

Oracle
Primavera Cloud
Scope Management User Guide

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Oracle Primavera Cloud Scope Management User Guide

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About This Guide

This guide explains how to use Oracle Primavera Cloud to plan and manage scope items required for a project.

Project managers and cost engineers who are performing install-based deliverables management should read this guide.

Scope management is performed using the Scope app.

Scope Overview

Oracle Primavera Cloud provides an install-based deliverables management solution through its Scope app.

The app enables project managers and cost controllers to define the deliverables, materials, or products, all of which are considered scope items that are required to complete a project. The app enables tracking of the installation and cost of the scope items without requiring a detailed schedule.

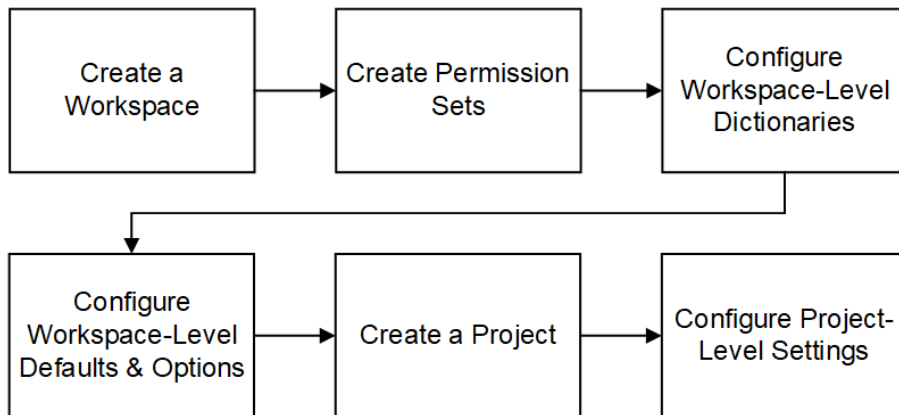
Key Features

- ▶ **PBS:** Provides a structure for organizing scope items. A PBS typically represents what is being built. An import feature enables the PBS and scope items identified in external systems to be imported into the application.
- ▶ **WBS:** Provides a structure for work to be completed. The WBS typically represents how the product represented in the PBS is to be built. This structure is also used to organize work packages and activities.
- ▶ **Work Packages:** Supports managing the installation of a group of related scope assignments.
- ▶ **Change Requests:** Provides a mechanism for reviewing and approving changes for scope items, work packages, and scope assignments after the original baseline is set.
- ▶ **Activity Linking:** Enables scope assignments and work packages to inherit the dates of the activities they are linked to from the project schedule. Also enables scope assignments to optionally drive the progress of the project schedule.
- ▶ **Connecting with P6 EPPM:** Enables data to be moved back and forth between Oracle Primavera Cloud and P6 EPPM. The WBS and work package relationship connects the scope assignments to the schedule.

Get Started with Scope

This section details the basic configuration of settings you will need before using the Scope app. Depending on how you plan to use Scope, some of the settings below may be optional, and most settings can be configured in any order.

Complete the following steps to get started with Scope:



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.

Before you can use the Scope app, you should create a workspace to contain your organization's projects.

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 Scope** (on page 15) for more information on the permissions specific to the Scope app.

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 by the objects within the workspace.

There are several workspace-level dictionaries that can be leveraged in the Scope app. All of them are optional, depending on how you plan to use the Scope app. Dictionaries to consider using are as follows:

- ▶ **CBS:** Use the CBS to create your organization's cost code structure. CBS helps to standardize cost code structures across projects. Project specific CBS Codes can also be created. If you do not plan to manage costs as part of scope, or if you do not require that costs be organized by CBS code, you do not need to create the CBS. If you do create CBS codes, the leaf nodes of the CBS can be assigned to Scope Items, and all Scope costs will roll up into the Cost Sheet by CBS code. See **CBS Overview** (on page 17) for more information.

- ▶ **Codes:** Use the Codes feature to create custom hierarchical coding structures to organize Scope data in different ways. By default, Scope Items are organized by PBS, and Work Packages are organized by WBS. See **Codes Overview** (on page 25) for more information.
- ▶ **Currencies:** If your projects manage costs in multiple currencies, you can add those currencies and specify exchange rates over time. Scope cost data is stored and can be viewed in either the Project Currency or the Base Currency. See **Currencies Overview** (on page 29) for more information.
- ▶ **Curve Profiles:** Curve profiles can be assigned to Scope Assignments to automatically distribute a Scope Assignment's costs, quantities, and hours according to the curve definition. See **Curve Profiles Overview** (on page 33) for more information.
- ▶ **Reporting Cycles:** Define Reporting Cycles if you want to plan scope quantities and track scope performance by Reporting Periods, in addition to traditional calendar time. When you assign a Reporting Cycle to a project, Scope Assignment data is stored per period when you run Period Closeout. See **Scope Reporting Cycles Overview** (on page 35) for more information.
- ▶ **Rules of Credit:** Rules of Credit are required if you want to progress Scope using milestones rather than by entering installed quantities. For each Work Package, you can specify which progress method you want to use in the Progress Measure field (Milestone % Complete or Physical % Complete). If you choose Milestone % Complete, you can assign a Rule of Credit to the Work Package, and progress on the Work Package will be calculated based on the milestones defined in the Rule of Credit. See **Rules of Credit Overview** (on page 37) for more information.
- ▶ **Units of Measure:** Units of Measure are required if a project's Scope Items will need to use different Units of Measure. See **Units of Measure Overview** (on page 39) for more information.

Configure Workspace-Level Defaults & Options

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

Select an object in the Defaults & Options section of the application to view its configuration options. Available options vary by object. The following options are relevant to objects used in the Scope app:

- ▶ **Defaults:** Set object defaults for auto numbering.
- ▶ **Field Labels:** View definitions for the fields relevant to each object, updating the names of the fields to suit your organization's standards.
- ▶ **Configured Fields:** Create configured fields to capture user-defined data.
- ▶ **Codes:** Add codes to an object for additional classification. Assign codes from a parent workspace or codes that belong to other objects.

The objects below should be configured before using the Scope app.

Defaults & Options Settings

Objects	Configuration Options	Link
PBS	Field Labels	See PBS (on page 46) for more information.
Project	Defaults (auto numbering)	See Project (on page 46) for more information.
Scope Assignment	Defaults (auto numbering), Field Labels, Configured Fields, Codes	See Scope Assignment (on page 47) for more information.
Scope Item	Defaults (auto numbering), Field Labels, Configured Fields, Codes	See Scope Item (on page 49) for more information.
WBS	Field Labels, Configured Fields, Codes	See WBS (on page 52) for more information.
Work Package	Defaults (auto numbering), Field Labels, Configured Fields, Codes	See Work Package (on page 53) for more information.

Some help topics, such as Field Labels and Configured Fields, can be performed on a wide range of objects and are separate from each object section. Topics specific to a particular object are found within the object's section.

Create a Project

A project is a formalized plan undertaken to create a service, product, or result. You must create a project before you can use the Scope app.

Configure Project-Level Settings

When you are in the context of a project, you can configure the following Scope-specific project settings in Summary & Settings:

- ▶ **Reporting Cycle:** Select a Reporting Cycle if you configured one at the workspace level. Primavera Cloud includes some sample Reporting Cycles. If using Reporting Cycles, specify how often you want period names to start over again. Each period contains a period number. If you are using weekly reporting periods for example, the periods will be numbered 1 through 52 and reset after a year (if selected). Setting this is only necessary if a Reporting Cycle is selected. See **Set the Reporting Cycle for a Project** (on page 56) for more information.
- ▶ **Auto Numbering** tab: Define project-specific auto-numbering settings for Scope Assignments, Scope Items, Work Packages, Change Requests, and Change Items. See **Configure the Auto Numbering Defaults for a Project** (on page 56) for more information.

Permissions

Permission sets determine the level of access to objects and functionality. Configure permission sets to grant users or user groups access to view or complete actions on a variety of objects.

Understanding View Privileges

View privileges determine a user's ability to view certain pages or objects.

The View Only (System) permission set is a permission set provided by the application. When assigned to a user, this permission set provides view-only access to all pages and objects in a context except for certain pages and objects with their own View privilege. The pages and objects with their own View privilege have been determined to need an extra layer of security - for example, cost and financial information.

The following pages and objects have their own View privilege for an object permission set, so users need the following privileges to access the page or object. Users with only the View Only (System) permission set will not be able to view the below pages and objects:

Workspace Permission Sets

Configuration

- ▶ Forms
- ▶ Resource Costs/Financials
- ▶ Role Costs/Financials
- ▶ Workflow Configuration
- ▶ Workflow Design

General

- ▶ Funding
- ▶ Funding Costs/Financials
- ▶ Strategies
- ▶ Workspace Aggregate Cost Data

Project Permission Sets

Contract

- ▶ Change Order Costs/Financials
- ▶ Change Orders
- ▶ Changes
- ▶ Changes Costs/Financials
- ▶ Commitment Costs/Financials
- ▶ Commitments
- ▶ Contract Costs/Financials
- ▶ Contracts
- ▶ Payment Application Costs/Financials
- ▶ Payment Application

- ▶ Potential Change Orders
- ▶ Potential Change Orders Costs/Financials

Cost

- ▶ Actuals
- ▶ Actuals Costs/Financials
- ▶ Project Budget

Funds

- ▶ Funding
- ▶ Funding Costs/Financials

Project

- ▶ Project Costs/Financials

Resources

- ▶ Resource Costs/Financials
- ▶ Role Costs/Financials

Risk

- ▶ Risk

Schedule

- ▶ Scenarios

Portfolio Permission Sets

Funds

- ▶ Funding
- ▶ Funding Costs/Financials

Portfolio

- ▶ Portfolio Costs

Idea Permission Sets

Idea

- ▶ Evaluation

Program Permission Sets

Program

- ▶ Program Costs/Financials

Cost

- ▶ Program Aggregate Cost Data
- ▶ Program Budget

Risk

- ▶ Risk

Funds

- ▶ Funding
- ▶ Funding Costs/Financials

Security Permissions for Scope

The following security permissions enable access to the objects and functionality within the Scope app. **Create workspace permission sets** (see "**Create a Workspace Permission Set**" on page 15) to enable access to relevant workspace-level data, including dictionaries, object defaults, resources, and roles. **Create project permission sets** (see "**Create a Project Permission Set**" on page 16) to enable access to page-level functionality and creation and modification privileges for the objects in the project. Depending on the permission, actions may include add, edit, delete, view, or enable.

To use the Scope app, users should have the following permissions, depending on their role:

Workspace Permissions

Category	Permissions
Configuration	Codes, Currencies, Curve Profiles, Configured Fields, Field Labels, Report Cycles, Rules of Credit, Units of Measure

Project Permissions

Category	Permissions
Project	Add WBS from other project/templates, Baselines, Baselines - Set Project Baselines, Close Reporting Periods, Currencies, WBS
Scope	Approve/Reject Scope Change Requests, PBS, Scope Assignments, Scope Change Requests, Scope Items, Work Packages

Create a Workspace Permission Set

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

To create a workspace permission set:

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

- 2) In the sidebar, select **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Permissions**, and then select **Workspace**.
- 4) On the **Workspace** permission sets page, select **+ Add**.
- 5) In the **Name** field, enter a unique name.
- 6) In the **Description** field, enter a description of the permission set.
- 7) In the **Privileges** section, expand each category to assign privileges.
- 8) Select **Save**.
- 9) In the **Summary & Settings** panel, select **× Close**.

Notes:

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

Tips

- ▶ Provide clear permission set names and descriptions to help you manage permissions.
- ▶ You can duplicate existing permission sets by selecting the **+ Add ▼** menu and selecting **Duplicate**. The Administrator (System) permission set cannot be duplicated.
- ▶ You can delete a permission set by selecting the profile and selecting **× Delete**. You can only delete permission sets that are not currently in use. The View Only (System) and Administrator (System) global permission sets cannot be deleted.

Create a Project Permission Set

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

To create a project permission set:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Permissions**, and then select **Project**.
- 4) On the **Project** permission sets page, select **+ Add**.
- 5) In the **Name** field, enter a unique name.
- 6) In the **Description** field, enter a description of the permission set.
- 7) In the **Privileges** section, expand each category to assign privileges.
- 8) Select **Save**.
- 9) In the **Summary & Settings** panel, select **× Close**.

Notes:

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

Tips

- ▶ Provide clear permission set names and descriptions to help you manage permissions.
- ▶ You can duplicate existing permission sets by selecting the **+ Add ▼** menu and selecting **Duplicate**. The Administrator (System) permission set cannot be duplicated.
- ▶ You can delete a permission set by selecting the profile and selecting **✕ Delete**. You can only delete permission sets that are not currently in use. The View Only (System) and Administrator (System) global permission sets cannot be deleted.

Dictionaries

Workspace-level dictionaries are repositories of items that can be used across the application, without having to create the same items for each object. Workspace-level dictionary items can be used in the projects, portfolios, programs, ideas, and child workspaces within the workspace. Dictionaries provide for efficient reuse of organizational data. For example, you can create multiple calendars or codes in a workspace and then apply them across activities in multiple projects in that workspace.

CBS Overview

A Cost Breakdown Structure (CBS) is used to track, manage, and report costs related to a project or program. The CBS standardizes costs into categories that represent manageable cost sources for an organization and a standard cost classification system. The CBS is comprised of cost codes that are classified into three types: expense, capital, or none. These codes are concatenated based on the segment definition and can be viewed as a flat or hierarchical structure. CBS codes are used in top-down and bottom-up cost planning and tracking.

The app enables you to create CBSs at the workspace and project levels. When you create a CBS at the project level, you can select the budget sources for your project. This selection can be edited from the Cost Sheet page.

Workspace CBS

Any CBS codes that are standards in your organization should be associated at the highest level workspace or node that they apply to so that they are available to child workspaces and projects. A CBS at the workspace level can be copied from the parent workspace, copied from sibling workspaces, imported from a Microsoft Excel spreadsheet, or entered manually. If you have created a unique workspace CBS, it can serve as a resource for projects in that workspace and sibling and child workspaces. Each workspace can contain only one CBS. The workspace CBS is created to serve as a CBS for projects and child workspaces to roll up the child workspace and project costs for a high level view of costs within that workspace.

Project or Program CBS

CBS codes at the project level can be copied from the parent workspace. If you have created a unique project CBS, it can serve as a resource for other projects in that workspace. Each project cost sheet can contain only one CBS.

Create a Workspace CBS

Creating a workspace CBS enables you to use the same CBS across multiple projects in your workspace and in sibling workspaces. If a workspace and a child workspace share the same CBS, costs will roll up to the workspace Cost Sheet page, providing a high level view of project and child workspace costs in the workspace.


Choose one of the following methods to create your CBS:

- ▶ **Add a Workspace CBS** (on page 18)
Add a new CBS if your workspace has a unique CBS.
- ▶ **Copy a Parent Workspace CBS** (on page 22)
Copy a parent workspace CBS if you want to use the same CBS as the parent.
- ▶ **Create a Workspace CBS by Import** (on page 19)
Add a CBS by importing if your organization already has a structured CBS you want to use.
- ▶ **Copy a Sibling Workspace CBS** (on page 21)
Copy a sibling workspace CBS if you want to use a CBS from a sibling workspace.

Add a Workspace CBS

Add a CBS at the workspace level when projects included in the workspace or sibling workspaces need to use the same CBS.

To add a workspace CBS:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.
- 4) On the **CBS** page, select **Create CBS**.
- 5) In the **CBS Setup** dialog box, select **Create new**, and select **Next**.
- 6) Provide at least one segment definition. Each segment definition you enter here corresponds with a level in the CBS hierarchy. The number of segment definitions you create determines the number of hierarchical levels you can have in your CBS. For example, if you only define one segment, then the CBS will be a flat list with one level. If, however, you define two segments, then the CBS can be two levels deep, with some CBS codes nested under the top-level CBS codes. Use these fields to provide segment definitions:

- ▶ **Name:** The name of the segment definition. Remember, here you are defining the name of the hierarchical level, not the name of an individual item. For example, if you are using MasterFormat to organize specs and documents, it would make more sense to enter "Divisions" here than to enter something like "Procurement and Contracting" or "General Requirements." That's because each of these things is itself a division. After you have defined the segment definitions, you can enter the individual divisions—like "Procurement and Contracting" or "General Requirements"—back where you are defining the CBS.
 - ▶ **Default Value:** For CBS codes that are subordinate to top-level CBS codes, this optional default value appears in their place before you add them. For example, let's say you've defined two segments, one called Divisions and another called Subdivisions. Let's also say that the default value for Subdivisions is 00. On the Cost Sheet page, if you add a new top-level CBS code titled "HVAC", then that code will be appended with 00 to read "HVAC 00." The **Separator** value determines how this default code is separated from the name of the parent code. In this case, we're using a space.
 - a. **Separator:** The separator that follows the name of the division. This can be a period, space, or hyphen. For example, let's say you have two segment definitions and have set the Separator value of the top-level segment to be a period. Let's also say the default value for both is 00. If you then add a new top-level CBS code titled "HVAC," it will appear on the Cost Sheet page as "HVAC.00".
- 7) Select **Finish**.
 - 8) Enter your CBS codes, and select **Save**.
 - 9) On the **Summary & Settings** panel, select **Close**.

Tips

- ▶ Create an import template in Microsoft Excel instead of manually entering values if you have a lot of CBS codes to enter.

This setting is used in the following apps:

 **Cost and Funds**

 **Risk**

 **Scope**

Create a Workspace CBS by Import

Creating a CBS using Microsoft Excel enables you to use the CBS already defined by your organization.


To create a CBS by import:

- 1) **Download an Import Template for Importing CBS Codes** (on page 19)
- 2) **Import a CBS** (on page 21)

Download an Import Template for Importing CBS Codes

Download a Microsoft Excel template to use when importing a workspace CBS. The number of levels in the segment definition in the spreadsheet must match the number of levels in the segment definition in the application.

To download an import template:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.
- 4) On the **CBS** page, select **Create CBS**.
- 5) In the **CBS Setup** dialog box, select **Create new**, and select **Next**.
- 6) Provide at least one segment definition. Each segment definition you enter here corresponds with a level in the CBS hierarchy. The number of segment definitions you create determines the number of hierarchical levels you can have in your CBS. For example, if you only define one segment, then the CBS will be a flat list with one level. If, however, you define two segments, then the CBS can be two levels deep, with some CBS codes nested under the top-level CBS codes. Use these fields to provide segment definitions:
 - ▶ **Name:** The name of the segment definition. Remember, here you are defining the name of the hierarchical level, not the name of an individual item. For example, if you are using MasterFormat to organize specs and documents, it would make more sense to enter "Divisions" here than to enter something like "Procurement and Contracting" or "General Requirements." That's because each of these things is itself a division. After you have defined the segment definitions, you can enter the individual divisions—like "Procurement and Contracting" or "General Requirements"—back where you are defining the CBS.
 - ▶ **Default Value:** For CBS codes that are subordinate to top-level CBS codes, this optional default value appears in their place before you add them. For example, let's say you've defined two segments, one called Divisions and another called Subdivisions. Let's also say that the default value for Subdivisions is 00. On the Cost Sheet page, if you add a new top-level CBS code titled "HVAC", then that code will be appended with 00 to read "HVAC 00." The **Separator** value determines how this default code is separated from the name of the parent code. In this case, we're using a space.
 - a. **Separator:** The separator that follows the name of the division. This can be a period, space, or hyphen. For example, let's say you have two segment definitions and have set the Separator value of the top-level segment to be a period. Let's also say the default value for both is 00. If you then add a new top-level CBS code titled "HVAC," it will appear on the Cost Sheet page as "HVAC.00".
- 7) Select **Finish**.
- 8) On the **CBS** page, select the **Actions** ▼ menu, and then select **Download Import Template**.
- 9) Select **Save**.
- 10) In the **Summary & Settings** panel, select **✕ Close**.

Tips

- ▶ The import template is downloaded as a Microsoft Excel file with the default file name, ExportDataToSpreadsheet.
- ▶ The top two rows of the CBS Codes worksheet are required when importing data from a worksheet. Do not change the data in these rows.

- ▶ The top row of the Segment Separators worksheet is required when importing data from a worksheet. If you need to add another level to your hierarchy, increment the level number for each new level.
- ▶ The segment definition specified in the spreadsheet must match the segment definition specified in the application.
- ▶ Review the Instructions worksheet on the first tab of the spreadsheet for helpful tips on populating the import template.

This setting is used in the following apps:

 **Cost and Funds**


 **Risk**

 **Scope**

Import a CBS

Import a CBS into the application from a Microsoft Excel (.xls or .xlsx) file.

To import a CBS:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.
- 4) On the **CBS** page, select the **Actions** ▼ menu, and then select **Import**.
- 5) In the **Import CBS** dialog box, select **... Browse**, select the file you want to import, and select **Import**.
- 6) Select **Save**.
- 7) In the **Summary & Settings** panel, select **✕ Close**.

Tips

- ▶ The segment definition specified in the spreadsheet must match the segment definition specified in the application.

This setting is used in the following apps:

 **Cost and Funds**


 **Risk**

 **Scope**

Copy a Sibling Workspace CBS

Copy the CBS of a sibling workspace if any projects within your workspace will use the same CBS.

To copy a sibling workspace CBS:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.

- 3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.
- 4) On the **CBS** page, select **Create CBS**.
- 5) In the **CBS Setup** dialog box, select **Copy from other**, and select **Next**.
- 6) Select a CBS to use, and select **Next**.
- 7) Select the CBS codes you want to include, and select **Finish**.
- 8) Select **Save**.
- 9) In the **Summary & Settings** panel, select **✕ Close**.

This setting is used in the following apps:

 **Cost and Funds**


 **Risk**

 **Scope**

Copy a Parent Workspace CBS

Copy the parent workspace CBS if your workspace will use the same CBS.

To copy a parent workspace CBS:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.
- 4) On the **CBS** page, select **Create CBS**.
- 5) In the **CBS Setup** dialog box, select **Build from**, and select **Next**.
- 6) Select the CBS codes you want to include, and select **Finish**.
- 7) Select **Save**.
- 8) In the **Summary & Settings** panel, select **✕ Close**.

This setting is used in the following apps:

 **Cost and Funds**


 **Risk**

 **Scope**

Modify a Workspace Segment Definition

Use segment definitions to control the depth of the CBS hierarchy and how codes are concatenated. The number of segment definitions you create determines the number of hierarchical levels you can have in your CBS. For example, if you only define one segment, then the CBS will be a flat list with one level. If, however, you define two segments, then the CBS can be two levels deep, with some CBS codes nested under the top-level CBS codes.

To modify a segment definition:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.

- 3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.
- 4) On the **CBS** page, select the **Actions** ▼ menu, and then select **Edit Segment Definitions**.
- 5) In the **Segments** dialog box, make any edits, and select **Save**.
- 6) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

- ▶ You cannot add a new segment definition if the existing segment definition is associated with a CBS code that is already assigned costs.
- ▶ You cannot remove a segment definition if the CBS codes form a hierarchy as deep as the row number of the segment definition.
- ▶ You cannot add or remove segment definitions to or from a workspace or project CBS that has been copied from its parent. However, importing from the parent CBS may pull down additional segment definitions.

This setting is used in the following apps:

 **Cost and Funds**



 **Risk**

 **Scope**



Add a CBS Code

Add or delete CBS codes if your workspace CBS needs change.

To add a CBS code:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.
- 4) On the **CBS** page, in the  **Context** menu, select **Add Below**.
- 5) In the new row, enter the new CBS code.
- 6) Select **Save**.
- 7) In the **Summary & Settings** panel, select ✕ **Close**.

Tips

- ▶ All CBS codes are created as active, but you can deactivate any codes that you do not want to be available for use by other users for scope assignments or copying CBSs.
- ▶ Select the  **Context** menu to organize your codes by moving them vertically or hierarchically.
- ▶ If the CBS was copied from its parent workspace, you cannot add CBS root codes. However, you can add a new child CBS code indented below the root. To add a child CBS code, select the  **Context** menu, and then select **Add**.
- ▶ You cannot delete a CBS code if the code has been copied by any projects or child workspaces in the owning workspace.

This setting is used in the following apps:

 **Cost and Funds**


 **Risk**

 **Scope**

Import Additional CBS Codes

If you copied a parent workspace CBS, you can update the workspace CBS with additional codes as your CBS needs change. You can import new codes added to the original CBS or import codes that you did not select before.

To import additional CBS codes:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.
- 4) On the **CBS** page, select the **Actions** ▼ menu, and then select **Import**.
- 5) In the **Import CBS** dialog box, select the codes you want to include, and select **Import**.
- 6) Select **Save**.
- 7) In the **Summary & Settings** panel, select **✕ Close**.

This setting is used in the following apps:

 **Cost and Funds**

 **Risk**


 **Scope**

Reset a Workspace CBS

You can reset the workspace CBS if your CBS needs change if the following conditions are met:

- ▶ CBS codes are not assigned to scope items, scope assignments, funds, or risks.
- ▶ CBS codes are not inherited by another workspace or project CBS.

