Oracle
Primavera Cloud
Task Management User Guide

January 2026

Oracle Primavera Cloud Task Management User Guide

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Contents

About This Content

This guide explains how to use the Tasks app in Oracle Primavera Cloud to plan and manage project work tasks.

Project managers, schedulers, superintendents, subcontractors, and trade foremen should read this guide.

Tasks Overview

Tasks Overview Video

The Tasks app combines lean construction planning and scheduling principles with general task management functionality to provide a lightweight work management solution for the projects in your organization. Using the Tasks app, break down project responsibilities into tasks to manage work more effectively, without the overhead or complexity of a traditional CPM schedule. You can optionally align your tasks with your CPM schedule for a more detailed breakdown of the work to be performed.

Task management functionality is supported on multiple pages, each designed and optimized for specific purposes:

▶ **Hand-offs** (see "**Hand-offs Overview**" on page 83): View a network diagram of the tasks and task milestones in your project and create hand-off relationships between them. View the longest calculated path or total task duration to determine impact to a project schedule during pull planning. Create hand-offs using a table, by drawing lines between tasks, or by group selection.

▶ **Work Plan** (see "**Work Plan Overview**" on page 102): Plan tasks in weekly intervals on a virtual planning board. Focus on short-term planning using a planning period task filter and customizing the number of weeks displayed.

▶ **Task List** (see "**Task List Overview**" on page 143): Manage private and public tasks in a table format. Create named views to customize the display of columns, grouping and sorting options, and task filters. Sequence tasks and create hand-offs using a Gantt view. Use the Task List page at the program level to plan and manage tasks for multiple projects simultaneously.

While each page specializes in a particular area, you can perform the same task management duties on any of them.

Two additional pages provide supporting functionality:

▶ **Constraints** (see "**Constraints Overview**" on page 135): Identify the issues or materials that must be addressed before an associated task can begin.

▶ **Analysis** (see "**Tasks Analysis Overview**" on page 169): Monitor a variety of real-time metric charts that track task and company performance.

See **Understanding Tasks App Concepts** (on page 10) to learn about task management in Primavera Cloud. These concepts are used in processes across the pages in the Tasks app.

Understanding Tasks App Concepts

The following concepts are used in processes across the pages in the Tasks app. Processes such as creating tasks, estimating crew size, identifying constraints, committing to tasks, and adding hand-offs between tasks occur regularly during daily or weekly planning sessions. They can be performed as many times as necessary and in any order.

Planning Period

The Planning Period enables a team of project collaborators to control the window of time that they want to focus on for planning and scheduling their task work. At the task level, short-term planning periods are ideal, such as displaying tasks for only the current week and the following week.

Tasks

Tasks are identified during planning as the physical work to be performed by the tradespeople on the project. Each task has a name, duration, and associated company responsible for performing the work on the task. A user within the assigned company can also be added to the task to indicate individual responsibility. A workspace-level or project-level code can be assigned to a task to help group and sort tasks. Task cards are colored according to the associated company's assigned color. Tasks can be assigned to project activities to view your CPM schedule in greater detail, but this is not required. A variety of indicators are available to ensure that tasks associated with an activity align with the activity's dates and status. Tasks can be public or private. Public tasks are visible to all users with access to the app and the project, regardless of their company assignment. To edit public tasks, users must have the required security privileges. Private tasks are only visible and editable to the user who created them and application administrators. You cannot convert a public task with existing commitments, hand-offs, or constraints into a private task, because that task information is already shared.

There are two task types: **Task** and **Task Milestone**. Regular tasks describe work to be performed and can be public or private. Task milestones are used to mark distinct phases of your project and can only be public. They do not have durations or assigned users, and a company assignment is optional.

Tasks without due dates are called unplanned tasks, and tasks with due dates are called planned tasks. A due date is added to a task to indicate when the company expects to complete it. In scenarios where tasks are part of a chain of tasks belonging to multiple companies, a company can propose a new task due date that can be reviewed and accepted by the superintendent and relevant stakeholders. This provides additional control when changing dates that may affect the tasks of other companies. When a company is confident that it can perform the work on a task, it can create a **commitment**. Due dates, proposed due dates, and commitment due dates can be updated as needed to accommodate changes to the work plan. When work on a task has finished, the task can be marked complete.

Tasks in the Tasks app display icons that indicate different statuses. Several icons can be selected to edit task details. See *Task Icon Reference* (on page 173) for icon descriptions.

Crew Size

Crew size is the estimated number of people needed to work on a specific task, and it can be useful for lean planners reinforcing staffing predictability. Show crew size in project settings, and it displays on task cards with crew size assignments. You can add a crew size estimate at any time, and the number appears with other task details, or as a grid column, on any page that supports tasks.

Task Plans

A task plan is a collection of tasks and their associated responsibilities that arranges the planning board by designated swimlanes as a visual aid. A task plan can be added and applied to the planning board on the Work Plan page to help your project team visualize tasks and related activities that need to be accomplished throughout your project's lifecycle. When you add a task plan, you can identify swimlane categories that organize task cards by assigned user, company, activity code, task code, or Work Breakdown Structure (WBS). This will help your team more easily identify responsibilities and use the most efficient workload distribution during the planning phase. You can create multiple task plans to share with your team, and then manage the details of those task plans throughout the project's lifecycle.

To add, edit, or delete a task plan, users must have the project-level security privileges for Configure Task Plan enabled.

Task Plan Swimlanes

Swimlanes arrange task cards on the planning board using horizontal lanes according to the associated task plan settings. Organizing the planning board by swimlane categories enables you to track tasks based on the most relevant attributes for your project and to visualize responsibility in the workflow. You can move existing tasks freely among swimlanes in the planning board or to and from the hopper.

Constraints

During project planning sessions, you will identify a variety of conditions that must be met before work on a particular task can begin. These conditions are known as **task constraints**. A constraint could be a drawing or specification, mandatory inspection, material delivery, or submittal approval that is associated with a specific task. A constraint may impact the start of one or more tasks, and a single task may have multiple constraints. Using constraint functionality is optional, but it enables you to define your project tasks and their requirements in greater detail. After you identify tasks impacted by a constraint, you can view them in the Constraints grid.

The goal of constraint planning is to ensure all constraints are identified and resolved before the associated task is scheduled to begin. The following steps can be done in any order.

> ▸ Identify the issues, materials, or other deliverables that your tasks will require before they can begin. These are your constraints. You can add notes and upload files to each constraint.
> ▸ Designate a company and user as responsible for addressing individual constraints.
> ▸ Associate one or more public tasks with each constraint to indicate that they will be impacted by the constraint.

▸ Link a constraint to a package of associated documents in Aconex for greater impact visibility.

▸ Enter dates on each constraint for its promised delivery by the responsible party and for its necessary resolution. The date by which the constraint needs to be resolved will most likely be before the associated task's start date.

▸ When the constraint is actually resolved, deliver the constraint.

Commitments

Commitments are optional submitted agreements to assume responsibility for the work to be performed on a public task. The assigned company and user commit to perform the work by a specific date. If the commitment due date is not met, then the task is overdue. Responsible users can recommit to overdue tasks, providing a new due date, and one or more reasons for why the previous commitment was not met, and any additional comments they may have. Task commitment history can be tracked and reported on according to due dates and reasons, and comments. Commitment history enables you to view trends, evaluate performance, and identify issues with companies and users over time, enabling you to make decisions regarding their future use. When a task is committed or recommitted, any proposed due date is removed, and the task due date is updated to match the committed due date. You cannot commit to task milestones.

Hand-offs

A hand-off is a connection between two tasks that indicates the sequence in which the task work should be performed. Work is "handed off" to the next task to be performed after its preceding task has been completed.

Hand-offs are an important tool for accurately modeling the flow of task work during push planning and pull planning. In traditional or push planning, work is planned in sequence from the start of a project or task milestone. Planners "push" work through the sequence according to an established schedule. In pull planning, the sequence of work is determined by responsible parties planning backward from a task milestone or goal. Performers request or "pull" work from their dependencies based on demand for subsequent work to begin and after all prerequisite tasks have been completed. In both methods, hand-offs provide a tool for project stakeholders to properly sequence their tasks.

Tasks can have multiple predecessor and successor hand-offs to accurately detail all of the work dependencies in a project. Hand-off types describe the hand-off relationship between two tasks. Tasks support start and finish hand-off connections, while task milestones only support finish connections. You can create the following hand-off relationships:

▸ Finish to Start (between two tasks; between a task milestone and a task). Finish to Start types indicate that a successor task should start only after its predecessor has finished. In a Finish to Start hand-off, the due date of the predecessor task cannot occur on or after the start date of the successor task.

▸ Finish to Finish (between two tasks; between two task milestones; between a task and a task milestone; between a task milestone and a task). Finish to Finish types indicate that the successor cannot finish until its predecessor finishes. In a Finish to Finish hand-off, the due date of the predecessor task can occur on or before the due date of the successor task.

- Start to Start (between two tasks). Start to Start types indicate that the successor task cannot start before the predecessor task has started. In a Start to Start hand-off, the start date of the successor task must be equal to or later than the start date of the predecessor task.

Hand-offs can be created between tasks with the same, different, or no activity assignments. If necessary, you can modify the activity assignment of a task in a hand-off chain without affecting the chain itself. A hand-off chain can also exist across multiple companies. If a hand-off is added between a planned and an unplanned task, the unplanned task is given a due date. Tasks can have multiple hand-offs to describe the variety of relationships a task might have to other tasks. However, two tasks can only have one hand-off between them. You cannot create hand-offs between private tasks.

Hand-off Slack

As your project progresses, and tasks are performed, added, and delayed, additional time may be added to the hand-offs between tasks. This is called slack. There are two types of slack in Oracle Primavera Cloud:

- **Dependency slack**: The amount of time a task can be delayed before affecting a successor's start date (for Finish to Start and Start to Start relationships) or finish date (for Finish to Finish relationships). It is calculated for every successor task hand-off.
- **Task slack**: The amount of time a task can be delayed before it affects the start date or finish date of its most immediate successor. The task slack value is a task's lowest dependency slack value.

Slack is a read-only value that can help you determine where flexibility exists between tasks and which tasks may cause delays to your project.

Hand-off Lag

Some tasks in a hand-off relationship require a period of no work between the predecessor and successor task. This is called lag. You can choose to use work days only or work days and non-work days as part of lag. Unlike slack, lag can't be consumed in a hand-off.

In a Finish to Start hand-off, lag is the delay between the predecessor task finish and the successor task start. In a Start to Start hand-off, lag is the delay between the predecessor task start and the successor task start. In a Finish to Finish hand-off, lag is the delay between the predecessor task finish and the successor task finish.

Hand-off Modes

There are two hand-off modes in the Tasks app. Each mode offers different functionality when modifying your tasks.

1) **Keep Hand-offs**: Use this mode when you want to maintain the relationships and due dates as much as possible, even if slack is affected. In Keep mode, hand-off logic is maintained when due dates are added, changed, or removed. Slack is added or consumed when changing existing due dates. This is the default hand-off mode.

   Adding or removing a task due date will do the same to all other tasks in the chain based on their duration and chain position. For example, if you add a due date to the first task in a chain, the subsequent tasks are given a due date calculated from a combination of the predecessor due date and the duration of the task. You cannot remove a due date from a task in a chain with at least one committed task.

When modifying an existing due date of a task in a chain, several scenarios are possible. Moving a task's due date backward or forward in time will reduce dependency slack on the hand-offs in that direction until they reach zero. Dependency slack on the hand-offs in the opposite direction will increase as the due date is moved further away. If a task's due date is moved beyond the due date of a predecessor or successor, then the predecessor or successor due date is adjusted to maintain the sequence and a slack of zero.

2) **Break Hand-offs**: Use this mode when you want to maintain the due dates of surrounding tasks as much as possible, even if relationships are broken. In Break mode, hand-off logic is not maintained when due dates are added or removed. Slack is added or consumed when changing existing due dates until it reaches zero.

Adding or removing a task's due date will remove the task from any hand-off chains and leave the remaining tasks in the chain unchanged.

Modifying an existing due date of a task in a chain works similar to the Keep Hand-offs mode, except when a task's due date is moved beyond the due date of a predecessor or successor, the hand-off between the two tasks is broken.

In both modes, if a task's due date is moved beyond a completed task's complete date, then the hand-off is broken. Completed tasks cannot be moved.

Longest Path

Task details and attributes can change rapidly as a project progresses. It can be useful to identify the longest path for task duration when reviewing hand-offs. The longest path is the longest possible duration between two tasks. It is calculated from the duration of all dependencies identified between a task and its Finish task milestone on the Hand-offs page.

Longest path details display by default on the Hand-offs page after you identify at least one task milestone as the Finish. You can toggle them on or off, and highlight the longest path in the Hand-offs diagram. For more detailed information on using the longest path for pull planning, see *Longest Path Overview* (on page 100).

Get Started with Tasks

This section details the basic configuration of settings you will need before using the Tasks app. Depending on how you plan to use Tasks, 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 Tasks:
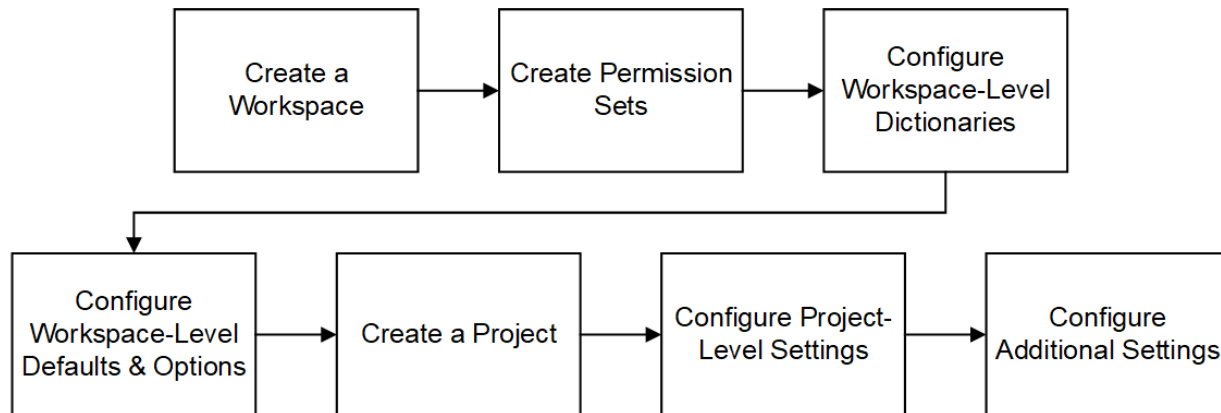
Create a Workspace

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 Tasks 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 Tasks* (on page 17) for more information on the permissions specific to the Tasks 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.

The following dictionaries are relevant to objects used in the Tasks app:

▶ **Calendars**: Define available workdays, work hours, nonwork days, holidays, and exception time. Separate calendars can be applied to projects, resources, and roles. Workdays on which a task can be scheduled is determined by the assigned project calendar. Calendar settings can impact print display. For example, the task color changes to gray on nonwork days when you print the Planning Board on the Work Plan page. See *Calendars Overview* (on page 47) for more information.

▶ **Codes**: Develop hierarchical structures for grouping your tasks and task constraints. Use the Codes dictionary to enable a code and its values for objects. See *Codes Overview* (on page 54) for more information.

▶ **Reasons**: When recommitting to work on a task, you must provide at least one reason for missing the initial commitment. Reasons can be created in a dictionary or on the fly when recommitting to a task. See **Reasons Overview** (on page 58) for more information.

Configure Workspace-Level Defaults & Options

The default configuration of settings for an 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. The following options are relevant to the objects used in the Tasks app:

▶ **Defaults**: Set auto numbering defaults for tasks and task constraints.
▶ **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.

