Select **OK**.

Add Hours to an Activity for a Resource

Timesheet supervisors can enter hours against an activity for a project on behalf of a resource assigned to a project that they supervise. You can select any activity from a project that the user has access to even if the user is not assigned as a resource on that activity.

To enter hours for a resource:


- 1) In the header, select your username.
- 2) On the **User** menu, select **Timesheets**.
- 3) On the **Timesheets** page, select **Supervisor's Timesheets** from the **View** menu on the toolbar.
- 4) Select a timesheet from the **Name** column.
- 5) On the **Timesheet Details** page, select a resource beneath a project, select the  **Context** menu, and then select **Add Hours**.
- 6) In the new row, select an activity.
- 7) (Optional) Add a **Project Supervisor** if a default supervisor has not been added for the project.
- 8) (Optional) In the **Hour Type** column, select the type of hours for which you are logging time, such as overtime, holiday time.
- 9) Enter hours for each day in the time period.
- 10) Select **Save**.

Delete an Activity from a Project


Timesheet supervisors can delete an activity from a project for a resource if it is no longer needed.

To delete an activity:

- 1) In the header, select your username.
- 2) On the **User** menu, select **Timesheets**.

- 3) On the **Timesheets** page, select **Supervisor's Timesheets** from the **View** menu on the toolbar.
- 4) Select a timesheet from the **Name** column.
- 5) On the **Timesheet Details** page, expand a project row to view the activities added to it.
- 6) Select an activity, select the  **Context** menu, and then select **Delete**.
- 7) Select **Save**.



Tips

- ▶ To delete multiple activities at the same time, select the check box next to each activity, select the  **Context** menu, and then select **Delete Rows**.

Submit a Timesheet for a Resource

Timesheet supervisors can submit a timesheet on behalf of a resource, which triggers the approval process. After the supervisors submit the timesheet, timesheet users and approvers receive a notification in their emails and Primavera Cloud Inbox notifying them of the submission.


To submit the timesheet for a resource:

- 1) In the header, select your username.
- 2) On the **User** menu, select **Timesheets**.
- 3) On the **Timesheets** page, select **Supervisor's Timesheets** from the **View** menu on the toolbar.
- 4) Select a timesheet from the **Name** column.
- 5) On the **Timesheet Details** page, expand a project to view the resources added to it.
- 6) Select the resource for which the timesheet has not been submitted, select the  **Context** menu, and then select **Submit**. Or, select the check box for the resource, select the **Actions**  menu from the toolbar, and then select **Submit**.

Apply a Quick Filter

You can use quick filters on the Timesheets page or the Timesheet Details page to refine the timesheet data displayed on a page. Select one or more values on which to filter. Clear a filter to show more results. Quick filters are not saved with the view.

To apply a quick filter:

- 1) On the toolbar, select the  **Filters** icon.
- 2) In the **Quick Filters** list, select applicable filter values and then select **Apply**.
- 3) To remove a filter, expand the filter list, and select **Clear**.

Notifications Overview

Notifications are brief updates about your work within the application. You receive notifications when you and your team members complete specific actions or processes that need to be brought to your attention. This could include discussion mentions or updates about the activities that are assigned to you. You will also receive system announcements from Oracle in the notifications panel.

Working with Notifications (Oracle Primavera Cloud)

The Notifications panel lists your five most recent notifications and announcements. Select View notifications in the header to open the Notifications panel and access your notifications and announcements. In the Notifications panel, you can mark notifications as read, access links, refresh your notifications, open the Inbox, and access the All Notifications page. The All Notifications page enables you to view all of your notifications on a single page and remove notifications from your list.