To reset a workspace CBS:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **CBS**.
- 4) On the **CBS** page, select the **Actions** ▼ menu, and then select **Reset CBS**.
- 5) Select **Save**.
- 6) In the **Summary & Settings** panel, select **✕ Close**.

This setting is used in the following apps:

 **Cost and Funds**

 **Risk**

 **Scope****Codes Overview**

Codes help you categorize your data objects based on characteristics that they share. If you have many instances of an object, codes help you group and filter potentially vast amounts of information spanning different areas of the organization. You can also use codes to arrange objects hierarchically. The application supports an almost unlimited number of codes and values; therefore, you can establish as many as you need to meet the filtering, sorting, and reporting requirements of your organization.

At the workspace level, codes can be created and associated with a wide variety of objects available within the workspace. At the project level, you can create activity and task codes that will only be available to a single project.

Workspace-level codes can be created for the following objects:

- ▶ Activities
- ▶ Commitments
- ▶ Contracts
- ▶ Custom Logs
- ▶ Files
- ▶ Funds
- ▶ Ideas
- ▶ Portfolios
- ▶ Programs
- ▶ Projects
- ▶ RFIs
- ▶ Reports
- ▶ Resources/Roles
- ▶ Risks
- ▶ Scope Assignments
- ▶ Scope Items
- ▶ Strategies
- ▶ Submittals
- ▶ Tasks
- ▶ Task Constraints
- ▶ WBSs
- ▶ Work Packages

Add a Code

Using Colors with Activity Codes Video

Create codes to help categorize and track objects based on attributes they share.

You can apply workspace-level codes to one or more of the following objects: Activities, Custom Logs, Files, Funds, Ideas, Portfolios, Programs, Projects, Reports, Resources/Roles, Risks, Scope Assignments, Scope Items, Strategies, Task Constraints, Tasks, WBSs, and Work Packages.

To add a code to one or more objects:

- 1) **Navigate to the Codes dictionary page** (see page 168).
- 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 168).
- 2) In the table, select a code or code value.
- 3) Do either of the following:
 - ▶ In the toolbar, select the **+ Add Code ▼** menu, and then select **Add Code Value**. A new value is beneath the selection.
 - ▶ In the table, select the **⚙ Context** menu, and select **Add Code Value**.
- 4) In the **Name** and **ID** columns, enter a name and ID for the code value.
- 5) (Optional) In the **Color** column, select a color for the code value.
 - ▶ Code value colors are used on the **Activities** and **Task List** pages and workspace dashboard charts to color activity bars in the Gantt chart according to each activity's or task's assigned codes and code values.
 - ▶ The color associated with code values can be displayed on the **Portfolio Scorecard** page.
- 6) Save your changes:
 - a. Select **Save**.
 - b. In the **Summary & Settings** panel, select **✕ Close**.

You can also perform this task on a single object from the Summary & Settings panel in **Primavera Cloud**:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select **⚙ Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Defaults & Options**.
- 4) Select the object, and then select the **Codes** tab.










This setting is used in the following apps:

 **Cost and Funds**

 **Custom Logs**

 **Dashboards**


 **Files**

-  **Portfolio Analysis**
-  **Reports**
-  **Resources**
-  **Risk**
-  **Schedule**
-  **Scope**
-  **Strategic Alignment**
-  **Tasks**
-  **Workflows and Forms**











Update the Owing Workspace of a Code

Update the owning workspace of a code to move it to another workspace that you are assigned. If you move the code to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a code:

- 1) **Navigate to an object configuration page** (see page 169).
- 2) On the object page, select the **Codes** tab.
- 3) On the **Codes** tab, select a code.
- 4) Select the  **Context** menu, and then select **Change Owing Workspace**.
- 5) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.
- 6) Save your changes:
 - a. Select **Save**.
 - ▶ In the **Summary & Settings** panel, select **✕ Close**.

This setting is used in the following apps:

-  **Cost and Funds**
-  **Custom Logs**
-  **Dashboards**
-  **Portfolio Analysis**
-  **Reports**
-  **Resources**
-  **Risk**
-  **Schedule**
-  **Scope**
-  **Strategic Alignment**

☰ Tasks

🔗 Workflows and Forms

Currencies Overview

Currencies Overview Video

Configure currencies in the application to track the cost of your projects in their native currency. For example, if the base currency of your organization is Euros, but your project is located in the United States, you may want to set your project currency to United States Dollars. On pages that support costs, you can view costs in workspace or base currency. You cannot change the currency of a workspace or project once cost data exists.

Base Currency

The base currency is set at the root workspace during company provisioning. The base currency you select should be the currency that the majority of the workspaces and projects will use.

Workspace Currency

Set a workspace currency for any workspace that will not use the base currency. The workspace currency is the currency of record for the workspace, and when cost data is entered it will be in this currency. The workspace currency exchange rate follows the most recent exchange rate defined in the workspace. If workspace currency is selected but is not supported, cost data will display in the base currency. For a currency to be available to use as a workspace currency, an exchange rate must be defined and the sharing method set to Automatic. For more information, see [Workspace Currency Overview](#).

Project Currency

Set project currencies for any projects that will not use the base currency. The project currency exchange rate follows the most recent exchange rates defined in the workspace. On pages that support project costs, you can view costs in the project, workspace, or base currency.

Add a Currency

Add currencies to workspaces to make them available to projects in the workspace. All currencies added to the root workspace are inherited in child workspaces. Changes to these currencies must be made in the owning workspace. Add any other currencies that projects may need by selecting them from the preexisting list.

To add a currency:

- 1) **Navigate to the Currencies dictionary page** (see page 169).
- 2) On the **Currencies** page, select **+ Add**.
- 3) In the **Select Currency** dialog box, select currencies, and select **Select**.
- 4) Modify other currency settings as needed.
- 5) Save your changes:
 - a. Select **Save**.
 - b. In the **Summary & Settings** panel, select **✕ Close**.

Tips

- ▶ The Decimal Places setting enables you to select how many decimal places to show when viewing costs in the application. The database stores values for up to 6 decimals for cost fields, regardless of the number of decimal places set to display.

This setting is used in the following apps:

 **Cost and Funds**

 **Portfolio Analysis**

 **Resources**

 **Risk**

 **Schedule**

 **Scope**

 **Strategic Alignment**

 **Tasks**

Add a Custom Currency

You can create custom currencies if the default currencies do not meet the needs of your organization.





To add a custom currency:

- 1) **Navigate to the Currencies dictionary page** (see page 169).
- 2) On the **Currencies** page, in a new row, complete the following fields:
 - ▶ **Name:** Enter a unique name for the currency.
 - ▶ **Currency Code:** Enter a unique currency code with fewer than 3 characters.
 - ▶ **Currency Symbol:** Enter a currency symbol. The currency symbol is displayed next to monetary amounts in the application for users who chose to display currency symbols.
 - ▶ **Decimal Places:** Enter the amount of decimal places to display. The application shows up to 5 decimal places.
 - ▶ **Sharing Method:** Specify how the currency is shared between parent and child workspaces:
 - **Manual:** The currency can be pulled down by child workspaces individually, using the **Assign** button in each child workspace. This is the default option.
 - **Automatic:** The currency is pushed down to child workspaces automatically.
- 3) Save your changes:
 - a. Select **Save**.
 - b. In the **Summary & Settings** panel, select **✕ Close**.

This setting is used in the following apps:

 **Cost and Funds**

 **Portfolio Analysis**

-  Resources
-  Risk
-  Schedule
-  Scope
-  Strategic Alignment
-  Tasks

Modify a Project Currency

Projects inherit the base or workspace currency by default, but you can set a custom project currency. A workspace currency must have an exchange rate defined to appear in the list of currencies available to the project. A project can be viewed in the project, workspace, or the base currency. For information on pages that support workspace currency, see [Workspace Currency Overview](#).

The currency exchange rate will be set for the life of the project at the project creation date. For example, if the project is created on Jan 5, 2022, the project exchange rate will be set to the exchange rate for that date and will not reflect changes to the workspace exchange rate. The exchange rate can be modified on the project (under project details), but only if no cost data has been entered.









The project currency cannot be changed if costs exist for a project.

To modify a project currency:

- 1) **Navigate to the project Details page** (see page 167).
- 2) In the **Currency** section, in the **Project Currency** field, select the project currency.
- 3) Save your changes:
 - a. Select **Save**.
 - b. In the **Summary & Settings** panel, select **✕ Close**.

The **Exchange Rate** field is automatically populated with the exchange rate defined at the workspace level. You can change it if costs are not already defined for the project.

This setting is used in the following apps:

-  Cost and Funds
-  Portfolio Analysis
-  Resources
-  Risk
-  Schedule
-  Scope
-  Strategic Alignment
-  Tasks

Add an Exchange Rate

Add exchange rates to currencies to keep cost calculations up-to-date. Exchange rates added to workspace currencies will apply to project currencies. A workspace currency must have an exchange rate defined to appear in the list of currencies available to the project. You can add past exchange rates to retain a historical record before the currency is in use, or you can enter the current exchange rate. You cannot enter future exchange rates. You cannot delete or edit historical exchange rates. All exchange rates must be added to the currency in the owning workspace.

For workspaces with workspace currency, all cost data will be recalculated and exchange rates updated based on the latest exchange rate of the workspace currency.

To add an exchange rate to a currency:

- 1) **Navigate to the Currencies dictionary page** (see page 169).
- 2) On the **Currencies** page, in the table, select a currency.
- 3) In the **Exchange Rates** detail window, enter an **Effective Date** and **Exchange Rate**.
- 4) Save your changes:
 - a. Select **Save**.
 - b. In the **Summary & Settings** panel, select **✕ Close**.

This setting is used in the following apps:

 **Cost and Funds**

 **Portfolio Analysis**

 **Resources**

 **Risk**

 **Schedule**

 **Scope**


 **Strategic Alignment**

 **Tasks**

Update the Owing Workspace of a Currency

Update the owning workspace of a currency to move it to another workspace that you are assigned. If you move a currency to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a currency:

- 1) **Navigate to the Currencies dictionary page** (see page 169).
- 2) On the **Currencies** page, in the table, select a currency.
- 3) Select the  **Context** menu, and then select **Change Owing Workspace**.
- 4) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.
- 5) Select **Save**.

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

This setting is used in the following apps:

 **Cost and Funds**

 **Portfolio Analysis**

 **Resources**

 **Risk**

 **Schedule**

 **Scope**

 **Strategic Alignment**

 **Tasks**

Curve Profiles Overview

Curve Profile Overview Video

Curve profiles enable you to specify the allocation of scope assignment costs, quantities, and hours over the duration of an activity; resource or role hours spread over the duration of an activity; and budget quantities over their durations.

Amounts are distributed evenly throughout an activity unless a nonlinear distribution is specified using a curve profile. Scope assignments can use curve profiles regardless of whether they are linked to activities.

Interpreting Curve Profiles

After you navigate to the Curve Profiles dictionary page, you can view all of the default and custom curve profiles available to you. Select a curve profile to view a graph that represents how it works. The x-axis, labeled at the top of the graph, represents the percentage of the object's duration. The y-axis, labeled along the left side of the graph, represents the percentage of the object that has been allocated to the duration percentages. The numbers along the bottom of the graph indicate what percentage of the is allocated at each increment of the duration.

Among the simplest built-in curve profiles is the Linear profile. Select it to view its graph. By default, the Linear curve profile evenly distributes 5.00% of the total quantity to every 5% increment in the item's duration, rounding as necessary.

Here is a list of all the built-in curve profiles:


- ▶ Bell
- ▶ Double Bell
- ▶ Delayed Double Bell
- ▶ Offset Triangular
- ▶ Triangular Decrease
- ▶ Triangular Increase
- ▶ Front Loaded

- ▶ Three Step
- ▶ Linear
- ▶ Back Loaded
- ▶ Trapezoidal
- ▶ Triangular

Define a Curve Profile

Define curve profiles to specify how scope assignment costs, quantities, and hours spread over the duration of an activity; resource or role hours spread over the duration of an activity; and budget quantities over budget durations. There are some default curve profiles defined in the application. You can add a new curve, which is based on the default linear curve, or copy and modify one of the existing curves.

To define a curve profile:

- 1) **Navigate to the Curve Profiles dictionary page** (see page 168).
- 2) To copy an existing curve, select the  **Context** menu next to the curve to copy, and select **Duplicate**.

To create a curve, select the  **Context** menu for a curve, and select **Add**.

- 3) Enter a **Curve Name**.
- 4) Modify the curve value percentages to create a curve that indicates how your costs and quantities should distribute over time. Curves are defined by 21 points (5% intervals from 0 to 100 is the default for a new curve).
- 5) Select **Prorate** to make the total of the distribution values equal to 100% while maintaining the shape you specified.
- 6) Save your changes:
 - a. Select **Save**.
 - b. In the **Summary & Settings** panel, select **✕ Close**.

This setting is used in the following apps:

 **Cost and Funds**

 **Resources**

 **Risk**




 **Schedule**

 **Scope**

Update the Owing Workspace for Curve Profiles

Update the owning workspace of a curve profile to move it to another workspace that you are assigned. If you move the curve profile to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a curve profile:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Curve Profiles**.
- 4) In the table, select a curve profile.
- 5) Select the  **Context** menu, and then select **Change Owing Workspace**.
- 6) In the **Select Workspace** dialog box, select the new owing workspace, and select **Select**.
- 7) Select **Save**.
- 8) In the **Summary & Settings** panel, select  **Close**.

This setting is used in the following apps:

 **Cost and Funds**

 **Resources**

 **Risk**

 **Schedule**

 **Scope**

Scope Reporting Cycles Overview

The reporting periods for projects are defined by patterns set in reporting cycles. Reporting periods are used as part of the project control process to compare actual progress for scope assignments against the planned progress captured in the project baseline.

Reporting periods for a reporting cycle can be set to occur daily, weekly, semi-monthly, or monthly, depending on the reporting requirements for a project. Factors to be considered when defining reporting cycles include duration, cost, overall risk, and reporting needs of stakeholders involved in the project. For example, if a project is expected to have an overall duration of one month, the reporting period may be daily. In contrast, if a project has an expected duration of five years, then the reporting period may be monthly.

Each project can use only one reporting cycle. Therefore, scope period closeout and store period performance in the same project will both use the same reporting cycle. Scope period closeout takes place on the Period Closeout page of the Scope app, and store period performance closeout occurs on the Activities page of the Schedule app.



Define a Reporting Cycle

Reporting cycles are defined to create reporting periods which are used to plan and update progress on scope assignments and to store period performance for your activities.

Reporting cycles can be set to occur daily, weekly, semi-monthly, or monthly, depending on the reporting requirements for a project.

To define a reporting cycle:

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

- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Reporting Cycles**.
- 4) In the **Name** field, enter a name for the reporting cycle.
- 5) Complete the following fields in the **Period Pattern** section:
 - ▶ **Period Frequency:** Choose whether the reporting periods should be Daily, Weekly, Semi-Monthly, or Monthly.
A daily cycle begins at 12 a.m. and ends at 11:59 p.m. A semi-monthly cycle includes days 1 through 15 in one period and days 16 through the end of the month in a subsequent period, except for February which ends on day 14 in the first period.
 - ▶ **Period End:** Select the last day in the reporting period for the cycle when the Period Frequency is set to Weekly or Monthly.
A monthly cycle ending with a **Middle of the month** setting will end on the 15th, except for February which ends on the 14th.
 - ▶ **Base Date:** Select the date used as the starting point for generating the period start and end dates in the **Period Preview** section on this page.
 - ▶ **Prefix:** Enter a prefix for the period naming convention label, which is used to distinguish individual time periods when viewing reporting cycles in a time phased view.
 - ▶ **Suffix:** Enter a numerical suffix for the period naming convention label, which is used to distinguish individual time periods when viewing reporting cycles in a time phased view.
 - ▶ **Increment:** Select a number to increment the suffix by in each period naming convention label, which is used to distinguish individual time periods when viewing reporting cycles in a time phased view.
- 6) Select **Save**.
- 7) In the **Summary & Settings** panel, select  **Close**.

Tips

- ▶ A reporting cycle cannot be deleted if it is used by a project or inherited by a child workspace.

This setting is used in the following apps:


 **Schedule**

 **Scope**

Assign a Default Reporting Period

If several projects within a workspace will use the same reporting cycle, you can set a default reporting cycle for all new projects within the workspace to inherit. This can be changed at the project level.

To assign a default reporting period:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.

- 3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Reporting Cycles**.
- 4) Select **Default** for the reporting cycle that you want to be the default.
- 5) Select **Save**.
- 6) In the **Summary & Settings** panel, select **✕ Close**.

This setting is used in the following apps:



 **Schedule**

 **Scope**

Update the Owing Workspaces of a Reporting Cycle

Update the owning workspace of a reporting cycle to move it to another workspace that you are assigned. If you move a reporting cycle to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a reporting cycle:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Reporting Cycles**.
- 4) Select a reporting cycle.
- 5) Select the  **Context** menu, and then select **Change Owing Workspace**.
- 6) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.
- 7) Select **Save**.
- 8) In the **Summary & Settings** panel, select **✕ Close**.

This setting is used in the following apps:

 **Resources**

 **Schedule**

 **Scope**

Rules of Credit Overview

Rules of credit can be used when tracking progress on scope assignments. A rule is defined by its milestones and their percentage complete. These rules are used when contracts require certain conditions to be met before a payment is made. The rules are also used when it is necessary to track progress of an assignment at a more detailed level or when there are specific steps that need to be completed to satisfy the scope assignment.

The rules are configurable to meet the needs of the contract or general project statusing requirements. In some cases, it is necessary to track the percentage complete for each milestone. In other cases, it is only important to track whether the milestone is complete.


A rule of credit is set at the scope assignment level when the work package is set to measure progress by Milestone Percent Complete. The milestones defined for the rule of credit are used to show progress.

Rules of credit are typically defined by project managers and cost controls engineers.

Add a Rule of Credit

Add rules of credit for tracking progress on scope assignments when the work package progress measure is set to Milestone Percent Complete.

To add a rule of credit:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Rules of Credit**.
- 4) Select **+ Add**.
- 5) In the **Name** field, enter the name for the rule of credit.
- 6) In the **Input Type** list, choose how to apply the rule of credit:
 - ▶ **Manual**: Enables users to enter their percentage complete on a milestone. Use this option if it is important to track the percentage complete on a milestone.
 - ▶ **0/100 Percent Complete**: Enables users to mark a milestone as complete. Use this option if it is important to show whether the work is complete or not complete. A weighted percentage is still applied to enable a percentage complete rollup at the work package level.
- 7) Use the table to define milestones used to track percentage complete.
 - a. In the **Milestone Name** field, enter the name of a milestone.
 - b. In the **Incremental Percent Complete** field, enter the percentage each milestone represents for the rule of credit. The Cumulative Percent Complete must equal 100%.
- 8) Select **Save**.
- 9) In the **Summary & Settings** panel, select **✕ Close**.

Tips

- ▶ A rule of credit cannot be deleted if it is applied to a work package.

This setting is used in the following apps:




 **Scope**

Update the Owing Workspace of a Rule of Credit

Update the owning workspace of a rule of credit to move it to another workspace that you are assigned. If you move a rule of credit to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a rule of credit:

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

- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Rules of Credit**.
- 4) In the table, select a rule of credit.
- 5) Select the  **Context** menu, and then select **Change Owing Workspace**.
- 6) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.
- 7) Select **Save**.
- 8) In the **Summary & Settings** panel, select  **Close**.

This setting is used in the following apps:

 **Cost and Funds**

 **Scope**

Units of Measure Overview


A unit of measure is a standardized way to define how materials or products are measured.

Assigning the unit of measure provides a means to identify how the quantity is evaluated. Units of measure can be defined for material resources, scope items, and actuals line items.

Add a Unit of Measure

Add units of measure labels to assign to material resources, scope items, and actuals line items.

To add a unit of measure:

- 1) **Navigate to the Units of Measure dictionary page** (see page 168).
- 2) In the **Abbreviation** field, enter a short name or code for the unit of measure.
- 3) In the **Name** field, enter the name for the unit of measure.
- 4) Save your changes:
 - a. Select **Save**.
 - b. In the **Summary & Settings** panel, select  **Close**.

This setting is used in the following apps:

 **Cost and Funds**

 **Resources**

 **Risk**



 **Schedule**

 **Scope**

Update Owning Workspace of a Unit of Measure

Update the owning workspace of a unit of measure to move it to another workspace that you are assigned. If you move the unit of measure to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owning workspace of a unit of measure:

- a) In the object selector, select a workspace.
- b) In the sidebar, select  **Summary & Settings**.
 - 1) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Units of Measure**.
 - 2) In the table, select a unit of measure.
 - 3) Select the  **Context** menu, and then select **Change Owning Workspace**.
 - 4) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.
 - 5) Select **Save**.
 - 6) In the **Summary & Settings** panel, select **✕ Close**.

This setting is used in the following apps:

 **Cost and Funds**

 **Resources**

 **Risk**

 **Schedule**

 **Scope**

Defaults & Options

Configuring Defaults and Options Video

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. Settings for each object may include autonumbering defaults, standard and configured fields, object codes, measures, custom workflows, custom forms, and any other default settings applicable to the object. The available configuration options vary by object.

Field Labels Overview

Standard fields are the default fields found in Oracle Primavera Cloud. Fields can be used to store data, provide details, and accept user input. On many pages, fields can be added as columns in a table, used to sort or group data, or used as filters to reduce the number of items displayed on a page. They can also be found in dialog boxes, detail windows, and settings pages. Fields may be associated with a specific object. For example, the activity object is associated with various activity-related fields, such as *Start*, *Finish*, and *Duration*. These fields can be used on pages that support activities.

The Field Labels tab in the Defaults & Options section of the workspace Summary & Settings provides the default column name, column label, data type, and description of each field associated with an object. Labels are the field names displayed throughout the application. Default field labels may not reflect the terminology of your organization or industry. You can customize labels to meet the needs of your organization in any of the twelve supported languages.

Oracle Primavera Cloud documentation uses default field labels. If you change a field label in the application, it will no longer match the label used in documentation. Modified field labels can be reset back to their defaults.

Access a Standard Field Description

You can view the default column name, column label, data type, and description of any standard field in the application. The column label of each field can be modified to match the terminology used by your organization. Fields are associated with objects and can be used in pages that support that object.

To view the details of a standard field:

- 1) **Navigate to an object configuration page** (see page 169).
- 2) On the object page, select the **Field Labels** tab, and view the **Column Name**, **Column Label**, **Data Type**, and **Description** columns.

This setting is used in the following apps:

 **Cost and Funds**

 **Custom Logs**

 **Files**

 **Portfolio Analysis**

 **Resources**

 **Risk**

 **Schedule**

 **Scope**

 **Strategic Alignment**

 **Tasks**

Change a Standard Field Label

Relabel Fields Video



You can update standard field labels in your native language or update labels in the Localization detail window to customize the field label in other languages. In the table of standard fields, the Column Name field specifies the original field name. The Column Label field specifies the custom label, entered by the user. By default it matches the original field name.

Note: Oracle Primavera Cloud documentation uses default field labels. If you follow these steps to change a field label in the application, it will no longer match the label used in documentation.

To change a standard field label:

- 1) **Navigate to an object configuration page** (see page 169).
- 2) On the object page, select the **Field Labels** tab.
- 3) In the table, select a field.
- 4) In the **Column Label** field, enter a new label.
- 5) In the **Localization** detail window, select the **Column Label** field of the language, and enter a new label.
- 6) Save your changes:
 - a. Select **Save**.
 - b. In the **Summary & Settings** panel, select **✕ Close**.

Tips

- ▶ You can restore the default label of a standard field by selecting the  **Context** menu and then selecting **Reset Label**.
- ▶ New child workspaces inherit the field labels set in the parent workspace. To apply field labels to all existing child workspaces, select one or more fields, select the  **Context** menu, and then select **Apply Label to Child Workspace**.

This setting is used in the following apps:

 **Cost and Funds**

 **Custom Logs**

 **Portfolio Analysis**

 **Resources**

 **Risk**

 **Schedule**

 **Scope**

 **Strategic Alignment**


 **Tasks**

Configured Fields Overview

Creating Configured Fields Video

Configured fields are user-created fields that allow you to define and maintain data specific to your organization. For example, you can track information such as Strategic Importance or Main Stakeholder.

Configured fields are created in the context of an object and can be used in views on pages that support that object. For example, you can create an Activity configured field and use it on the Activities page as a column, grouping band, sorting option, or filter criterion. Configured fields are global, so they can be used across all workspaces, projects, portfolios, programs, and ideas.

Oracle Primavera Cloud fields are categorized by data type, including: Boolean, cost, date, integer, list, number, or text. Multi-currency is supported only for data type cost for formula configured fields. For configured fields of data type cost, you can select the **Currency** tab in  **Settings** to choose which currency to view cost data. For some types of data, you can define a formula or statement to calculate values for a field. For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency. For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency. For more information on creating or using custom formulas, consult the *Oracle Primavera Cloud Expression Language Guide* on Oracle Help Center. Configured fields have different character limitations depending on the purpose and type. For example, list configured fields have a character limit of 128, and text configured fields have a character limit of 255.

Documentation on adding a configured field to a specific object can be found under that object.