Defaults & Options Settings

Object	Configuration Options	Link
Task	Defaults, Field Labels, Configured Fields, Codes	See **Task** (on page 65) for more information.
Task Constraint	Defaults, Field Labels, Configured Fields, Codes	See **Task Constraint** (on page 68) 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 an object's 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 Tasks app.

Configure Project-Level Settings

Project-level settings include details, default configuration settings inherited from the workspace, and project-specific dictionary items. New projects inherit the default settings configured at the workspace level, but these can be updated at the project level. Settings updated at the project level only apply to that project.

Before using the Tasks app, you should perform the following actions:

Details

▶ **Assign a manager** (see "**Assign a Manager to a Project**" on page 70) to designate the person responsible for managing the project.
▶ **Assign a calendar** (see "**Assign a Project Calendar**" on page 71) that defines the workdays, nonwork days, holidays, and exception time for your project. Valid workdays for tasks are determined by the assigned project calendar.

▶ *Configure the start and finish dates* (see "*Configure Schedule Settings for a Project*" on page 71) of your project.

Settings

▶ *Set the time zone* (see "*Configure the Task Time Zone Setting*" on page 72) that will be used when tasks and task constraints are marked overdue or due this week.

▶ *Configure the settings* (see "*Configure Task Summary Settings*" on page 72) for the Task Summary tool.

▶ *Set auto numbering defaults* (see "*Configure the Auto Numbering Defaults for a Project*" on page 74) for the tasks and task constraints in your project if the numbering system you use should differ from the settings inherited from the workspace.

Project Dictionaries

▶ *Add project-level calendars* (see "*Calendars (Project-level)*" on page 74) if they only need to be available to a specific project. Project-level calendars support assignment to the project or to activities, resources, and roles within the project, but you can also assign workspace-level calendars to the same objects.

▶ *Add project-level activity and task codes* (see "*Codes (Project-level)*" on page 81) if certain codes should only be available to your project. You can use them in the Tasks app to group, sort, and filter by the activities and codes assigned to your tasks. Codes that should be made available to other objects and projects in your workspace should still be added at the workspace level.

Configure Additional Settings

▶ *Assign companies* (see "*Assign a Company to a Project*" on page 82) to your project to designate responsibility for tasks and task constraints.

After configuring the settings discussed in this topic, you can begin using the Tasks app. If you need to add or change settings, consult the topics contained in this section.

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.

Security Permissions for Tasks

The following security permissions enable access to the objects and functionality within the Tasks app. *Create workspace permission sets* (see "*Create a Workspace Permission Set*" on page 20) to enable access to relevant workspace-level data, including dictionaries and object defaults. *Create project permission sets* (see "*Create a Project Permission Set*" on page 28) to enable access to page-level functionality and creation and modification privileges for the relevant project objects. Depending on the permission, actions may include add, edit, delete, view, or enable. Depending on how you plan to use Tasks, some of the permissions below may be optional.

To use the Tasks app, users should have the following permissions:

Workspace Permissions

Category	Permissions
Configuration	Calendars, Codes, Configured Fields, Field Labels, Reasons

Project Permissions

Category	Permissions
Project	Calendars, Codes, Companies, Project
Schedule (Current)	Activities
Tasks	Complete Constraints for All Companies, Complete Constraints for My Company, Configure Task Notifications for Others, Configure Task Plan, Constraints, Link Constraint to Aconex Package, Manage Commitments and Complete All Company's Tasks, Manage Commitments and Complete My Company's Tasks, Manage Commitments and Complete My Tasks, Tasks for All Companies, Tasks for My Company

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
- ▶ Scenarios

Resources

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

Risk

- ▶ Risk

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

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 ⬚ **Workspace**.
2) In the object selector, beside a workspace name, select •••, and then select ⚙ **View Summary & Settings**.
3) On the **Summary & Settings** page, 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**.

Note

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

Tip

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

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

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

Workspace Security Privileges Definitions

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

Configuration

Analysis Views

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

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

Baseline Categories

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

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

Calendars

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

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

Applies to: Workspace-level Calendars dictionary

CBS

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

Charts

Enables users to add, edit, and delete charts.

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

Codes

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

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

Configured Fields

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

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

Cost Categories

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

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

Custom Log Types

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

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

Currencies

Enables users to add, edit, and delete currencies.

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

Curve Profiles

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

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

Evaluation Categories

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

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

Field Labels

Enables users to edit field labels.

Folder Templates

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

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

Forms

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

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

Locations

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

You must assign all privileges.

Measures

Enables users to add, edit, and delete measures.

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

Notebook Topics

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

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

Reasons

Enables users to add, edit, and delete reasons.

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

Report Cycles

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

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

Resource Costs/Financials

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

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

Applies to: Resources

Resources

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

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

Applies to: Resources

Restricted Configured Fields

Enables users to edit workspace-level restricted configured fields.

Applies to: Projects, Portfolios, and Programs.

Risk Matrix Templates

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

You must assign all security privileges.

Risk Threshold Templates

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

You must assign all security privileges.

Role Cost/Financials

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

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

Applies to: Resources

Roles

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

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

Applies to: Resources

Rules of Credit

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

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

Set Tasks Color Settings

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

Start Workflows

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

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

Strategy Types

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

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

Units of Measure

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

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

Views

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

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

Workflow Configuration

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

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

Workflow Design

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

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

Workspaces

Enables users to add, edit, and delete workspace hierarchy nodes, add or update workspace logo, and edit workspace ID, name, description, and workspace currency (if costs do not exist). Workspace nodes at the highest level (root) must be added by an application administrator. Users with the delete privilege are able to delete a workspace and move all data to the parent workspace; only an application administrator can delete a workspace and all its data.

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

Workspace Dashboards

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

You must assign all security privileges.

General

Allow Project Creation to Copy from Existing

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

Funding

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

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

Funding Costs/Financials

Enables users to edit and view funds and financial data.

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

Ideas

Enables users to add and submit ideas in the workspace.

Import Project

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

Import Project Excel

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

Move Project

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

Move Workspace

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

Portfolios

Enables users to add portfolios.

Print Layouts

Enables users to add print layouts.

Programs

Enables users to add programs to the workspace.

Project Proposals

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

Applies to: Accept Idea workflow action, Project Inventory

Project Template

Enables users to add project templates.

Projects

Enables users to add projects.

Promote Report to Workspace

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

Recalculate Workspace Costs

Enables users to recalculate workspace costs when editing cost information.

Strategies

Enables users to add, edit, or delete strategies.

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

Workspace Aggregate Cost Data

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

Workspace Cost Sheet

Enables users to add and edit the workspace cost sheet.

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

Users and Security

Permission Sets

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

You must assign all security privileges.

User Groups

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

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

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 ⬚ **Workspace**.
2) In the object selector, beside a workspace name, select •••, and then select ⚙ **View Summary & Settings**.
3) On the **Summary & Settings** page, 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**.

> **Note**
>
> - 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.

Tip

▶ 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.

Project Security Privileges Definitions

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

Contract

Contracts

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

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

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

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

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

Contract Costs/Financials

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

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

Contracts Approval

Enables users to approve and withdraw contracts.

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

Commitments

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

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

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

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

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

Commitment Costs/Financials

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

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

Commitments Approval

Enables users to approve and withdraw commitments.

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

Changes

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

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

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

Changes Costs/Financials

Enables users edit and view changes.

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

These privileges also apply to changes.

Close/Reopen/Void Changes

Enables users to close, reopen, or void changes.

Change Orders

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

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

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

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

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

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

Change Order Costs/Financials

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

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

Change Orders Approval

Enables users to approve and withdraw change orders.

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

Potential Change Orders

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

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

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

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

Potential Change Orders Costs/Financials

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

These privileges also apply to potential change orders.

Potential Change Order Proposals

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

Approve a Proposal and Close the Potential Change Order

Enables users to approve proposals and close potential change orders.

Withdraw a Potential Change Order

Enables users to withdraw potential change orders.

Payment Applications

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

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

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

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

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

Payment Application Costs/Financials

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

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

Payment Applications Approval

Enables users to approve and withdraw payment applications.

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

Cost

Accept Proposed Budget and Request Changes

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

Applies to: Costs and Funds

Actuals

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

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

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

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

Applies to: Costs and Funds

Actuals Costs/Financials

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

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

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

Applies to: Costs and Funds

Cash Flow Snapshots

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

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

Applies to: Costs and Funds

Project Budget

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

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

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

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

Applies to: Costs and Funds

Project Budget Approval

Enables users to approve project budgets.

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

Applies to: Costs and Funds

Project Cost Sheet

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

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

Applies to: Costs and Funds

Recalculate Project Costs

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

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

Applies to: Costs and Funds, Schedule

Documents

Custom Log Types

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

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

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

Manage Submittal Approvals

Enables users to manage submittal approvals.

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

Spec Sections

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

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

Submittals

Enables users to add, edit, or delete submittals.

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

Upload Submittals for All Companies

Enables users to upload submittals for all companies.

Upload Submittals for My Company

Enables users to upload submittals for their associated companies.

Funds

Funding

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

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

Applies to: Costs and Funds

Funding Costs/Financials

Enables users to edit and view funds and financial data.

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

Applies to: Costs and Funds

Tasks

Complete Constraints for All Companies

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

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

Applies to: Tasks

Complete Constraints for My Company

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

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

Applies to: Tasks

Configure Task Notifications for Others

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

Applies to: Tasks

Configure Task Plan

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

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

Applies to: Tasks

Constraints

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

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

Applies to: Tasks

Link Constraint to Aconex Package

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

Applies to: Tasks

Manage Commitments and Complete All Company's Tasks

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

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

Applies to: Tasks

Manage Commitments and Complete My Company's Tasks

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

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

Applies to: Tasks

Manage Commitments and Complete My Tasks

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

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

Applies to: Tasks

Tasks for All Companies

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

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

Applies to: Tasks, Schedule

Tasks for My Company

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

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

Applies to: Tasks, Schedule

Project

Add WBS from other projects/templates

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

Applies to: Schedule, Scope

Alerts

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

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

Applies to: Costs and Funds, Schedule, Scope

Baselines

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

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

Applies to: Schedule, Scope

Baselines - Set as Current Schedule

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

Applies to: Schedule

Baselines - Set Project Baselines

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

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

Applies to: Schedule, Scope

Calendars

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

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

Applies to: Project-level Calendars dictionary

Close Reporting Periods

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

Applies to: Scope

Codes

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

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

Applies to: Project-level Codes dictionary, Schedule

Companies

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

Applies to: Project Team

Currencies

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

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

Applies to: Project Settings

Global Change

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

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

Applies to: Schedule

Global Change - Run

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

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

Applies to: Schedule

Project

Enables users to edit and delete projects and project templates.

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

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

Applies to: Project Inventory, Project Settings

Project Costs/Financials

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

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

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

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

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

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

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

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

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

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

▸ Cost-related scope field values are displayed.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Project Dashboards

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

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

Applies to: Dashboards

Project Integration

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

Applies to: Integration

Promote Report to Project

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

Applies to: Reports

Scenarios

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

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

Applies to: Schedule

Scenarios - Set as Current Schedule

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

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

Applies to: Schedule

User Groups

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

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

Applies to: Global Admin, Project Team

Views

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

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

Applies to: Project-level pages that support named views

WBS

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

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

Applies to: Schedule, Scope

Project Proposals

Project Proposals

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

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

Applies to: Project Inventory, Project Settings

Project Proposals and WBS Costs/Financials

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

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

Applies to: Costs and Funds, Project Details

Resources

Resource Costs/Financials

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

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

Applies to: Resources

Resource Demand

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

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

Resources

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

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

Applies to: Resources

Role Costs/Financials

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

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

Applies to: Resources

Roles

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

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

Applies to: Resources

Risk

Risk

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

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

Risk Analysis

Enables users to run risk analysis.

Risk Matrix

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

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

Schedule (Current)

Activities

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

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

Applies to: Schedule

Future Periods

Enables users to edit planned and remaining units in the current schedule for future periods. To edit spread data associated with activities in the current schedule, the Edit Activities privilege must also be selected.

If the Edit Activities privilege is deselected, the Edit Future Periods privilege is also deselected.

Applies to: Resources, Schedule

Level

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

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

Applies to: Schedule

Merge Activities to Current Schedule

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

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

Applies to: Schedule

Relationships

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

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

Applies to: Schedule

Schedule

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

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

Applies to: Schedule

Store Period Performance

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

Applies to: Schedule

Schedule (Baselines)

Activities

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

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

Applies to: Schedule

Level

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

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

Applies to: Schedule

Merge Activities to Baseline

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

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

Applies to: Schedule

Relationships

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

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

Applies to: Schedule

Schedule

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

Applies to: Schedule

Schedule (Scenarios)

Activities

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

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

Applies to: Schedule

Level

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

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

Applies to: Schedule

Merge Activities to Scenario

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

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

Applies to: Schedule

Relationships

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

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

Applies to: Schedule

Schedule

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

Applies to: Schedule

Scope

Approve/Reject Scope Change Requests

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

PBS

Enables users to add, edit, or delete PBSs.

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

Scope Assignments

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

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

Scope Change Requests

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

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

Scope Items

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

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

Work Packages

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

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

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.

Calendars Overview

Managing Calendars Video

Calendars enable you to define available workdays and work hours in a day, observe national and recognized holidays, and add exceptions to the standard work time. Assign calendars to projects, resources, roles, and activities to specify their time constraints in a uniform way. Calendar assignments are used for scheduling, leveling, risk analysis, and other processes throughout the application.

You can create an unlimited number of calendars to accommodate different work patterns. For example, if some activities require a five-day workweek, while others can only be performed part-time (such as Monday, Wednesday, and Friday), you can create different calendars and assign them to the activities and resources in your projects. An activity's Type setting determines whether the activity will use the calendars from its assigned resources and roles or from the project when scheduling its dates.

Before calendars can be assigned, they must be made available to supporting objects. Each workspace-level calendar can be made available to projects, resources/roles, or both. This ensures calendars intended for projects or resources/roles are only available to those types of objects. The calendar marked as the default calendar is automatically made available to projects, resources, and roles within the workspace and is automatically assigned to new projects, resources, and roles when they are created. The calendar assigned to a project also controls the default calendar for new activities within the project. There is one default calendar per workspace. Any calendar in the workspace can be assigned as the default calendar.

You can also create Calendars (Project-level) if they only need to be available to a single project. Project-specific calendars are available for assignment to the project and project activities, resources, and roles. When assigning a calendar to a project, activity, resource, or role, you can choose from a workspace-level or project-level calendar. If a project-level calendar should be made available to more projects, you can promote it to the parent workspace.

The default workspace calendar designation and calendar assignments on individual objects can be changed at any time. Each project, resource, role, and activity must always have a calendar assigned. Any time that you make changes to a workspace or project calendar that is used by the current schedule, a baseline, or a scenario, the dates will be impacted. Open each schedule variation that relies on the modified calendar, and then reschedule the project to ensure schedule accuracy.

Add a Holiday List

Add a holiday list to include any public or company holidays observed by the organization that should be reflected in project and resource schedules. An existing list can be assigned to a calendar during the calendar's creation, or you can assign a calendar's holiday list later. One holiday list can be selected per calendar.

Holiday lists are available to be used throughout the workspace hierarchy. You must have the security privileges required to add and edit calendars in the workspace to add and edit a holiday list.

To add a holiday list:

1) ***Navigate to the Calendars dictionary page*** (see page 208).
2) Select **Holidays**.
3) In the **Manage Holiday Lists** dialog box, select ➕ **Add**, and then enter a name for the holiday list. You can also select an existing list.
4) Select **Edit Holiday List**.
5) Select ➕ **Add** to create a new holiday for the list. Enter a name for the holiday. You can also select an existing holiday.
6) Choose when the holiday occurs:
   ▸ **Once on**: Select if this holiday is a onetime occurrence.
   ▸ **Repeat every**: Select if this holiday occurs on the same date every year.