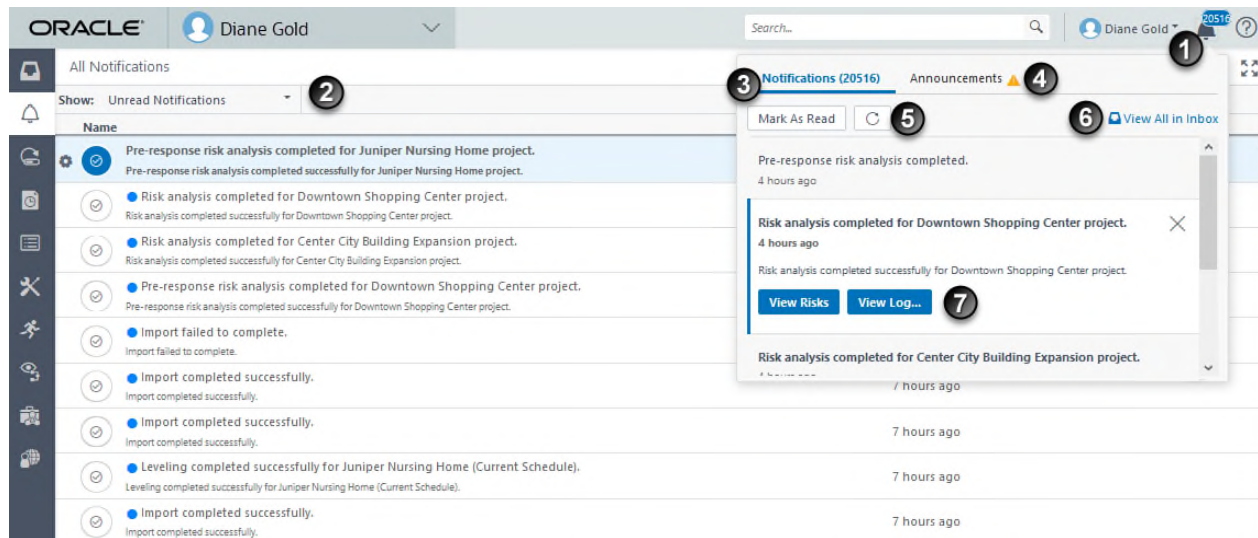




Table of Screen Highlights

Item	Description
1	User Control Panel: The User Control Panel enables you to access the Notifications panel and indicates the number of unread notifications you have. Select  View notifications on the User Control Panel to open the Notifications Panel.

Item	Description
2	<p>All Notifications Page: On the All Notifications page, view all of your notifications. Filter by unread or all notifications. Clear the notification or access more information about it.</p> <p>Select a notification on the All Notifications page to mark it as read. Notifications on the All Notifications page contain the time at which they were received, a message, and, depending on the type of notification, a link to relevant pages. You can also remove notifications from the All Notifications page.</p>
3	<p>Notifications Panel: Preview your most recent notifications from the Notifications Panel. Select a notification in the Notifications panel to view more information. If the notification is informing you of an action you need to take, a link to the relevant page displays.</p>
4	<p>Notifications Panel Tabs: View your notifications and announcements from one panel. Notifications are brief updates about your work within the application. You receive notifications when you and your team members complete specific actions or processes. System announcements are messages sent by Oracle's system administrators to inform users of important information such as system outages.</p>
5	<p>Notifications Panel Toolbar: You can use the Notifications panel toolbar to access and manage your notifications. Select Mark as Read to mark all notifications in the Notifications panel as read. Unread notification titles appear in bold. Select  Refresh to populate the Notifications panel with your five most recent notifications.</p>
6	<p>View All in Inbox: Select View All in Inbox to access your personal inbox to access items that you have been assigned as a performer or a manager. You can also navigate to the All Notifications page from the inbox.</p>
7	<p>Notification: Select a notification in the Notification Panel for quick access to more information about a notification. Some notifications include links to relevant pages as well.</p>





Access Notifications

You can access notifications through the Notifications Panel. In the User Control Panel, the Notifications link indicates the number of unread notifications you currently have and enables you to open the Notifications Panel. The Notifications Panel enables you to view your five most recent notifications.

A preview of the notification will pop up in the user interface as they are received. You can select the notification to view it or let it fade out.

To view a complete list of your notifications, access the All Notifications page.