Restricted Configured Fields

A configured field that is designated as restricted can be viewed by anyone with access to the portfolio, program, or project, but only the users with workspace-level Restricted Configured Fields Edit privilege can edit it. Users with this privilege can restrict any configured field by selecting the Restricted check box when adding or updating a configured field in Summary and Settings for a program, project, or portfolio in a workspace. For example, if a configured field is updated as a result of a workflow decision, you can set the configured field to restricted to prevent users from updating the field. To learn more about permissions, contact your application administrator or see Permission Sets Overview in the Application Administration Guide.

Add a Formula-Based Configured Field: Example

This example demonstrates how to create a configured field to calculate and store the Estimated Final Cost of a project.

Note: For information on creating advanced formulas for measures, refer to the *Oracle Primavera Cloud Expression Language Guide* on Oracle Help Center.

Let us assume that you will define the Estimated Final Cost of a project as Approved Budget plus Proposed Budget.

Creating a Configured Field

- 1) **Navigate to the Project configuration page** (see page 169).
- 2) On the **Project** page, select **Configured Fields**.
- 3) In the table, complete the following fields:
 - a. In the **Column Label** column, enter *Estimated Final Cost*.
 - b. In the **View Column Name** column, enter *EST_FINAL_COST*.

- c. In the **Data Type** column, select **Cost**.
- d. In the **Type** column, select **Formula**.
- e. In the **Summary Calculation** column, select **Sum**.

Defining a Formula

- 1) In the **Formula** detail window, in the **Field** list, select **Approved Budget**, and select **Insert Field**.
- 2) Select **+**.
- 3) In the **Field** list, select **Proposed Budget**, and select **Insert Field**.
- 4) Select **Validate Formula**.
- 5) In the **Formula validation passed** dialog box, select **OK**.
- 6) Save your changes:
 - a. Select **Save**.
 - b. In the **Summary & Settings** panel, select **✕ Close**.

Note: Multi-currency is supported only for data type cost for formula configured fields. For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency. For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

Tips

- ▶ To delete a configured field, select the field, select **⚙ Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.

Update the Owing Workspace of a Configured Field

Update the owing workspace of a configured field to move it to another workspace that you are assigned. If you move the field to a workspace that is higher in the workspace hierarchy, it will be available to more workspaces.

To update the owing workspace of a configured field:

- 1) **Navigate to an object configuration page** (see page 169).
- 2) On the object page, select the **Configured Fields** tab.
- 3) On the **Configured Fields** tab, select **Manage Shared Data**.
- 4) Select the **⚙ Context** menu, and then select **Change Owing Workspace**.
- 5) In the **Select Workspace** dialog box, select the new owing workspace, and select **Select**.
- 6) Save your changes:
 - a. Select **Save**.
 - ▶ In the **Summary & Settings** panel, select **✕ Close**.

This setting is used in the following apps:

 **Cost and Funds**

 **Custom Logs**

 **Files**

 **Portfolio Analysis**

 **Resources**

 **Risk**

 **Schedule**

 **Scope**

 **Strategic Alignment**

 **Tasks**



Change a Configured Field Label

You can update configured field labels in your native language or update labels in the Localization detail window to customize the field label in other languages. In the table of configured fields, the View Column Name field specifies the original field name. The Column Label field specifies the custom label, entered by the user. By default it matches the original field name.

To change a configured field label:

- 1) **Navigate to an object configuration page** (see page 169).
- 2) On the object page, select the **Configured Fields** tab.
- 3) In the table, select a field.
- 4) In the **Column Label** field, enter a new label.
- 5) In the **Localization** section, select the **Column Label** field of the language, and enter a new label.
- 6) Save your changes:
 - a. Select **Save**.
 - b. In the **Summary & Settings** panel, select **✕ Close**.

Tips

- ▶ You can restore the default label of a configured field by selecting the  **Context** menu and then selecting **Reset Label**.
- ▶ New child workspaces inherit the field labels set in the parent workspace. To apply field labels to all existing child workspaces, select one or more fields, select the  **Context** menu, and then select **Apply Label to Child Workspace**.

This setting is used in the following apps:

 **Cost and Funds**

 **Custom Logs**

 **Files**

 **Portfolio Analysis**

 **Resources**

 **Risk**

 **Schedule**

 **Scope**

 **Tasks**

PBS

Relabel standard fields to meet the needs of your organization. Localize names and column labels for supported languages.

Field Labels

Access a Standard Field Description (on page 41)

Change a Standard Field Label (on page 41)

Project

Set scope change request defaults for auto numbering.

Defaults

Configure Auto Numbering Defaults for a Scope Change Request (on page 46)

Configure Auto Numbering Defaults for a Scope Change Request

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

- 1) ***Navigate to the Project configuration page*** (see page 169).
- 2) Select the **Defaults** tab.
- 3) In the **Auto Numbering** section, define the auto numbering default values for **Change Request** and **Change Item**.
- 4) Save your changes:
 - a. Select **Save**.
 - b. In the **Summary & Settings** panel, select **✕ Close**.

Tips

- ▶ Users can manually overwrite the default values when adding these objects in the application.

This setting is used in the following apps:

Scope

Scope Assignment

Create and customize field labels, create new codes, and set scope assignment defaults including auto numbering.

Defaults

Configure Auto Numbering Defaults for a Scope Assignment (on page 47)

Field Labels

Access a Standard Field Description (on page 41)

Change a Standard Field Label (on page 41)

Configured Fields

Add a Scope Assignment Field (on page 48)

Add a Formula-Based Configured Field: Example (on page 43)

Update the Owing Workspace of a Configured Field (on page 44)

Change a Configured Field Label (on page 45)

Codes

Add a Code (on page 25)


Add a Value to a Code (on page 27)

Update the Owing Workspace of a Code (on page 28)

Configure Auto Numbering Defaults for a Scope Assignment

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Scope Assignment**.
- 4) Select the **Defaults** tab.
- 5) In the **Auto Numbering** section, define the auto numbering default values.
- 6) Select **Save**.

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

Tips

- ▶ Users can manually overwrite the default values when adding these objects in the application.

This setting is used in the following apps:


Scope

Add a Scope Assignment Field

Add custom scope assignment fields to enable users to enter or view information which is important to your organization.

Note: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a scope assignment field:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Scope Assignment**.
- 4) On the **Defaults & Options: Scope Assignment** page, select the **Configured Fields** tab.
- 5) In the table, select **+ Add**.
 - a. In the **Column Label** column, enter a name for the new field.
 - b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.
 - c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.
 - d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.
 - e. (Optional) In the **Summary Calculation** field, specify how the app calculates summary rollup values for the field.

In most tables where you can view a list of similar objects, you can also view the totals for the various values of these objects. For example, on the Activities table for a project, you can view rollup totals for numerical values like Planned Duration and Planned Labor Units at the top of the table.

The **Summary Calculation** field enables you to specify how totals are determined for configured fields.

If you selected **Cost**, **Date**, **Integer**, or **Number** as the **Data Type**, in the **Summary Calculation** column, select a simple calculation like Sum or Average, if applicable.

Alternatively, if you set the **Type** field to **Formula**, you can set the **Summary Calculation** field to **Use Formula**. With this option selected, the app will use the formula defined in the **Formula** field to determine how the total rollup value is calculated for the field.

- f. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.
 - g. If you selected **Formula**, configure the **Formula** section. **Note:** When adding a null check to a formula, you must specify the null check at the beginning of the if condition statement.
- 6) Select **Save**.
 - 7) In the **Summary & Settings** panel, select **✕ Close**.

Tips

- ▶ To delete a configured field, select the field, select **⚙ Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.
- ▶ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in **⚙ Settings**.
- ▶ Multi-currency is supported only in data type cost for formula configured fields.
- ▶ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.
- ▶ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

 **Scope**

Scope Item

Create and customize field labels, create new codes, and set scope assignment defaults including auto numbering.

Defaults

Configure Auto Numbering Defaults for a Scope Item (on page 50)

Field Labels

Access a Standard Field Description (on page 41)

Change a Standard Field Label (on page 41)

Configured Fields

Add a Scope Item Field (on page 50)

Add a Formula-Based Configured Field: Example (on page 43)

Update the Owing Workspace of a Configured Field (on page 44)

Change a Configured Field Label (on page 45)

Codes

Add a Code (on page 25)


Add a Value to a Code (on page 27)

Update the Owning Workspace of a Code (on page 28)

Configure Auto Numbering Defaults for a Scope Item

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

- 1) In the object selector, select a project.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Scope Item**.
- 4) Select the **Defaults** tab.
- 5) In the **Auto Numbering** section, define the auto numbering default values.
- 6) Select **Save**.
- 7) In the **Summary & Settings** panel, select **✕ Close**.

Tips

- ▶ Users can manually overwrite the default values when adding these objects in the application.
- ▶ When importing scope items, if the ID column in the import template is left blank, the Scope Item ID fields are populated with the auto numbering defaults.

This setting is used in the following apps:


 **Scope**


Add a Scope Item Field

Add custom scope item fields to enable users to enter or view information which is important to your organization.

Note: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a scope item field:

- 1) In the object selector, select a workspace.
 - 2) In the sidebar, select  **Summary & Settings**.
-

- 3) On the  **Summary & Settings** menu, select **Defaults & Options**, and then select **Scope Item**.
- 4) On the **Scope Item** page, select the **Configured Fields** tab.
- 5) In the table, select **+ Add**.

- a. In the **Column Label** column, enter a name for the new field.
- b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.
- c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.
- d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.
- e. (Optional) In the **Summary Calculation** field, specify how the app calculates summary rollup values for the field.

In most tables where you can view a list of similar objects, you can also view the totals for the various values of these objects. For example, on the Activities table for a project, you can view rollup totals for numerical values like Planned Duration and Planned Labor Units at the top of the table.



The **Summary Calculation** field enables you to specify how totals are determined for configured fields.

If you selected **Cost**, **Date**, **Integer**, or **Number** as the **Data Type**, in the **Summary Calculation** column, select a simple calculation like Sum or Average, if applicable.

Alternatively, if you set the **Type** field to **Formula**, you can set the **Summary Calculation** field to **Use Formula**. With this option selected, the app will use the formula defined in the **Formula** field to determine how the total rollup value is calculated for the field.

- f. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.
 - g. If you selected **Formula**, configure the **Formula** section. **Note:** When adding a null check to a formula, you must specify the null check at the beginning of the if condition statement.
- 6) Select **Save**.
 - 7) In the **Summary & Settings** panel, select **✕ Close**.

Tips

- ▶ To delete a configured field, select the field, select  **Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.
- ▶ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in  **Settings**.
- ▶ Multi-currency is supported only in data type cost for formula configured fields.
- ▶ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

- ▶ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

 **Scope**

WBS

Create new configured fields and relabel standard fields to meet the needs of your organization, localize names and column labels for supported languages, and create new codes.

Field Labels

Access a Standard Field Description (on page 41)

Change a Standard Field Label (on page 41)

Configured Fields

Add a WBS Field (on page 52)

Add a Formula-Based Configured Field: Example (on page 43)

Update the Owning Workspace of a Configured Field (on page 44)

Change a Configured Field Label (on page 45)

Codes

Add a Code (on page 25)

Add a Value to a Code (on page 27)

Update the Owning Workspace of a Code (on page 28)

Add a WBS Field

Add custom WBS fields to enable users to enter or view information which is important to your organization.

Note: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a WBS field:

- 1) **Navigate to the WBS configuration page** (see page 170).
- 2) Select the **Configured Fields** tab.
- 3) In the table, select **+ Add**.
 - a. In the **Column Label** column, enter a name for the new field.
 - b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.
 - c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

- d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.
 - e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.
 - f. If you selected **Formula**, configure the **Formula** section.
- 4) Select **Save**.
 - 5) In the **Summary & Settings** panel, select **✕ Close**.

Tips

- ▶ To delete a configured field, select the field, select **⚙ Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.
- ▶ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in **⚙ Settings**.
- ▶ Multi-currency is supported only in data type cost for formula configured fields.
- ▶ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.
- ▶ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

🔗 Resources

📊 Risk

📅 Schedule

📄 Scope

Work Package

Create and customize field labels, create new codes, and set work package defaults including auto numbering.

Defaults

Configure Auto Numbering Defaults for Work Packages (on page 54)

Field Labels

Access a Standard Field Description (on page 41)

Change a Standard Field Label (on page 41)

Configured Fields

Add a Work Package Field (on page 54)

Add a Formula-Based Configured Field: Example (on page 43)

Update the Owing Workspace of a Configured Field (on page 44)

Change a Configured Field Label (on page 45)

Codes

Add a Code (on page 25)


Add a Value to a Code (on page 27)

Update the Owning Workspace of a Code (on page 28)

Configure Auto Numbering Defaults for Work Packages

Unique IDs are required for objects in the application. The IDs are automatically generated based on the default values set for prefix, starting number, and increment. You can use the defaults set in the application or enter values that represent your numbering system. Setting these at the workspace level will apply the defaults to all projects or programs within the workspace. Defaults can be updated at the project or program level.

To set the auto numbering defaults:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.
- 3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Work Package**.
- 4) Select the **Defaults** tab.
- 5) In the **Auto Numbering** section, define the auto numbering default values.
- 6) Select **Save**.
- 7) In the **Summary & Settings** panel, select **✕ Close**.

Tips

- ▶ Users can manually overwrite the default values when adding these objects in the application.

This setting is used in the following apps:

 **Schedule**


 **Scope**

Add a Work Package Field

Add custom work package fields to enable users to enter or view information which is important to your organization.

Note: On pages that support auto-save, configured field formulas will be automatically recalculated when a change is made that impacts the value of a configured field formula. However, there may be times where the recalculation is not updated in the user interface. When this occurs, refresh the page to see the recalculated value.

To add a work package field:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, select  **Summary & Settings**.

- 3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Work Package**.
- 4) On the **Defaults & Options: Work Package** page, select the **Configured Fields** tab.
- 5) In the table, select **+ Add**.
 - a. In the **Column Label** column, enter a name for the new field.
 - b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.
 - c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.
 - d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.
 - e. (Optional) In the **Summary Calculation** field, specify how the app calculates summary rollup values for the field.

In most tables where you can view a list of similar objects, you can also view the totals for the various values of these objects. For example, on the Activities table for a project, you can view rollup totals for numerical values like Planned Duration and Planned Labor Units at the top of the table.

The **Summary Calculation** field enables you to specify how totals are determined for configured fields.

If you selected **Cost**, **Date**, **Integer**, or **Number** as the **Data Type**, in the **Summary Calculation** column, select a simple calculation like Sum or Average, if applicable.

Alternatively, if you set the **Type** field to **Formula**, you can set the **Summary Calculation** field to **Use Formula**. With this option selected, the app will use the formula defined in the **Formula** field to determine how the total rollup value is calculated for the field.

- f. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.
 - g. If you selected **Formula**, configure the **Formula** section. **Note:** When adding a null check to a formula, you must specify the null check at the beginning of the if condition statement.
- 6) Select **Save**.
 - 7) In the **Summary & Settings** panel, select **× Close**.

Tips

- ▶ To delete a configured field, select the field, select **⚙ Context**, and then select **Delete**. You cannot delete a configured field if it is used in a form, workflow, or field mapping.
- ▶ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in **⚙ Settings**.
- ▶ Multi-currency is supported only in data type cost for formula configured fields.
- ▶ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.
- ▶ For configured fields that are data type number and integer, using cost fields as part of formulas will only produce one value. This value is always calculated and displayed in base currency.

This setting is used in the following apps:

 **Schedule**

 **Scope**

Project Settings

Configure settings at the project level.

Set the Reporting Cycle for a Project

Set the reporting cycle to be used in your project. Reporting cycles are used to enable users to plan, status, and report project status on scope assignments or to store period performance of activities.

Note: If a default reporting cycle is set for the workspace, all new projects will inherit this reporting cycle. You can change or remove the default reporting cycle.

To set a reporting cycle:

- 1) **Navigate to the project Details page** (see page 167).
- 2) In the **Details** section, in the **Reporting Cycle** field, select the reporting cycle.
- 3) In the **Frequency for Resetting Period Names** list, choose when period names are reset. The options available are based on the selection for Reporting Cycle. The standard calendar start and end dates are used as boundaries for resetting periods.
- 4) Save your changes:
 - a. Select **Save**.
 - b. In the **Summary & Settings** panel, select **✕ Close**.

This setting is used in the following apps:

 **Schedule**

 **Scope**

Configure the Auto Numbering Defaults for a Project

Unique IDs are required for a number of objects in the application. For example, in the Scope app, auto numbering defaults can be set for scope items, work packages, scope assignments, change requests, and change items. The IDs are automatically generated for each new object based on the default values set at the workspace level for prefix, suffix, and increment. You can use the defaults or enter values that represent the numbering system used for your project.

To set the auto numbering defaults:

- 1) **Navigate to the project settings page** (see page 167).
- 2) Select the **Auto Numbering** tab.
- 3) Define the auto numbering defaults for the objects used in the following areas.

- ▶ Cost: **Actuals, Budget Change, and Budget Transfer**
 - ▶ Files: **Custom Logs**
 - ▶ Ideas: **Idea**
 - ▶ Tasks: **Tasks, Task Constraint**
 - ▶ Resources: **Resource/Role**
 - ▶ Risk: **Risk**
 - ▶ Schedule: **Activity, Schedule Scenario, WBS**
 - ▶ Scope: **Scope Item, Work Package, Scope Assignment, Change Request, Change Item, and WBS**
- 4) Save your changes:
- a. Select **Save**.
 - b. In the **Summary & Settings** panel, select **✕ Close**.

Tips

- ▶ Users can manually overwrite the default values when adding these objects in the application.
- ▶ When importing scope items or scope assignments, if the ID column in the import template is left blank, the Scope Item ID or Scope Assignment ID columns are populated with the auto numbering defaults.

PBS Overview

A PBS is a hierarchical representation of the components required for a project; it represents what is to be built. A PBS is used for initial planning to organize scope items, the materials or products needed to complete a project. Depending on your industry or organization, PBS may be referred to as *Project*, *Product*, or *Plant Breakdown Structure*.

If a formal PBS is not created for the project, all scope items are added to the Default PBS.

Create a PBS

Create a PBS to provide a structure to organize scope items.

A PBS structure can be created manually or imported along with scope items from a Microsoft Excel file.

To create a PBS:

1) Add a PBS

Manually: **Add a PBS** (on page 58)

Importing PBS and Scope Items:

a. **Download an Import Template for the PBS and Scope Items** (on page 58)

b. **Import PBS and Scope Items** (on page 59)



2) **Add a File in a Files Detail Window** (on page 59)

Add a PBS

Add a PBS to define the structure to be used to organize scope items.

The PBS structure is pre-populated with one node called Default PBS. Default PBS can be used in projects that do not use a formal PBS or can be renamed. Default PBS can be deleted once another PBS node exists. One PBS node must always exist.

To add a PBS:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **PBS**.
- 3) Select **+ Add**.
- 4) In the new row, complete the following fields:
 - ▶ **Name**: The name of the PBS.
 - ▶ **Code**: The parent PBS code will be the prefix for additional child PBSs.
- 5) Continue to add PBS elements. To configure the PBS items in a hierarchy, use the  **Context** menu to move elements right or left to illustrate the hierarchical structure.
- 6) Select **Save**.


Tips

- ▶ A PBS node cannot be deleted when a scope item is assigned to it or any of its child nodes and the project baseline has been set.
- ▶ The Default PBS can only be deleted if another PBS exists.

Download an Import Template for the PBS and Scope Items

Download a Microsoft Excel template to use when importing the PBS and scope items.

To download an import template:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **PBS** or **Scope Items**.
- 3) Select the **Actions** ▼ menu and then select **Download Import Template**.
The import template is created as a Microsoft Excel file with the default file name, **ScopeltemImportTemplate.xls**.

Tips

- ▶ The file formats supported are .xls and .xlsx.
- ▶ The top two rows of the worksheet are required when importing data from a worksheet.
- ▶ The template is configured for a structure with a three level hierarchy. If you only need two levels, a parent and a child, then you can delete the additional **PBS Code** and **PBS Name** columns. If you need additional levels, then add new columns with the same names.


- ▶ All fields are required except **Scope Item ID**, **Description**, and **Unit of Measure Name**. If the **Scope Item ID** field is left blank, the auto numbering defaults for scope items will be used during the import. Unit of Measure Name must be the same as the name configured in the application for Units of Measure.

Import PBS and Scope Items

Import the PBS and associated scope items into the application from a Microsoft Excel (.xls or .xlsx) file. This can be done from the PBS page or the Scope Items page.

The data for import must be presented in the format as defined in the Import Template.

To import scope items:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **PBS** or **Scope Items**.
- 3) Select the **Actions** ▼ menu, and then select **Import**.
- 4) In the **Import Scope Items** dialog box, select a file to import and select **Import**.

Any issues with the import are identified as errors or as messages in the **Log** detail window. Errors must be fixed before the page can be saved. You can fix the errors directly on the Scope Items page or fix the spreadsheet and import the file again.

- 5) Select **Save**.

Tips

- ▶ Select **Create Import Template** to download a template file ready for you to populate with data.
- ▶ All scope items do not need to be in one file. After the first import, you can choose to import another file.

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.

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

- 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.

Scope Items Overview

Scope items are the materials or products needed to complete a project.

During initial planning, scope items are organized using the PBS enabling you to view what materials or products are needed. The installation of scope items is directly managed through work packages.

Create a Scope Item

Define the scope items needed to complete the project.

To create a scope item:

- 1) Add Scope Items
 - Manually: **Add a Scope Item** (on page 61)
 - Importing:


- a. **Download an Import Template for the PBS and Scope Items** (on page 58)
- b. **Import PBS and Scope Items** (on page 59)
- 2) **Assign a CBS Code to a Scope Item** (on page 62)
- 3) **Add a File in a Files Detail Window** (on page 59)

Add a Scope Item


Add the materials or products required to complete a project.

Note: After a baseline is set, scope items must be added by submitting a change request.

To add a scope item:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Scope Items**.
- 3) In the table, locate where you want to add the scope item on the PBS, and select the node.

Note: If the project does not use a PBS, then add the scope item under Default PBS.

- 4) Select the  **Context** menu, and select **Add**.
- 5) In the new row, complete the following fields:
 - ▶ **Name:** The name of the material or product.
 - ▶ **ID:** The ID is generated automatically based on project settings. Adjust as needed.
 - ▶ **Original Quantity:** The amount of material or product available to the project. This quantity is the limit that can be distributed to work packages unless a change request is initiated.
 - ▶ **Original Productivity Rate:** The hours required to install or assemble one unit of a scope item. This value can be updated when assigning the scope items to work packages.
 - ▶ **Original Hours:** The number of hours required to install the scope item quantity. This value is calculated as **Original Quantity** multiplied by **Original Productivity Rate**. If you choose to manually enter the **Original Hours**, the **Original Productivity Rate** field is recalculated to equal **Original Hours** divided by **Original Quantity**.
 - ▶ (Optional) **Unit of Measure:** The type of measurement used when determining quantity for the scope item.
 - ▶ (Optional) **Description:** Provide any additional details such as a description of the material or product or its use.

Note: If the same item is used in more than one node on the PBS, then create another scope item.

- 6) Select **Save**.

Assign a CBS Code to a Scope Item

Assign CBS codes to scope items if CBS codes are used in the project to manage costs. All scope assignments inherit the CBS code assigned to the scope item.

Note: After a baseline is set, CBS codes must be added or updated by submitting a change request.

To assign a CBS code to a scope item:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over **Scope**, and select **Scope Items**.
- 3) In the **CBS Code** column, select a code.
- 4) Select **Save**.

Tips

- ▶ Rolled up cost and hour values are viewed on the project Cost Sheet and can also be viewed on the Cost Sheet for the workspace.

Assign a Cost Category to a Scope Item

Assign cost categories to scope items if cost categories are used in the project to categorize cost types. All scope assignments inherit the cost category assigned to the scope item.

Note: After a baseline is set, cost categories must be added or updated by submitting a change request.

To assign a cost category to a scope item:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over **Scope**, and select **Scope Items**.
- 3) In the **Cost Category** column, select a category type.
- 4) Select **Save**.

Tips

- ▶ Rolled up cost and hour values are viewed on the project Cost Sheet and can also be viewed on the Cost Sheet for the workspace.

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.

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

- 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.

Scope Item Fields

Depending on your settings, the following fields might appear on the page as table columns, spreadsheet rows, or in detail windows. Fields that are generic across the application, such as Name, may not be included here.

Dates

Effective Finish

The latest Effective Finish date for Actual to Date values of all scope item's scope assignments.

Effective Start

The earliest Effective Start date for Actual to Date values of all the scope item's scope assignments.

General

CBS Code

The cost breakdown structure code assigned to the scope item.

Cost Category

The category name used to organize and define the cost.

Original Productivity Rate

The number of hours required to install or assemble a single quantity of the scope item material or product.

For example, if the product is 1,000 feet of cable it may be estimated to take 2 hours install one foot of cable.

Calculated as Original Hours divided by Original Quantity.

PBS

The parent PBS for the scope item.

Revised Productivity Rate

The number of hours required to install a single quantity of the scope item material or product based on current values.

For example, if the product is 1,000 feet of cable it may be estimated to take 2 hours install one foot of cable.