> **Note** You can select on a calendar when holidays are recognized as part of the standard work week.

   ▸ **Repeat the**: Select if this holiday occurs on a different date each year, but always occurs on the same day and week each year.
7) Continue to enter dates as needed.
8) Select **Save**.

> **Note** Any time that you make changes to a workspace or project calendar that is used by the current schedule, a baseline, or a scenario, the dates will be impacted. Open each schedule variation that relies on the modified calendar, and then reschedule the project to ensure schedule accuracy.

This setting is used in the following apps:
🏛 **Cost and Funds**
👥 **Resources**
◔ **Risk**
▤ **Schedule**
▦ **Scope**
☰ **Tasks**

Add a Calendar

Add calendars to a workspace so they can be available for assignment to projects, resources, and roles within the workspace.

To add a calendar:

1) *Navigate to the Calendars dictionary page* (see page 208).
2) Select + **Add**.
3) In the **Add Calendar** wizard, complete the following steps:
   a. **Name**: Enter a **Name** and **ID** for the calendar. Select **Next**.
   b. **Create Work Week**: Specify the standard number of work hours per day by manually entering the number of hours or by selecting the time period on the calendar. Change the time periods on the calendar by dragging the entire block of time or by expanding or reducing the block of time. Select **Next**.
   c. **Add Holidays**: Choose a holiday list to assign to the calendar. The holidays in the selected list are displayed.
      - Select the **If a holiday falls on standard nonwork time, move** option if your calendar has holidays that fall on standard nonwork time and should be marked as holiday time during standard work time. Select where on the calendar the holiday should be reflected.

      Note

      - This setting affects the placement of activities and resources/roles during scheduling and leveling. Changes to a holiday's placement on the calendar are not reflected in the Calendar tab of the Calendars dictionary page.
      - This setting applies to holidays being placed on nonwork time during the standard work week. It is unaffected by unavailable time created by an exception.

      - Select **Finish**.
4) Select **Save**.

Tip

- You can assign a calendar from a higher-level workspace by selecting **Assign**. You can only modify a calendar from its owning workspace.
- To duplicate an existing calendar, select the ⚙ **Context** menu next to the calendar, and then select **Duplicate**. This is useful if you want to modify a calendar assigned from a different workspace.
- You can modify a calendar's name and ID values in the calendar list, its standard hours on the **Standard Work Week** tab, and its holiday list on the **Summary** tab.

This setting is used in the following apps:

🏛 **Cost and Funds**

👥 **Resources**

- ⌔ **Risk**
- 🖹 **Schedule**
- 🖻 **Scope**
- ☰✓ **Tasks**

Configure Calendar Time Period Settings

A calendar's time period settings specify the default number of hours in each work period. The standard time period hours defined in the Application Settings are displayed by default, but can be changed after the calendar is created. Time period settings are separate from the calendar's standard work week values, which specify the working hours for each day of the week.

The application calculates and stores time unit values in hourly increments, but you can configure your user preferences to display time units in other increments, such as days or weeks. The values specified for Time Periods are used to convert hours to other time increments for display, and to convert all non-hourly time increments to hours for storage in the database.

To configure a workspace-level calendar's time period settings:

1) *Navigate to the Calendars dictionary page* (see page 208).
2) Select a calendar.
3) Select the **Summary** tab.
4) In the **Time Periods** section, enter the default number of hours in a day, week, month, and year.
5) Select **Save**.

This setting is used in the following apps:
- 🏛 **Cost and Funds**
- ⚇ **Resources**
- ⌔ **Risk**
- 🖹 **Schedule**
- 🖻 **Scope**
- ☰✓ **Tasks**

Specify Calendar Availability for Assignment

Before calendars can be assigned, they must be made available to supporting objects. Each workspace-level calendar can be made available to projects, resources/roles, or both. Both options as selected by default when a calendar is created. If a calendar is not available to one of these objects, it will not appear as an option when assigning calendars to that type of object.

The calendar set as the default calendar is automatically made available to projects, resources, and roles. This can only be changed if you set a different calendar as the default.

To specify calendar availability:

1) *Navigate to the Calendars dictionary page* (see page 208).
2) Select a calendar.

3) Select the **Summary** tab.

4) In the **Available To** section, select **Project**, **Resource/Role**, or both.

5) Select **Save**.

This setting is used in the following apps:

🏛 **Cost and Funds**

👥 **Resources**

◔ **Risk**

📊 **Schedule**

🖼 **Scope**

☰✓ **Tasks**

Set Calendar Exception Time

Exception time is set by selecting periods of time on a calendar that are exceptions to the calendar's standard working hours. You can set exception time for individual dates or in bulk for a range of dates. Select a period of time on a particular date to specify the new working time for that date or use the Manage Exceptions button to specify the exception time for a date range. For example, your organization may decide to give employees a half day of vacation time the day before a scheduled holiday. In this case, the first half of the standard work day would be selected, thereby designating it as exception time. You can also set an entire day or date range as unavailable, indicating that the day or the date range cannot be worked at all. Or, you can set the entire day or date range as available, indicating that the day or date range can be worked without the restrictions of standard work hours. Remove the changes by setting individual days back to standard working time or using the Remove option in the Manage Exceptions dialog box.

The calendar's Day and Week views enable you to add exception time, but only the Week view supports setting an entire day as unavailable or available. The Month and Year views enable you to see the different working time types at a high level. A legend below the calendar indicates whether each time period displayed is standard, exception, unavailable, or holiday time.

> **Note** Any time that you make changes to a workspace or project calendar that is used by the current schedule, a baseline, or a scenario, the dates will be impacted. Open each schedule variation that relies on the modified calendar, and then reschedule the project to ensure schedule accuracy.

Set Exception Time for a Range of Dates

To set calendar exception time for a date range:

1) *Navigate to the Calendars dictionary page* (see page 208).

2) Select a calendar.

3) Select the **Summary** or **Calendar** tab.

4) Select the **Manage Exceptions** button.

5) In the **Manage Exceptions** dialog box:

I. In the **Select Exception Dates** section, from the **Exception Type** drop-down list, select **Unavailable** or **Available**.

   For Unavailable Exception Type:

   - In the **From** and **To** fields, select the dates for which you want to add the **Unavailable** exception.

   Note

   - You can select **Unavailable** exception time for full days only. If you selected **Unavailable** exception type, then the **Full Day** check box will be selected by default.
   - Only the working days of a standard work week are marked as unavailable. For example, if Saturday and Sunday are non-working days for your standard work week, then the **Unavailable** exception will not be added to any Saturdays and Sundays within your selected date range.

   For Available Exception Type:

   a. In the **From** and **To** fields, select the dates for which you want to add the Available exception.

   b. (Optional) Select the **Full Day** check box to make full days within your selected date range as available.

   c. In the **Start Time** and **End Time** fields, specify the time when the **Available** exception time starts and ends for your selected date range.

   Note

   - The **Start Time** and **End Time** fields will not be available if you selected the **Full Day** check box.
   - **Available** exception time is added for both working and non-working days of the standard work week.

2. Select **Add Exception**.

3. In the **Exception Dates** section, view your specified exception time.

4. (Optional) Repeat the above steps to add additional exception time for a new set of dates.

5. Select **Apply** to apply the exceptions to the selected calendar.

6. Select **Save**.

   Note You can view your added exception time in the **Exceptions** section on the **Summary** tab. The **Exceptions** section displays the exceptions as individual dates.

Set Exception Time for Individual Dates

To set calendar exception time for individual dates:

1) ***Navigate to the Calendars dictionary page*** (see page 208).

2) Select a calendar.

3) Select the **Calendar** tab.

4) Navigate to a time period in the calendar when exception time should be added.

5) In the **Day** or **Week** view, make any of the following adjustments to the calendar:

▸ To change the work hours for a day, select a period of time on a specific day. Change the exception time on the calendar by dragging the entire block of time or by expanding or reducing the block of time. The block of time indicates the new work hours for the day.

▸ To set an entire day as nonworking time, select the date ▼ menu, and then select **Unavailable**.

▸ To set an entire day as working time, select the date ▼ menu, and then select **Available**.

▸ To revert any changes you made to a day, select the date ▼ menu, and then select **Set to Standard**. You can also remove individual blocks of exception time by select the **X** within a block.

▸ Select **Save**.

6) Exceptions are displayed on the **Summary** tab.

Tip

▸ Any day can be set as unavailable, available, or with a range of exception time within the day. This includes days set as holidays.

▸ To remove an already defined exception, in the **Exception Dates** section of the **Manage Exceptions** dialog box, select **Remove,** and then select **Apply**.

This setting is used in the following apps:

🏛 **Cost and Funds**

👥 **Resources**

🕑 **Risk**

📋 **Schedule**

🖼 **Scope**

☑ **Tasks**

Set the Default Calendar

There is one default calendar per workspace. The calendar set as the default calendar in the workspace-level Calendars dictionary is automatically assigned to new projects, resources, and roles when they are created. The calendars of existing projects, resources, or roles are not affected. Any calendar in the workspace can be assigned as the default calendar. One calendar must always be defined as the default.

The default calendar is automatically made available to projects, resources, and roles. This can only be changed if you set a different calendar as the default. The application has a built-in default calendar. The settings in this calendar cannot be changed. After another calendar has been assigned as the default, this calendar can be deleted.

You can also set the default calendar on the **Project** page in the workspace Defaults & Options. Choose from a list of calendars that are available to the Project object. This will also make the calendar available to resources and roles.

To set the default workspace calendar:

1) *Navigate to the Calendars dictionary page* (see page 208).
2) In the list of calendars, select the **Default** option for a calendar.
3) Select **Save**.

Tip

If the calendar you selected was only available to Project or Resource/Role, then both options are automatically selected when you select a new default calendar.

This setting is used in the following apps:

🏛 **Cost and Funds**

👥 **Resources**

◔ **Risk**

📋 **Schedule**

🖼 **Scope**

☑ **Tasks**

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 208).
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) Select **Save**.

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

1) In the object selector, select 🗗 **Workspace**.
2) In the object selector, beside a workspace name, select •••, and then select ⚙ **View Summary & Settings**.
3) On the **Summary & Settings** page, 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.

Tip

▶ 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.

▶ You cannot delete a code after it is assigned to objects in the workspace. You must remove all code assignments before deleting codes. To see which workspaces the code is assigned in, select the ⚙ **Context** menu, and then select **Used By**.

This setting is used in the following apps:

📈 **Portfolio Analysis**

🏛 **Cost and Funds**

📑 **Custom Logs**

🖼 **Dashboards**

🗂 **Files**

📊 **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 208).

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) Select **Save**.

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

1) In the object selector, select ⬒ **Workspace**.
2) In the object selector, beside a workspace name, select **•••**, and then select ⚙ **View Summary & Settings**.
3) On the **Summary & Settings** page, select **Defaults & Options**.
4) Select the object, and then select the **Codes** tab.

This setting is used in the following apps:

⬈ **Portfolio Analysis**

🏛 **Cost and Funds**

🗈 **Custom Logs**

🖾 **Dashboards**

🗀 **Files**

📊 **Reports**

👥 **Resources**

◔ **Risk**

🗟 **Schedule**

🖳 **Scope**

◎ **Strategic Alignment**

≡✓ **Tasks**

🖧 **Workflows and Forms**

Update the Owning Workspace of a Code

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

To update the owning workspace of a code:

1) *Navigate to an object configuration page* (see page 210).
2) On the object page, select the **Codes** tab.
3) On the **Codes** tab, select a code.
4) Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.
5) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.
   ▸ Select **Save**.

This setting is used in the following apps:

⬈ **Portfolio Analysis**

🏛 **Cost and Funds**

⬚ **Custom Logs**

⬚ **Dashboards**

⬚ **Reports**

⬚ **Resources**

⬚ **Risk**

⬚ **Schedule**

⬚ **Scope**

◎ **Strategic Alignment**

⬚ **Tasks**

⬚ **Workflows and Forms**

Reasons Overview

In contract management, reasons are used to provide additional information about why a contract change is taking place. In task management, reasons are used to identify why a previous task commitment was not met.

Reasons are added at the workspace level, enabling you to use them across multiple projects in your organization. You can set each reason to apply to contract changes, tasks, or both.

Add a Reason

Use reasons to provide additional information about a contract change or task recommitment.

To add a reason:

1) In the object selector, select ⬚ **Workspace**, select **View Workspaces List**, and then select a workspace name.
2) From the ☰ **Main Menu**, select ⚙ **Summary & Settings**.
3) On the **Summary & Settings** page, select **Dictionaries**, and then select **Reasons**.
4) On the **Reasons** page, select ＋ **Add**.
5) In the new row, complete the following fields:
   ‣ **Abbreviation**: Enter an abbreviation for the reason.
   ‣ **Name**: Enter a description for the reason.
6) In the panel, choose to make the reason available to the following objects:
   ‣ **Changes**: The reason is available when adding a change to a contract.
   ‣ **Task**: The reason is available when recommitting to tasks.
7) Select **Save**.

Tip

You can also add reasons when adding a contract change or recommitting to a task.

This setting is used in the following apps:

⬚ **Tasks**

Update the Owning Workspace for a Reason

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

To update the owning workspace of a reason:

1) In the object selector, select 🗗 **Workspace**, select **View Workspaces List**, and then select a workspace name.
2) From the ☰ **Main Menu**, select ⚙ **Summary & Settings**.
3) On the **Summary & Settings** page, select **Dictionaries**, and then select **Reasons**.
4) On the **Reasons** page, select a reason.
5) Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.
6) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.
7) Select **Save**.

This setting is used in the following apps:

≡✓ **Tasks**

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 210).
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:

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

Change the Localization of 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's localization:

1) **Navigate to an object configuration page** (see page 210).
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) Select **Save**.

Tip

▸ 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:

📈 **Portfolio Analysis**

🏛 **Cost and Funds**

📇 **Custom Logs**

👥 **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. Configured fields are also commonly called User Defined Fields (UDFs) and custom fields.

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 use a text configured field to track Project Objectives, Business Case, or Strategic Importance. You can use or define a list type field to choose a Business Unit, Region, Organization, Project Sponsor, or Main Stakeholder from a drop-down list. A configured field in the context of an object can be used on the object 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. List configured fields have a character limit of 128. Text configured fields for the following objects have a character limit of 255: programs, ideas, strategy, documents, files, reports, and more. Text configured fields for the following objects have a character limit of 2,000: projects, activities, WBS nodes, tasks, and more.

You cannot change the owning workspace of a configured field if it already exists in any field relationships, or is assigned to any objects in its current workspace. You cannot delete a configured field if it is used in another configured field, a form, a workflow, or a field mapping. You can delete a configured field that exists in a relationship if it is at the end of a relationship chain, but you can't delete a configured field that is driving other relationships.

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.

Change the Localization of 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's localization:

1) *Navigate to an object configuration page* (see page 210).
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) Select **Save**.

Tip

▸ You can restore the default label of a configured field by selecting the ⚙ **Context** menu and then selecting **Reset Label**.

▸ For configured fields of type list, you can reorder the List tab details by selecting the ⚙ **Context** menu next to Value and selecting Reorder List Values.

▸ 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:

📈 **Portfolio Analysis**

🏛 **Cost and Funds**

🗐 **Custom Logs**

🗁 **Files**

👥 **Resources**

◔ **Risk**

🗒 **Schedule**

🖼 **Scope**

☰✓ **Tasks**

Change a List Configured Field Value

You can update the value for certain list configured fields even if they are already associated with multiple objects in the application. 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. The Data Type column specifies the type of configured field.

> **Note** You cannot change the value for configured fields associated with microservice entities, such as programs, ideas, strategy, documents, files, and reports. If the value you attempt to change is associated with a microservice, you'll receive an error message.