To access your notifications in Oracle Primavera Cloud:

- 1) In the header, select  **View notifications**.
- 2) Select  **Refresh** to populate the **Notifications Panel** with your five most recent notifications.
- 3) In the **Notifications Panel**, select a notification.
 - ▶ Select  **Clear** to remove the notification from your notifications list.
- 4) In the **Notifications Panel**, select **View All in Inbox**.
- 5) In the sidebar, select  **All Notifications**.
- 6) On the **All Notifications** page, in the **Show** list, select **All Notifications**.


Remove Notifications

You can clear notifications to remove them from your notifications list permanently.

To clear a notification in Oracle Primavera Cloud:

- 1) In the header, select  **View notifications**.
- 2) In the **Notifications** panel, select **View All in Inbox**.
- 3) In the sidebar, select  **All Notifications**.
- 4) On the **All Notifications** page, in the **Show** list, select **All Notifications**.
- 5) Select the notification you want to remove, and select  **Clear**.


Tips

- ▶ In Primavera Cloud, remove notifications in the **Notifications Panel** by selecting the notification and then selecting  **Clear**. This will also remove the notification from the All Notifications page.

View an Announcement

Oracle's system administrators use announcements to notify you of important information. If a system administrator has created a new announcement, the announcement is displayed in the Announcements dialog box the next time you log in to the application. After you have closed an announcement, it does not display upon log in. You can still access announcements you have closed by selecting Announcements in the Notification panel. System announcements are accessible until they expire.

To view a system announcement:

- 1) In the header, select  **View notifications**.
- 2) In the **Notifications** panel, select the **Announcements** tab.

Inbox Overview

The Inbox helps you keep track of activities and workflow tasks that you have been assigned as a performer or manager. Most Inbox items include action links to pages related to their contents. You can filter your Inbox by a wide range of options to tailor your Inbox to your needs.

Use the Inbox to:

- ▶ Receive reminders of upcoming and overdue activities to ensure you and your team stay connected and complete work on time.
- ▶ Review discussions that you have been mentioned in.
- ▶ Receive updates on submitted, approved, and rejected timesheets.

Working with the Inbox

The Inbox is your personal list of shared pages, discussion mentions, workflow tasks, and project activities. Filter the Inbox items to optimize your work day. Select an Inbox item to review additional information and instructions about it.

The screenshot displays the Inbox interface. On the left, a 'Filter By' panel (1) allows filtering by Type, Project, Due Date, Received Date, Assigned To, From, and Managed By. Above the list, an 'Actions' menu (2) includes options like 'All', 'Action Required', 'Flagged', 'Unread', 'Manager', and 'Archive'. The main 'Inbox Item List' (3) shows a table of items with columns for Name and Received Date. One item is selected, showing a detailed view (4) with fields for Instance Name, Task Name, Workflow Name, Assign To, Started By, In Object, Started, Description, Manager, and Instruction.

Table of Screen Highlights



Item	Description
1	Filter Panel: Use the filter panel to filter your Inbox.
2	Actions Menu: The Actions menu allows you to further organize your Inbox. Select Inbox items and then choose Archive, Mark all as read, or Mark all as unread. You can also use the actions menu to move archived items back to the Inbox. Refresh: Select to refresh your Inbox contents.
3	Inbox Item List: View all of your Inbox items in the Inbox item list. The Inbox item list is filtered by your options in the filter panel.

Item	Description
4	Preview Panel: View detailed information about an Inbox item. Take action on an item.
5	Clear: Select Clear to clear all filters.

Access the Inbox

Your Inbox is your personal tracking system for upcoming and overdue action items as a manager or performer. You should check your Inbox frequently to stay up-to-date on your tasks and pending work.




To access the Inbox:

- 1) In the header, select  **View notifications**.
- 2) In the **Notifications** panel, select  **View All in Inbox**.


Flag an Inbox Item

Flag items in your Inbox to designate them as important and make them available with the Flagged status filter. You can also filter your Inbox by flagged items.

To flag an Inbox item:

- 1) In the header, select  **View notifications**.
- 2) In the **Notifications** panel, select  **View All in Inbox**.
- 3) In the item list, find the item that you want to flag, and then select  **Flag**.




Tips






- ▶ To remove a flag, select  **Flag** again.

Filter Inbox Items

You can filter your Inbox items to help manage your workload.