This field is recalculated if Current Hours are changed.

Unit of Measure

The name of the measurement type used to describe the quantity of a scope item.

Hours

Approved Change Hours

The total number of hours approved for scope item changes.

Baseline Hours

The Revised Hours at the time the baseline was set.

Original Hours

The original expected hours needed to complete all the work on a scope item.

Calculated as Original Quantity multiplied by Original Productivity Rate.

Pending Change Hours

The total number of hours waiting for approval on a scope item.

Revised Hours

The total number of hours needed to complete all the work on a scope item, including any approved changes. This value equals the Original Hours before the original baseline is set. Calculated as the sum of Original Hours plus Approved Changed Hours, if any.

Percentages

Scope Percent Complete

Sum of Quantity Completed Weight for the scope items assigned to work packages divided by Revised Quantity for the scope item.

Units

Actual Quantity to Date

The total amount of the scope item installed.
Calculated as the sum of Installed Quantity for all scope assignments.

Adjusted Quantity

The scope item quantity that is not yet accounted for. For example, you might enter a value to represent pending change requests that are likely to be approved.
This is a manual entry field.

Approved Change Quantity

The total quantity approved for scope item changes.

Assigned Quantity

The total quantity distributed to work packages by way of scope assignments. After the original baseline is set, this number is updated to also reflect scope assignments that are created from approved quantity changes of the scope item.

At Completion Quantity

The total amount of the scope item to be installed for the project.
Calculated as Revised Quantity plus Adjusted Quantity.

Baseline Quantity

The Revised Quantity at the time the current baseline was set.

Installed Quantity

The amount of material or product that has been installed to date.
This is the cumulative value for all scope assignments created for the scope item.

Original Quantity

The original expected amount of material or product required for a scope item.

Pending Change Quantity

The total quantity waiting for approval on a scope item.

Remaining Quantity

The quantity remaining for the scope item.

Calculated as Revised Quantity for the scope item minus the sum of Installed Quantity for the scope item's assignments.

Revised Quantity

The total quantity that has been revised to account for approved changes for a scope item.

Calculated as Original Quantity plus Approved Change Quantity. Revised Quantity equals the Original Quantity before the original is baseline set.

Unassigned Quantity

The total quantity that has not been distributed to work packages. This is the amount that is available for distribution to scope assignments. After the original baseline is set, this includes all approved quantity changes for scope items.

Scope Assignments

Plan scope assignments for a work package. After a baseline is set, provide status on the assignments and request changes or transfers.


Configure View Settings (on page 139)

Assign a Scope Item to a Work Package

Select the materials or products needed to complete work packages.

Note: After a baseline is set, scope items must be assigned to work packages by submitting a change request.

To assign a scope item to a work package:


- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Scope Assignments**.
- 3) On the **Scope Assignments** page, in the **Work Package** field, select the name of the work package.
- 4) Select **Plan**.
- 5) Select **+ Add**.
- 6) On the **Select Scope Item** panel, select all the scope items needed for the work package and select **Select**.
- 7) In the **General** detail window, complete the following fields for each assigned scope assignment:
 - ▶ **Original Quantity:** The amount needed for this work package. The Unassigned Quantity is prepopulated in this field.

- ▶ **Original Productivity Rate:** This field is prepopulated with the rate initially defined for the scope item. Update as necessary. Updates are only reflected in this scope assignment.
 - ▶ **Original Hours:** This field is calculated by multiplying the **Original Quantity** times the **Original Productivity Rate**. If you change this value, the **Original Productivity Rate** is recalculated.
 - ▶ **Rate By:** Determines whether the cost is calculated using **Quantity** or **Hours**. If the cost of assignments is not relevant for your calculations, then leave the **Original Cost Rate** field as **0**.
 - **Quantity:** Quantity is used to calculate cost. For example, **Original Cost** is calculated as **Original Quantity** times **Original Cost Rate**.
 - **Hours:** Hours are used to calculate cost. For example, **Original Cost** is calculated as **Original Hours** times **Original Cost Rate**.
 - ▶ **Original Cost Rate:** The rate used to calculate cost. Depending on the Rate By selection, this rate is either based on the rate per quantity or hours.
- 8) Select **Save**.

Assign a Manager to a Scope Assignment

Assign managers to scope assignments if the manager assigned at the work package level is not the person responsible for managing the scope assignment.

To assign a manager to a scope assignment:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Scope Assignments**.
- 3) On the **Scope Assignments** page, in the **Work Package** field, select the name of the work package.
- 4) Select **Plan**.
- 5) In the table, select the scope assignment.
- 6) Select the **General** detail window.
- 7) In the **Manager** field, select a manager.
- 8) Select **Save**.

Time Phase

View the time phased distributed data for work package scope assignments to analyze quantity, hours, and cost. Set the curve profile to distribute time phased data for scope assignments according to a specified nonlinear curve.

Distribute Hours and Quantities for a Scope Assignment Per Timescale Interval


Time phased data for scope assignments, by default, is evenly spread according to the specified dates assigned to scope assignments. You can redistribute original hours and quantities for scope assignments per timescale interval using curve profiles or by manual distribution using the Time Phase view. This process occurs before the original baseline is set.

- ▶ **Specify a Curve Profile for a Scope Assignment** (on page 68)
- ▶ **Manually Distribute Hours and Quantities Per Timescale Interval for a Scope Assignment** (on page 68)

Specify a Curve Profile for a Scope Assignment


A curve profile can be selected per work package to redistribute cost, hours, and quantities for all scope assignments within the work package according to a specified curve.

To specify a curve profile:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Scope Assignments**.
- 3) On the **Scope Assignments** page, in the **Work Package** field, select the name of the work package.
- 4) Select **Time Phase**.
- 5) To apply a curve profile for the scope assignment:
 - a. Select **Apply Curve**.
 - b. In the **Select Curve** dialog box, select a curve and select **OK**.

Note: The curve applies to all scope assignments within the work package.

Tips


- ▶ If you manually distribute values and need to restore the distributed values to the curve that was previously set, select the  **Context** menu and select **Reset Curve**.


Manually Distribute Hours and Quantities Per Timescale Interval for a Scope Assignment

Original hours and quantities can be manually updated per timescale interval.

Note: Once you make a manual update to original hours or original quantities using the Time Phase view, certain fields on the Plan view will no longer be editable for the scope assignment. These fields are Original Hours, Original Quantity, Original Productivity Rate, Original Cost, Original Cost Rate, and Rate By.

To manually update original hours and quantities per timescale interval:


- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Scope Assignments**.

- 3) On the **Scope Assignments** page, in the **Work Package** field, select the name of the work package.
- 4) Select **Time Phase**.
- 5) To change the timescale interval:
 - a. Select  **Settings**.
 - b. In the **Setting** dialog box, select the **Timescale** tab.
 - c. In the **Timescale Interval** field, select the timescale to use for planning.
 - d. Select **Apply**.

Note: You can also change the timescale interval by right clicking on the timescale in the table and selecting an option.

- 6) Update the individual timescale intervals for **Original Quantity** or **Original Hours** as necessary. Updating these fields will automatically adjust the **Original Cost** field.

Tips


- ▶ You can apply a curve first and then redistribute values. After a value is entered manually, the Curve Profile is set to Manual.
- ▶ After manually distributing values, if you need to restore the distributed values using the curve that was previously set, select the  **Context** menu and select **Reset Curve**.

Review the Time Phase Distribution for a Scope Assignment

View the time phased distributed data for work package scope assignments to analyze quantity, hours, and cost.

Configure the Time Phase view to enable you to view information that is important when monitoring the progress of work on scope assignments.

To configure the time phase data:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Scope Assignments**.
- 3) On the **Scope Assignments** page, in the **Work Package** field, select the name of the work package.
- 4) Select **Time Phase**.
- 5) Configure the quantity, hours, and cost spreadsheet rows to review in the table. For more information, see [link](#)
- 6) Configure the timescale to view quantity, hours, and cost. For more information, see [timescale link](#).
If you chose a Reporting Period, select whether to only display the custom label that is configured for the reporting period.
- 7) To view a specific date, in the **Go to** field, select a date. This will also synchronize dates in the table and chart.
- 8) To configure the chart view:

- ▶ In the **Show** list, select whether to view data by **Quantity**, **Hours**, or **Costs**.
- ▶ In the **View** list, select whether to view **Incremental** or **Cumulative** values.

Scope Assignments: Time Phase Fields

Depending on your settings, the following fields might appear on the page as table columns, spreadsheet rows, or in detail windows. Fields that are generic across the application, such as Name, may not be included here.

Financial

Actual Cost to Date

The actual costs incurred on the scope assignment. This tracks the VOWD (Value of Work Done).

Approved Change Cost

The sum of all approved cost changes in the change records for the scope assignment.

Baseline Cost

The Revised Cost at the time the current baseline was set.

Incremental Installed Cost

The total cost incurred on the scope assignment as of the current date.

If Rate By is set to Hours, then Installed Cost equals Revised Cost Rate multiplied by Installed Hours.

If Rate By is set to Quantity, then Installed Cost equals Revised Cost Rate multiplied by Installed Quantity.

Original Cost

The original cost of the scope assignment.

If Rate By is set to Hours, then Original Cost equals Original Hours multiplied by Original Cost Rate. If this value is entered manually, then Original Cost Rate is recalculated to equal Original Cost divided by Original Hours.

If Rate By is set to Quantity, then Original Cost equals Original Quantity multiplied by Original Cost Rate. If this value is entered manually, then Original Cost Rate is recalculated to equal Original Cost divided by Original Quantity.

Manual updates can only be performed on the Plan view, not on the Time Phase view.

Pending Change Cost

Calculated as the sum of all pending cost changes in the change records for the scope assignment.

Remaining Early Cost

The amount left to be spent.

If Rate By set to Hours, then Remaining Cost equals Remaining Hours multiplied by Revised Cost Rate.

If Rate By set to Quantity, then Remaining Cost equals Remaining Quantity multiplied by Revised Cost Rate.

Remaining Early and Remaining Late fields display for time phased scope assignments to account for the Remaining Early and Remaining Late date fields.

Remaining Late Cost

The amount left to be spent.

If Rate By set to Hours, then Remaining Cost equals Remaining Hours multiplied by Revised Cost Rate.

If Rate By set to Quantity, then Remaining Cost equals Remaining Quantity multiplied by Revised Cost Rate.

Remaining Early and Remaining Late fields display for time phased scope assignments to account for the Remaining Early and Remaining Late date fields.

Revised Cost

The Original Cost before the baseline is set. After the baseline is set, Revised Cost equals Original Cost plus Approved Change Cost.

Hours

Actual Hours to Date

The number of hours spent on this scope assignment since the last progress date. This value is added to Cumulative Actual Hours to Date.

Approved Change Hours

The sum of all approved change hours in the change and transfer records for the scope assignment.

Baseline Hours

The Revised Hours at the time the baseline was set.

Incremental Installed Hours

Hours spent on the scope assignment.

Calculated as Installed Quantity multiplied by Revised Productivity Rate.

Original Hours

The original expected hours needed to complete all the work required to install the material quantity on the scope assignment.

Calculated as Original Quantity multiplied by Original Productivity Rate.

Before the baseline is set, this field can be entered manually. A manual entry recalculates the Original Productivity Rate to equal Original Hours divided by Original Quantity.

Pending Change Hours

Calculated as the sum of all pending hour changes in the change records for the scope assignment.

Remaining Early Hours

The number of hours left for the scope assignment.

Calculated as Remaining Quantity multiplied by Original Productivity Rate.

Remaining Early and Remaining Late fields display for time phased scope assignments to account for the Remaining Early and Remaining Late date fields.

Remaining Late Hours

The number of hours left for the scope assignment.

Calculated as Remaining Quantity multiplied by Original Productivity Rate.

Remaining Early and Remaining Late fields display for time phased scope assignments to account for the Remaining Early and Remaining Late date fields.

Revised Hours

Original Hours before the baseline set. After the baseline, Revised Hours is equal to Original Hours plus Approved Change Hours.

Units

Actual Quantity to Date

That amount of material or product that has been installed since the last progress date.

Approved Change Quantity

Calculated as the sum of all approved change quantities in the change records for the scope assignment.

Baseline Quantity

The Revised Quantity at the time the current baseline was set.

Installed Quantity

That amount of material or product that has been installed since the last progress date.

Original Quantity

The expected amount of material or product required.

Pending Change Quantity

The sum of all pending change quantities in the change records for the scope assignment.

Remaining Early Quantity

The quantity remaining for the scope assignment.

Calculated as Revised Quantity minus Installed Quantity.

Remaining Early and Remaining Late fields display for time phased scope assignments to account for the Remaining Early and Remaining Late date fields.

Remaining Late Quantity

The quantity remaining for the scope assignment.

Calculated as Revised Quantity minus Installed Quantity.

Remaining Early and Remaining Late fields display for time phased scope assignments to account for the Remaining Early and Remaining Late date fields.

Revised Quantity

The total quantity that has been revised to account for approved changes for a scope assignment. This value equals the Original Quantity before the original baseline is set. Calculated as Original Quantity plus Approved Change Quantity. Revised Quantity equals the Original Quantity before the original is baseline set.

Scope Assignments Fields

Depending on your settings, the following fields might appear on the page as table columns, spreadsheet rows, or in detail windows. Fields that are generic across the application, such as Name, may not be included here.

Dates

Baseline Finish

The planned finish date for the scope assignment as is set in the current baseline. This field is used to spread baseline data fields. This field is populated with the Revised Finish date at the time that the current baseline is set. If there is an activity link, this field is populated with the activity's Current BL Finish date.

Baseline Start

The planned start date for the scope assignment as is set in the current baseline. This field is used to spread baseline data fields. This field is populated with the Revised Start date at the time that the current baseline is set. If there is an activity link, this field is populated with the activity's Current BL Start date.

Effective Finish

The latest date of all Actual to Date and Actual Cost to Date values for the scope assignment. This is a read-only field.

Effective Start

The earliest date of all Actual Hours to Date and Actual Cost to Date values for the scope assignment. This is a read-only field.

Installed Finish

The date work on the scope assignment completed. The latest date of all Installed Quantity values for the scope assignment when Scope Percent Complete equals 100%. This field is used to spread Installed data fields.

Installed Start

The date work on the scope assignment began. This is the earliest date of all Installed Quantity values for the scope assignment. This field is used to spread Installed data fields.

Original Finish

The date the work on the scope assignment is scheduled to finish.

This field is populated with the work package's Original Finish date, but it can be manually modified until the original baseline is set.

If there is no activity link, the field is locked when the original baseline is set.

If there is an activity link, before the original baseline is set the field is populated with the activity's Planned Finish. After the baseline is set, the field is locked.

If the Data Date is specified after the Original Finish date is set and the Original Start date is before the Data Date, the application sets the Original Finish date to be the same date relative to Original Start before the Data Date was modified when the Modify Dates feature is run.

Original Start

The date the work on the scope assignment is scheduled to begin.

This field is populated with its work package's Original Start, but can be manually modified until the original baseline is set.

If there is no activity link, the field is locked when the original baseline is set.

If there is an activity link, before the original baseline is set the field is populated with the activity's Planned Start. After the baseline is set, the field is locked.

If the Data Date is specified, the date cannot be set to a date earlier than the Data Date.

If the Data Date is specified after the Original Start date is set and the Original Start date is before the Data Date, the Original Start date inherits the Data Date when the Modify Dates feature is run.

Planned Finish

The date the work on the scope assignment is scheduled to finish.

This field is used to spread original data fields.

If there is no activity link, this field is populated with the Original Finish date until the original baseline is set. It can be manually modified after the original baseline is set.

If Data Date is specified after the Planned Finish date is set and the Planned Start date is before the Data Date, the application sets the Planned Finish date to be the same date relative to Planned Start before the Data Date was modified when the Modify Dates feature is run.

If there is an activity link, this field is populated with the activity's Planned Finish date.

Planned Start

The date the work on the scope assignment is scheduled to begin.

This field is used to spread original data fields.

If there is no activity link, this field is populated with the Original Start date until the original baseline is set. It can be manually updated after the original baseline is set.

If the Data Date is specified, the date cannot be set to a date earlier than the Data Date.

If the Data Date is specified after the Planned Start date is set, the Planned Start date is before the Data Date, and the work package's Scope Percent Complete is equal to 0%, that is Installed Quantity is zero, then the date inherits the Data Date when the Modify Dates feature is run.

If there is an activity link, this field is populated with the activity's Planned Start date.

Remaining Early Finish

The earliest date the work on the scope assignment is scheduled to finish.

If there is no activity link, before the original baseline is set, this field is populated with the Original Finish date. After the original baseline is set, this field is populated with the Revised Finish date.

This field is blank when the scope assignment's Scope Percent Complete becomes 100%.

If there is any activity linked, this field is populated with the activity's Remaining Early Finish date.

This field is used to spread Remaining data fields.

Remaining Early Start

The earliest date the work on the scope assignment is scheduled to begin.

If there is no activity link, before the original baseline is set, this field is populated with the Original Start date. After the original baseline is set, this field is populated with the Data Date when the Modify Dates feature is run if the scope assignment's Scope Percent Complete is not equal to 100%.

This field is blank when the scope assignment's Scope Percent Complete becomes 100%.

If there is any activity linked, this field is populated with the activity's Remaining Early Start date.

This field is used to spread Remaining data fields.

Remaining Late Finish

The latest possible date work on the scope assignment must finish to not delay the finish date.

If there is no activity link, this field is always equal to the Remaining Early Finish date.

If there is any activity linked, this field is populated with the activity's Remaining Late Finish date.

This field is used to spread Remaining data fields.

Remaining Late Start

The latest possible date work on the scope assignment must begin without delaying the finish date.

If there is no activity link, this field is always equal to the Remaining Early Start date.

If there is any activity link, this field is populated with the activity's Remaining Late Start date.

This field is used to spread Remaining data fields.

Revised Finish

The revised finish date for the scope assignment.

It is always the latest finish of the scope assignment's Planned Finish date and all approved Change Finish dates.

This field is used to spread Revised data fields.

Revised Start

The revised start date for the scope assignment.

It is always the earliest start of the scope assignment's Planned Start date and all approved Change Start dates.

This field is used to spread Revised data fields.

Earned Value

BAC Cost

The Revised Cost or At Completion Cost at the time the current baseline was set, depending on the selection for the Budget at Completion Method. The Revised Cost of the current project if no baseline is set.

BAC Hours

The Revised Hours or At Completion Hours at the time the current baseline was set, depending on the selection for the Budget At Completion Method. The Revised Hours of the current project if no baseline is set.

BAC Quantity

The Revised Quantity or At Completion Quantity at the time the current baseline was set, depending on the selection for the Budget at Completion Method. The Revised Quantity of the current project if no baseline is set.

EAC Cost

Calculated as ETC Cost plus Actual Cost to Date.

EAC Hours

Calculated as ETC Hours plus Actual Hours to Date.

EAC Quantity

The estimate of how much material or product will be installed at completion of the scope assignment work.

Calculated as ETC Quantity plus Actual Quantity to Date.

Earned Cost

Calculated as Performance Percent Complete multiplied by BAC Cost.

Earned Hours

Calculated as Performance Percent Complete multiplied by BAC Hours.

Earned Quantity

The amount of material or product that has been installed based on the Performance Percent Complete of the scope assignment and the Budget At Completion Quantity.

Calculated as Performance Percent Complete multiplied by BAC Quantity.

ETC Cost

The estimate of the cost needed to complete the work.

Calculated as BAC Cost minus Earned Cost.

ETC Hours

The estimated number of hours needed to complete the work.

Calculated as BAC Hours minus Earned Hours.

ETC Quantity

The estimate of how much quantity is needed to complete the work.

Calculated as BAC Quantity minus Earned Quantity.

Financial**Actual Cost to Date**

The actual costs incurred on the scope assignment. This tracks the VOWD (Value of Work Done).

Adjusted Cost

The amount the scope assignment work that is not yet accounted for. For example, you might enter a value to represent pending change requests that are likely to be approved.

Approved Change Cost

The sum of all approved cost changes in the change records for the scope assignment.

At Completion Cost

The total cost at the completion of the scope assignment.

Calculated as Revised Cost plus Adjusted Cost.

Baseline Cost

The Revised Cost at the time the current baseline was set.

Installed Cost

The total cost incurred on the scope assignment as of the current date.

If Rate By is set to Hours, then Installed Cost equals Revised Cost Rate multiplied by Installed Hours.

If Rate By is set to Quantity, then Installed Cost equals Revised Cost Rate multiplied by Installed Quantity.

Original Cost

The original cost of the scope assignment.

If Rate By is set to Hours, then Original Cost equals Original Hours multiplied by Original Cost Rate. If this value is entered manually, then Original Cost Rate is recalculated to equal Original Cost divided by Original Hours.

If Rate By is set to Quantity, then Original Cost equals Original Quantity multiplied by Original Cost Rate. If this value is entered manually, then Original Cost Rate is recalculated to equal Original Cost divided by Original Quantity.

Original Cost Rate

The cost rate used in the cost calculation of the scope assignment.

If Rate By is set to Hours and the Original Cost value is entered manually, then Original Cost Rate equals Original Cost divided by Original Hours.

If Rate By is set to Quantity and the Original Cost value is entered manually, then Original Cost Rate equals Original Cost divided by Original Quantity.

Pending Change Cost

Calculated as the sum of all pending cost changes in the change records for the scope assignment.

Remaining Cost

The amount left to be spent.

If Rate By set to Hours, then Remaining Cost equals Remaining Hours multiplied by Revised Cost Rate.

If Rate By set to Quantity, then Remaining Cost equals Remaining Quantity multiplied by Revised Cost Rate.

Revised Cost

The Original Cost before the baseline is set. After the baseline is set, Revised Cost equals Original Cost plus Approved Change Cost.

Revised Cost Rate

The cost rate used in the cost calculation of the scope assignment based on current values.

If Rate By set to Hours, then Revised Cost Rate equals Revised Cost divided by Revised Hours.

If Rate By set to Quantity, then Revised Cost Rate equals Revised Cost divided by Revised Quantity.

General

CBS Code

The cost breakdown structure code assigned to the scope item of the scope assignment.

Cost Category

The category name used to organize and define the cost.

Curve Profile

The curve profile selected for the scope assignment.

Description

Additional details for the scope assignment.

Manager

The manager or person responsible for providing status on the scope assignment.

Manual Completed Weight

Calculated as Scope Percent Complete multiplied by Manual Weight.

Manual Weight

The value used to calculate manual completed weight when progress needs to be weighed against a factor other than quantity, hours, or cost.

This is a manual entry field when Scope Percent Complete Weight Method is set to Manual.

Original Productivity Rate

The number of hours it takes to install or assemble the product or material per unit. Defaults to the scope item's Original Productivity Rate, but can be updated for each scope item assignment.

Calculated as Original Hours divided by Original Quantity.

If this field is updated, Original Hours is recalculated to equal Original Quantity multiplied by Original Productivity Rate.

Rate By

Determines whether the cost is calculated using the Quantity or Hours.

Quantity: Quantity is used to calculate cost. For example, Original Cost is calculated as Original Quantity times Original Cost Rate.

Hours: Hours are used to calculate cost. For example, Original Cost is calculated as Original Hours times Original Cost Rate.

Revised Productivity Rate

The number of hours it will take to install or assemble the product or material per unit based on current values.

Calculated as Revised Hours divided by Revised Quantity.

This value is recalculated if Revised Quantity or Revised Hours are changed.

Hours

Actual Hours to Date

The actual hours spent on the scope assignment. This tracks the VOWD (Value of Work Done).

Adjusted Hours

The amount of scope assignment work that is not yet accounted for. For example, you might enter a value to represent pending change requests that are likely to be approved.

Approved Change Hours

The sum of all approved change hours in the change and transfer records for the scope assignment.

At Completion Hours

The total hours expected for the scope assignment.

Calculated as Revised Hours plus Adjusted Hours.

Baseline Hours

The Revised Hours at the time the baseline was set.

Installed Hours

Hours spent on the scope assignment.

Calculated as Installed Quantity multiplied by Revised Productivity Rate.

Original Hours

The original expected hours needed to complete all the work required to install the material quantity on the scope assignment.

Calculated as Original Quantity multiplied by Original Productivity Rate.

Before the baseline is set, this field can be entered manually. A manual entry recalculates the Original Productivity Rate to equal Original Hours divided by Original Quantity.

Pending Change Hours

Calculated as the sum of all pending hour changes in the change records for the scope assignment.

Remaining Hours

The number of hours left for the scope assignment.

Calculated as Remaining Quantity multiplied by Revised Productivity Rate.

Revised Hours

Original Hours before the baseline is set. After the baseline is set, Revised Hours is equal to Original Hours plus Approved Change Hours.

Percentages

Milestone Progress Percent Complete

The percentage complete for all milestones for the scope assignment. The calculation is based on the user entered percentage complete for the milestone and the rules defined for the milestone calculations.

Performance Percent Complete

Calculated as Installed Quantity divided by At Completion Quantity.

Scope Percent Complete

Calculated as Installed Quantity divided by At Completion Quantity.

Units

Actual Quantity to Date

The Installed Quantity for the scope assignment.