To change a list configured field value:

1) In the object selector, select 🗗 **Workspace**, select **View Workspaces List**, and then select a workspace name.

2) From the ☰ **Main Menu**, select ⚙ **Summary & Settings**, select **Defaults & Options**, and then select an object.

3) On the object page, select the **Configured Fields** tab.

4) In the table, select a configured field that is a List data type.

5) Select the **List** tab to open the **List** detail window.

6) Select and modify the value that you would like to change.

7) Select **Save**.

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 to set values for configured fields and 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 210).

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) Select **Save**.

> **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.

Tip

‣ 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 another configured field, a form, a workflow, or a field mapping.

Update the Owning Workspace of a Configured Field

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

To update the owning workspace of a configured field:

1) *Navigate to an object configuration page* (see page 210).
2) On the object page, select the **Configured Fields** tab.
3) On the **Configured Fields** tab, select **Manage Shared Data**.
4) Select the ⚙ **Context** menu, and then select **Change Owning Workspace**.
5) In the **Select Workspace** dialog box, select the new owning workspace, and select **Select**.
6) Select **Save**.

> **Note** You cannot change the owning workspace of a configured field if it already exists in any field relationships, or is assigned to any objects in its current workspace.

This setting is used in the following apps:

📈 **Portfolio Analysis**

🏛 **Cost and Funds**

🗐 **Custom Logs**

🗁 **Files**

🧑‍🤝‍🧑 **Resources**

◔ **Risk**

🗒 **Schedule**

🖼 **Scope**

◎ **Strategic Alignment**

☰ **Tasks**

Task

Set auto numbering task defaults, set task color defaults, create and customize field labels, and create new codes.

Defaults

Configure Auto Numbering Defaults for a Task (on page 66)

Field Labels

Access a Standard Field Description (on page 60)

Change the Localization of a Standard Field Label (on page 60)

Configured Fields

Add a Task Field (on page 67)
Add a Formula-Based Configured Field: Example (on page 64)
Update the Owning Workspace of a Configured Field (on page 65)
Change the Localization of a Configured Field Label (on page 62)

Codes

Add a Code (on page 55)
Add a Value to a Code (on page 56)
Update the Owning Workspace of a Code (on page 57)

Configure Auto Numbering Defaults for a Task

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

To set the auto numbering defaults:

1) In the object selector, select ⧉ **Workspace**, select **View Workspaces List**, and then select a workspace name.
2) From the ☰ **Main Menu**, select ⚙ **Summary & Settings**.
3) On the **Summary & Settings** page, select **Defaults & Options**, and then select **Task**.
4) On the **Defaults & Options: Task** page, select the **Defaults** tab.
5) In the **Auto Numbering** section, define the auto numbering default values.
6) Select **Save**.

This setting is used in the following apps:

≡✓ **Tasks**

Configure Task Color Defaults for a Workspace

This setting will determine the attribute used to color task cards, tasks bars, and swimlane headers. This setting will be used as the default Color Tasks by setting for new projects and workspaces under this workspace. It can be changed at the project level. Changes to the workspace Color Tasks by setting will not change the Color Tasks by setting of any existing projects.

To set task color defaults:

1) In the object selector, select ⧉ **Workspace**, select **View Workspaces List**, and then select a workspace name.
2) From the ☰ **Main Menu**, select ⚙ **Summary & Settings**.
3) On the **Summary & Settings** page, select **Defaults & Options**, and then select **Task**.

4) On the **Defaults & Options: Task** page, select the **Defaults** tab.

5) In the **Task Color** section, in the **Color Tasks by** list, select one of the following:

▸ **Company**: Individual company colors specified at the project level only. At a workspace level, a list of all project companies with randomized colors are displayed. Color associations are read-only. To edit project level settings go to ***Configure Task Color at the Project-level*** (***https://docs.oracle.com/cd/E80480_01/English/user_guides/task_management_user_guide/246213.htm***).

▸ **Workspace level activity codes**: Code value colors specified at the workspace level.

▸ **Workspace level task codes**: Code value colors specified at the workspace level.

> **Note** Only workspace codes enabled for both the Activity and Task are available for selection in the **Color Tasks by** list.

6) Select the color square for a specific code value, and then select a new color from the color selector.

> **Note** Changes to color associations for code values will affect colors for tasks, activities, and other objects that use these codes across projects.

7) Select **Save**.

Tip

▸ Code values are set in the Defaults & Options: Task page in the workspace.

Add a Task Field

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

To add a task field:

1) In the object selector, select ⬚ **Workspace**, select **View Workspaces List**, and then select a workspace name.

2) From the ☰ **Main Menu**, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** page, select **Defaults & Options**, and then select **Task**.

4) On the **Defaults & Options: Task** page, select the **Configured Fields** tab.

5) In the table, select ＋ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. In the **Type** column, select **Manual** if this field will hold data entered by a user or **Formula** if the data it holds will be calculated on the basis of a formula.

   e. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

6) If you selected **Formula**, configure the **Formula** section.

7) Select **Save**.

Tip

▸ 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 another configured field, a form, a workflow, or a field mapping.

▸ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▸ Multi-currency is supported only in data type cost for formula configured fields.

▸ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

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

This setting is used in the following apps:

≡✓ **Tasks**

Task Constraint

Set auto numbering task constraint defaults, create and customize field labels, and create new codes.

Defaults

Configure Auto Numbering Defaults for a Task Constraint (on page 69)

Field Labels

Access a Standard Field Description (on page 60)
Change the Localization of a Standard Field Label (on page 60)

Configured Fields

Add a Task Constraint Field (on page 69)
Add a Formula-Based Configured Field: Example (on page 64)
Update the Owning Workspace of a Configured Field (on page 65)
Change the Localization of a Configured Field Label (on page 62)

Codes

Add a Code (on page 55)
Add a Value to a Code (on page 56)
Update the Owning Workspace of a Code (on page 57)

Configure Auto Numbering Defaults for a Task Constraint

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 🗗 **Workspace**, select **View Workspaces List**, and then select a workspace name.

2) From the ☰ **Main Menu**, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Task Constraint**.

4) On the **Defaults & Options: Task Constraint** page, select the **Defaults** tab.

5) In the **Auto Numbering** section, define the auto numbering default values.

6) Select **Save**.

This setting is used in the following apps:

≡✔ **Tasks**

Add a Task Constraint Field

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

To add a task constraint field:

1) In the object selector, select 🗗 **Workspace**, select **View Workspaces List**, and then select a workspace name.

2) From the ☰ **Main Menu**, select ⚙ **Summary & Settings**.

3) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Task Constraint**.

4) On the **Defaults & Options: Task Constraint** page, select the **Configured Fields** tab.

5) In the table, select ➕ **Add**.

   a. In the **Column Label** column, enter a name for the new field.

   b. In the **View Column Name** column, enter a name for the field as it will be seen in the database when creating reports.

   c. In the **Data Type** column, select the type for the new field. The choices are: Boolean, Cost, Date, Integer, List, Number, or Text.

   d. (Optional) If you selected **Text** as the **Data Type**, in the **Field Length** column, enter the maximum number of characters that can be used in the field.

6) Select **Save**.

Tip

▶ 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 another configured field, a form, a workflow, or a field mapping.

▶ To choose which currency to view cost in configured fields of data type cost, select the **Currency** tab in 🔧 **Settings**.

▶ Multi-currency is supported only in data type cost for formula configured fields.

▶ For a configured field of data type cost, the cost formula calculation is performed and saved in base currency then converted to project currency.

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

This setting is used in the following apps:

≡ **Tasks**

Project Settings

At the project level, add project-specific details, configure settings, and create dictionary items.

Details

Add or update project details.

Assign a Manager to a Project

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

The user who created the project is automatically assigned as the manager.

To assign a manager to a project:

1) *Navigate to the project Details page* (see page 207).
2) In the **Details** section, in the **Manager** field, select a manager.
3) Select **Save**.

You can also do this on the Projects page.

1) In the object selector, select ⤸ **Project**, and then select **View Projects List**.
2) In the table, select a project, and then add a manger in the **Manager** field.

> **Note** If an error displays when loading the details page for a project created before the 24.1 (January 2024) release of Primavera Cloud, assign a manager to the project from the Projects page.

This setting is used in the following apps:

🏛 **Cost and Funds**

- ⤣ **Resources**
- ⥀ **Risk**
- 📋 **Schedule**
- 🖵 **Scope**
- ◎ **Strategic Alignment**
- ≣ **Tasks**

Assign a Project Calendar

Each project must have a calendar assigned. The project calendar determines valid work and nonwork times during the project. The project calendar is automatically assigned to all new activities within the project. Existing activity calendar assignments are not affected. An activity's calendar can be updated at any time.

The default calendar in the parent workspace is automatically assigned as the project calendar when the project is created, but this can be changed to suit the needs of the project. When assigning a project calendar, you can select workspace-level or project-level calendars that have been made available to the project object.

To assign a project calendar:

1) *Navigate to the project Details page* (see page 207).
2) In the **Details** section, in the **Calendar** field, select a calendar.
3) In the **Select Calendar** dialog box, in the **Filter By** list, select **Project** to view calendars available at the project level, or **Workspace** to view calendars available at the workspace level.
4) Select a calendar, and then select **Select**.
5) Select **Save**.

> **Note** If an error displays when loading the details page for a project created before the 24.1 (January 2024) release of Primavera Cloud, assign a manager to the project from the Projects page. See *Assign a Manager to a Project* (on page 70) for instructions.

Configure Schedule Settings for a Project

Configure project schedule settings to set planned project start and finish dates, as well as a date by which the project must finish. These dates are also used to drive the project scheduler during the scheduling process.

To configure schedule settings for your project:

1) *Navigate to the project Details page* (see page 207).
2) In the **Schedule** section, in the **Project Planned Start** field, select the start date.
3) In the **Project Planned Finish** field, select a planned finish date.
4) In the **Schedule Must Finish By Date** field, select the date the project must finish by.
5) Select **Save**.

> **Note** If an error displays when loading the details page for a project created before the 24.1 (January 2024) release of Primavera Cloud, assign a manager to the project from the Projects page. See *Assign a Manager to a Project* (on page 70) for instructions.

This setting is used in the following apps:
- Resources
- Risk
- Schedule
- Scope
- Tasks

Settings

Configure project settings depending on your needs, such as object defaults, calculation settings, and auto numbering.

Configure the Task Time Zone Setting

The Task Time Zone setting determines which time zone to use when marking tasks as overdue or due this week. This is especially important when users and companies are located in different time zones and the accuracy of your project performance is critical to project success. The check for overdue tasks and tasks due this week is run each time a task is edited and daily at midnight for the selected time zone. The default value is (GMT) Greenwich Mean Time. The chosen time zone also determines the latest date that can be selected for a task's Completed Date.

To configure the time zone setting:

1) *Navigate to the project settings page* (see page 208).
2) Select the **Tasks** tab, and then select **General**.
3) In the **Task Time Zone** field, select the time zone that will be used to check for tasks that are overdue or due this week.
4) Select **Yes** to confirm your selection.
5) Select **Save**.

This setting is used in the following apps:
- Tasks

Configure Task Summary Settings

The Task Summary tool consists of checks that monitor various project metrics. Each check can be enabled or disabled in the project settings. Some checks also have minimum criteria values that can be modified. Individual checks can be enabled or disabled according to your organization's needs. Completed tasks are not included in any of the check results.

To configure settings for the Task Summary tool:

1) *Navigate to the project settings page* (see page 208).
2) Select the **Tasks** tab, and then select **General**.
3) In the **Task Summary Settings** section, configure the following settings:
   ▸ For each check, select the **Active** option to include the selected check in the Task Summary panel.
   ▸ For each check that supports minimum criteria values, in the **Minimum Criteria** field, enter a new value.
4) Select **Save**.

Tip

If you are accessing the **Tasks** tab for the first time, you may be prompted to run the Task Summary checks. Select **Run** to run the checks.

This setting is used in the following apps:

≡✓ **Tasks**

Configure Task Color Defaults for a Project

The Color Tasks by setting determines the attribute used to color task cards, tasks bars, and swimlane headers. At the project-level, tasks colors can be changed to any value regardless of the workspace setting.

To configure task colors:

1) *Navigate to the project settings page* (see page 208)
2) Select the **Tasks** tab, and then select **Colors**.
3) In the **Color Tasks by** list, select one of the following:
   ▸ **General (Company)**: Individual company colors are specified at the project level only. At a workspace level, a list of all project companies with randomized colors are displayed. Color associations are read-only. To edit workspace level settings, go to *Configure Task Color Defaults for a Task* (see "*Configure Task Color Defaults for a Workspace*" on page 66).
   ▸ **Codes (Project)**: Code value colors specified at the project level.
   ▸ **Codes (Workspace)**: Code value colors specified at the workspace level.

   > **Note** Codes must be enabled in the Project and Workspace-level Codes dictionaries for both Activities and Tasks to make them available for selection in the **Color Tasks by** list.

4) Use the color picker to select a new color for the Company.
   ▸ You can set color associations or add more code values for workspace level codes. Code values are set in the Defaults & Options: Task page in the workspace.
5) Select **Save**.

This setting is used in the following apps:

▸ ≡✓ **Tasks**

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 208).
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**, **Risk Response Action**
    ▸ Schedule: **Activity**, **Schedule Scenario**, **WBS**
    ▸ Scope: **Scope Item**, **Work Package**, **Scope Assignment**, **Change Request**, **Change Item**, and **WBS**
4) Select **Save**.

Tip

▸ 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.

Dictionaries (Project)

Project-level dictionaries contain items that are only available to a single project.

Calendars (Project-level)

Calendars in the project Calendars dictionary are available to be assigned as the default project calendar or to individual activities, resources, and roles in the project. Project-specific calendars are useful when there are calendars that only need to be available to a single project. When assigning a calendar to the project, activity, resource, or role, you can choose from project-level or workspace-level calendars. If a project-level calendar should be made available to more projects, you can promote it to the parent workspace.

For more information about calendars, see *Calendars Overview* (on page 47).

Add a Holiday List to a Project-level Calendar

Add a holiday list to include any public or company holidays observed by the organization that should be reflected in the project schedule. An existing list can be assigned to a calendar during the calendar's creation, or you can assign a calendar's holiday list later. One holiday list can be selected per calendar.

Holiday lists are available to be used throughout the workspace hierarchy. You must have the security privileges required to add and edit calendars in the parent workspace to add and edit a holiday list.

To add a holiday list to a project-level calendar:

1) *Navigate to the project Calendars dictionary page* (see page 209).
2) Select **Holidays**.
3) In the **Manage Holiday Lists** dialog box, select ✛ **Add**, and then enter a name for the holiday list. You can also select an existing list.
4) Select **Edit Holiday List**.
5) Select ✛ **Add** to create a new holiday for the list. Enter a name for the holiday. You can also select an existing holiday.
6) Choose when the holiday occurs:

    ▸ **Once on**: Select if this holiday is a onetime occurrence.

    ▸ **Repeat every**: Select if this holiday occurs on the same date every year.

    > **Note** You can select on a calendar when holidays are recognized as part of the standard work week.

    ▸ **Repeat the**: Select if this holiday occurs on a different date each year, but always occurs on the same day and week each year.

7) Continue to enter dates as needed.
8) Select **Save**.

    > **Note** Any time that you make changes to a workspace or project calendar that is used by the current schedule, a baseline, or a scenario, the dates will be impacted. Open each schedule variation that relies on the modified calendar, and then reschedule the project to ensure schedule accuracy.

This setting is used in the following apps:

🏛 **Cost and Funds**

👥 **Resources**

◔ **Risk**

📋 **Schedule**

🔲 **Scope**

☰ **Tasks**

Add a Project-level Calendar

Add a project-level calendar if it only needs to be available to a particular project. Calendars at the project level can be assigned as the default project calendar or to activities in the project. They cannot be assigned to resources or roles in the project. You can promote project-level calendars to the parent workspace if they should be made available to other projects in the workspace or to resources/roles.