To filter Inbox items:

- 1) In the header, select  **View notifications**.
- 2) In the **Notifications** panel, select  **View All in Inbox**.
- 3) On the **Inbox** page, filter your Inbox:
 - a. Select a pre-defined filter:
 -  **All:** View all of your Inbox items.

-  **Action Required:** View Inbox items that require you to take action on them.
 -  **Flagged:** View flagged Inbox items.
 -  **Unread:** View unread Inbox items.
 -  **Manager:** View the Inbox from the manager view. This view shows active workflow tasks managed by you.
 -  **Archive:** View archived Inbox items.
- b. Select any number of filters from the **Filter By** section:
- **Type:** Filter by the type item in your Inbox. Options include Action Required, Alerts, Background Services, Mention, and Share.
 - **Project:** Filter by projects that you receive notifications for.
 - **Due Date:** Filter by the due date of activities or tasks. You can filter from preset options, or enter a custom date range.
 - **Received Date:** Filter by the date that you received Inbox items.
 - **Assigned To:** Filter by the user that Inbox items are assigned to.
 - **From:** Filter by the user that Inbox items are from.
 - **Managed By:** Filter by the manager of Inbox items.

Tips

- ▶ To clear all filters, select **Clear** on the bottom of the filter panel.


User Preferences Overview

The Preferences page enables you to customize data display formats and personal details. The options you customize are exclusively yours. You can alter global preferences, including formats for time units, dates, currencies, and search parameters. You can also change your avatar (profile picture) that other users will see on your posts in discussions. Proxy users do not have access to change your personal preferences.

Add a Profile Picture

Your avatar is shown with your username in some areas of the application, such as discussions. You cannot upload an image with a CMYK color format.

To add a profile picture:

- 1) **Navigate to the Preferences page** (see page 44).
- 2) On the **Preferences** page, select the **Settings** tab.
- 3) In the **User Details** section, select  **Choose Avatar Image**.
- 4) In the **Choose Avatar Image** dialog box, select **... Browse**, select the picture to upload, and then select **Upload**.
- 5) Save your changes:
 - a. Select **Save**.

- b. In the **Preferences** panel, select **✕ Close**.

Edit the User Details

You can edit your personal details such as name, title, phone number, and locale. You can also determine the display density for grids across the application.

To edit user details:

- 1) **Navigate to the Preferences page** (see page 44).
- 2) On the **Preferences** page, select the **Settings** tab.
- 3) In the **User Details** section, complete any of the following fields:
 - a. **First Name**: Enter your preferred first name.
 - b. **Last Name**: Enter your last name.
 - c. **Title**: Enter your job title.
 - d. **Locale**: Select your locale. If no Locale is selected, the locale set in the administration settings is used.
 - e. **Phone**: Enter your phone number.
 - f. **Mobile**: Enter your mobile phone number.
 - g. **Display Density**: Select the display density of page grids from the following options:
 - **Compact**: Provides the least amount of space in grids to fit the maximum number of rows on the screen.
 - **Cozy**: Provides a moderate amount of space in grids.
 - **Comfortable**: Provides the most space in grids for a less condensed view.
- 4) Save your changes:
 - a. Select **Save**.
 - b. In the **Preferences** panel, select **✕ Close**.

Related Video Tips

Setting Up Display Density Video

Configure Name and ID Display Format

You can select whether you would prefer to see only IDs for objects, such as workspaces and projects (for example to save screen space) or the ID and Name (to be able to identify objects more easily). The choices you make here are used for areas of the application that do not give you an option to configure these settings; for example, Task app users will see activities on the Work Plan page displayed according to these settings.

To configure name and ID display format:

- 1) **Navigate to the Preferences page** (see page 44).
- 2) On the **Preferences** page, select the **Settings** tab.
- 3) In the **Name and ID Display Format** section, select either **ID only** or **ID - Name**.
- 4) Save your changes:

- a. Select **Save**.
- b. In the **Preferences** panel, select **✕ Close**.

Configure the Number Format

You can select how you would prefer to see numbers throughout the application.