Adjusted Quantity

The scope assignment quantity that is not yet accounted for. For example, you might enter a value to represent pending change requests that are likely to be approved.

Approved Change Quantity

Calculated as the sum of all approved change quantities in the change records for the scope assignment.

At Completion Quantity

The total amount of the scope item to be installed for the scope assignment.

Calculated as Revised Quantity plus Adjusted Quantity.

Available Quantity

The amount of material or product available for scope assignment.

Calculated as Revised Quantity minus Installed Quantity.

Baseline Quantity

The Revised Quantity at the time the current baseline was set.

Installed Quantity

The amount of material or product that has been installed to date.

If the Progress Measure on the work package is set to Milestone Percent Complete, then Installed Quantity equals Revised Quantity multiplied by Milestone Progress Percent Complete.

This field can be manually overridden if the Progress Measure is set to Physical Percent Complete, then Installed Quantity is manually entered and not calculated.

Original Quantity

The expected amount of material or product required.

Pending Change Quantity

The sum of all pending change quantities in the change records for the scope assignment.

Remaining Quantity

The quantity remaining for the scope assignment.

Calculated as Revised Quantity minus Installed Quantity.

Revised Quantity

The total quantity that has been revised to account for approved changes for a scope assignment. This value equals the Original Quantity before the original baseline is set.

Calculated as Original Quantity plus Approved Change Quantity. Revised Quantity equals the Original Quantity before the original is baseline set.

Update the Work Package Progress

When a project is in execution, project managers can update progress on scope assignments, add project baselines to record progress over time, and review work package and scope assignment data.

Before progress is captured, a project baseline must be set. See **Add a Baseline** (on page 126).

To update a work package:

- ▶ Update Work Package and Scope Assignment Dates

- ▶ **Update the Work Package Dates** (on page 114)
- ▶ **Update Scope Assignment Dates** (on page 115)
- ▶ **Update the Data Date When Progressing a Work Package and Scope Assignment** (on page 115)

Note: If work packages or their scope assignments are associated with activities, this is handled through the activity updates.

- ▶ **Update Installed Quantity for a Scope Assignment** (on page 116)
- ▶ **Update Actual Cost and Hours to Date for a Scope Assignment** (on page 116)
- ▶ **Update an Adjusted Value for a Scope Assignment** (on page 117)
- ▶ **Add a Baseline** (on page 126)
- ▶ **Review the Time Phase Distribution for a Scope Assignment** (on page 69)
- ▶ **Close Out a Reporting Period** (on page 118)

WBS Overview

Building a WBS Video

A WBS, or work breakdown structure, is a hierarchical arrangement of work activities that divides a project into discrete levels, phases, or layers. The WBS is structured in levels of work detail, beginning with the deliverable and separated into identifiable work elements.

A WBS can be configured and managed from either the WBS page or the Activities page. WBS structure can be updated from either page using all of the same features such as adding, deleting, cutting or copying and pasting, and moving a WBS.

Create a WBS

Create a work breakdown structure (WBS) to define a hierarchical arrangement of work.

To create a WBS:

- 1) Add a WBS
 - ▶ **Add a WBS** (on page 83)
 - ▶ **Add a WBS from a Template or Other Project** (on page 84)
 - ▶ **Create a WBS by Import** (on page 84)
 - ▶ WBS Fields
- 2) **Assign a Manager to a WBS** (on page 85)
- 3) **Add a File in a Files Detail Window** (on page 59)
- 4) **Cut or Copy and Paste a WBS Node** (on page 87)

Add a WBS

Add a work breakdown structure (WBS) to represent a hierarchical arrangement of work. You can create sibling WBSs to represent WBSs that are hierarchically equal, or child WBSs to represent WBSs that are subordinate to other WBSs.

The WBS structure is pre-populated with one root node that is the name of the project. It cannot be deleted. The root WBS can only have child nodes.

Each level in the WBS hierarchy is separated by a period. When entering a new WBS node, the parent hierarchy is automatically prefixed, and the current node is incremented with the next number in the sequence. For example, a new sibling of *WBS 1.1* will be automatically named *WBS 1.2*, and a child will automatically be named *WBS 1.1.1*. These values can be changed at any time. When updating a WBS Code or Name field, only the current level needs to be entered.

To add a WBS:

- 1) **Navigate to the WBS page** (see page 165).
- 2) On the **WBS** page, select a WBS row.
- 3) To add a sibling WBS node, select **+ Add** or select the **Context** menu, and then select **Add Sibling WBS**. To add a child WBS node, select the **Context** menu, and then select **Add Child WBS**.

The new WBS node will automatically be assigned a name based on its sequence in the WBS, but it can be changed at any time. Double-click on the WBS in the grid to directly edit the name, or edit the name in the **General** detail window with the WBS selected.

- 4) All changes made to this page are saved automatically.

Note: If user preference is set to save views manually, you must save the view to keep changes.

Tips



- ▶ To add a WBS from a project template or project, select a WBS row, select the **Context** menu, and then select **Add WBS from Project**. Use the **Add WBS from Projects** dialog box to select a WBS node and the specific activity data that you want to copy. The new WBSs are added as children of the selected row.
- ▶ You can also cut or copy and paste WBS nodes. See **Cut or Copy and Paste a WBS Node** (on page 87).
- ▶ To make an existing WBS node a child of the node above it, select the **Context** menu, and then select **Move Right**. Select **Move Left** to change a child node to a sibling node. The name of the node is automatically updated based on its new sequence in the WBS.
- ▶ Primavera Cloud supports WBS hierarchies up to 50 levels.

Add a WBS from a Template or Other Project

If your organization uses templates or a standardized structure across projects, you can save time when adding WBSs by copying them from a project template or another project in your workspace or parent workspaces. You can choose objects within the WBS that you would like to copy into your project, including activities, relationships, project-level codes, workspace-level codes, configured fields, and assignments. The chosen WBS and any child WBSs are copied as children of the WBS you selected on the page.

You can perform this task from the project **Activities** page or **WBS** page. To do so, the page must be grouped by WBS. You must have the required security privileges to add a WBS from a template or other project.

To add a WBS from a template or other project:

- 1) **Navigate to the WBS page** (see page 165).
- 2) In the table, select a WBS row, select the  **Context** menu, and then select **Add WBS from Project**.
- 3) In the **Add WBS from Projects** dialog box, filter the display of WBS results by selecting **Templates** or **Other Projects**.
- 4) Select the  **Tree/List** ▼ to view results in a tree or a list.
- 5) Expand or collapse the hierarchy of project templates or projects, and then select a WBS.
- 6) Select **Show Activity Details** to view a list of activities associated with the selected WBS.
- 7) Select **Add WBS** to add the selected WBS immediately, or select **Next** to choose the items you would like to copy, and then select **Add WBS**.
- 8) All changes made to this page are saved automatically.

Create a WBS by Import

Creating a WBS using Microsoft Excel enables you to use data from an outside system which can save you time from manual entry.

To create a WBS:

- 1) **Download an Import Template for Importing a WBS** (on page 84)
- 2) **Import a WBS from Microsoft Excel** (on page 85)

Download an Import Template for Importing a WBS

Download a Microsoft Excel template to use when importing a WBS and related data, such as WBS codes and configured fields.

To download an import template:

- 1) **Navigate to the WBS page** (see page 165).
- 2) Select **Actions** ▼, select **Download Import Template**, and then select one of the following:
 - ▶ **Empty Template**: Use this template to create data.
 - ▶ **Template with Data**: Use this template to update the data that exists in the table.

Tips

- ▶ The top two rows of the worksheet are required when importing a WBS from a spreadsheet. You can delete unused columns, but do not change the data in these rows.
- ▶ Review the Instructions worksheet on the first tab of the spreadsheet for helpful tips on populating the import template.

Import a WBS from Microsoft Excel

You can import a WBS and WBS data into the application from a Microsoft Excel (.xls or .xlsx) file. After downloading the import template, follow the instructions to create or update a WBS in the spreadsheet. The import will fail if there are any invalid values in the spreadsheet. You can download the spreadsheet file to view and fix the errors indicated in the error column at the end of each worksheet, and then import the file again.

You must have sufficient privileges to perform this task.

To import a WBS from Microsoft Excel:

- 1) **Navigate to the WBS page** (see page 165).
- 2) On the **WBS** page, select the **Actions** ▼ menu, and then select **Import**.
- 3) In the **Import WBS** dialog box, select **... Browse**, select a file, and select **Import**.

Assign a Manager to a WBS

Assign managers to WBS elements to identify the project manager or person responsible for managing the WBS.

The person who created the project is automatically assigned as the manager. The person who is assigned to a parent WBS node is automatically assigned as the manager to child WBS nodes.

The functionality described in this topic applies to the following pages in the application:

- ▶ Activities
- ▶ WBS

To assign a manager to a WBS:

- 1) Navigate to the main table on a page.
- 2) In the table, select a WBS, and then select the **General** detail window.
- 3) In the **Manager** field, select a manager.
- 4) All changes made to this page are saved automatically.

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.

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

- 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.

Cut or Copy and Paste a WBS Node



You can save time when building the work breakdown structure by cutting or copying existing WBS nodes. The cut operation enables you to easily move WBS nodes around in the table. This is useful for moving nodes from one group to another, for example, across projects in a program. Use the copy operation to duplicate nodes in the table. You can cut or copy one or more nodes at a time. Cut or copy one or more nodes to duplicate their hierarchical structure. You can also copy all of the activities assigned to the selected WBS and their associated activity data. This is useful if your project repeats the same type of work, such as constructing each floor of a building.

If you include activities in the copied WBS nodes, you can configure the renumbering options for the activity IDs that are copied. If the pattern you choose results in duplicate activity IDs, you will be prompted to enter a new activity ID for each conflicting activity.

The functionality described in this topic applies to the following pages in the application:

- ▶ Activities
- ▶ WBS

To cut or copy and paste WBS nodes:

- 1) Navigate to the main table on a page.
- 2) In the table, select one or more WBS nodes, select the  **Context** menu, and then select **Copy**.
- 3) Select the row in the table where you want to paste the node, select the  **Context** menu, and then select **Paste**.
- 4) In the **Paste WBS Options** dialog box, select **Include Activities** if you want to also copy the activities in the selected nodes. Choose what activity data you want to copy.
- 5) (If **Include Activities** is selected) In the **Renumbering Options** section, in the **Renumber Activity IDs** list, select one of the following options, and then configure the option's settings:
 - ▶ **Increment Activity ID based on selected activities:** Enter a value that each pasted activity will be incremented by.
Each pasted activity ID is incremented with an ID that begins after the highest activity ID sequence with a matching prefix. For example, in a project with activity IDs A10, A30, and B50, copying all three activities and pasting them with an increment value of *10* will result in new activities with IDs A40, A50, and B60 because A30 and B50 were the largest existing IDs with matching prefixes.
 - ▶ **Auto-number:** Enter a prefix value, starting number, and increment value. The pasted activities will be numbered in the order that the copied activities appeared in the table.
Each pasted activity ID is incremented with an ID that begins after the largest existing ID with a matching prefix. For example, in a project with activity IDs A10, A30, and B50, copying all three activities and pasting them with a prefix value of *A*, starting number of *1*, and increment value of *1* will result in new activities with IDs A31, A32, and A33 because A30 was the largest existing ID with a matching prefix.
 - ▶ **Replace beginning characters:** Enter the number of characters to replace starting from the beginning of the ID, and then enter the value that will replace the characters.

- ▶ For example, in a project with activity IDs A10, A30, and B50, copying all three activities and pasting them with the first character replaced by the letter C will result in new activities with IDs C10, C30, and C50.
- 6) Select **Paste**.
 - 7) All changes made to this page are saved automatically.

Note: If user preference is set to save views manually, you must save the view to keep changes.

Tips

- ▶ Your security privileges control which activity data objects you can copy over to new activities.
- ▶ This feature only applies to the data in the current schedule.

Work Packages Overview

Work packages are used to breakdown the work defined in the WBS into smaller deliverables. Each work package contains a combination of the materials and steps needed to satisfy its deliverable. A work package that does not have any scope items assigned can be considered a planning package. The WBS ties the work package and the scope assignments to the schedule. Activities can be assigned to work packages.

Create a Work Package

Create work packages to track and manage related work items.

To create a work package:

- 1) **Add a Work Package** (on page 89)
- 2) **Assign a Manager to a Work Package** (on page 89).
This can be done as part of step 1 or done separately.
- 3) **Set the Progress Measure for a Work Package** (on page 90)
- 4) **Set the Percent Complete Weight Method for a Work Package** (on page 90)
- 5) **Add a File in a Files Detail Window** (on page 59)
- 6) **Assign a Scope Item to a Work Package** (on page 66)
- 7) **Distribute Hours and Quantities for a Scope Assignment Per Timescale Interval** (on page 68)
- 8) **Assign a Manager to a Scope Assignment** (on page 67)

If you are linking work packages and scope assignments to the schedule, perform the following tasks.

- 1) **Set the Activity Percent Complete Weight Method for a Work Package** (on page 91).
- 2) **Link a Work Package to an Activity** (on page 123)
- 3) **Link an Activity to a Scope Assignment** (on page 122)

During the work package planning process, you can capture progress and track changes by saving project baselines.


- ▶ **Add a Baseline** (on page 126)

Add a Work Package

A work package without scope items or activities assigned to it may also be referred to as a planning package. As soon as a scope item is assigned, the planning package becomes a work package.

Note: After a baseline is set, each new work package must be added by submitting a change request.


To add a work package:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Work Packages**.
- 3) Select **+ Add**.
- 4) In the new row, complete the following fields:
 - ▶ **Name:** Enter a name for the work package.
 - ▶ **ID:** The ID is generated automatically based on project settings. Adjust as needed.
 - ▶ **WBS:** Select the WBS to associate with this work package. If the project does not use a WBS, then associate the work package with the default WBS.
 - ▶ **Original Start:** Select the date the work on the work package is scheduled to begin.
 - ▶ **Original Finish:** Select the date the work on the work package is scheduled to finish.
- 5) Select **Save**.

Assign a Manager to a Work Package

Assign managers to work packages to specify which users are responsible for managing them.

To assign a manager to a work package:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Work Packages**.
- 3) In the table, select the work package.
- 4) Select the **General** detail window.
- 5) In the **Manager** field, select a manager.
- 6) Select **Save**.

Tips

- ▶ The manager assignment is pushed down to all scope assignments in the work package; however, a different manager can be assigned to each scope assignment.

Set the Progress Measure for a Work Package

Setting the Progress Measure option enables you to determine how progress is measured against scope assignments in work packages.

To set the progress measure:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over **Scope**, and select **Work Packages**.
- 3) In the table, select the work package.
- 4) Select the **General** detail window.
- 5) Select the **Progress Measure** option.
 - ▶ **Milestone Percent Complete**: This option uses a selected Rule of Credit to measure progress.
 - ▶ **Physical Percent Complete**: This option allows users to manually enter Installed Quantity for scope assignments.
- 6) If **Milestone Percent Complete** is selected, select options for the following:
 - ▶ **Rule of Credit Method**: A defined set of milestones that are used to show progress for each scope assignment in the work package.
 - ▶ **Progress Type**: Select **Sequential** if milestones must be completed in order, or select **Non Sequential** if order does not matter for the rule of credit.
- 7) Select **Save**.

Set the Percent Complete Weight Method for a Work Package

Setting the Percent Complete Weight Method enables you to determine how the Scope Percent Complete is calculated for the work package. It determines whether it will be weighted by the work package's scope assignment quantity, hours, cost, or by manual input.

To set the percent complete weight method:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over **Scope**, and select **Work Packages**.
- 3) In the table, select the work package.
- 4) Select the **General** detail window.
- 5) Select the **Scope Percent Complete Weight Method**.

The weight is calculated using cost, quantity, hours, or manually entered values. **Cost**, **Quantity**, and **Hours** are represented as n in the equations that follow.

The n weight is first calculated for each scope assignment in the work package as **Revised n** multiplied by the scope assignment **Scope Percent Complete**.

Scope Percent Complete is calculated as **Installed Quantity** divided by **At Completion Quantity**.

The sum of the scope assignments **Revised n** and the sum of the scope assignments n **Weight** for all scope assignments in the work package are then used to compute the work package **Scope Percent Complete**. This is calculated as the n **Weight** divided by **Revised n** .

Completed Weight for the **Manual** option is calculated as **Manual Weight** multiplied by **Scope Percent Complete**.


Scope Percent Complete at the work package level for the manual option is calculated as the sum of **Manual Completed Weight** divided by the sum of **Manual Weight** for all scope assignments in the work package.

- 6) Select **Save**.

Set the Activity Percent Complete Weight Method for a Work Package

Setting the Activity Percent Complete Weight Method enables you to determine how Activity Percent Complete will be calculated for the activities assigned to the work package and scope assignments.

To set the activity percent complete weight method:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Work Packages**.
- 3) In the table, select the work package.
- 4) Select the **General** detail window.
- 5) Select the **Activity Weight Method**. The Activity Weight Method option is used to determine how the Weight field for an activity will be populated: manually, or automatically using the Duration, Labor Units, or Non Labor Units for the activity.

Using the appropriate value as specified for the work package, the **Activity Percent Complete** for the work package is calculated as the sum of **Completed Weight** divided by the sum of **Weight** for all activities assigned to the work package and scope assignments. **Completed Weight** equals **Weight** multiplied by **Activity Percent Complete** for each activity.

- 6) Select **Save**.

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.

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

- 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.

Assign a Scope Item to a Work Package

Select the materials or products needed to complete work packages.

Note: After a baseline is set, scope items must be assigned to work packages by submitting a change request.

To assign a scope item to a work package:


- 1) In the object selector, select a project.
- 2) In the sidebar, hover over **Scope**, and select **Scope Assignments**.
- 3) On the **Scope Assignments** page, in the **Work Package** field, select the name of the work package.
- 4) Select **Plan**.
- 5) Select **+ Add**.

- 6) On the **Select Scope Item** panel, select all the scope items needed for the work package and select **Select**.
- 7) In the **General** detail window, complete the following fields for each assigned scope assignment:
 - ▶ **Original Quantity:** The amount needed for this work package. The Unassigned Quantity is prepopulated in this field.
 - ▶ **Original Productivity Rate:** This field is prepopulated with the rate initially defined for the scope item. Update as necessary. Updates are only reflected in this scope assignment.
 - ▶ **Original Hours:** This field is calculated by multiplying the **Original Quantity** times the **Original Productivity Rate**. If you change this value, the **Original Productivity Rate** is recalculated.
 - ▶ **Rate By:** Determines whether the cost is calculated using **Quantity** or **Hours**. If the cost of assignments is not relevant for your calculations, then leave the **Original Cost Rate** field as **0**.
 - **Quantity:** Quantity is used to calculate cost. For example, **Original Cost** is calculated as **Original Quantity** times **Original Cost Rate**.
 - **Hours:** Hours are used to calculate cost. For example, **Original Cost** is calculated as **Original Hours** times **Original Cost Rate**.
 - ▶ **Original Cost Rate:** The rate used to calculate cost. Depending on the Rate By selection, this rate is either based on the rate per quantity or hours.
- 8) Select **Save**.

Download an Import Template for Work Packages and Scope Assignments

Download a Microsoft Excel template to use when creating new work packages and when importing scope assignments into work packages.

To download an import template:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Work Packages**.
- 3) Select the **Actions** ▼ menu, and select **Download Import Template**.
The import template is created as a Microsoft Excel file with the default file name, **WorkPackagesScopeAssignmentImportTemplate.xls**.

Tips

- ▶ The file formats supported are .xls and .xlsx.
- ▶ The top two rows of the worksheet are required when importing data from a worksheet.
- ▶ If configured fields are available for work packages or scope assignments, columns will appear for them in the template.
- ▶ Review the Instructions worksheet on the first tab of the spreadsheet for helpful tips on populating the import template.

Import Work Packages and Scope Assignments

Import new work packages and import scope assignments into their respective work packages from a Microsoft Excel (.xls or .xlsx) file. Changes cannot be made to existing work packages or scope assignments using the import template.

If scope assignments exist for any work packages, you can optionally delete all existing scope assignments when importing the file.

Note: An import can only occur before the original baseline is set.

The data for import must be presented in the format as defined in the import template.

To import work packages and scope assignments:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over **Scope**, and select **Work Packages**.
- 3) Select the **Actions** ▼ menu, and select **Import**.
- 4) In the **Import Work Packages** dialog box:
 - a. Select a file to import.
 - b. Select the option to delete existing scope assignments, if you want to delete all existing scope assignments in all existing work packages.
 - c. Select **Import**.

Any issues with the import are identified as errors. Download the file to view the errors. Fix all errors in the file and repeat the import process.

- 5) Select **Save**.

Tips

- ▶ Select **Create Import Template** to download a template file ready for you to populate with data.

Distribute Hours and Quantities for a Scope Assignment Per Timescale Interval


Time phased data for scope assignments, by default, is evenly spread according to the specified dates assigned to scope assignments. You can redistribute original hours and quantities for scope assignments per timescale interval using curve profiles or by manual distribution using the Time Phase view. This process occurs before the original baseline is set.

- ▶ **Specify a Curve Profile for a Scope Assignment** (on page 68)
- ▶ **Manually Distribute Hours and Quantities Per Timescale Interval for a Scope Assignment** (on page 68)

Specify a Curve Profile for a Scope Assignment


A curve profile can be selected per work package to redistribute cost, hours, and quantities for all scope assignments within the work package according to a specified curve.

To specify a curve profile:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Scope Assignments**.
- 3) On the **Scope Assignments** page, in the **Work Package** field, select the name of the work package.
- 4) Select **Time Phase**.
- 5) To apply a curve profile for the scope assignment:
 - a. Select **Apply Curve**.
 - b. In the **Select Curve** dialog box, select a curve and select **OK**.

Note: The curve applies to all scope assignments within the work package.

Tips



- ▶ If you manually distribute values and need to restore the distributed values to the curve that was previously set, select the  **Context** menu and select **Reset Curve**.

Manually Distribute Hours and Quantities Per Timescale Interval for a Scope Assignment

Original hours and quantities can be manually updated per timescale interval.

Note: Once you make a manual update to original hours or original quantities using the Time Phase view, certain fields on the Plan view will no longer be editable for the scope assignment. These fields are Original Hours, Original Quantity, Original Productivity Rate, Original Cost, Original Cost Rate, and Rate By.


To manually update original hours and quantities per timescale interval:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Scope Assignments**.
- 3) On the **Scope Assignments** page, in the **Work Package** field, select the name of the work package.
- 4) Select **Time Phase**.
- 5) To change the timescale interval:
 - a. Select  **Settings**.
 - b. In the **Setting** dialog box, select the **Timescale** tab.
 - c. In the **Timescale Interval** field, select the timescale to use for planning.
 - d. Select **Apply**.

Note: You can also change the timescale interval by right clicking on the timescale in the table and selecting an option.

- 6) Update the individual timescale intervals for **Original Quantity** or **Original Hours** as necessary. Updating these fields will automatically adjust the **Original Cost** field.


Tips

- ▶ You can apply a curve first and then redistribute values. After a value is entered manually, the Curve Profile is set to Manual.
- ▶ After manually distributing values, if you need to restore the distributed values using the curve that was previously set, select the  **Context** menu and select **Reset Curve**.

Assign a Manager to a Scope Assignment

Assign managers to scope assignments if the manager assigned at the work package level is not the person responsible for managing the scope assignment.

To assign a manager to a scope assignment:


- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Scope Assignments**.
- 3) On the **Scope Assignments** page, in the **Work Package** field, select the name of the work package.
- 4) Select **Plan**.
- 5) In the table, select the scope assignment.
- 6) Select the **General** detail window.
- 7) In the **Manager** field, select a manager.
- 8) Select **Save**.


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.

Work Packages Fields

Depending on your settings, the following fields might appear on the page as table columns, spreadsheet rows, or in detail windows. Fields that are generic across the application, such as Name, may not be included here.

Dates

Baseline Finish

The planned finish date for the work package as is set in the current baseline.

This field is populated with the Revised Finish date at the time that the current baseline is set.

Baseline Start

The planned start date for the work package as is set in the current baseline.

This field is populated with the Revised Start date at the time that the current baseline is set.

Effective Finish

The latest Effective Finish date of all scope assignments in the work package.

This is a read-only field.

Effective Start

The earliest Effective Start date of all scope assignments in the work package.

This is a read-only field.

Installed Finish

The date work on the work package is complete.

This is the latest Installed Finish date of all scope assignments in the work package.

Installed Start

The date work on the work package began.

This is the earliest Installed Start date of all scope assignments in the work package.

Original Finish

The date the work on the work package is scheduled to finish.

This field is populated with the Data Date plus 4 days when the work package is created, but it can be manually modified until the Original Baseline is set.

If the Data Date is specified after the Original Finish date is set and the Original Start date is before the Data Date, the application sets the Original Finish date to be the same date relative to Original Start before the Data Date was modified when the Modify Dates feature is run.

If there is no activity link, the field is locked when the original baseline is set.

If there is an activity link, before the original baseline is set the field is populated with the earliest Planned Finish date of all linked activities. After the baseline is set, the field is locked.

Original Start

The date the work on the work package is scheduled to begin.