To add a project-level calendar:

1) ***Navigate to the project Calendars dictionary page*** (see page 209).
2) Select ＋ **Add**.
3) In the **Add Calendar** wizard, complete the following steps:
   a. **Name**: Enter a **Name** and **ID** for the calendar. Select **Next**.
   b. **Create Work Week**: Specify the standard number of work hours per day by manually entering the number of hours or by selecting the time period on the calendar. Change the time periods on the calendar by dragging the entire block of time or by expanding or reducing the block of time. Select **Next**.
   c. **Add Holidays**: Choose a holiday list to assign to the calendar. The holidays in the selected list are displayed.
      ▪ Select the **If a holiday falls on standard nonwork time, move** option if your calendar has holidays that fall on standard nonwork time and should be marked as holiday time during standard work time. Select where on the calendar the holiday should be reflected.

      Note

      ▪ This setting affects the placement of activities during scheduling and leveling. Changes to a holiday's placement on the calendar are not reflected on the Calendar tab of the Calendars dictionary page.
      ▪ This setting applies to holidays being placed on nonwork time during the standard work week. It is unaffected by unavailable time created by an exception.

      ▪ Select **Finish**.
4) Select **Save**.

Tip

▶ To promote a calendar to the parent workspace **Calendars** dictionary, select a calendar, select the ⚙ **Context** menu, and then select **Promote to Workspace**.

▶ You can also create a calendar by duplicating an existing calendar. Select the ⚙ **Context** menu next to the calendar, and then select **Duplicate**.

This setting is used in the following apps:

🏛 **Cost and Funds**

👥 **Resources**

◠ **Risk**

⊟ **Schedule**

⊡ **Scope**

⊟ **Tasks**

Configure Project-level Calendar Time Period Settings

A calendar's time period settings specify the default number of hours in each work period. The standard time period hours defined in the Application Settings are displayed by default, but can be changed after the calendar is created. Time period settings are separate from the calendar's standard work week values, which specify the working hours for each day of the week.

The application calculates and stores time unit values in hourly increments, but you can configure your user preferences to display time units in other increments, such as days or weeks. The values specified for Time Periods are used to convert hours to other time increments for display, and to convert all non-hourly time increments to hours for storage in the database.

To configure a project-level calendar's time period settings:

1) *Navigate to the project Calendars dictionary page* (see page 209).
2) Select a calendar.
3) Select the **Summary** tab.
4) In the **Time Periods** section, enter the default number of hours in a day, week, month, and year.
5) Select **Save**.

This setting is used in the following apps:

🏛 **Cost and Funds**

👥 **Resources**

◔ **Risk**

⊟ **Schedule**

⊡ **Scope**

⊟ **Tasks**

Specify Project-level Calendar Availability for Assignment

Before calendars can be assigned, they must be made available to supporting objects. Each project-level calendar can be made available for assignment to the project or to project resources and roles.

Making project-level calendars available to the project enables you to set it as the default project calendar or to individual activities in the project. The option is selected by default when a calendar is created.

To specify project-level calendar availability:

1) *Navigate to the project Calendars dictionary page* (see page 209).
2) Select a calendar.
3) Select the **Summary** tab.
4) In the **Available To** section, select **Project**, **Resource/Role**, or **both**.

5) Select **Save**.

Tip

If you assign a project-level calendar to a project-level resource or role, then the resource or role can't be promoted to the workspace unless you remove the calendar assignment or promote the project calendar to the workspace.

This setting is used in the following apps:

- Cost and Funds
- Resources
- Risk
- Schedule
- Scope
- Tasks

Set Project-level Calendar Exception Time

Exception time is set by selecting periods of time on a calendar that are exceptions to the calendar's standard working hours. You can set exception time for individual dates or in bulk for a range of dates. Select a period of time on a particular date to specify the new working time for that date, or use the Manage Exceptions button to specify the exception time for a date range. For example, your organization may decide to give employees a half day of vacation time the day before a scheduled holiday. In this case, the first half of the standard work day would be selected, thereby designating it as exception time. You can also set an entire day as unavailable, indicating that the day cannot be worked at all or available, indicating that the day can be worked without the restriction of standard work hours. Remove changes by setting individual days back to standard working time or using the Remove option in the Manage Exceptions dialog box to remove exceptions for a range of dates.

The calendar's Day and Week views enable you to add exception time, but only the Week view supports setting an entire day as unavailable or available. The Month and Year views enable you to see the different working time types at a high level. A legend below the calendar indicates whether each time period displayed is standard, exception, unavailable, or holiday time.

> **Note** Any time that you make changes to a workspace or project calendar that is used by the current schedule, a baseline, or a scenario, the dates will be impacted. Open each schedule variation that relies on the modified calendar, and then reschedule the project to ensure schedule accuracy.

Set Exception Time for a Range of Dates

To set project-level calendar exception time for a date range:

1) *Navigate to the Calendars dictionary page* (see page 208).
2) Select a calendar.
3) Select the **Summary** or **Calendar** tab.
4) Select the **Manage Exceptions** button.
5) In the **Manage Exceptions** dialog box:

I. In the **Select Exception Dates** section, from the **Exception Type** drop-down list, select **Unavailable** or **Available**.

For Unavailable Exception Type:

-   In the **From** and **To** fields, select the dates for which you want to add the **Unavailable** exception.

Note

-   You can select **Unavailable** exception time for full days only. If you selected **Unavailable** exception type, then the **Full Day** check box will be selected by default.
-   Only the working days of a standard work week are marked as unavailable. For example, if Saturday and Sunday are non-working days for your standard work week, then the **Unavailable** exception will not be added to any Saturdays and Sundays within your selected date range.

For Available Exception Type:

a. In the **From** and **To** fields, select the dates for which you want to add the **Available** exception.
b. (Optional) Select the **Full Day** check box to make full days within your selected date range as available.
c. In the **Start Time** and **End Time** fields specify the time when the **Available** exception time starts and ends for your selected date range.

Note

-   The **Start Time** and **End Time** fields will not be available if you selected the **Full Day** check box.
-   **Available** exception time is added for both working and non-working days of the standard work week.

2. Select **Add Exception**.
3. In the **Exception Dates** section, view your specified exception time.
4. (Optional) Repeat the above steps to add additional exception time for a new set of dates.
5. Select **Apply** to apply the exceptions to the selected calendar.
6. Select **Save**.

Set Exception Time for Individual Dates

To set project-level calendar exception time for individual dates:

1) *Navigate to the project Calendars dictionary page* (see page 209).
2) Select a calendar.
3) Select the **Calendar** tab.
4) Navigate to a time period in the calendar when exception time should be added.
5) In the **Day** or **Week** view, make any of the following adjustments to the calendar:

> ▸ To change the work hours for a day, select a period of time on a specific day. Change the exception time on the calendar by dragging the entire block of time or by expanding or reducing the block of time. The block of time indicates the new work hours for the day.
>
> ▸ To set an entire day as nonworking time, select the date ▼ menu, and then select **Unavailable**.
>
> ▸ To set a holiday as a work day, select the date ▼ menu, and select **Available**. Adjust the exception time for the new work day by dragging, expanding, and reducing the block of time.
>
> ▸ To revert any changes you made to a day, select the date ▼ menu, and then select **Set to Standard**. You can also remove individual blocks of exception time by select the **X** within a block.

6) Select **Save**.

7) Exceptions are displayed on the **Summary** tab.

Tip

▸ Any day can be set as unavailable, available, or with a range of exception time within the day. This includes days set as holidays.

▸ To remove an already defined exception, in the **Exception Dates** section of the **Manage Exceptions** dialog box, select **Remove,** and then select **Apply**.

This setting is used in the following apps:

🏛 **Cost and Funds**

👥 **Resources**

⌁ **Risk**

📑 **Schedule**

🖼 **Scope**

☰ **Tasks**

Promote a Project-level Calendar to the Parent Workspace

If a project-level calendar should be made available to other projects in the workspace, you can promote it to the parent workspace. If the promoted calendar's ID is not unique throughout the parent workspace's hierarchy, the promotion will fail. If this occurs, modify the ID and try again. After the calendar is promoted, it is removed from the project-level Calendars dictionary.

You must have the required security privileges to add a calendar in the parent workspace.

To promote a project-level calendar to the workspace:

1) *Navigate to the project Calendars dictionary page* (see page 209).

2) In the calendar list, select a calendar, select the ⚙ **Context** menu, and then select **Promote to Workspace**.

3) All changes made to this page are saved automatically.

This setting is used in the following apps:

🏛 **Cost and Funds**

Ω **Resources**

◡ **Risk**

≡ **Schedule**

▣ **Scope**

≡✓ **Tasks**

Codes (Project-level)

In the project Codes dictionary, codes are available to be assigned to activities and tasks within the project. Project-specific codes are useful when there are codes that only need to be available to a single project. You can use codes to help you categorize your data based on shared characteristics. Codes can be added as columns, grouping bands, sorting options, filters, and more. If a project-level code should be made available to more areas of your application, you can promote it to the parent workspace.

Add a Project-level Code

Codes enable you to categorize and track objects based on attributes they share. Add codes to the project Codes dictionary if they should only be available to a specific project. You can promote project-level codes if they should be made available to other objects in the project's parent workspace.

You can apply project-level codes to activities and tasks within the project.

To add a project-level code:

1) *Navigate to the project Codes dictionary page* (see page 209).
2) In the table, select ✛ **Add Code** ▼.
3) In the new row, in the **Name** and **ID** columns, enter a name and ID for the new code.
4) In the **Applies to** panel, select one or more objects to apply the code. All are selected by default.
    ▸ **Activities**: Select to make the code available for assignment to activities in the project.
    ▸ **Tasks**: Select to make the code available for assignment to tasks in the project.
5) Select **Save**.

Tip

▸ Individual activity and task code values can be associated with a color.   Colors associated with activity codes are used for activity bars in the Gantt chart on the Activities page. Colors associated with task codes are used for task bars in the Gantt chart on the Task List page and task cards on Tasks App pages.

▸ To promote a code and its values to the parent workspace Codes dictionary, select a code in the table, select the ⚙ **Context** menu, and then select **Promote to Workspace**. Select **Save**.

▸ You cannot delete a code after it is made available and assigned to objects. You must remove all code assignments before deleting project and workspace-level codes.

Add a Value to a Project-level Code

Add values to codes so that you can group, sort, and filter objects based on their code values. At the project level, you can add values to project-specific codes. Individual activity and task code values can be associated with a color. Colors associated with activity codes are used for activity bars in the Gantt chart on the Activities page. Colors associated with task codes are used for task bars in the Gantt chart on the Task List page and task cards on Tasks App pages.

To add a code value to a project-level code:

1) *Navigate to the project Codes dictionary page* (see page 209).
2) In the table, select a code or code value.
3) Do either of the following:

   ‣ In the toolbar, select the + **Add Code** ▼ menu, and then select **Add Code Value**. A new value is added beneath the selection.

   ‣ In the table, select the ⚙ **Context** menu, and then select **Add Code Value**.

4) In the **Name** and **ID** columns, enter a name and ID for the code value.
5) (Optional) In the **Color** column, select a color for the code value. Code value colors are for activity bars in the Gantt chart on the Activities page. Code value colors are used for task bars in the Gantt chart on the Task List page and task cards on Tasks App pages.
6) Select **Save**.

Tip

Code values can be configured hierarchically to further enhance your object organization. Select the ⚙ **Context** menu next to a code value, and then choose to move the value up, down, left, or right.

Additional Settings

Some settings may need to be configured in other areas of the application.

Assign a Company to a Project

Companies are assigned at the project level to designate responsibility for the work performed on your project. Assign companies to your project, and set a color for each company.

> **Note** When a user or user group is assigned to a project, the companies associated with those users are automatically assigned.

To assign a company to a project:

1) In the object selector, select �X **Project**, select **View Projects List**, and then select a project name.
2) From the ☰ **Main Menu**, select ▣ **Project Team**, and then select **Companies**.
3) Select **Assign**.
4) In the **Assign Companies** dialog box, select a company, and then select **Assign**.
5) In the **Color** field, select a color to associate with the company.

6) Select **Save**.

Tip

Assign companies to be responsible for the work on your tasks. Associate a color with each company to make company tasks easier to identify.

Hand-offs Overview

Use the Hand-offs page to view a network diagram of the tasks and task milestones in your project. The page is optimized for creating and modifying task hand-offs in a variety of ways. You can also view task longest path details, add tasks, assign constraints, create hand-offs between tasks, and commit to perform the task work.

By default, this page displays a planning period of six weeks (one week before the current week and four weeks after the current week). Tasks outside the planning period may not be visible.

You can edit the current planning period settings by selecting 📅 **Planning Period** on the page toolbar. You can also edit planning period and other settings in the Manage Views panel. See **Configure and Apply Filtering** (on page 184).

To learn more about the concepts used on this page, see **Understanding Tasks App Concepts** (on page 10).

Working with the Hand-offs Page

Use the Hand-offs page to view a network diagram of the tasks and task milestones in your project, create hand-off relationships between them, and view the longest path of task duration. You can also add new tasks, commit to tasks, and edit task details on this page. Hand-offs can be created between tasks by using a table, by graphically drawing hand-off lines to connect task cards, or by updating a group selection. Group tasks on the page by activity, codes, company, WBS, or no grouping using the **Plan by** option.
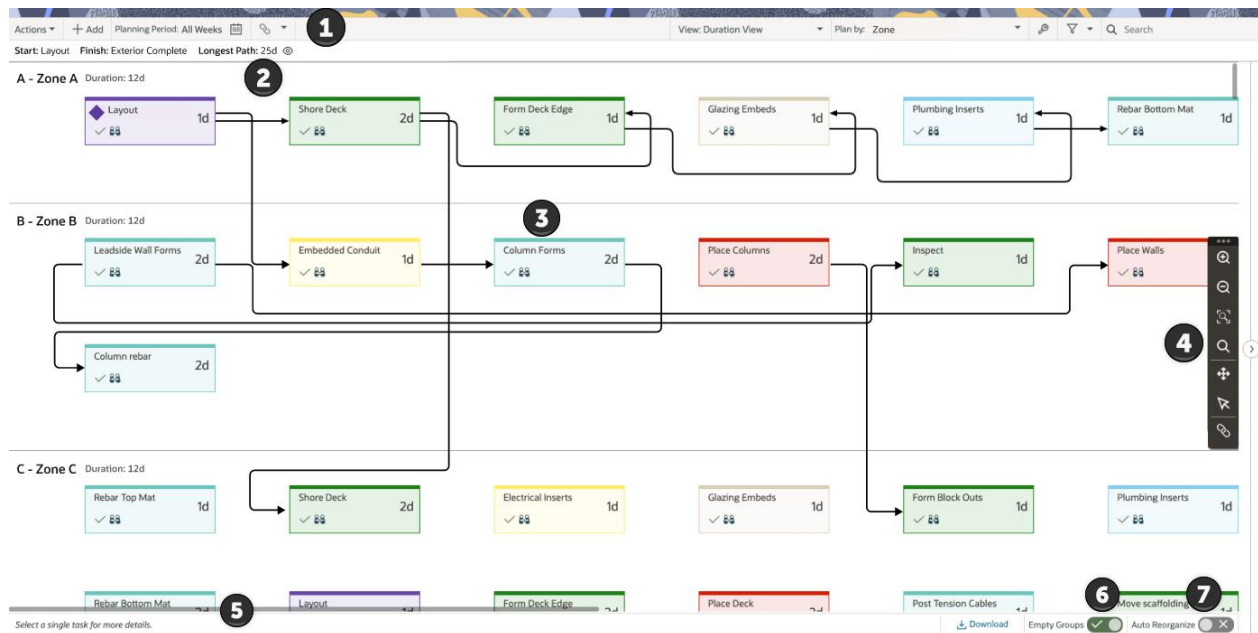
Table of Screen Highlights

Item	Description
1	**Hand-off Modes**: Select **Keep Hand-offs** or **Break Hand-offs**. Each mode determines the movement of a hand-off chain when any of the tasks in the chain are modified.
2	**Longest Path:** Select ⊚ **View** or ⦸ **Hide** to show or hide the longest path for task duration in the Hand-offs diagram. Display all details for the **Longest Path** by selecting **Show/Hide Longest Path Details** in the **Actions** ▾ menu.