To configure the format for numbers:

- 1) **Navigate to the Preferences page** (see page 44).
- 2) On the **Preferences** page, select the **Settings** tab.
- 3) In the **Number Format** section:
 - ▶ Select **Show decimal places** if you want to see decimal digits.
If you selected **Show decimal places**, select whether to show 1 or 2 decimal places.
 - ▶ Select a **Decimal Separator**.
 - ▶ Select a **Digit Grouping Separator**.
 - ▶ Select a **Digit Grouping Style**.
- 4) Save your changes:
 - a. Select **Save**.
 - b. In the **Preferences** panel, select **✕ Close**.

Configure the Currency Format

You can select how you would prefer to see currency fields throughout the application.

To configure the format for currency:

- 1) **Navigate to the Preferences page** (see page 44).
- 2) On the **Preferences** page, select the **Settings** tab.
- 3) In the **Currency** section, modify the following fields:
 - ▶ **Show currency symbol**: If you want to see the symbol representing the currency for costs.
 - ▶ **Negative Format**: Select a format to use for negative currency values.
 - ▶ **Positive Format**: Select a format to use for positive currency values.

Note: For each format option, a "#" symbol denotes where in the currency value the currency symbol will be placed.

- 4) Save your changes:
 - a. Select **Save**.
 - b. In the **Preferences** panel, select **✕ Close**.

Tips

- ▶ The number of decimal places that display for cost fields is configured by an application administrator.

Configure the Date Format

You can select how you would prefer to see dates throughout the application.

To configure the format for dates:

- 1) **Navigate to the Preferences page** (see page 44).
- 2) On the **Preferences** page, select the **Settings** tab.
- 3) In the **Date** section:
 - a. Select a **Date Format** from the list.
 - b. Select **Four digit year** if you want to see four digits for the year instead of two.
 - c. Select **Month name** if you want to see a three-letter abbreviation of the month name rather than the number of the month in dates.
 - d. Select **Leading zeros** if you would like to make all single date and month numbers two digits.
 - e. Select a **Separator** from the list.
 - f. Select a **Time Format** from the list.
 - g. Select **Show minutes** if you want to see minutes with times.
- 4) Save your changes:
 - a. Select **Save**.
 - b. In the **Preferences** panel, select **✕ Close**.

Configure Time Units

You can configure how you see time units in the application.

To configure time units:

- 1) **Navigate to the Preferences page** (see page 44).
- 2) On the **Preferences** page, select the **Settings** tab.
- 3) In the **Time Units** section:
 - ▶ Select a format to **Display Units in**.
 - Select show **Sub units** if you want to show sub units.
 - Select show **Units label** if you want to show the unit labels.
 - Select **Decimal places** if you want to see decimal digits for your units. If selected, use the **Show decimal places** list to choose whether to show 1 or 2 decimal places.
 - ▶ Select a format to **Display Durations in**.
 - Select show **Sub units** if you want to show sub units.
 - Select show **Duration label** if you want to show the unit labels.
 - Select **Decimal places** if you want to see decimal digits for your durations. If selected, use the **Show decimal places** list to choose whether to show 1 or 2 decimal places.
 - ▶ Select a **Units/Time Format**. Units/Time values can be entered as a ratio or percentage and will be automatically converted to the chosen format.

- 4) Save your changes:
 - a. Select **Save**.
 - b. In the **Preferences** panel, select **✕ Close**.

Configure the Assignment Settings Dialog Preference

Resources and roles both support Units/Time values to indicate work availability and Price/Unit values to indicate pay rate. On any activity, whenever a role assignment is staffed with a resource or an existing resource assignment is replaced with a different resource, you must choose whether to use the current assignment's Units/Time and Price/Unit values or use the values of the new resource. Options for each value can be chosen from the Assignment Settings dialog box on the Activities page, but you can configure default selections on the Preferences page.

The option for choosing a specific assignment's Units/Time value occurs when you select a resource to staff a role assignment or you replace a current resource assignment with a different resource. The current resource may be assigned with or without an associated role. Depending on your preference, the assignment will use the new resource's Units/Time value or the current assignment's Units/Time value, or you will be prompted to choose.