This field is populated with the Data Date with the work package is created, but it can be manually modified until the Original Baseline is set.

If the Data Date is specified, Original Start cannot be set to a date earlier than the Data Date. If the Data Date is specified after the Original Start date is set and the Original Start date is before the Data Date, the Original Start is populated with the Data Date when the Modify Dates feature is run.

If there is no activity link, this field is locked when the original baseline is set.

If there is an activity link, before the original baseline is set this field is populated with the earliest Planned Start dates of all linked activities. After the baseline is set, the field is locked.

Planned Finish

The date the work on the work package is scheduled to finish.

If there is no activity link, this field is populated with the Original Finish date until the original baseline is set. It can be manually modified after the original baseline is set.

If Data Date is specified after the Planned Finish date is set and the Planned Start date is before the Data Date, the application sets the Planned Finish date to be the same date relative to Planned Start before the Data Date was modified when the Modify Dates feature is run.

If there is an activity link, this field is populated with the latest Planned Finish date of all activities in the work package.

Planned Start

The date the work on the work package is scheduled to begin.

If there is no activity link, this field is populated with the Original Start date until the original baseline is set. It can be manually updated after the original baseline is set.

If the Data Date is specified, the date cannot be set to a date earlier than the Data Date.

If the Data Date is specified after the Planned Start date is set, the Planned Start date is before the Data Date, and the work package's Scope Percent Complete is equal to 0%, that is Installed Quantity is zero, then the date inherits the Data Date when the Modify Dates feature is run.

If there is an activity link, this field is populated with the earliest Planned Start date of all the activities in the work package.

Remaining Early Finish

The earliest date the work on the work package is scheduled to finish.

If there is no activity link, this field is populated with the latest Remaining Early Finish date of all its scope assignments. If the work package does not have scope assignments, the field is populated the Original Finish date before the original baseline is set and the Revised Finish date after the original baseline is set.

This field is blank when the scope assignment's Scope Percent Complete becomes 100%.

If there is an activity linked, this field is populated with the latest Remaining Early Finish date of all linked activities.

Remaining Early Start

The earliest date the work on the work package is scheduled to begin.

If the work package does not have scope assignments, before the original baseline is set, this field is populated with the Original Start date. After the original baseline is set, it inherits the Data Date when the Modify Dates feature is run if the work package's Scope Percent Complete is not equal to 100%.

This field is blank when the scope assignment's Scope Percent Complete becomes 100%.

If there is any activity linked, this field is populated with the earliest Remaining Early Start date of all linked activities.

Remaining Late Finish

The latest possible date work on the work package must finish to not delay the finish date.

If there is no activity link, this field is populated with the latest Remaining Late Finish date of all its scope assignments. If the work package does not have scope assignments, the field is populated with the Remaining Early Finish date.

If there is an activity linked, this field is populated with the latest Remaining Late Finish date of all linked activities.

Remaining Late Start

The latest possible date work on the work package must begin without delaying the finish date.

If there is no activity link, this field is always equal to the Remaining Late Start date of all scope assignments in the work package. If the work package does not have scope assignments, this field is populated with the Remaining Early Start date.

If there is any activity linked, this field is populated with the earliest Remaining Late Start date of all activities.

Revised Finish

The revised finish date for the work package.

If the work package does not have scope assignments, this field is populated with the Original Finish date until the original baseline is set.

When the Modify Dates feature is run after the original baseline is set, the Revised Start date is before the Data Date, and the work package's Scope Percent Complete is equal to 0%, the Revised Finish date is updated to be the same date relative to the Revised Start date as it was before the Data Date was modified.

If the work package has scope assignments, the date is always the latest finish of its scope assignments' Planned Finish dates and all approved Change Finish dates.

Revised Start

The revised start date for the work package.

If the work package does not have scope assignments, this field is populated with the Original Start date until the original baseline is set.

This field is populated with the Data Date when the Modify Dates feature is run after the original baseline is set if the Revised Start date is before the Data Date and the work package's Scope Percent Complete is equal to 0%.

If the work package has scope assignments, is always the earliest start of its scope assignments' Planned Start dates and all approved Change Start dates.

Earned Value

BAC Cost

The Revised Cost or At Completion Cost at the time the current baseline was set, depending on the selection for the Budget at Completion Method. The Revised Cost of the current project if no baseline is set.

This is the cumulative value for all scope assignments in the work package.

BAC Hours

The Revised Hours or At Completion Hours at the time the current baseline was set, depending on the selection for the Budget At Completion Method. The Revised Hours of the current project if no baseline is set.

This is the cumulative value for all scope assignments in the work package.

EAC Cost

The total cost estimated to be earned as the completion of the work package.

Calculated as ETC Cost plus Actual Cost to Date.

This is the cumulative value for all scope assignments in the work package.

EAC Hours

The total hours estimated to be earned at the completion of the work package.

Calculated as ETC Hours plus Actual Hours to Date.

This is the cumulative value for all scope assignments in the work package.

Earned Cost

The portion of the budgeted cost that is currently earned for the work package.

Calculated as Performance Percent Complete multiplied by BAC Cost.

This is the cumulative value for all scope assignments in the work package.

Earned Hours

The portion of budgeted hours that is currently earned for the work package.
Calculated as Performance Percent Complete multiplied by BAC Hours.
This is the cumulative value for all scope assignments in the work package.

ETC Cost

The estimate of the cost needed to complete the work.
Calculated as BAC Cost minus Earned Cost.
This is the cumulative value for all scope assignments in the work package.

ETC Hours

The estimated number of hours needed to complete the work.
Calculated as BAC Hours minus Earned Hours.
This is the cumulative value for all scope assignments in the work package.

Financial

Actual Cost to Date

The actual costs incurred on the scope assignment. This tracks the VOWD (Value of Work Done).
This is the cumulative value for all scope assignments in the work package.

Adjusted Cost

The amount the scope assignment work that is not yet accounted for. For example, you might enter a value to represent pending change requests that are likely to be approved.
This is the cumulative value for all scope assignments in the work package.

Approved Change Cost

The sum of all approved cost changes in the change records for the scope assignment.
This is the cumulative value for all scope assignments in the work package.

At Completion Cost

The total cost at the completion of the scope assignment.
Calculated as Revised Cost plus Adjusted Cost.
This is the cumulative value for all scope assignments in the work package.

Baseline Cost

The Revised Cost at the time the current baseline was set.
This is the cumulative value for all scope assignments in the work package.

Installed Cost

The total cost incurred on the scope assignment as of the current date.
If Rate By is set to Hours, then Installed Cost equals Revised Cost Rate multiplied by Installed Hours.
If Rate By is set to Quantity, then Installed Cost equals Revised Cost Rate multiplied by Installed Quantity.
This is the cumulative value for all scope assignments in the work package.

Original Cost

The original cost of the scope assignment.

If Rate By is set to Hours, then Original Cost equals Original Hours multiplied by Original Cost Rate. If this value is entered manually, then Original Cost Rate is recalculated to equal Original Cost divided by Original Hours.

If Rate By is set to Quantity, then Original Cost equals Original Quantity multiplied by Original Cost Rate. If this value is entered manually, then Original Cost Rate is recalculated to equal Original Cost divided by Original Quantity.

This is the cumulative value for all scope assignments in the work package.

Pending Change Cost

Calculated as the sum of all pending cost changes in the change records for the scope assignment.

This is the cumulative value for all scope assignments in the work package.

Remaining Cost

The amount left to be spent.

If Rate By set to Hours, then Remaining Cost equals Remaining Hours multiplied by Revised Cost Rate.

If Rate By set to Quantity, then Remaining Cost equals Remaining Quantity multiplied by Revised Cost Rate.

This is the cumulative value for all scope assignments in the work package.

Revised Cost

The Original Cost before the baseline is set. After the baseline is set, Revised Cost equals Original Cost plus Approved Change Cost.

This is the cumulative value for all scope assignments in the work package.

General

Activity Weight Method

The method used to calculate Activity Percent Complete. Methods are Duration, Labor Units, Non Labor Units, and Manual.

Duration: Planned Duration, also known as Original Duration, is used for Weight.

Labor Units: At Completion Labor Units is used for Weight.

Non Labor Units: At Completion NonLabor Units is used for Weight.

Manual: Weight is added manually.

Budget At Completion Method

The setting allows users to select which value to use for populating BAC fields when a baseline is set. Choose At Completion to include adjusted values.

Curve Profile

The curve profile used for time phase distribution of scope assignments.

Description

Provides additional details about the work package.

Manager

The manager or person responsible for the work package.

Progress Measure

The method used to measure progress.

Milestone Percent Complete: This option uses a selected Rule of Credit to measure progress.

Physical Percent Complete: This option allows users to manually enter Installed Quantity for scope assignments.

Progress Type

Determines how the milestones are progressed if the Progress Measure is set to Milestone Percent Complete.

Sequential: Milestones must be progressed in order.

Non Sequential: Milestones can be progressed in whatever order necessary.

Rule of Credit Method

The name of the rule of credit which includes a set of milestones for which progress is measured.

Scope Percent Complete Weight Method

The weight is calculated using cost, quantity, hours, or manually entered values. Cost, Quantity, and Hours are represented as n in the equations that follow.

The n weight is first calculated for each scope assignment in the work package as Revised n multiplied by the scope assignment Scope Percent Complete.

Scope Percent Complete is calculated as Installed Quantity divided by At Completion Quantity.

The sum of the scope assignments Revised n and the sum of the scope assignments n Weight for all scope assignments in the work package are then used to compute the work package Scope Percent Complete. This is calculated as the n Weight divided by Revised n.

Completed Weight for the Manual option is calculated as Manual Weight multiplied by Scope Percent Complete.

Scope Percent Complete at the work package level for the manual option is calculated as the sum of Manual Completed Weight divided by the sum of Manual Weight for all scope assignments in the work package.

WBS

The WBS that the work package is associated with.

Hours

Actual Hours to Date

The actual hours spent on the scope assignment. This tracks the VOWD (Value of Work Done).

This is the cumulative value for all scope assignments in the work package.

Adjusted Hours

The amount of scope assignment work that is not yet accounted for. For example, you might enter a value to represent pending change requests that are likely to be approved.

This is the cumulative value for all scope assignments in the work package.

Approved Change Hours

The sum of all approved change hours in the change and transfer records for the scope assignment.

This is the cumulative value for all scope assignments in the work package.

At Completion Hours

The total hours expected to be spend at the completion of the scope assignment.

Calculated as Revised Hours plus Adjusted Hours.

This is the cumulative value for all scope assignments in the work package.

Baseline Hours

The Revised Hours at the time the baseline was set.

This is the cumulative value for all scope assignments in the work package.

Installed Hours

Hours spent on the scope assignment.

Calculated as Installed Quantity multiplied by Revised Productivity Rate.

This is the cumulative value for all scope assignments in the work package.

Original Hours

The original expected hours needed to complete all the work required to install the material quantity on the scope assignment.

Calculated as Original Quantity multiplied by Original Productivity Rate.

Before the baseline is set, this field can be entered manually. A manual entry recalculates the Original Productivity Rate to equal Original Hours divided by Original Quantity.

This is the cumulative value for all scope assignments in the work package.

Pending Change Hours

Calculated as the sum of all pending hour changes in the change and transfer records for the scope assignment.

This is the cumulative value for all scope assignments in the work package.

Remaining Hours

The number of hours left for the scope assignment.

Calculated as Remaining Quantity multiplied by Revised Productivity Rate.

This is the cumulative value for all scope assignments in the work package.

Revised Hours

Original Hours before the baseline is set. After the baseline is set, Revised Hours is equal to Original Hours plus Approved Change Hours.

This is the cumulative value for all scope assignments in the work package.

Percentages

Activity Percent Complete

The percentage complete for all activities assigned to the work package.

Earned Percent Complete

Calculated as Earned Hours divided by BAC Hours for all scope assignments in the work package.

Scope Percent Complete

The weight is calculated using cost, quantity, hours, or manually entered values. Cost, Quantity, and Hours are represented as n in the equations that follow.

The n weight is first calculated for each scope assignment in the work package as Revised n multiplied by the scope assignment Scope Percent Complete.

Scope Percent Complete is calculated as Installed Quantity divided by At Completion Quantity.

The sum of the scope assignments Revised n and the sum of the scope assignments n Weight for all scope assignments in the work package are then used to compute the work package Scope Percent Complete. This is calculated as the n Weight divided by Revised n .

Weight for the Manual option is calculated as Manual Weight Factor multiplied by Scope Percent Complete.

Scope Percent Complete at the work package level for the manual option is calculated as the sum of Manual Weight divided by the sum of Manual Weight Factors for all scope assignments in the work package.

Scope Assignments Fields

Depending on your settings, the following fields might appear on the page as table columns, spreadsheet rows, or in detail windows. Fields that are generic across the application, such as Name, may not be included here.

Dates

Baseline Finish

The planned finish date for the scope assignment as is set in the current baseline.

This field is used to spread baseline data fields.

This field is populated with the Revised Finish date at the time that the current baseline is set.

If there is an activity link, this field is populated with the activity's Current BL Finish date.

Baseline Start

The planned start date for the scope assignment as is set in the current baseline.

This field is used to spread baseline data fields.

This field is populated with the Revised Start date at the time that the current baseline is set.

If there is an activity link, this field is populated with the activity's Current BL Start date.

Effective Finish

The latest date of all Actual to Date and Actual Cost to Date values for the scope assignment.

This is a read-only field.

Effective Start

The earliest date of all Actual Hours to Date and Actual Cost to Date values for the scope assignment.

This is a read-only field.

Installed Finish

The date work on the scope assignment completed.

The latest date of all Installed Quantity values for the scope assignment when Scope Percent Complete equals 100%.

This field is used to spread Installed data fields.

Installed Start

The date work on the scope assignment began.

This is the earliest date of all Installed Quantity values for the scope assignment.

This field is used to spread Installed data fields.

Original Finish

The date the work on the scope assignment is scheduled to finish.

This field is populated with the work package's Original Finish date, but it can be manually modified until the original baseline is set.

If there is no activity link, the field is locked when the original baseline is set.

If there is an activity link, before the original baseline is set the field is populated with the activity's Planned Finish. After the baseline is set, the field is locked.

If the Data Date is specified after the Original Finish date is set and the Original Start date is before the Data Date, the application sets the Original Finish date to be the same date relative to Original Start before the Data Date was modified when the Modify Dates feature is run.

Original Start

The date the work on the scope assignment is scheduled to begin.

This field is populated with its work package's Original Start, but can be manually modified until the original baseline is set.

If there is no activity link, the field is locked when the original baseline is set.

If there is an activity link, before the original baseline is set the field is populated with the activity's Planned Start. After the baseline is set, the field is locked.

If the Data Date is specified, the date cannot be set to a date earlier than the Data Date.

If the Data Date is specified after the Original Start date is set and the Original Start date is before the Data Date, the Original Start date inherits the Data Date when the Modify Dates feature is run.

Planned Finish

The date the work on the scope assignment is scheduled to finish.

This field is used to spread original data fields.

If there is no activity link, this field is populated with the Original Finish date until the original baseline is set. It can be manually modified after the original baseline is set.

If Data Date is specified after the Planned Finish date is set and the Planned Start date is before the Data Date, the application sets the Planned Finish date to be the same date relative to Planned Start before the Data Date was modified when the Modify Dates feature is run.

If there is an activity link, this field is populated with the activity's Planned Finish date.

Planned Start

The date the work on the scope assignment is scheduled to begin.

This field is used to spread original data fields.

If there is no activity link, this field is populated with the Original Start date until the original baseline is set. It can be manually updated after the original baseline is set.

If the Data Date is specified, the date cannot be set to a date earlier than the Data Date.

If the Data Date is specified after the Planned Start date is set, the Planned Start date is before the Data Date, and the work package's Scope Percent Complete is equal to 0%, that is Installed Quantity is zero, then the date inherits the Data Date when the Modify Dates feature is run.

If there is an activity link, this field is populated with the activity's Planned Start date.

Remaining Early Finish

The earliest date the work on the scope assignment is scheduled to finish.

If there is no activity link, before the original baseline is set, this field is populated with the Original Finish date. After the original baseline is set, this field is populated with the Revised Finish date.

This field is blank when the scope assignment's Scope Percent Complete becomes 100%.

If there is any activity linked, this field is populated with the activity's Remaining Early Finish date.

This field is used to spread Remaining data fields.

Remaining Early Start

The earliest date the work on the scope assignment is scheduled to begin.

If there is no activity link, before the original baseline is set, this field is populated with the Original Start date. After the original baseline is set, this field is populated with the Data Date when the Modify Dates feature is run if the scope assignment's Scope Percent Complete is not equal to 100%.

This field is blank when the scope assignment's Scope Percent Complete becomes 100%.

If there is any activity linked, this field is populated with the activity's Remaining Early Start date.

This field is used to spread Remaining data fields.

Remaining Late Finish

The latest possible date work on the scope assignment must finish to not delay the finish date.

If there is no activity link, this field is always equal to the Remaining Early Finish date.

If there is any activity linked, this field is populated with the activity's Remaining Late Finish date.

This field is used to spread Remaining data fields.

Remaining Late Start

The latest possible date work on the scope assignment must begin without delaying the finish date.

If there is no activity link, this field is always equal to the Remaining Early Start date.

If there is any activity link, this field is populated with the activity's Remaining Late Start date.

This field is used to spread Remaining data fields.

Revised Finish

The revised finish date for the scope assignment.

It is always the latest finish of the scope assignment's Planned Finish date and all approved Change Finish dates.

This field is used to spread Revised data fields.

Revised Start

The revised start date for the scope assignment.

It is always the earliest start of the scope assignment's Planned Start date and all approved Change Start dates.

This field is used to spread Revised data fields.

Earned Value

BAC Cost

The Revised Cost or At Completion Cost at the time the current baseline was set, depending on the selection for the Budget at Completion Method. The Revised Cost of the current project if no baseline is set.

BAC Hours

The Revised Hours or At Completion Hours at the time the current baseline was set, depending on the selection for the Budget At Completion Method. The Revised Hours of the current project if no baseline is set.

BAC Quantity

The Revised Quantity or At Completion Quantity at the time the current baseline was set, depending on the selection for the Budget at Completion Method. The Revised Quantity of the current project if no baseline is set.

EAC Cost

Calculated as ETC Cost plus Actual Cost to Date.

EAC Hours

Calculated as ETC Hours plus Actual Hours to Date.

EAC Quantity

The estimate of how much material or product will be installed at completion of the scope assignment work.

Calculated as ETC Quantity plus Actual Quantity to Date.

Earned Cost

Calculated as Performance Percent Complete multiplied by BAC Cost.

Earned Hours

Calculated as Performance Percent Complete multiplied by BAC Hours.

Earned Quantity

The amount of material or product that has been installed based on the Performance Percent Complete of the scope assignment and the Budget At Completion Quantity.

Calculated as Performance Percent Complete multiplied by BAC Quantity.

ETC Cost

The estimate of the cost needed to complete the work.

Calculated as BAC Cost minus Earned Cost.

ETC Hours

The estimated number of hours needed to complete the work.

Calculated as BAC Hours minus Earned Hours.

ETC Quantity

The estimate of how much quantity is needed to complete the work.

Calculated as BAC Quantity minus Earned Quantity.

Financial

Actual Cost to Date

The actual costs incurred on the scope assignment. This tracks the VOWD (Value of Work Done).

Adjusted Cost

The amount the scope assignment work that is not yet accounted for. For example, you might enter a value to represent pending change requests that are likely to be approved.

Approved Change Cost

The sum of all approved cost changes in the change records for the scope assignment.

At Completion Cost

The total cost at the completion of the scope assignment.

Calculated as Revised Cost plus Adjusted Cost.

Baseline Cost

The Revised Cost at the time the current baseline was set.

Installed Cost

The total cost incurred on the scope assignment as of the current date.

If Rate By is set to Hours, then Installed Cost equals Revised Cost Rate multiplied by Installed Hours.

If Rate By is set to Quantity, then Installed Cost equals Revised Cost Rate multiplied by Installed Quantity.

Original Cost

The original cost of the scope assignment.

If Rate By is set to Hours, then Original Cost equals Original Hours multiplied by Original Cost Rate. If this value is entered manually, then Original Cost Rate is recalculated to equal Original Cost divided by Original Hours.

If Rate By is set to Quantity, then Original Cost equals Original Quantity multiplied by Original Cost Rate. If this value is entered manually, then Original Cost Rate is recalculated to equal Original Cost divided by Original Quantity.

Original Cost Rate

The cost rate used in the cost calculation of the scope assignment.

If Rate By is set to Hours and the Original Cost value is entered manually, then Original Cost Rate equals Original Cost divided by Original Hours.

If Rate By is set to Quantity and the Original Cost value is entered manually, then Original Cost Rate equals Original Cost divided by Original Quantity.

Pending Change Cost

Calculated as the sum of all pending cost changes in the change records for the scope assignment.

Remaining Cost

The amount left to be spent.

If Rate By set to Hours, then Remaining Cost equals Remaining Hours multiplied by Revised Cost Rate.

If Rate By set to Quantity, then Remaining Cost equals Remaining Quantity multiplied by Revised Cost Rate.

Revised Cost

The Original Cost before the baseline is set. After the baseline is set, Revised Cost equals Original Cost plus Approved Change Cost.

Revised Cost Rate

The cost rate used in the cost calculation of the scope assignment based on current values. If Rate By set to Hours, then Revised Cost Rate equals Revised Cost divided by Revised Hours.

If Rate By set to Quantity, then Revised Cost Rate equals Revised Cost divided by Revised Quantity.

General

CBS Code

The cost breakdown structure code assigned to the scope item of the scope assignment.

Cost Category

The category name used to organize and define the cost.

Curve Profile

The curve profile selected for the scope assignment.

Description

Additional details for the scope assignment.

Manager

The manager or person responsible for providing status on the scope assignment.

Manual Completed Weight

Calculated as Scope Percent Complete multiplied by Manual Weight.

Manual Weight

The value used to calculate manual completed weight when progress needs to be weighed against a factor other than quantity, hours, or cost.

This is a manual entry field when Scope Percent Complete Weight Method is set to Manual.

Original Productivity Rate

The number of hours it takes to install or assemble the product or material per unit. Defaults to the scope item's Original Productivity Rate, but can be updated for each scope item assignment.

Calculated as Original Hours divided by Original Quantity.

If this field is updated, Original Hours is recalculated to equal Original Quantity multiplied by Original Productivity Rate.

Rate By

Determines whether the cost is calculated using the Quantity or Hours.

Quantity: Quantity is used to calculate cost. For example, Original Cost is calculated as Original Quantity times Original Cost Rate.

Hours: Hours are used to calculate cost. For example, Original Cost is calculated as Original Hours times Original Cost Rate.

Revised Productivity Rate

The number of hours it will take to install or assemble the product or material per unit based on current values.

Calculated as Revised Hours divided by Revised Quantity.

This value is recalculated if Revised Quantity or Revised Hours are changed.

Hours

Actual Hours to Date

The actual hours spent on the scope assignment. This tracks the VOWD (Value of Work Done).

Adjusted Hours

The amount of scope assignment work that is not yet accounted for. For example, you might enter a value to represent pending change requests that are likely to be approved.

Approved Change Hours

The sum of all approved change hours in the change and transfer records for the scope assignment.

At Completion Hours

The total hours expected for the scope assignment.

Calculated as Revised Hours plus Adjusted Hours.

Baseline Hours

The Revised Hours at the time the baseline was set.

Installed Hours

Hours spent on the scope assignment.

Calculated as Installed Quantity multiplied by Revised Productivity Rate.

Original Hours

The original expected hours needed to complete all the work required to install the material quantity on the scope assignment.

Calculated as Original Quantity multiplied by Original Productivity Rate.

Before the baseline is set, this field can be entered manually. A manual entry recalculates the Original Productivity Rate to equal Original Hours divided by Original Quantity.

Pending Change Hours

Calculated as the sum of all pending hour changes in the change records for the scope assignment.

Remaining Hours

The number of hours left for the scope assignment.

Calculated as Remaining Quantity multiplied by Revised Productivity Rate.

Revised Hours

Original Hours before the baseline is set. After the baseline is set, Revised Hours is equal to Original Hours plus Approved Change Hours.

Percentages

Milestone Progress Percent Complete

The percentage complete for all milestones for the scope assignment. The calculation is based on the user entered percentage complete for the milestone and the rules defined for the milestone calculations.

Performance Percent Complete

Calculated as Installed Quantity divided by At Completion Quantity.

Scope Percent Complete

Calculated as Installed Quantity divided by At Completion Quantity.

Units

Actual Quantity to Date

The Installed Quantity for the scope assignment.

Adjusted Quantity

The scope assignment quantity that is not yet accounted for. For example, you might enter a value to represent pending change requests that are likely to be approved.

Approved Change Quantity

Calculated as the sum of all approved change quantities in the change records for the scope assignment.

At Completion Quantity

The total amount of the scope item to be installed for the scope assignment.

Calculated as Revised Quantity plus Adjusted Quantity.

Available Quantity

The amount of material or product available for scope assignment.

Calculated as Revised Quantity minus Installed Quantity.

Baseline Quantity

The Revised Quantity at the time the current baseline was set.