Item	Description
3	**Task Cards:** Basic task cards are shown in the diagram. Status icons that display on task cards indicate a status of Complete, Committed, Overdue, or Pending. Other icons display to indicate whether a task has a constraint, a discussion, hand-offs, or a proposed due date. Cards with diamonds indicate milestone tasks. See *Task Icon Reference* (on page 173) for more detailed icon descriptions.
	Enable configurable task cards to show a customized set of task details when a basic task card is double-clicked.
	Details: Double-click a task or task milestone to edit its details. Select a hand-off line to view predecessor, successor, type, lag, and slack information. Right-click a card to view task details, add tasks and hand-offs, or remove hand-offs. Right-click a hand-off line to delete it.
4	**Diagram Toolbar**: Use the toolbar to Zoom, Pan, and Select tasks in the diagram. Toggle the display of task hand-off lines.
5	**Info Bar**: Use the info bar at the bottom of the page to view details for the selected task card. You can use the icons in the info bar to commit or complete the selected task. See *Task Icon Reference* (on page 173) for icon descriptions. The info bar will display the value for the attribute that is coloring the Task. If activity code is coloring the task, the info bar legend will show the code value assigned to the selected task. If no code value is assigned, or if no activity is associated with a task and color by is set to activity code, then the label will display "No Value Assigned".
6	**Empty Groups**: Use the Empty Groups feature to organize grouping bands based on if the band contains a task or task milestone.
	When enabled, empty grouping bands will display on the Hand-offs page and allow you to add tasks to the empty bands. By default, this option is disabled, and empty grouping bands will not display.
7	**Auto Reorganize**: Use the Auto Reorganize feature to automatically organize tasks according to their hand-off chain lengths. Tasks are sorted by hand-off chain length, with the longest chains at the top.
	When enabled, tasks are automatically organized as they are created or deleted and whenever hand-offs are added or removed. By default, this option is disabled, and tasks remain in place until the page is refreshed or the option is enabled. Auto Reorganize is also available from the **Actions** menu.

Add a Task or Task Milestone on the Hand-offs Page

Add tasks to detail the work to be performed on your project. Add task milestones to mark the distinct phases of your project.

Depending on your needs, tasks can be added in a variety of ways. The Add button on the toolbar opens the Task Details dialog box, which you can use to complete the most common task fields. You can also quickly add a task with default values directly to the page without opening the dialog box or add a task as a predecessor or successor to an existing task.

To learn more about tasks, see *Understanding Tasks App Concepts* (on page 10).

To add a task or task milestone on the Hand-offs page:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.
2) From the ☰ **Main Menu**, select ☰✓ **Tasks**, and then select **Hand-offs**.
3) Add a task or task milestone using any of the following methods:
    a. Using the toolbar:
        1. On the toolbar, select ＋ **Add**. In the task details dialog box, select the **General** tab.
        2. **Type**: Select the ☑ **Task** or ◆ **Task Milestone** icon.

            Note
            - You can change the task type if the task is not complete and has no commitments.
            - Task milestones do not support the Assigned User, Duration, Use Only Work Days, or Start Date fields.

        3. **Task Name**: Enter the name of the task.
            - The task card opens with the **Task Name** field in edit mode.
        4. **WBS**: Select a WBS if the task needs to be associated with a WBS.
        5. **Activity**: Select an activity if the task is required to complete the activity.
        6. **Company**: Select the company responsible for performing work on the task.
            - The color picker displays the color that is selected for the company.
        7. **Assigned User**: Select the user responsible for performing the task. The user must belong to the assigned company.
        8. **Crew Size**: Enter the number of people needed to complete the task.
        9. **Duration**: Enter the amount of time the task will take to complete.
            - **Use Only Work Days**: Select this option to allow only the project calendar's work days and ignore non-work days when determining the value for Start and Due Date.
        10. **Due Date**: Select a date by which the task must be completed.
            - The **Start Date** field is read-only and is calculated based on the **Duration** and **Due Date** of the task.
        11. **Proposed Due Date**: Propose an updated due date by which the task must be completed.
            - Select ✓ **Accept** to accept the proposed due date. The **Due Date** field will be updated with the accepted date.

12. **Completed Date**: The date that the task was completed. This date can be modified after the task is marked completed.

   - Select ✓ **Complete** to mark the task complete.

13. If task-based configured fields or codes exist in your workspace, you can select the **Additional Fields** tab to edit configured field and code values for the selected task. These values can also be displayed on other pages in the **Tasks** app.

14. Select **Save**.

   > **Note** Select **Create Another**, and then select **Save** to create the task without closing the dialog box.

b. Add directly to the page:

   - Right-click an empty area of the page, and then select **Add Task** or **Add Task Milestone**. A new task with default values is added to the page and the Task Details or Configurable Task Card is displayed. If the page is organized by activity or company, the task is automatically assigned to the activity or company section where you clicked.

c. Add tasks with hand-offs:

   - Right-click a task, and then select **Add Task Before**, **Add Task After**, **Add Task Milestone Before**, or **Add Task Milestone After**. A new task with default values is added as a predecessor or successor to the existing task and the Task Details or Configurable Task Card is displayed.

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

Tip

▶ 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.

▶ When empty group bands are enabled, you can add a new task or task milestone directly to the empty band. To add the new task or task milestone, right-click the empty area of the page in the band and select **Add Task** or **Add Task Milestone**.

▶ Double-click a task to modify its general details, configured field and code values, commitments, hand-offs, and discussions.

▶ Double-click a task to view the task details window or the task card. To view the configurable task card you must configure your task card settings. Follow the steps in *Customize Task Cards for a Project* (on page 95) to enable configurable task cards.

▶ To delete a task, open the **Task Details** dialog box, select **Delete**, and then select **Yes**. You can also select one or more task cards and press **Delete** to delete them or right-click the selection and select **Delete Tasks**.

Add a Hand-off on the Hand-offs Page

The Hand-offs page enables you to create hand-offs between tasks using a variety of methods, including using a tabular format in the Task Details dialog box, drawing lines between tasks, or by using group selection. You can add hand-offs between two tasks, between two task milestones, or between a task and a task milestone.

On the page, tasks can be ungrouped or they can be grouped by activity or company. This makes it easier to see hand-off chains according to their associated activities or by their assigned companies. Hand-offs can be created between tasks with the same, different, or no activity assignments.

To learn more about hand-offs, see *Understanding Tasks App Concepts* (on page 10).

To add a hand-off on the Hand-offs page:

1) In the object selector, select ⅄ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☰⅄ **Tasks**, and then select **Hand-offs**.

3) Add a hand-off using any of the following methods:

  a. Using the **Task Details** dialog box:

    1. Double-click a task or task milestone. In the **Task Details** dialog box, select the **Hand-offs** tab.

    2. In the **Predecessors** or **Successors** section, select ＋ **Add**, and then select one or more tasks to add as predecessors or successors to the current task.

        > **Note** The **Select Task** dialog box enables you to filter the list of available tasks by tasks with the same activity assignment as the current task or by tasks with any activity assignment. This includes any task without an activity assignment.

    3. Select **Select**.

    4. In the **Type** field, select the hand-off relationship between the two tasks.

    5. (Optional) In the **Lag** field, enter the lag for the hand-off relationship. Select **Lag - Use Only Work Days** if you want the lag duration to only include work days.

    6. Select **Save**.

  b. Using hand-off lines:

    1. Hover over a card. On either edge of the card, select the circle, which represents the start of a hand-off.

    2. Select a circle on a different task card to complete the hand-off line.

  c. Using the right-click menu:

    ▪ Right-click a task, and then select **Add Task Before**, **Add Task After**, **Add Task Milestone Before**, or **Add Task Milestone After**. A hand-off path is created between the original task and the new task, even if the original task has existing hand-offs.

  d. Using group selection:

    1. Select the ⬉ **Select** tool in the diagram toolbar, and then click and drag to highlight multiple tasks. You can also Ctrl + click to select multiple tasks. To use Ctrl + click, the ⬉ **Select** tool must not be selected.

The ⟲ **Select** tool is used to create hand-offs in the order that the selected tasks appear. Ctrl + click is used to create hand-offs in the order that tasks are selected, except for tasks with due dates, which are arranged in the chain from earliest to latest.

2. Right-click any card in the selection and select **Add Hand-offs**.

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

Tip

▸ To remove hand-offs, do either of the following:

▸ Right-click one or more task cards and select **Remove Hand-offs**. This option removes all hand-offs from the tasks in the selection.

▸ Right-click one or more hand-off lines and select **Remove Hand-offs**. This option only removes the lines you select.

▸ Select a hand-off line to view predecessor, successor, type, lag, and slack information.

▸ A Finish to Start hand-off is created by default when a successor task's due date is after the predecessor's due date. A Finish to Finish hand-off is created by default when both tasks have the same due date. The hand-off type for tasks with different due dates can be Finish to Start, Finish to Finish, or Start to Start. The hand-off type for tasks with the same due date can only be Finish to Finish.

▸ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

▸ 🔗 **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.

▸ 🔗 **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

▸ If you are navigating using a keyboard, you must complete this task on the **Work Plan** or **Task List** page.

Propose and Accept a Task Due Date on the Hand-offs Page

When a task is part of a hand-off chain, directly modifying its due date may affect the due dates of other tasks in the chain. If the hand-off chain contains tasks from different companies, each company should be aware of the potential changes to their tasks. To solve this issue, updated due dates can be proposed without affecting the actual task due date. This enables the companies with tasks in the chain to review proposed due dates before they are accepted.

When a proposed due date is accepted, it is removed from the task and becomes the current task due date. If the accepted due date occurs on a non-work day, the Use Only Work Days setting is cleared and the due date is updated. If a task with a proposed due date is committed, the proposed due date is removed, and the current due date is updated to match the committed due date.

To learn more about task due dates, see *Understanding Tasks App Concepts* (on page 10).

To propose and accept a task due date on the Hand-offs page:

1) In the object selector, select ⅄ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ≡⌵ **Tasks**, and then select **Hand-offs**.

3) On the **Hand-offs** page, double-click a task or task milestone to open the **Task Details** dialog box.

4) In the **Task Details** dialog box, in the **Proposed Due Date** field, select a date by which the task must be completed.

5) Select **Save**.

6) When you are ready to accept the proposed due date, you can do either of the following:

   ‣ In the **Task Details** dialog box, select ✓ **Accept**.
   ‣ Right-click a task card, and then select **Accept Proposed Due Date**.

7) All changes made to this page are saved automatically.

Tip

‣ The 🗓 **Proposed Due Date** icon on a task card or in the info bar indicates that the task has a proposed due date that has not been accepted.

‣ You cannot propose a due date on completed tasks.

‣ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

‣ ⌖ **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.

‣ ⟳ **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

Assign a Constraint to a Task on the Hand-offs Page

Assign constraints to a task to indicate the items that need to be addressed before work on the task can begin. Constraint details include the status of the constraint, the date it is needed by, who is responsible for addressing it, and the type of constraint. Icons next to the Date Needed field indicate if the constraint is overdue or needed within the next 7 days. After a task has been assigned a constraint, the constraint icon displays on the task card.

Use the Constraints tab in the Task Details dialog box to monitor the current status of all constraints assigned to a task. To only view tasks on the page that have at least one constraint, select **Tasks With Constraints** from the Constraints quick filter.

To learn more about task constraints, see *Understanding Tasks App Concepts* (on page 10).

To assign a constraint to a task on the Hand-offs page:

1) In the object selector, select ⅄ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ≡⌵ **Tasks**, and then select **Hand-offs**.

3) Double-click a task or task milestone. In the **Task Details** dialog box, select the **Constraints** tab.

4) Select **Assign**. In the **Select Constraints** dialog box, select one or more constraints to associate with the current task.

5) Select **Select**.

6) Select **Save**.

7) All changes made to this page are saved automatically.

8) The constraints shown on the **Constraints** tab are read-only. Select a constraint name to view and edit it on the **Constraints** page.

Tip

▶ In the **Constraints** detail window, select one or more constraints, and then select the ⚙ **Context** menu to remove the selected constraints from the task. Select a constraint name to view it on the **Constraints** page.

▶ Select the 🖉 **Notes** icon next to a constraint to view the notes associated with the constraint. Constraints without notes will not show this icon.

Commit to a Task on the Hand-offs Page

Commit to tasks to agree to perform their work by a specified date. In the Task Details dialog box, you can track the commitment history of a task, including committed dates, due dates, and reasons missed. You cannot commit to task milestones or completed tasks. If a proposed due date exists for a task, it will be displayed on the Commitments tab. This enables you to review the proposed due date before selecting the same or a different due date for the commitment. When a task is committed, the proposed due date is removed from the task, and the current due date is updated to match the committed due date.

To learn more about task commitments, see *Understanding Tasks App Concepts* (on page 10).

To commit to a task on the Hand-offs page:

1) In the object selector, select ⟟ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☰ **Tasks**, and then select **Hand-offs**.

3) Commit to a task using any of the following methods:

▶ Select the 🔗 **Commitments** icon in the info bar for a task with no prior commitments to commit to the task without opening the **Task Details** dialog box.

▶ Right-click a task, and then select **Commit**. In the **Commit Tasks** dialog box, select a **Due Date** for the task, and then select **Commit**.

▶ Double-click a task. In the **Task Details** dialog box, select the **Commitments** tab. Select a **Due Date** for the task, and then select **Commit**. Select **Save**.

▶ Commit to a group of tasks by right-clicking a selection and selecting **Commit Tasks**. Only tasks in the selection without an existing commitment will be committed. For pending tasks, the committed due date is set to the task's current due date. For new tasks, the committed due date is set to today's date or the next valid work day.

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

Tip

▸ To delete the most recent commitment, select the 🗑 **Delete** icon on the **Commitments** tab, and then select **Yes**. The task displays the due date of the next commitment in the list.

▸ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

▸   🔗 **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.

▸   🔄 **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

Recommit to a Task on the Hand-offs Page

If you are unable to meet the due date of a previous commitment, you can recommit to work on the task. Select one or more reasons for missing the previous commitment, and then select a new due date for the recommitment. You can optionally add comments to further explain the recommitment. Track task commitment history on the Commitments tab of the Task Details dialog box. If a proposed due date exists for a task, it will be displayed on the Commitments tab. This enables you to review the proposed due date before selecting the same or a different due date for the recommitment. When a task is committed, the proposed due date is removed from the task, and the current due date is updated to match the committed due date.

To learn more about task commitments, see *Understanding Tasks App Concepts* (on page 10).

To recommit to a task on the Hand-offs page:

1) In the object selector, select ⅄ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☰✓ **Tasks**, and then select **Hand-offs**.

3) Recommit to a task using either of the following methods:

▸ On a task with commitments, select the ⬤ **Pending** icon or the 🔗 **Commitments** icon in the info bar, or right-click the task card and select **Recommit** to open the **Recommit Task** dialog box.

▸ Right-click a committed task card, and then select **View Task Details**. In the **Task Details** dialog box, select the **Commitments** tab.

4) In the **Recommit Task** or **Task Details** dialog box, complete the following fields:

▸ **Due Date**: Select a due date for the recommitment.

▸ **Reasons Missed**: Select one or more reasons for missing the previous commitment.