An assignment's Price/Unit value is determined by the assignment Rate Source and the Rate Type associated with the Rate Source. The option for using a specific assignment's Rate Source and Price/Unit value occurs when you select a resource to staff a role assignment or replace the current resource on an assignment that is already staffed. Depending on your preference, the assignment will use the new resource's Price/Unit value and set the Rate Source value to Resource, use the current assignment's Rate Source value and set the Price/Unit value according to the rate source, or you will be prompted to choose. You will only be prompted to choose if the assignment's current Rate Source value is Role or Override. If the assignment's Rate Source value is set to Resource, and your preference is to be prompted, then the Price/Unit value will be set to the new resource's value, but you will not be prompted to choose.

If either option is set to prompt you for a selection, you can choose to not be asked again and make the current choice your new default option. If both options are set to prompt you for a selection, a single dialog box will contain both prompts. Your preference settings can be changed again at any time from the Preferences page. Changes to your preferences will only affect assignments updated after the changes were made.

To configure the Assignment Settings dialog preferences:

- 1) **Navigate to the Preferences page** (see page 44).
- 2) On the **Preferences** page, select the **Settings** tab.
- 3) In the **Resources** section, configure the following options:
 - ▶ **When assigning a resource to existing activity assignment:**
 - **Use new resource's Units/Time:** The new resource's Units/Time value will be applied to the assignment.
 - **Use current assignment's Units/Time:** The current assignment's Units/Time value will stay the same.
 - **Ask:** You will be prompted to either apply the new resource's Units/Time value or keep the current assignment's Units/Time value.

- ▶ **When a resource and role share an activity assignment:**
 - **Use new resource's Rate Source and Price/Unit:** The new resource's Price/Unit value will be applied to the assignment and the Rate Source will be changed to Resource.
 - **Use current assignment's Rate Source and Price/Unit:** If the Rate Source is Role or Override, the current assignment's Price/Unit value will stay the same. If the Rate Source is Resource, the Rate Source will remain Resource, but the Price/Unit value will change to the new resource's value.
 - **Ask:** You will be prompted to either apply the new resource's Rate Source and Price/Unit values or keep the current assignment's Rate Source and Price/Unit values. If the Rate Source is set to Resource, you will not be prompted.
- 4) Save your changes:
- a. Select **Save**.
 - b. In the **Preferences** panel, select **✕ Close**.

Configure Activity Date Indicators

You can configure the use of activity date indicators for the Start and Finish dates of activities that have actual dates or assigned constraints. Activity Date Indicators are enabled by default.

To configure indicators:

- 1) **Navigate to the Preferences page** (see page 44).
- 2) On the **Preferences** page, select the **Settings** tab.
- 3) In the **Activity Date Indicators** section, select one or all of the following:
 - ▶ **Show Actuals:** The Actuals indicator specifies if an activity's Start or Finish date is an Actual Start or Actual Finish.
 - ▶ **Show Constraints:** The Constraints indicator specifies if an activity's Start or Finish date is impacted by an assigned constraint.

Note: When enabled, hover over the indicator to reveal the type of constraint assigned and its effective date. Activities with two assigned constraints will either have an indicator on Start and Finish, or both constraints will impact the same field. Indicators may be shown on activities in the current schedule, in baselines, and in scenarios.

- 4) Save your changes:
- a. Select **Save**.
 - b. In the **Preferences** panel, select **✕ Close**.

Configure Save Views

The **Save Views** setting allows you to choose if named view changes are saved manually or automatically for pages where data changes are saved automatically. These pages include all types of views, such as workspace, project, and personal. You have the option to Save, Save As, and Reset changes made to a view by using the **View** menu.

To configure the views preferences:

- 1) **Navigate to the Preferences page** (see page 44)
- 2) On the **Preferences** page, select the **Settings** tab.
- 3) In the **Save Views** section, select either **Save views automatically** or **Save views manually**.


Note: Changing this setting to **Save views manually** will require you to manually save your view changes. This is recommended for organizations that use Project or Workspace views.

- 4) Save your changes:
 - a. Select **Save**.
 - b. In the **Preferences** panel, select **✕ Close**.