Installed Quantity

The amount of material or product that has been installed to date.

If the Progress Measure on the work package is set to Milestone Percent Complete, then Installed Quantity equals Revised Quantity multiplied by Milestone Progress Percent Complete.

This field can be manually overridden if the Progress Measure is set to Physical Percent Complete, then Installed Quantity is manually entered and not calculated.

Original Quantity

The expected amount of material or product required.

Pending Change Quantity

The sum of all pending change quantities in the change records for the scope assignment.

Remaining Quantity

The quantity remaining for the scope assignment.

Calculated as Revised Quantity minus Installed Quantity.

Revised Quantity

The total quantity that has been revised to account for approved changes for a scope assignment. This value equals the Original Quantity before the original baseline is set.

Calculated as Original Quantity plus Approved Change Quantity. Revised Quantity equals the Original Quantity before the original is baseline set.

Update the Work Package Progress

When a project is in execution, project managers can update progress on scope assignments, add project baselines to record progress over time, and review work package and scope assignment data.

Before progress is captured, a project baseline must be set. See **Add a Baseline** (on page 126).

To update a work package:

- ▶ Update Work Package and Scope Assignment Dates
 - ▶ **Update the Work Package Dates** (on page 114)
 - ▶ **Update Scope Assignment Dates** (on page 115)
 - ▶ **Update the Data Date When Progressing a Work Package and Scope Assignment** (on page 115)

Note: If work packages or their scope assignments are associated with activities, this is handled through the activity updates.

- ▶ **Update Installed Quantity for a Scope Assignment** (on page 116)
- ▶ **Update Actual Cost and Hours to Date for a Scope Assignment** (on page 116)
- ▶ **Update an Adjusted Value for a Scope Assignment** (on page 117)
- ▶ **Add a Baseline** (on page 126)
- ▶ **Review the Time Phase Distribution for a Scope Assignment** (on page 69)
- ▶ **Close Out a Reporting Period** (on page 118)


Update the Work Package Dates

As work is performed on the project, update work package dates to reflect the progress.

Note: Dates cannot be updated if the work package is linked to an activity.

To update work package dates:

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


- 2) In the sidebar, hover over  **Scope**, and select **Work Packages**.
- 3) Configure the view to display the dates for updating.
For example, in the early stages, you may choose to view Original Start, Original Finish, Planned Start, and Planned Finish. As the project progresses, you may be more concerned with Baseline, Revised, Installed, and Remaining dates as they will reflect the progress of the work package.
- 4) In a date column, select the date.
- 5) Select **Save**.

Update Scope Assignment Dates

As work is performed on the project, update scope assignment dates to reflect the progress.

Note: Dates cannot be updated if the scope assignment or its work package is linked to an activity.

To update scope assignment dates:


- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Scope Assignments**.
- 3) On the **Scope Assignments** page, in the **Work Package** field, select the name of the work package.
- 4) Configure the view to display the dates for updating.
For example, in the early stages, you may choose to view Original Start, Original Finish, Planned Start, and Planned Finish. As the project progresses, you may be more concerned with Baseline, Revised, Installed, and Remaining dates as they will reflect the progress of the scope assignment.
- 5) In a date column, select the date.
- 6) Select **Save**.

Update the Data Date When Progressing a Work Package and Scope Assignment

When adjusting work package or scope assignment dates, update the data date to adjust all key date fields. This will adjust the Original, Planned, Revised, and Remaining dates.

Note: This only applies when activities are not linked to work packages or scope assignments.

To update the data date:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Work Packages**.
- 3) Select **Modify Dates**.
- 4) In the **Modify Dates** dialog box, select a new data date and select **Modify**.


Tips

- ▶ When activities are linked to work packages or scope assignments, dates are updated when the scheduler is run.

Update Installed Quantity for a Scope Assignment

As work is performed on the project, update the progress. Progress for each scope assignment in a work package is measured using rule of credit milestones or using installed values, depending on the progress measure settings defined for the work package.

To update installed quantity for a scope assignments:

- 1) In the object selector, select a project.
 - 2) In the sidebar, hover over  **Scope**, and select **Scope Assignments**.
 - 3) On the **Scope Assignments** page, in the **Work Package** field, select the name of the work package.
 - 4) Select **Status**.
 - 5) In the table, select the scope assignment.
 - 6) Select the **Progress** detail window, and select **Installed**.
 - 7) Select **+ Add**.
 - 8) In the new row, in the **Progress Date** column, select a date.
 - 9) Update progress.
 - ▶ If progress is measured by **Milestone Percent Complete**, enter the percentage complete for the work completed on the milestone or mark the milestone as completed. Milestones are to be completed sequentially or non-sequentially, depending on the progress type setting for the work package. The percentage complete for each milestone is used to calculate **Milestone Progress Percent Complete**, which is multiplied by **Revised Quantity** to calculate **Installed Quantity**.
 - ▶ If progress is measured by **Physical Percent Complete**, enter the amount that has been installed since the last progress recording in the **Increment Installed Quantity** field or enter the total installed amount to date in the **Cumulative** field.
- The **Scope Percent Complete** field displays the percentage complete for the scope assignment.
- 10) Select **Save**.

Update Actual Cost and Hours to Date for a Scope Assignment

As work is performed on the project, you can capture the invoiced amount (also known as VOWD values) using the Actual Cost to Date and Actual Hours to Date fields. This lets you compare what was installed and what you are billed for. These values are used to calculate Actual Cost To Date and Actual Hours To Date values for the work package. You can enter either Actual Hours to Date or Actual Cost to Date, or both, in one entry.

To update actual cost and hours:

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

- 2) In the sidebar, hover over **Scope**, and select **Scope Assignments**.
- 3) On the **Scope Assignments** page, in the **Work Package** field, select the name of the work package.
- 4) Select **Status**.
- 5) In the table, select the scope assignment.
- 6) Select the **Progress** detail window, and select **Actual To Date**.
- 7) Select **+ Add**.
- 8) In the new row, in the **Progress Date** column, select a date.
- 9) To enter **Actual Hours To Date**, enter the amount of hours that have been spent since the last progress recording in the **Incremental Actual Hours To Date** field or enter the total number of hours spent in the **Cumulative Actual Hours To Date** field.
- 10) To enter **Actual Cost To Date**, enter the amount that has been spent since the last progress recording in the **Incremental Actual Cost To Date** field or enter the total amount spent in the **Cumulative Actual Cost To Date** field.
- 11) Select **Save**.

Update an Adjusted Value for a Scope Assignment

As work is performed on the project, expenses (time and money) other than those related to the scope assignments may be incurred for the work package. While pending items are awaiting approval, you might want a way to represent those values knowing that they will be approved in the future. Use the Adjusted Cost, Adjusted Hours, and Adjusted Quantity fields to reflect these values.

These values are used to calculate At Completion Cost, At Completion Hours, and At Completion Quantity. The values for At Completion Cost and At Completion Hours are rolled up to the work package level.

To update adjusted values for scope assignments:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over **Scope**, and select **Scope Assignments**.
- 3) On the **Scope Assignments** page, in the **Work Package** field, select the name of the work package.
- 4) Select **Status**.
- 5) Update the values for the **Adjusted Cost**, **Adjusted Hours**, and **Adjusted Quantity** fields.
- 6) Select **Save**.

Review the Time Phase Distribution for a Scope Assignment

View the time phased distributed data for work package scope assignments to analyze quantity, hours, and cost.

Configure the Time Phase view to enable you to view information that is important when monitoring the progress of work on scope assignments.

To configure the time phase data:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over **Scope**, and select **Scope Assignments**.
- 3) On the **Scope Assignments** page, in the **Work Package** field, select the name of the work package.
- 4) Select **Time Phase**.
- 5) Configure the quantity, hours, and cost spreadsheet rows to review in the table. For more information, see [link](#)
- 6) Configure the timescale to view quantity, hours, and cost. For more information, see [timescale link](#).
If you chose a Reporting Period, select whether to only display the custom label that is configured for the reporting period.
- 7) To view a specific date, in the **Go to** field, select a date. This will also synchronize dates in the table and chart.
- 8) To configure the chart view:
 - ▶ In the **Show** list, select whether to view data by **Quantity**, **Hours**, or **Costs**.
 - ▶ In the **View** list, select whether to view **Incremental** or **Cumulative** values.

Close Out a Reporting Period

Closing out reporting periods enables project managers and other stakeholders to analyze the progress of projects using reports, identify problem areas, and take corrective actions as necessary over the life of the project. Ensure progress is updated before you close out a reporting period. When a reporting period is closed, installed and actual to date values are locked down for the selected date and can no longer be updated.

You must have the appropriate security privileges to close out reporting periods.

Before the first reporting period is closed, the following conditions must be met:

- ▶ Scope assignment data exists.
- ▶ The project baseline is set.
- ▶ The correct Reporting Cycle and Frequency for Resetting Period Name settings are selected. This can be done directly on the Reporting Period Closeout page.

To close out a reporting period:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over **Scope**, and select **Period Closeout**.
- 3) On the **Reporting Period Closeout** page, select **Close Period**.

Scope Assignments: Time Phase Fields

Depending on your settings, the following fields might appear on the page as table columns, spreadsheet rows, or in detail windows. Fields that are generic across the application, such as Name, may not be included here.

Financial

Actual Cost to Date

The actual costs incurred on the scope assignment. This tracks the VOWD (Value of Work Done).

Approved Change Cost

The sum of all approved cost changes in the change records for the scope assignment.

Baseline Cost

The Revised Cost at the time the current baseline was set.

Incremental Installed Cost

The total cost incurred on the scope assignment as of the current date.

If Rate By is set to Hours, then Installed Cost equals Revised Cost Rate multiplied by Installed Hours.

If Rate By is set to Quantity, then Installed Cost equals Revised Cost Rate multiplied by Installed Quantity.

Original Cost

The original cost of the scope assignment.

If Rate By is set to Hours, then Original Cost equals Original Hours multiplied by Original Cost Rate. If this value is entered manually, then Original Cost Rate is recalculated to equal Original Cost divided by Original Hours.

If Rate By is set to Quantity, then Original Cost equals Original Quantity multiplied by Original Cost Rate. If this value is entered manually, then Original Cost Rate is recalculated to equal Original Cost divided by Original Quantity.

Manual updates can only be performed on the Plan view, not on the Time Phase view.

Pending Change Cost

Calculated as the sum of all pending cost changes in the change records for the scope assignment.

Remaining Early Cost

The amount left to be spent.

If Rate By set to Hours, then Remaining Cost equals Remaining Hours multiplied by Revised Cost Rate.

If Rate By set to Quantity, then Remaining Cost equals Remaining Quantity multiplied by Revised Cost Rate.

Remaining Early and Remaining Late fields display for time phased scope assignments to account for the Remaining Early and Remaining Late date fields.

Remaining Late Cost

The amount left to be spent.

If Rate By set to Hours, then Remaining Cost equals Remaining Hours multiplied by Revised Cost Rate.

If Rate By set to Quantity, then Remaining Cost equals Remaining Quantity multiplied by Revised Cost Rate.

Remaining Early and Remaining Late fields display for time phased scope assignments to account for the Remaining Early and Remaining Late date fields.

Revised Cost

The Original Cost before the baseline is set. After the baseline is set, Revised Cost equals Original Cost plus Approved Change Cost.

Hours

Actual Hours to Date

The number of hours spent on this scope assignment since the last progress date. This value is added to Cumulative Actual Hours to Date.

Approved Change Hours

The sum of all approved change hours in the change and transfer records for the scope assignment.

Baseline Hours

The Revised Hours at the time the baseline was set.

Incremental Installed Hours

Hours spent on the scope assignment.

Calculated as Installed Quantity multiplied by Revised Productivity Rate.

Original Hours

The original expected hours needed to complete all the work required to install the material quantity on the scope assignment.

Calculated as Original Quantity multiplied by Original Productivity Rate.

Before the baseline is set, this field can be entered manually. A manual entry recalculates the Original Productivity Rate to equal Original Hours divided by Original Quantity.

Pending Change Hours

Calculated as the sum of all pending hour changes in the change records for the scope assignment.

Remaining Early Hours

The number of hours left for the scope assignment.

Calculated as Remaining Quantity multiplied by Original Productivity Rate.

Remaining Early and Remaining Late fields display for time phased scope assignments to account for the Remaining Early and Remaining Late date fields.

Remaining Late Hours

The number of hours left for the scope assignment.

Calculated as Remaining Quantity multiplied by Original Productivity Rate.

Remaining Early and Remaining Late fields display for time phased scope assignments to account for the Remaining Early and Remaining Late date fields.

Revised Hours

Original Hours before the baseline set. After the baseline, Revised Hours is equal to Original Hours plus Approved Change Hours.

Units

Actual Quantity to Date

That amount of material or product that has been installed since the last progress date.

Approved Change Quantity

Calculated as the sum of all approved change quantities in the change records for the scope assignment.

Baseline Quantity

The Revised Quantity at the time the current baseline was set.

Installed Quantity

That amount of material or product that has been installed since the last progress date.

Original Quantity

The expected amount of material or product required.

Pending Change Quantity

The sum of all pending change quantities in the change records for the scope assignment.

Remaining Early Quantity

The quantity remaining for the scope assignment.

Calculated as Revised Quantity minus Installed Quantity.

Remaining Early and Remaining Late fields display for time phased scope assignments to account for the Remaining Early and Remaining Late date fields.

Remaining Late Quantity

The quantity remaining for the scope assignment.

Calculated as Revised Quantity minus Installed Quantity.

Remaining Early and Remaining Late fields display for time phased scope assignments to account for the Remaining Early and Remaining Late date fields.

Revised Quantity

The total quantity that has been revised to account for approved changes for a scope assignment. This value equals the Original Quantity before the original baseline is set.

Calculated as Original Quantity plus Approved Change Quantity. Revised Quantity equals the Original Quantity before the original is baseline set.

Associating Activities with Scope Assignments and Work Packages for Scope Management Overview

If you use the application to manage your schedule and manage scope assignments, you can link your activities to scope assignments and work packages.

The activity and the work package must be associated with the same WBS. An activity can only be assigned to one work package, but it can be assigned to multiple scope assignments within the work package.

Note: Schedule costs and scope costs are calculated separately. Linking a work package or scope assignment with an activity won't link the costs.

Scope assignments and work packages inherit dates from their associated activities. When activities are linked to a work package or its associated scope assignments, the Original Start and Original Finish dates are set to reflect the activity's Planned Start and Planned Finish dates before the baseline is set. After the baseline is set, the Original Start and Original Finish dates are set to read-only and the Planned Start and Planned Finish dates for the work package and scope assignments are updated with the activity's Planned Start and Planned Finish dates. For work packages that have scope assignments with activity links, this is the earliest start and finish dates set for all scope assignments within the work package.

Note: The following dates do not inherit values from activities: Revised Start/Finish, Effective Start/Finish, and Installed Start/Finish.

Unlinking activities from scope assignments or work packages will do the following:

- ▶ Reset the Original Start and Planned Start dates with the Data Date before the baseline is set. Reset the Planned Start dates with the Data Date after the baseline is set.
- ▶ Reset the Original Finish and Planned Finish dates with the Data Date plus 4 days, excluding holidays, before the baseline is set. Reset the Planned Finish dates with the Data Date plus 4 days, excluding holidays, after the baseline is set.


Unlinking a scope assignment will not unlink its work package from the activity.


Link an Activity to a Scope Assignment

Link activities to scope assignments when you want to manage scope assignment dates using activity dates. This enables you to more accurately manage the time phase distribution of scope data for scope assignments.

Only one activity can be linked per scope assignment.

To link an activity to a scope assignment:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Scope Assignments**.
- 3) On the **Scope Assignments** page, in the **Work Package** field, select the name of the work package.
- 4) Select **Plan** or **Status**.

- 5) In the table, select the scope assignment.
- 6) Select the **Activities** detail window, and select  **Link**.
- 7) In the **Link Activity** dialog box, select an activity and select **Link**.

Note: Only activities that are assigned the same WBS as the scope assignment's work package are available. Activities that are assigned to other work packages and activities that are assigned to scope assignments in other work packages are filtered out.


- 8) Select **Save**.

Link a Work Package to an Activity

Link work packages to activities when you want to manage work package dates using activity dates.

Note: Schedule costs and scope costs are calculated separately. Linking a work package or scope assignment with an activity won't link the costs.

To link an activity to a work package:

- 1) **Navigate to the Activities page** (see page 165).
- 2) In the table, select the activity.
- 3) On the **Layout** menu, select  **Activity Details**, and then select the **General** detail window.
- 4) In the **Work Package Name** field, select a work package.

Note: You can only link an activity to a work package that belong to the same WBS that is associated with the activity.

- 5) All changes made to this page are saved automatically.

Baselines Overview

Setting the Original Baseline Video

A baseline is a copy of a project's schedule data at a given point in time. As a static representation of the project plan, it can be used as a benchmark against which to measure performance as the project progresses. Create multiple baselines to evaluate performance at different phases of the project lifecycle. Project managers can also create and assign baseline categories to help provide more identifying context for baselines when they are created.

When you create a baseline, you can set the baseline date to capture project data at any point between the project creation date and the current date. This is useful if you want to add a baseline for project data as it existed on a specific date in the past. If you forgot to add a baseline on a specific date, select a past baseline date to use the data from that date.

Baselines can be opened on the Activities page to view the project data represented by the baseline. When a baseline is open, baseline values are used to populate the standard schedule fields. When the current schedule, a baseline, or a scenario is open, a baseline's values are used to populate corresponding baseline fields. Baseline fields are used for comparison with the current schedule or scenario fields. For example, if the original baseline is open, the baseline's start values populate Start date fields. If the current schedule or a scenario is open, Start date fields are populated with current schedule or current scenario values, and Original BL Start date fields are populated with original baseline values. The baseline fields used for comparison in the current schedule are empty when any baseline is open.

Baselines can also be opened so that they can be updated. While updating baseline data is not a typical project management practice, there may be situations where minor adjustments to a baseline need to be made by the project manager or scheduler. You can modify most of the data in a baseline as you would the data in the current schedule. The data stored by a baseline is unique to that baseline. For example, actions such as updating activity data, assigning resources and roles, scheduling activities, leveling resources and roles, and using the schedule health check tool do not affect the current schedule, other baselines, or schedule scenarios. You cannot manually add new activities to a baseline, but you can add existing activities from the current schedule to a baseline and update the data for existing baseline activities. If you need to replace your current schedule with the data from a baseline, you can set the baseline as the current schedule. If the changes you make to a baseline need to be undone, you can revert the baseline back to its original state, as long as that baseline was created in Oracle Primavera Cloud and not imported from P6. The baseline must be open before it can be updated or reverted. See **Open a Baseline** (on page 127) for more information.

Note: Because of differences in how data is managed in P6 and Oracle Primavera Cloud, you cannot revert changes made to a baseline if that baseline was imported from a P6 XML file.

There are four types of baselines in the application: original, current, supplementary, and unofficial:

- ▶ An original baseline is an official baseline that is typically set when the project has been approved. It may also be referred to as the Performance Measurement Baseline (PMB). Setting an original baseline captures values in all original baseline fields. Original scope values cannot be updated after the original baseline is set.
- ▶ A current baseline, also referred to as the active baseline, is an official baseline used to measure differences between current project values and the original values. You can only set a current baseline after an original baseline has been set.
- ▶ The supplementary baseline is an official baseline that can be used for any purpose. A supplementary baseline might be created before a major schedule update to capture the state of the project before the update.
- ▶ Unofficial baselines can be created to capture how the project is progressing or they can come from previous official baselines. For example, a baseline that was previously set as your official current baseline is not removed when you set a new current baseline. It instead becomes an unofficial baseline that is retained for future reference.

At any point in time, you can have one original baseline, one current baseline, one supplementary baseline, and an unlimited number of unofficial baselines. You can change the types of existing baselines or remove a baseline's type to make it an unofficial baseline. Any baseline can be opened for viewing or updating.

The distinction between official baselines and unofficial baselines is that official baselines—original, current, and supplementary—have corresponding baseline fields while unofficial baselines do not. To view the field values stored in an unofficial baseline, you can either change its type to an official baseline or set it as a user baseline preference. You can set up to three existing baselines as user baseline preferences, which typically indicate the baselines that are most important to you. The baselines set as your preferences are used to populate the values in user baseline fields. This is useful when you want to measure project performance against baselines other than the official project baselines. Set on the Activities page, user baseline preferences apply only to the user who set them. Official or unofficial baselines can be set as user baselines.

Schedule Management

For schedule management, each baseline captures a complete set of data about the project schedule, including activity dates, durations, units, costs, float, and percentages. After the project schedule is developed, an original baseline should be set to establish points of reference to monitor your schedule as it changes over time. When the current baseline is created, all of the current baseline fields are updated to reflect the current project values.

To measure schedule performance, configure views that show baseline variance fields to identify activities that are not progressing as planned. Baseline variance fields measure the differences between your current project values and your baseline values. You can view variances for your original, current, supplementary, and user baselines. Variances are useful in identifying the activities with the greatest impact to your original project plan.

When activity date indicators are enabled, the baseline Start and Finish date fields will display visual indicators when a constraint is configured for the activity or if an actual start date or actual finish date is set. See [Configure Activity Date Indicators](#) to enable indicators.

Official and user baselines can also be configured as bars to be displayed in the Gantt chart and used to monitor activity progress visually on the project timeline.

Earned Value functionality is also supported for schedule management use cases. Designate one of your existing baselines as the project's earned value baseline. This enables earned value metrics to be calculated for the activities in your project. Activity earned value data is rolled up to the WBS and project levels. Earned value metrics track current schedule and budget performance against the designated baseline. There are a variety of supported fields that you can use to monitor progress, including planned value, earned value, schedule and cost variances, schedule and cost performance indexes, estimates to complete, and estimates at completion. Most earned value metrics can be viewed in terms of costs or labor units. If you already have a baseline that should be used for earned value, it is recommended that you open the baseline to schedule it to a data date appropriate for that baseline, and then recalculate its costs. These actions ensure that the baseline fields referenced in earned value calculations are accurate and up to date.

Scope Management

For scope management, a current baseline is created to capture all approved changes since the original baseline was created. When the current baseline is created, all the baseline fields are updated to reflect the current values and are in turn used in certain calculations to measure progress. The original values are not changed.

For a work package, there are four baseline attributes that the user can refer to after a baseline has been set: Baseline Cost, Baseline Hours, Baseline Start, and Baseline Finish. For each scope assignment, there are five baseline attributes: Baseline Start, Baseline Finish, Baseline Cost, Baseline Hours, and Baseline Quantity. When the original baseline is set, these fields are populated with the original values. After the original baseline is set, all changes needed for scope items, work packages, and scope assignments must go through a review process, which is initiated by submitting change and transfer requests.

Related Video Tips

Setting a Baseline with Past Data Video

Add a Baseline

Adding project baselines enables you to track progress throughout the project lifecycle. If no baseline exists for a project, the first baseline must be an original or unofficial baseline. Any subsequent baselines can be original, current, supplementary, or unofficial baselines. You can also change the type of existing baselines. Only one original, current, and supplementary baseline can exist at a time, but you can maintain an unlimited number of unofficial baselines.

You can add, edit, and delete project baselines from the Baselines page or Activities page.



To add a project baseline:

- 1) **Navigate to the Baselines page** (see page 165).
- 2) Select **+ Add**.
- 3) In the **Add Baseline** dialog box, enter the following information:
 - ▶ **Name:** The name of the baseline.
 - ▶ **Source:** The source of the baseline data. Select **Current Schedule**, **Scenario**, **Baseline**, or **From History**.
 - If you selected **Current Schedule** as the source, continue to type selection.
 - If you selected **Baseline** as the source, use the **Baseline** list to choose an existing baseline with data you want to copy.
 - If you selected **Scenario** as the source, use the **Scenario** list to choose an existing scenario with data you want to copy.
 - If you selected **From History** as the source, use the **Baseline Date** picker to choose the date of the project data captured by the baseline. Select a date in the past to use project data from that date. The default value is the current date and time
 - ▶ **Type:** The type of baseline. Select **Original**, **Current**, **Supplementary**, or leave the value blank.

Notes:

- Unofficial baselines do not have a Type. Select the blank row in the list to add an unofficial baseline.
 - The dialog box displays the baseline type selected as the earned value baseline. This can be changed in the project settings.
- ▶ **Category:** The baseline categories are available in your project's owning workspace to help organize data. If there are no categories in the list, then none have been created. See Baseline Categories Overview for more information about baseline categories.
- 4) (Optional) Enter a description for the new scenario.
 - 5) Select **Add**.
 - 6) All changes made to this page are saved automatically.