> **Note** You can use the **Select Reasons Missed** dialog box to add new

reasons. Select **Manage Reasons** to view the Reasons dictionary.

▸ (Optional) In the **Comments** field, add any comments you may have regarding the recommitment. Comments for each recommitment are visible in the Commitments detail window.

▸ Select **Recommit**.

▸ (Task Details dialog box only) Select **Save**.

5) All changes made to this page are saved automatically.

Tip

▸ To delete the most recent commitment, select the 🗑 **Delete** icon on the **Commitments** tab, and then select **Yes**. The task displays the due date of the next commitment in the list.

▸ You cannot commit to task milestones.

▸ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

▸ ⊘ **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.

▸ ⟳ **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

Complete a Task on the Hand-offs Page

Mark a task or task milestone complete to indicate that all work has been performed on the task. After the task is completed, you cannot modify certain fields, including dates, company, and duration. To enable all fields on the task, remove the completed date.

When a task is marked complete, the completed date on the task is set to the task's due date if it is today's date or earlier. If the task's due date is blank or set to a future date, the completed date is set to today's date. A task's completed date can be modified to a past date after it is marked complete. A task's completed date cannot be set to a nonwork day if Use Only Work Days is enabled. Completing a task due in the future may affect the hand-off sequence of the task.

To complete a task on the Hand-offs page:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ⩦ **Tasks**, and then select **Hand-offs**.

3) Complete a task using any of the following methods:

▸ Double-click a task to open the **Task Details** dialog box. In the **Task Details** dialog box, select ✓ **Complete**. Select **Save**.

▸ Select a task, and then select the ✓ **Complete** icon in the info bar.

▸ Right-click a selection of one or more tasks, and then select **Complete Tasks**.

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

Tip

▶ You cannot mark a task complete if:

▶ The task status is set to Pending and there are one or more commitments.

▶ The task is assigned to another user, and you do not have the required *Commit to and Complete All Users' Tasks* security privilege.

Configure and Apply Tasks Quick Filters

You can use quick filters to refine the data displayed on a page. Configure which filters you want to appear in the quick filters list.   In the quick filters list, select one or more values on which to filter. Use multiple quick filters to further reduce how much data is displayed. For example, you can create a filter to show only specific task codes related to Company A and Company B on the Work Plan page. Clear a filter to show more results. Quick filter value selections are not saved with the view.

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

▶ Hand-offs

▶ Work Plan

▶ Constraints

▶ Task List

To configure and apply Tasks quick filters:

1) Navigate to a page, and then select 🔧 **Settings**.

2) In the **Manage Views** panel, select the **Quick Filters** tab.

3) In the **Show** section, select the quick filters you want to show in the quick filters list.

4) Select **Save**, and then select ✕ **Close**.

5) In the ▽ **Quick Filters** list, select applicable filter values, or select all.

6) To remove an applied filter, expand a filter list, and then select **Clear Filter**.

   To remove all applied filters, in the **Quick Filters** list, select **Clear All**.

Tip

The **Work Plan** page supports additional quick filter functionality:

▶ To quickly set additional activities or WBS as quick filter objects, select one or more activity bands or WBS nodes in the hopper or planning board, right-click the selection, and then select **Set Activities as Quick Filter** or **Set WBS as Quick Filter**. To do this, the **Activity** and **WBS** quick filters must be added to the view.

▶ To apply codes as quick filter objects, select one or more codes in the hopper or the planning board, right-click the selection, and then select **Set Code as Quick Filter**. To do this, you must first add **Codes** quick filters to the view and select up to five codes from the list of available options.

▶ You can select and apply parent, subordinate, or all objects in a hierarchy as quick filter objects. First select the parent level to expand all child levels beneath the selection. Select **Set Code as Quick Filter** or **Select WBS as Quick Filter**, and then select the objects.

Customize Task Cards for a Project

Customize Task Cards Video

The Work Plan page and the Hand-offs page support the display of multiple task card types. You can customize default task cards, and apply them to both the Hand-offs page and the Work Plan page. Alternatively, you can create separate task card styles for the two Task pages. 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 is 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 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_gui de/224775.htm#t224775***).

When configurable task cards 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. When you create a task, the task card will immediately be opened and the name field will be in edit mode. 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. To customize task card settings for a project, you must have the Edit privilege enabled for projects.

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) *Navigate to the project settings page* (see page 208)
2) Select the **Tasks** tab, and then select **Cards**.
3) On the **Cards** page, in the **Card Appearance** list, choose a page whose task card display you'd like to customize:
   ▶ **Default**: Select this option to customize default task cards on both the **Hand-offs** page and **Work Plan** page.
   ▶ **Hand-offs page**: Select this option to customize task cards on the **Hand-offs** page.
   ▶ **Work Plan page**: Select this option to customize task cards on the **Work Plan** page.
4) In the **Basic Task Card** section, configure basic task card settings. View the changes in the **Preview** section:
   ▶ **Show Task Icons**: Display icons on basic task cards on the planning board.
   ▶ **Show Crew Size**: Display the crew size estimate and icon on basic task cards. This option is enabled by default.
   ▶ **Wrap Text on Tasks**: Wrap long task names to the next line of a basic task card.
5) In the **Configurable Task Card** section, select **Enable Configurable Task Card**, and then customize. View the changes in the **Preview** section:

▸   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.

6) In the **Icons** dropdown, choose to show task icon at the top of the card, bottom or the card, or not at all.

7) In the **Font Size** dropdown, choose to show a standard font size across all fields or enable each field value to fit the available cell space.

8) Select **Apply**.

9) All changes made to this page are saved automatically.

Tip

▸   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.

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) In the object selector, select ⛓ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☰⁝ **Tasks**, and then select **Hand-offs**.

3) Select 🔧 **Settings**.

4) In the **Manage Views** panel, select the **Plan By** tab.

5) In the **Available** section, select the options you want to appear in the **Plan By** filters list.

6) 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.

7) (Optional) To display WBS and Code value grouping bands hierarchically select **Display lanes for WBS and Code values hierarchically.**

8) 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 **Close**.

Tip

▶ For more information on how to configure codes, review the *Codes Overview* (on page 54) 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.

Search the Hand-offs Page

The search function on the Hand-offs page enables you to search for specific tasks, activities, codes, companies, or WBS in the diagram. Search results are displayed below the search field.

To use the search function on the Hand-offs page:

1) In the object selector, select ⅄ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☰ **Tasks**, and then select **Hand-offs**.

3) In the **Search** field on the toolbar, enter a search term. Results matching the string will appear automatically.

> **Note** Plan by settings impact the search results that display:
> - When Plan by is set to None, only tasks display.
> - When Plan by is set to Activity, both activities and tasks display.
> - When Plan by is set to Company, both company and tasks display.

4) Select a search result to indicate that item in the diagram.

View Activity Details in the Tasks App

On pages in the Tasks app, select an activity name to view information about the activity, including displays general activity details and task counts by category.

To use this feature on the Work Plan page, the Tasks and Activities grouping option must be selected or the task plan must be open and set to **Tasks and Activities** view. On the Hand-offs page, the page must be organized by Activity. On the Task list page, the table must be grouped by Activity or the Activity column must be displayed.

You can also perform this task on the Task List page in the context of a program.

To view activity details in the Tasks app:

1) In the object selector, select ⋋ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☰✓ **Tasks**, and then select **Work Plan**, **Hand-offs**, or **Task List**.

   Beside each activity name the total number of tasks displays. If no number displays, there are no assigned tasks.

3) Select an activity name to display the activity detail popover containing more task information. The activity detail popover displays project, WBS, and activity details, such as percent complete, duration information, and total float, as well as the following task counts:

   ▸ **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.

Tip

▸ Select the activity name when viewing activity details to go directly to the activity on the Activities page.

▸ Task counts are for public tasks only and do not include private tasks.

▸ When activity date indicators are enabled, the activity details display indicators for the Start and Finish dates of activities that have actual dates or assigned constraints. When the As Late As Possible constraint is selected, the constraint indicator is not displayed. See Configure Activity Date Indicators to enable indicators.

▸ To make Activity Start and Finish dates more prominent in the Task List Page table, you can configure Activity Start and Activity Finish dates as columns. Select 🔧 **Settings**, and then select **Columns**.

‣ To choose which task counts to display in the popover, select 🔧 **Settings**, and then select **Task Counts**.

Set Task Notification Preferences

Changes in task details have the potential to impact your project's schedule performance. You can stay better informed on task updates by setting up task notifications. When a proposed due date is entered on a task or if a task becomes overdue, you can choose to receive a notification in the application's Inbox, your email, or both. You can adjust the number of notifications you receive by selecting a notification frequency of immediate, daily, or weekly. You can also choose to be notified for all tasks or only those tasks to which you are assigned.

All users can set their own notification preferences if they have access to the project. Users with the privilege to set notification preferences for others can also configure notification preferences on behalf of other users and configure a default set of preferences for all users assigned to at least one task in the project. This privilege is intended for application administrators and superintendents responsible for overseeing other users. The default set of preferences do not apply to users who configure their own set of preferences or have their own set of preferences configured for them.

Task notification preferences are set per project and can be configured on the Work Plan, Hand-offs, and Task List pages. The preferences are the same across all pages. Notifications are disabled by default for all users.

To set task notification preferences:

1) In the object selector, select ⤸ **Project**, select **View Projects List**, and then select a project name.
2) From the ☰ **Main Menu**, select ≣✓ **Tasks**, and then select **Work Plan**, **Hand-offs**, or **Task List**.
3) Select the **Actions** ▼ menu, and then select **Set Notification Preferences**.
4) In the **Set Notification Preferences** dialog box, select **Assign User** to add or remove users from the list, or select the option whose preferences you want to set:

> **Note** This section is only visible to users with the required privilege.
> Users without the privilege will only see preferences for themselves.

   ‣ **My Preferences**: Configure your own notification preferences.
   ‣ **Task Assigned User (default preferences)**: Configure the default notification preferences for all users assigned to at least one task. These preferences do not apply to users with their own configured preferences.
   ‣ **Existing User**: Select the name of a user in the list to configure notification preferences on their behalf.
5) In the **Preferences** section, configure the following settings for the **Overdue Due Date** and **Proposed Due Date** notification types:

> **Note** Each notification type has its own set of preferences and

notifications.

 a. **Inbox**: A notification is sent to the selected user's application Inbox.

 b. **Email**: A notification is sent to the selected user's email.

 c. **Frequency**:

- **Immediate**: A notification is sent as soon as a task meets your notification criteria.
- **Daily Digest**: A daily notification is sent at midnight with a list of tasks that currently meet the notification criteria.
- **Weekly Digest**: A weekly notification is sent at midnight on Sunday with a list of tasks that currently meet the notification criteria.

6) Select **Receive notifications for only my assigned tasks** to limit notifications to only tasks to which the selected user is assigned. If this option is disabled, the selected user will receive notifications on all tasks in the project that meet their notification criteria.

7) Select **Set**.

8) All changes made to this page are saved automatically.

Tip

▸ When a notification is received on the Inbox page or in an email, select **View Task** to view the relevant tasks on the **Task List** page.

▸ Select the ⚙ **Context** menu next to an existing user to delete them from the list. The **My Preferences** and **Task Assigned User** options cannot be removed.

Longest Path Overview

Identify the longest possible path between a task and a Finish task milestone on the Hand-offs page. This path calculation takes into account all possible task deviations identified for a work phase during pull planning. Show details for the longest path to view its duration in days, and then highlight or hide the path in the Hand-offs diagram.

Understanding pull planning is key to understanding the benefits of identifying the longest path. In this type of planning, the sequence of work is determined by responsible parties planning backward from a task milestone or goal. Performers request or pull work from their dependencies based on demand for subsequent work to begin and after all prerequisite tasks have been completed. These task dependencies can cause deviations, which makes it difficult to quickly identify the potential impact to a project's schedule. The longest path enables you to compare all possible paths across levels and groups of tasks on the Hand-offs page, and to note the absolute longest duration. Planners can use this information to ensure that all work that needs to be done fits within the project schedule.

The longest path will continue to update based on the following factors as work on tasks progresses:

▸ Changing task duration

▸ Changing lag on a hand-off

▸ Adding or removing hand-offs

▸ Adding or deleting a task

▸ Changing an attribute assignment on a task being used for Plan By

In order to calculate the longest path between two milestones, you must first identify at least one Finish milestone, and connect it to the chain using hand-offs without adding successors. If there are multiple Finish milestones, then the longest path of all Finish milestones is used. To view all Finish milestones, select the **More Milestones** link. If a Finish milestone has no linked tasks, its duration will be zero.

Plan By view settings determine how items are grouped for display on the Hand-offs page. To see tasks grouped by common Plan By options, add and apply them to a view from the 🔧 **Settings** menu on the page. Display settings for the longest path save by user by page view and are independent from named view settings.

When the longest path is highlighted, task information within the longest path can still be edited but tasks in other paths are not editable. You cannot add or delete tasks or hand-offs while modifying tasks within the longest path.

In some cases, named and quick filters can prevent the longest path from being shown. Adjust filters to display the longest path.

View the Longest Path on the Hand-offs Page

View the longest possible path of task duration between a task and a Finish task milestone on the Hand-offs page. You can show or hide longest path details and highlight the longest path on the page to assist in pull planning. See *Longest Path Overview* (on page 100) for more information.

To view the Longest Path on the Hand-offs page:

1) In the object selector, select 🔀 **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☰✓ **Tasks**, and then select **Hand-offs**.

3) Add at least one Finish task milestone for your phase of work:

   a. From the page, right-click a task, and then select **Add Task Milestone After** to add a task milestone to another task as a hand-off.

   b. Right-click on the milestone and select **View Task Milestone Details** to confirm milestone information, and then adjust if needed. For example, you have the option create additional Finish task milestones or to create additional hand-offs in the chain.

4) (Optional) In the **Plan By** list, choose an option to group items on the board according to your view settings. If **Plan By** is set to None, items will not be grouped. See *Configure Plan By Options* (on page 96).

5) In the **Actions** ▼ menu, select **Show Longest Path Details** to display the following information beneath the **Hand-offs** page toolbar:

   ▸ **Start**: The first task in the hand-offs chain.

   ▸ **Finish**: The last task milestone in the hand-offs chain.

   ▸ **Longest Path**: The longest duration in days, based on all possible deviations, that could take place during a phase of work.

6) (Optional) Beside the **Longest Path** duration, select ◎ **View** to show or 🚫 **Hide** to hide **Longest Path Details**.

Tip

Select **More Milestones** in the banner beneath the Hand-offs page toolbar to view a panel with a list of all Finish task milestones on the page. This option doesn't appear unless you have more than one Finish task milestone.

Work Plan Overview

Use the Work Plan page to sequence and progress tasks on a virtual planning board in daily or weekly intervals. Unplanned tasks are displayed in a hopper, an area of the Work Plan page where tasks can be edited, deleted, or grouped according to their assigned activity, WBS, activity code, task code, or company. Dragging a task from the hopper to the planning board creates a due date on the task. Companies may commit to perform work on a task by a due date, marking it as completed when the work has been performed. Tasks can also be placed into future period planning buckets if they are not ready to be performed.

Create or open a task plan on the planning board that arranges task cards by specified swimlane categories that are most significant to your project team.

By default, this page displays a planning period of six weeks (one week before the current week and four weeks after the current week). Tasks outside the planning period may not be visible. You can edit the current planning period settings by selecting 📅 **Planning Period** on the page toolbar. You can also edit the planning period and other settings in the Manage Views panel. See *Configure and Apply Filtering* (on page 184) for more information.

Tasks that overlap onto nonworking days, as defined in the Project Calendar Dictionary, display gray on the Work Plan page regardless of assigned task color. See *Calendars Overview* (on page 47) for more information.

To learn more about the concepts used on this page, see *Understanding Tasks App Concepts* (on page 10).