Enable Feature Previews

Oracle Primavera Cloud enables you to turn on upcoming features via User Preferences. Functionality listed in the Preview Features section is fully functional, but is not yet turned on permanently in the application. These features are turned off by default.

To enable feature previews:

- 1) **Navigate to the Preferences page** (see page 44).
- 2) On the **Preferences** page, select the **Settings** tab.
- 3) In the **Preview Features** section, select any of the following:
 - ▶ **Enhanced Printing:** Enables improved printing functionality on all pages in the application with a  **Print** icon in the page toolbar. When this option is disabled, standard browser printing functionality is used. On pages with Gantt charts, Gantt printing functionality is used.

Note: Generating a print preview for a large number of records may slow performance. Select Cancel to return to the previous page.

- 4) Save your changes:
 - a. Select **Save**.
 - b. In the **Preferences** panel, select **✕ Close**.

Configure Searches

You can customize how you want global and spatial search to work within the application. Specify the types of objects you want to search and the distance from your location. The choices you make here are used for areas of the application which do not give you an option to configure these settings.

To configure searches:

- 1) **Navigate to the Preferences page** (see page 44).
- 2) On the **Preferences** page, select the **Search** tab.
- 3) Select a **Maximum Number of Results Per Page**.
- 4) In the **Spatial Search** section:
 - a. Select **Default Distance Units**.
 - b. Enter a **Default Distance**.
- 5) Select **Save**.
- 6) In the **Preferences** panel, select **✕ Close**.

Proxy Users Overview

Designate a Proxy User Video

The proxy user feature permits you to act as another user in the application. You can complete tasks or assignments on behalf of another user, and another user can complete tasks or assignments on your behalf. For example, if you will be out of the office for two weeks of vacation, you can assign a co-worker or manager to act as your proxy in your absence if they have the same licenses as you. The user will have access to any projects and workspaces that you do. While other users are acting as proxy for you, each action they complete will be noted as Added On Behalf Of or Modified On Behalf Of to indicate that another user has completed the action on your behalf.

You must have the required security privileges to assign proxy users. The proxy user must have the same or more licenses as a user to act as their proxy. Only application administrators can act as a proxy user for other application administrators.

Add a Proxy User

Assign a user to serve as a proxy for you if you will be away from work. The proxy user that you assign will be able to complete tasks on your behalf.

Note: The proxy user must have the same or more licenses as you to act as your proxy.

To add a proxy user:

- 1) In the header, select your username.
- 2) On the **User** menu, select **Proxy Users**, and then select **Manage Proxy Users**.

- 3) On the **Manage Proxy Users** page, select **Assign**.
- 4) In the **Assign Users** dialog box:
 - a. Enter part or all of a user's login name or personal name into the **Search** field.
 - b. Select a user, and then select **Assign**.
- 5) In the **Start Date** field, select a start date.
- 6) In the **End Date** field, select an end date.
- 7) Select **Save**.

Tips

- ▶ Select **Revoke** to revoke an active user's ability to act as your proxy.
- ▶ Select **Delete** to delete a pending user's ability to act as your proxy.

View Your Proxy Users

You can use the Manage Proxy Users page to manage the users you can act as a proxy for. This table includes active, pending, and expired proxies.

To view your proxy users:

- 1) In the header, select your username.
- 2) On the **User** menu, select **Proxy Users**, and then select **Manage Proxy Users**.
- 3) On the **Manage Proxy Users** page, in the **Proxy To** section, view the list of users that you can act as a proxy for.

Act as a Proxy User

If you are assigned as a proxy user in the application, you can act as that user at any time during the proxy period to complete any work or tasks on behalf of a user. While acting as another user, you cannot change any user preferences. The only objects on the user menu that you will be able to access are the Background Services and Get Primavera Cloud Mobile pages.

To act as another user:

- 1) In the header, select your username.
- 2) On the **User** menu, select **Proxy Users**, and then select a username.
- 3) Select **Yes** to act as that user.

Tips


- ▶ Select the **User** menu, and then select **Logout of Proxy** to end the proxy session.


Add a Discussion

Using Discussions Video

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.

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**.