Tips

- ▶ To access your baselines from the **Activities** page, select the **Actions** ▼ menu, and then select **Manage Baselines**. You can also add baselines from the **Manage Baselines** dialog box. Baselines added in this manner automatically set the current schedule as the scenario source.
- ▶ To add baselines directly from the **Activities** page, select the **Actions** ▼ menu, and then select **Add Baseline**.
- ▶ If you do not see a newly added baseline on the **Activities** page or in the **Manage Baselines** dialog box, select  **Refresh**.
- ▶ The **Data Date** field shows the data date value as of the Baseline Date. This is useful when determining the progress point of your project at the time represented by the baseline.
- ▶ The **Baseline for Earned Value** field shows which baseline is being used as the project's earned value baseline.
- ▶ To delete a baseline, on the **Baselines** page, in the **Manage Baselines** dialog box, or on the **Activities** page, select the  **Context** menu, and then select **Delete**. You cannot delete an original baseline if a current or supplementary baseline exists. If you delete the baseline designated as the earned value baseline, all earned value calculations will be reset when you recalculate costs.
- ▶ You cannot remove or change the original baseline if you have any scope changes, installed or actual scope quantities, or at least one closed reporting period.
- ▶ When a new scenario is created, a notification message is displayed and you can review the full message in the **Inbox**.

Open a Baseline

Open a baseline if you need to view or update the activity data stored by the baseline. When a baseline is open, baseline values are used to populate the standard schedule fields, and the designated baseline fields are empty.

While updating a baseline is not a typical project management practice, there may be situations where minor adjustments to a baseline need to be made by the project manager or scheduler. You cannot manually add activities in a baseline, but you can update existing activity data. If the changes you make to a baseline need to be undone, you can revert the baseline back to its original state. The baseline must be open before it can be updated or reverted.

Use the Open menu in the page toolbar to switch between your current schedule, schedule scenarios, and schedule baselines. The list contains your official baselines, any baselines set as a user baseline preference, and the open baseline. Each official baseline in the list displays the name of the baseline and its baseline type.

When a baseline is open, a banner appears above the page toolbar to inform you that you are currently making changes to a baseline. This message is to remind you of the object in which you are currently working and that any changes made to the baseline do not directly impact your current schedule, but are reflected in the corresponding baseline fields visible in your current schedule. The banner can be dismissed for your current session and will reappear when you reload the page.

To open a baseline:

- 1) **Navigate to the project Activities page** (see page 165).
- 2) In the **Open** menu, in the **Baselines** section, select a baseline to open.

Tips

- ▶ The **Open** menu also contains the following items:
 - ▶ **Current Schedule**: Select to open the project's current schedule.
 - ▶ **Scenarios** section: Select **View All** to open the **Manage Scenarios** dialog box.
 - ▶ **Baselines** section: Select **View All** to open the **Manage Baselines** dialog box.
- ▶ You can open any available baseline from the **Manage Baselines** dialog box, including those not listed in the **Open** menu.
- ▶ To revert a baseline, select the **Actions** ▼ menu, and then select **Revert Baseline**. This action cannot be undone.

Scope Change Request Overview

After the original baseline is set for a project, all changes needed for scope items, work packages, and scope assignments must go through a review process, which is initiated by submitting change requests. A single change request can have multiple change items listed in the request.

For scope items, change requests can be made to add new scope items to the project, change the quantity of existing scope items, and add or change CBS codes or cost categories.

For work packages, change requests can be made to add a new work package to the project, add new scope assignments to work packages, adjust scope assignment quantities, and transfer scope assignments to other work packages.

After a change request is made, the request needs to be reviewed and either approved or rejected. If changes are approved, the changes are reflected in the application. Approved changes are not reflected in the baseline until a new current baseline is set.

Approved scope item or work package change requests can be withdrawn and rejected scope item or work package change requests can be reopened for further evaluation or deletion, if needed.

Create a Change Request for a Scope Item

Change requests are used to manage and track changes to project scope items after the original baseline is set. When it is determined that new scope items need to be added to the project, when the quantity of scope items needs to be adjusted for existing scope items, or when a CBS code or cost category needs to be added or changed, a change request is created.

To create a change request for a scope item:

- 1) **Add a Scope Item Change Request** (on page 129)
- 2) Specify as many changes as needed.
 - ▶ **Add a New Scope Item to a Change Request** (on page 130)
 - ▶ **Add a Scope Item Change to a Change Request** (on page 130)

After the change request is complete, you can do the following.


- ▶ **Review a Scope Item Change Request** (on page 131)
- ▶ **Withdraw or Reopen an Approved or Rejected Scope Item Change Request** (on page 131)

Add a Scope Item Change Request


90040_Demo

Add scope item change requests when new scope items are needed, when additional quantities are needed, when it is determined that a lesser quantity is needed for a project, or when CBS code or cost category assignments needs to be added or changed. One change request can capture as many change items as needed.

To add a new scope item change request:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Scope Item Changes**.
- 3) Select **+ Add Scope Item Change**.
- 4) On the **Scope Item Change Details** page, in the **Description** field, optionally enter the purpose for the change request and select **Save**.


Tips

- ▶ You can initiate a request for a new scope item on the Scope Items page by selecting a scope item in the PBS where you want to add a new scope item and selecting the  **Context** menu.


Add a New Scope Item to a Change Request

Add change item requests for new scope items when additional materials or products are needed for the project. A change item request is added to a scope item change request, where one or more change items can be added.

To add a new scope item change item:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Scope Item Changes**.
- 3) In the table, select the **ID** for the scope item change request.
- 4) On the **Scope Item Change Details** page, select the **Add Scope Item** tab.
- 5) Select **+ Add**.
- 6) In the new row, complete the following fields:
 - ▶ **Name:** Enter the name of the material or product.
 - ▶ **PBS:** Select the field, and then select **... Select**. Select the PBS where the scope item belongs, and select **OK**.
 - ▶ **Quantity:** Enter the amount of material or product needed. This quantity is the limit that can be distributed to work packages unless a change request is initiated.
 - ▶ **Productivity Rate:** Enter the hours required to install or assemble the item per unit. This value can be updated when assigning the scope items to work packages.
 - ▶ **Hours:** The number of hours required to install the scope item quantity. This value is calculated as **Quantity** multiplied by **Productivity Rate**. If you choose to manually enter the **Hours**, the **Productivity Rate** is recalculated as **Hours** divided by **Quantity**.
 - ▶ (Optional) **Unit of Measure:** Select the type of measurement used when determining quantity for the scope item.
 - ▶ (Optional) **CBS Code:** Select the CBS code to assign to the scope item.
 - ▶ (Optional) **Cost Category:** Select the cost category to assign to the scope item.
- 7) Select **Save**.

Tips


- ▶ You can initiate a request for a new scope item on the Scope Items page by selecting a scope item in the PBS where you want to add a new scope items and selecting the  **Context** menu.

Add a Scope Item Change to a Change Request

Add change item requests for scope items when quantities need to be updated for the scope items identified for the project, or when CBS code or cost category assignments need to be added or changed.

A change item request is added to a scope item change request, where one or more change items can be added.

To add a change item:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Scope Item Changes**.
- 3) In the table, select the **ID** for the scope item change request.
- 4) On the **Scope Item Change Details** page, select the **Change Scope Item** tab.
- 5) Select **+ Add**.
- 6) In the **Select Scope Item** dialog box, use the search to locate the scope item to modify.
- 7) Select one or more items (Ctrl + click) and select **OK**.
- 8) In the new row, in the **Type** field, select the type of change to make.
- 9) Change the necessary fields:
 - ▶ **Change Quantity:** Enter the quantity to be added or subtracted from the scope item.
 - ▶ **CBS Code:** Select the CBS code.
 - ▶ **Cost Category:** Select the cost category.
- 10) Select **Save**.



Review a Scope Item Change Request

Review scope item change requests to determine whether changes are required.

Approve or reject requests to complete the change request. Individual change items can be rejected by using the actions menu. Change items can be updated. When the change items are verified, the change request can be approved. After the changes are approved, the new scope items or additional quantities can be assigned to work packages through a work package change.

The entire change request can be rejected if it was determined the changes are not needed.



To approve a scope item change request:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Scope Item Changes**.
- 3) In the table, select the **ID** for the change request.
- 4) On the **Scope Item Change Details** page, review the change items in the detail tabs.
 - ▶ To modify details, such as quantity or CBS code, update the fields.
 - ▶ To reject a change item, select the  **Context** menu, and select **Reject**.
 - ▶ To approve the entire change request, select **✓ Approve**.
 - ▶ To reject the entire change request, select **✗ Reject**.
- 5) Select **Save**.

Withdraw or Reopen an Approved or Rejected Scope Item Change Request

Scope item changes that have been approved or rejected can be withdrawn or reopened for further evaluation or deletion. This sets their status back to pending, which allows you to make any necessary changes.

To reopen an approved or rejected scope item change:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Scope Item Changes**.
- 3) In the table, locate the row for the approved or rejected scope item change, select the  **Context** menu, and then select **Withdraw Approval** for an approved scope item change or **Reopen Rejection** for a rejected scope item change.
- 4) In the dialog box, in the **Notify Users** field, select all users that you want to be notified of the change.
- 5) In the **Comment** field, enter any information that you want to send to the users you selected in the previous step.
- 6) Select **Withdraw** or **Reopen**.

Create a Change Request for a Work Package

Change requests are used to manage and track changes to work packages and scope assignments after the original baseline is set. When it is determined that new work packages need to be added to the project, new scope assignments need to be added to work packages, the scope assignment quantity, hours, or when scope assignments need to be transferred, a change request is created.

To create a change request for a work package:

- 1) **Add a Work Package Change Request** (on page 132)
- 2) Specify as many changes as needed.
 - ▶ **Add a New Work Package to a Change Request** (on page 133)
 - ▶ **Add a Scope Assignment to a Change Request** (on page 133)
 - ▶ **Add a Scope Assignment Change to a Change Request** (on page 134)
 - ▶ **Add a Work Package Transfer to a Change Request** (on page 135)


After the change request is complete, you can do the following:

- ▶ **Review a Work Package Change Request** (on page 136)
- ▶ **Withdraw or Reopen an Approved or Rejected Work Package Change Request** (on page 137)

Add a Work Package Change Request

Add work package change requests when it is determined that new work packages need to be added to the project, new scope assignments need to be added to work packages, the scope assignment quantity or hours needs to be adjusted, or when scope assignments need to be transferred. One change request can capture as many change items as needed.

To add a work package change request:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Work Package Changes**.
- 3) Select **+ Add Work Package Change**.

- 4) On the **Work Package Change Details** page, in the **Description** field, optionally enter the purpose for the change request and select **Save**.

Tips

- ▶ You can initiate a new work package request from the Work Packages page by selecting **+ Request New Work Package**.

Add a New Work Package to a Change Request

Add work package change item requests when new work packages are needed for a project. A work package change item request is added to a work package change request, where one or more change items can be added.

To request a new work package:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over **Scope**, and select **Work Package Changes**.
- 3) In the table, select the **ID** for the work package change request.
- 4) On the **Work Package Changes** details page, select the **Add Work Packages** tab.
- 5) Select **+ Add**.
- 6) In the **Add Work Packages** dialog box, complete the following fields:
 - ▶ **Name:** Enter the name of the work package.
 - ▶ **ID:** The ID is generated automatically based on project settings. Adjust as needed.
 - ▶ **WBS:** Select the WBS to associate with this work package.
 - ▶ **Start:** Select the date the work on the work package is scheduled to begin
 - ▶ **Finish:** Select the date the work on the work package is scheduled to finish.
 - ▶ (Optional) **Manager:** Select a project manager or person responsible for managing the work package.
 - ▶ (Optional) **Description:** Enter description for the work package.
- 7) Select **Save**.



Notes:

- If you want to add scope assignments to the work package, you must add scope assignments to the same change request.
- To edit details of the work package request, select the Work Package ID.

Add a Scope Assignment to a Change Request

Add new scope assignment change item requests when new scope assignments are needed for a work package. A scope assignment change item request is added to a work package change request, where one or more change items can be added.


To request a new scope assignment for a work package:

- 1) In the object selector, select a project.
 - 2) In the sidebar, hover over  **Scope**, and select **Work Package Changes**.
 - 3) In the table, select the **ID** for the work package change request.
 - 4) On the **Work Package Changes** details page, select the **Add Scope Assignments** tab.
 - 5) Select **+ Add**.
 - 6) In the **Add Scope Assignments** dialog box:
 - a. In the **Work Packages** field, select **... Select**.
 1. In the **Select Work Package** dialog box, select the work package where the scope assignment is needed.
 2. Select **Select**.
 - b. In the **Scope Items** section, use the search to locate the scope item to add. Select one or more items (Ctrl + click) and select **Select**.
 - 7) Complete the following fields:
 - ▶ **Quantity**: Enter amount needed for this work package.
 - ▶ **Productivity Rate**: This field is prepopulated with the rate initially defined for the scope item. Update as necessary. Updates are only reflected on this scope assignment.
 - ▶ **Hours**: This field is calculated by multiplying the **Quantity** by the **Productivity Rate**. If you change this value, the **Productivity Rate** is recalculated.
 - ▶ **Rate By**: Select whether the cost is calculated using **Quantity** or **Hours**. If the cost of assignments is not relevant for your calculations, then leave the **Cost Rate** field as **0**.
 - ▶ **Cost Rate**: Enter the rate used to calculate **Cost**. Depending on the **Rate By** selection, this rate is either based on the rate per quantity or hours.
- Note:** To view details about the scope item, select the **Scope Item**.
- 8) To enter additional details, such as **Change Start/End** dates or **Cost/Schedule Impact**, select the  **Context** menu and select **Details**.
 - 9) In the **Scope Assignments Details** dialog box, review or update details and select **Save**.
 - 10) Select **Save**.

Add a Scope Assignment Change to a Change Request

Add change item requests for scope assignments when quantities or hours need to be updated for the scope assignments identified for a work package. A change item request is added to a work package change request, where one or more change items can be added.

To request a scope assignment change item:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Work Package Changes**.
- 3) In the table, select the **ID** for the work package change request.
- 4) On the **Work Package Changes** details page, select the **Change Scope Assignment** tab.
- 5) Select **+ Add**.

- 6) In the **Change Scope Assignments** dialog box:
 - a. In the **Work Packages** field, select the work package where the scope assignment is currently assigned.
 - b. In the **Scope Assignments** section, use the search to locate the scope assignment to modify. Select one or more items (Ctrl + click) and select **Select**.
- 7) Change the necessary fields:
 - ▶ **Change Quantity:** Enter the quantity to be added or subtracted from the scope assignment.
 - ▶ **Change Hours:** Enter the number of hours to be added to the scope assignment.
 - ▶ **Change Cost Rate:** Enter the rate used to calculate **Change Cost**. Depending on the **Rate By** selection, this rate is either based on the rate per quantity or hours.


Note: When changing an existing scope assignment, the Change Cost Rate on the change item is only used to calculate the Change Cost. After the change is approved, this rate does not replace the original rate on the scope assignment.


- 8) Select **Save**.

Add a Work Package Transfer to a Change Request

Add work package transfers to transfer assigned quantities from one scope assignment in a work package to one or more work packages.

To transfer scope assignment quantities:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Work Package Changes**.
- 3) In the table, select the **ID** for the work package change request.
- 4) On the **Work Package Changes** details page, select the **Transfer Scope Assignments** tab.
- 5) Select **+ Add**.
- 6) In the **Add Transfer** dialog box:
 - a. In the **Source Work Package** field, select the work package where the scope assignment is currently assigned.
 - b. In the **Source Scope Assignments** section, use the search to locate the scope assignment. Select one or more items (Ctrl + click) and select **Select**.
- 7) In the **Source** row, complete the following field:
 - ▶ **Transfer Quantity:** Enter the quantity to be distributed to one or more work packages.
- 8) In the **Destination** row, complete the following fields:
 - ▶ **Work Package:** Select **... Select**. In the **Select Work Package** dialog box, select the work package the scope assignment is to be transferred to.
 - ▶ **Type:** Select the type of transfer to be made on the scope assignment.
 - **New:** To add a new scope assignment for the destination.

- **Update:** To update an existing scope assignment for the destination.
 - ▶ **Scope Assignment:** If the **Type** is **Update**, select the field and select **... Select**. In the **Select Scope Assignment** dialog box, select the scope assignment to add additional quantities to.
 - ▶ **Scope Assignment ID:** If the **Type** is **New**, the ID is generated automatically based on project settings. Adjust as needed.
 - ▶ **Transfer Quantity:** Enter the quantity to be distributed to a work package.
 - ▶ **Transfer Cost Rate** or **Transfer Cost:** Enter the cost rate or cost. The field that was not populated will be calculated accordingly based off the Rate By setting.
 - ▶ (Optional) **Transfer Start:** Select the date the transfer will begin.
 - ▶ (Optional) **Transfer Finish:** Select the date the transfer will end.
 - ▶ (Optional) **Cost Impact:** Select to indicate there is a cost impact.
 - ▶ (Optional) **Schedule Impact:** Select to indicate there is a schedule impact.
 - ▶ (Optional) **Description:** Enter information about the transfer request.
- 9) If there are remaining quantities to distribute, select the  **Context** menu and select **Add Destination**.
- 10) Continue to distribute remaining quantities.
- 11) Select **Save**.

Note: The Productivity Rate, Rate, and Rate By values of the new scope assignment in the new work package are inherited from the source assignment; however, these values can be updated as needed.





Review a Work Package Change Request

Review work package change requests to determine whether changes are required.

Approve or reject requests to complete the change request. Individual change items can be rejected by using the actions menu. Change items can be updated. When the change items are verified, the change request can be approved. After the changes are approved, the work packages are updated to reflect the changes.

The entire change request can be rejected if it was determined the changes are not needed.



To approve a work package change request:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Work Package Changes**.
- 3) In the table, select the **ID** for the change request.
- 4) On the **Work Package Changes** details page, review the change items in the detail tabs.
 - ▶ To modify details, such as quantity, update the fields.
 - ▶ To reject a change item, select the  **Context** menu and select **Reject**.
 - ▶ To approve the entire change request, select  **Approve**.
 - ▶ To reject the entire change request, select  **Reject**.

Withdraw or Reopen an Approved or Rejected Work Package Change Request

Work package changes that have been approved or rejected can be withdrawn or reopened for further evaluation or deletion. This sets their status back to pending, which allows you to make any necessary changes.

To reopen an approved or rejected work package change:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Work Package Changes**.
- 3) In the table, locate the row for the approved or rejected work package change, select the  **Context** menu, and then select **Withdraw Approval** for an approved work package change or **Reopen Rejection** for a rejected work package change.
- 4) In the dialog box, in the **Notify Users** field, select all users that you want to be notified of the change.
- 5) In the **Comment** field, enter any information that you want to send to the users you selected in the previous step.
- 6) Select **Withdraw** or **Reopen**.

Perform Scope Management When Connected with P6 EPPM using Primavera Gateway

If your project is being worked on simultaneously in P6 EPPM, coordinate with the scheduler to import and export data between Oracle Primavera Cloud and P6 EPPM.

For performing tasks in P6 EPPM, refer to P6 EPPM Help.

To perform scope management, the following sequence is recommended.





- 1) In Oracle Primavera Cloud:
 - a. Create the project.
 - b. Set the EPS Code. This code determines where the project will reside in the EPS in P6 EPPM.
 - c. Create the PBS.
 - d. Add the scope items.
 - e. Create the WBS.
 - f. Create the work packages.
 - g. Send the project to P6 EPPM.
- 2) In P6 EPPM:
 - a. Open the project. You will see the WBS structure and work packages as defined in Oracle Primavera Cloud.
 - b. Add activities to work packages.
 - c. Send the project to Oracle Primavera Cloud.
- 3) In Oracle Primavera Cloud:

- a. Select the Activity Weight Method for the work packages. This value lets you decide which aspect of the activity is used to derive the Activity Percent Complete.
- b. Review the activities assigned to work packages using the Activities detail window.
- c. If the Activity Weight Method is Manual, enter weights for each activity. These weights are used to calculate the Activity Percent Complete.

Set the EPS Code for a Workspace Connected with P6 EPPM

When exporting a project from Oracle Primavera Cloud into P6 EPPM, the location where the project will reside in the Enterprise Project Structure (EPS) must be defined. This is done using an EPS Code set at the workspace level. Use the **Synchronize** page to run the **Create EPS Code in Primavera Cloud** synchronization business flow.


To set the EPS Code:

- 1) In the object selector, select a workspace.
- 2) In the sidebar, hover over  **Integration**, and select **Synchronize**.
 - **Note:** The selected workspace must have a P6 EPPM connection with the **Create EPS Code in Primavera Cloud** business flow enabled.
- 3) Select the **Create EPS Code in Primavera Cloud** row, select the  **Context** menu, and then select **Run**.
- 4) Monitor the business flow job on the **Monitor** page.
- 5) After the business flow job has completed, in the sidebar, select  **Summary & Settings**.
- 6) On the **Summary and Settings** menu, select **Dictionaries**, and then select **Codes**.
- 7) Verify that the table contains the **P6 EPS** code.
- 8) In the **Summary & Settings** panel, select  **Close**.

Set the Activity Percent Complete Weight Method for a Work Package

Setting the Activity Percent Complete Weight Method enables you to determine how Activity Percent Complete will be calculated for the activities assigned to the work package and scope assignments.

To set the activity percent complete weight method:

- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Scope**, and select **Work Packages**.
- 3) In the table, select the work package.
- 4) Select the **General** detail window.
- 5) Select the **Activity Weight Method**. The Activity Weight Method option is used to determine how the Weight field for an activity will be populated: manually, or automatically using the Duration, Labor Units, or Non Labor Units for the activity.

Using the appropriate value as specified for the work package, the **Activity Percent Complete** for the work package is calculated as the sum of **Completed Weight** divided by the sum of **Weight** for all activities assigned to the work package and scope assignments. **Completed Weight** equals **Weight** multiplied by **Activity Percent Complete** for each activity.



- 6) Select **Save**.

Run a Project Business Flow from a Project

Run a project business flow from a project to synchronize data between Primavera Cloud and external applications.

Note: After importing P6 project data into Primavera Cloud, you must reschedule the project and recalculate costs before making any project updates.

To run a project business flow from a project:



- 1) In the object selector, select a project.
- 2) In the sidebar, hover over  **Integration**, and select **Synchronize**.
- 3) Select a business flow row, select the  **Context** menu, and then select **Run**.

Note: You will receive a notification when the synchronization job starts and another notification when the job completes. You can view the list of running and completed synchronization jobs on the **Monitor** page of the **Integration** app.

Tips

- ▶ Select a business flow name to view the objects and fields that will be synchronized when you run the business flow.

Note: Viewing synchronized objects and fields associated with a business flow is not supported for Gateway connections. To view Gateway business flow details, access the business flow definitions in Gateway.

- ▶ Select  **Refresh** to view the current list of synchronizations available for the project.
- ▶ Select  **Search** to search for a synchronization.

Configure View Settings

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.

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


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.


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.

Related Video Tips


Using Drag-and-Drop Video

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.

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 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**.

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 144).


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 143).


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 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.

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

- 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 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 143).
 - 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.

Related Video Tips

Style a Grid Video

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 165)
- 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**.


Related Video Tips

Using Multi-Column Sorting Video

Configure Gantt Bars on the Activities Page

To visually distinguish the different activity-specific 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.

To configure Gantt chart bars:

- a) In the object selector, select a project or program.
 - 1) In the sidebar, hover over  **Schedule**, and select **Activities**.
 - 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 Bars on the Task List Page

To visually distinguish project level task bars displayed in the Gantt chart, you can configure bar and bar label settings for the Gantt chart view on the Task List page.

To configure Gantt bars on the Task List page:

- 1) In the object selector, select a project or program.
- 2) In the sidebar, hover over  **Tasks**, and select **Task List**.
- 3) In the **Manage Views** or **Settings** panel, select the **Bars** tab.
- 4) In the editor grid, select the **Task Name** to make changes to the following label settings:
 - ▶ Adjust the bar label position: Click and drag the Task Name box to change the bar label position in respect to the Task Bar. For example, you can drag the label above, below, before, or after the task bar to customize the position of the task name label. By default, the task name displays after the bar.
 - ▶ Change the bar label color: After selecting **Task Name**, use the **Color** selector to change the task name label color.
 - ▶ Remove the bar label: Click the **X** beside Task Name to completely remove the bar label.
- 5) In the **Height** list, specify a bar height. Options include Small, Medium, and Large.
- 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 **X Close**.
 - In the **Settings** panel:
- 7) Select **Save**.

Tips


- ▶ To preview how your Gantt chart bars will look, select **Preview**.
- ▶ To reset your Gantt chart bar settings to the default configuration, select **Reset**.
- ▶ Tasks bars are colored by specific attributes. Go to Project Settings to modify this option.

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** (Activities Page only): 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.
 - ▶ **Hand-offs** (Task List Page only): Determines whether to show hand-offs in the Gantt chart.
 - ▶ **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** (Activities Page only): 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** (Activities Page only): 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**.

Related Video Tips

Quickly Add a Row Video

Customize Task Cards





Customize Task Cards Video

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. See **Task Icon Reference** (https://docs.oracle.com/cd/E80480_01/English/user_guides/task_management_user_guide/224775.htm#224775).

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. This setting is enabled by default for all views.
 - ▶ **Wrap Text on Tasks**: Wrap long task names to the next line of a basic task card.
- 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 or 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 139).


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


Highlight Read-Only Fields Video

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 162).

Configure Cell, Column, and Row Formatting


Fast Formatting in Views Video

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 25) 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 and Work Plan pages.
- ▶ 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

- a) In the object selector, select a project or program.
- b) 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.
- a) 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**.