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

Working with the Work Plan Page

Using the Work Plan Page Video

The Work Plan page provides a planning board for sequencing your task work. Create tasks, and then drag and drop them onto the planning board to build your work plan. The first time you open the Work Plan page, you can choose to watch a video that provides an overview of the page and its features. The video can be viewed at any time by opening the Help menu and accessing the Training Center.

Table of Screen Highlights

Item	Description
1	**Hopper**: The hopper contains all tasks that do not have a due date, also known as unplanned tasks. Add new tasks, and group the list of tasks by assigned activity, WBS, activity or task code, company, or none. You can also drag tasks into the planning board or planning buckets. Each hopper band indicates the number of unplanned tasks assigned to the activity. Bands without numbers have zero assigned tasks. Right-click a hopper band to select all tasks assigned to that activity in the hopper, highlight the activity on the planning board, or set the activity as a quick filter.

Item	Description
2	**Planning Board**: The planning board displays tasks that have due dates, in weekly or daily intervals. Drag a task to a new date on the planning board, into past or future planning buckets, or into the hopper to remove its due date. Each activity band indicates the number of assigned tasks. Bands without numbers have zero assigned tasks. Right-click an activity band to select all tasks assigned to that activity on the planning board, highlight the activity in the hopper, or set the activity as a quick filter.
	If a task plan is open on the planning board, the name of the task plan displays above the planning board, and the planning board adjusts to display swimlanes. See *Use Swimlanes on the Planning Board* (on page 124) for more information about using swimlanes.
3	**Tasks Cards**: Basic task cards are shown in the hopper and planning board. Each task card is colored according to its assigned company. The width of each card in the planning board denotes its duration. Icons on task cards indicate statuses of Complete, Committed, Overdue, Pending, and if a task has hand-offs or a proposed due date. Cards with diamonds indicate milestone tasks. See *Task Icon Reference* (on page 173) for icon descriptions.
	Enable configurable task cards to show a customized set of task details when a basic task card is double-clicked. If the size of the planning board columns are decreased beyond a certain point, smaller, more generic cards may be shown.
4	**Planning Board Options**: Change the hand-off mode that is selected. Display up to six weeks at a time in the calendar. When working in a task plan, you can enable full display of task data with activities shown in swimlanes by selecting **Tasks and Activities** or select **Tasks Only** to view only basic task cards in swimlanes on the planning board. Enable activity bands to assist you when assigning tasks to activities. Move the planning board time period to previous or future periods. Organize tasks to group them by best fit or by company. Apply quick filters to the tasks on the page.
5	**Planning Buckets**: Planning buckets display past and future weekly periods according to the currently applied filter. Move a task from the hopper or planning board into a bucket to place it in that time period.
6	**Hide Empty Lanes**: Use the **Hide Empty Lanes** toggle to organize swimlanes based on if the swimlane contains a task or task milestone.
	When the toggled off, empty swimlanes will display on the Work Plan page and allow you to add tasks to the empty swimlanes. By default, this option is toggled on, and empty swimlanes are hidden.
	Hide No Value Lanes: Use the **Hide No Value Lanes** toggle to hide swimlane levels that contain no data. For example, you may want to hide swimlane levels for newly created tasks on the board that have no assigned user. By default, this toggle is on to hide swimlanes with no value.

Item	Description
7	**Info Bar**: Use the info bar at the bottom of the planning board to view details for the selected task or activity. You can use the icons in the info bar to commit, complete, or view hand-offs on the selected task. The bar can be enabled in the view settings. The info bar will display the value for the attribute that is coloring the Task. If activity code is coloring the task, the info bar legend will show the code value assigned to the selected task. If no code value is assigned, or if no activity is associated with a task and color by is set to activity code, then the label will display "No Value Assigned".

Create a Task on the Work Plan Page

On the Work Plan page, create public tasks and task milestones manually, or use Microsoft Excel to create or update multiple tasks simultaneously.

To create a task on the Work Plan page:

▶ *Add a Task or Task Milestone on the Work Plan Page* (on page 105)
▶ *Create a Task by Import* (on page 107)

Add a Task or Task Milestone on the Work Plan Page

Add tasks to detail the work to be performed on your project. Add task milestones to mark the distinct phases of your project. Tasks added to the planning board have due dates. Tasks added to the hopper do not have due dates.

Depending on your needs, tasks can be added in a variety of ways. The Add button on the toolbar opens the Task Details dialog box, which you can use to complete the most common task fields. You can also quickly add a task with default values directly to the hopper or planning board, add a task as a predecessor or successor to an existing task, copy and paste an existing task to duplicate it, or add it directly from a swimlane.

To learn more about tasks, see *Understanding Tasks App Concepts* (on page 10).

To add a task or task milestone on the Work Plan page:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.
2) From the ☰ **Main Menu**, select ≡ᵛ **Tasks**, and then select **Work Plan**.
3) Add a task or task milestone using any of the following methods:
    a. Using the toolbar:
        1. On the toolbar, select ＋ **Add**. In the task details dialog box, select the **General** tab.
        2. **Type**: Select the ☑ **Task** or ◆ **Task Milestone** icon.

Note

- You can change the task type if the task is not complete and has no commitments.
- Task milestones do not support the Assigned User, Duration, Use Only Work Days, or Start Date fields.

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3. **Task Name**: Enter the name of the task.
   - The task card opens with the **Task Name** field in edit mode.
4. **WBS**: Select a WBS if the task needs to be associated with a WBS.
5. **Activity**: Select an activity if the task is required to complete the activity.
6. **Company**: Select the company responsible for performing work on the task.
   - The color picker displays the color that is selected for the company.
7. **Assigned User**: Select the user responsible for performing the task. The user must belong to the assigned company.
8. **Crew Size**: Enter the number of people needed to complete the task.
9. **Duration**: Enter the amount of time the task will take to complete.
   - **Use Only Work Days**: Select this option to allow only the project calendar's work days and ignore non-work days when determining the value for Start and Due Date.
10. **Due Date**: Select a date by which the task must be completed.
    - The **Start Date** field is read-only and is calculated based on the **Duration** and **Due Date** of the task.
11. **Proposed Due Date**: Propose an updated due date by which the task must be completed.
    - Select ✓ **Accept** to accept the proposed due date. The **Due Date** field will be updated with the accepted date.
12. **Completed Date**: The date that the task was completed. This date can be modified after the task is marked completed.
    - Select ✓ **Complete** to mark the task complete.
13. If task-based configured fields or codes exist in your workspace, you can select the **Additional Fields** tab to edit configured field and code values for the selected task. These values can also be displayed on other pages in the **Tasks** app.
14. Select **Save**.

Note Select **Create Another**, and then select **Save** to create the task without closing the dialog box.

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b. Add directly to the hopper:
   - In the hopper, under an activity band, select ⊕ **Add**. A new task is assigned to the activity with default values.
c. Add directly to the planning board:

- In the planning board, right-click an activity band, and then select **Add Task** or **Add Task Milestone**. A new task with default values is added on the day that you right-clicked and the Task Details or Configurable Task Card is displayed.

- In the planning board, right-click a swimlane, and then select **Add Task** or **Add Task Milestone**. A new task with default values is added on the day that you right-clicked and the Task Details or Configurable Task Card is displayed.

   d. Add tasks with hand-offs:

- Right-click a task in the hopper or planning board, and then select **Add Task Before**, **Add Task After**, **Add Task Milestone Before**, or **Add Task Milestone After**. A new task with default values is added as a predecessor or successor to the existing task and the Task Details or Configurable Task Card is displayed.

   e. Using copy and paste:

- Right-click a selection of one or more tasks in the hopper or planning board, and then select **Copy Tasks**. Right-click an activity band, and then select **Paste Tasks**. If you paste tasks on the planning board, the tasks are added on the day column that you right-clicked.

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

Tip

▶ Group tasks in the hopper by WBS, task code, or company if they do not have assigned activities.

▶ Select ⊟ **Tasks and Activities** to display activity bands in the hopper and planning board. Tasks can be added to the "No Activity" band if they do not have assigned activities.

▶ Sort activity bands by selecting Activity Name, Activity ID, Start Date, or Finish Date for tasks with assigned activities.

▶ Double-click a task to view the task details window or the task card. To view the configurable task card you must configure your task card settings. Follow the steps in *Customize Task Cards for a Project* (on page 95) to enable configurable task cards.

Create a Task by Import

Creating tasks and task milestones using Microsoft Excel enables you to use data from an outside system which can save you time from manual entry.

To create or update a task:

1) *Download an Import Template for Importing Tasks* (on page 107)
2) *Import Tasks from Microsoft Excel* (on page 108)

Download an Import Template for Importing Tasks

Download a Microsoft Excel template to use when importing tasks and task milestones. The template contains standard task fields that you can populate for new and existing tasks, as well as all current configured task fields.

To download an import template:

1) In the object selector, select ⚬ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ≡✓ **Tasks**, and then select **Work Plan** or **Task List**.

3) Select the **Actions** ▼ menu, and then select **Download Import Template**.

Tip

▸ The import template is downloaded as a Microsoft Excel file with the default file name TasksImportTemplate.

▸ The top two rows of the worksheet are required when importing tasks from a spreadsheet. You can delete unused columns, but do not change the data in these rows.

▸ You cannot import tasks in the context of a program.

▸ Review the Instructions worksheet on the first tab of the spreadsheet for helpful tips on populating the import template.

Import Tasks from Microsoft Excel

You can import tasks and task milestones into the application from a Microsoft Excel (.xls or .xlsx) file. After downloading the import template, follow the instructions to create or update tasks in the spreadsheet. You cannot update committed or completed tasks. 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 tasks from Microsoft Excel:

1) In the object selector, select ⚬ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ≡✓ **Tasks**, and then select **Work Plan** or **Task List**.

3) Select the **Actions** ▼ menu, and then select **Import**.

4) In the **Import Tasks** dialog box, select ••• **Browse**, select a file, and select **Import**.

Tip

You cannot import tasks in the context of a program.

Manage Tasks on the Work Plan Page

Manage Tasks Video

Plan your tasks on the Work Plan page by adding them to the planning board. Add a new task plan or open an existing task plan to organize the planning board by swimlanes. Add hand-offs between tasks to define the sequence in which they will be accomplished. View a timeline of your work in daily or weekly intervals, moving individual tasks between past, present, and future periods. Assign constraints to tasks to indicate the items that are preventing the tasks from starting. When ready, commit to work on your tasks, and mark them completed after the work has been performed. All of these processes can be performed as many times as necessary and in any order.

Many of the processes below can be performed using basic or *configurable task cards* (see "*Customize Task Cards for a Project*" on page 95). Both card types support right-click menu functionality and the selection of *status icons* (*https://docs.oracle.com/cd/E80480_01/English/user_guides/task_management_user_gui de/224775.htm#t224775*) on the card. Configurable task cards also support the editing of task values without opening the Task Details dialog box.

To modify tasks on the Work Plan page:

▸ *Use Swimlanes on the Planning Board* (on page 124)
▸ *Add a Hand-off on the Work Plan Page* (on page 109)
▸ *Move a Task on the Work Plan Page* (on page 111)
▸ *Modify Task Details on the Work Plan Page* (on page 112)
▸ *Add a Crew Size Estimate on the Work Plan Page* (on page 114)
▸ *Propose and Accept a Task Due Date on the Work Plan Page* (on page 114)
▸ *Manage Task Constraints on the Work Plan Page* (on page 115)
▸ *Commit to a Task on the Work Plan Page* (on page 117)
▸ *Recommit to a Task on the Work Plan Page* (on page 118)
▸ *Complete a Task on the Work Plan Page* (on page 119)

Add a Hand-off on the Work Plan Page

Add hand-offs between tasks to order the work in a logical sequence. A hand-off signifies the next task to be performed after its preceding task has been completed. Use the Hand-offs panel to view a network diagram of the tasks in a hand-off sequence. Hand-offs can be created between tasks with the same, different, or no activity assignments. You can add hand-offs between two tasks, between two task milestones, or between a task and a task milestone.

To learn more about hand-offs, see *Understanding Tasks App Concepts* (on page 10).

To add a hand-off on the Work Plan page:

1) In the object selector, select ⅄ **Project**, select **View Projects List**, and then select a project name.
2) From the ☰ **Main Menu**, select ☰✓ **Tasks**, and then select **Work Plan**.
3) Add a hand-off using any of the following methods:
   a. Using the **Task Details** dialog box:
      1. Right-click a task in the hopper or planning board, and then select **View Task Details**. In the **Task Details** dialog box, select the **Hand-offs** tab.
      2. In the **Predecessors** or **Successors** section, select ＋ **Add**, and then select one or more tasks to add as predecessors or successors to the current task.

         Note The **Select Task** dialog box enables you to filter the list of available tasks by tasks with the same activity assignment as the current task or by tasks with any activity assignment. This includes any task without an activity assignment.

      3. Select **Select**.

4. In the **Type** field, select the hand-off relationship between the two tasks.

5. (Optional) In the **Lag** field, enter the lag for the hand-off relationship. Select **Lag - Use Only Work Days** if you want the lag duration to only include work days.

6. Select **Save**.

b. Using the right-click menu:

- Right-click a task, and then select **Add Task Before**, **Add Task After**, **Add Task Milestone Before**, or **Add Task Milestone After**. A hand-off path is created between the original task and the new task, even if the original task has existing hand-offs.

c. Using group selection:

- Select a group of tasks, right-click the selection, and then select **Add Hand-offs**. Hand-offs are created between the tasks in the order that they were selected, except for tasks with due dates, which are arranged in the chain from earliest to latest.

  You can also right-click an activity band in the hopper or planning board, and then select **Select All**. Right-click the selection, and then select **Add Hand-offs**. Using this method, hand-offs are created between the tasks in the order that they appear.

4) After hand-offs are added to a task, select the ⊘ **Hand-off Flow** icon on a task card or in the info bar, or right-click the card and select **View Hand-offs** to open the **Hand-off Flow** panel.

a. In the **Hand-off Flow** panel:

- Use the Pan, Zoom In, Zoom Out, or Zoom to Fit option to see the complete hand off flow for a large number of tasks.

- Reset zoom settings, hide hand-offs, or adjust **Predecessor Levels** and **Successor Levels**. The default number of predecessor and successor levels for new users is three.

5) All changes made to this page are saved automatically.

Tip

▸ In the hopper or planning board, right-click one or more task cards and select **Remove Hand-offs**. This option removes all hand-offs from the tasks in the selection.

▸ A Finish to Start hand-off is created by default when a successor task's due date is after the predecessor's due date. A Finish to Finish hand-off is created by default when both tasks have the same due date. The hand-off type for tasks with different due dates can be Finish to Start, Finish to Finish, or Start to Start. The hand-off type for tasks with the same due date can only be Finish to Finish.

▸ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

▸ ⊘ **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.

  ▸ ↻ **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

Move a Task on the Work Plan Page

The Work Plan page enables you to plan your tasks and task milestones in an interactive manner similar to an actual planning board. Tasks can be moved to and from the hopper, planning board, or planning buckets. When moving a task to a date on the planning board, the date selected becomes the due date of the task. Move a task from the planning board to the hopper to remove its due date. Move a task to a planning bucket to place it in a past or future week without navigating away from the current view.

When grouping by tasks and activities, you can move tasks to different activity bands to change their activity assignments. Drag and drop or paste tasks directly on the band to move them. When an activity band contains task assignments, the band displays the total number of tasks. Move a task to the "No Activity" band to remove its activity assignment. Tasks set to Use Only Work Days may have their due dates affected by non-work time on the planning board.

When swimlanes are applied, an activity band without task assignments displays by default beneath the associated WBS or activity code value. This helps you quickly identify unassigned areas to be moved, or create task assignments.

To move a task on the Work Plan page:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☰✓ **Tasks**, and then select **Work Plan**.

3) In the hopper or planning board, select one or more tasks.

4) Do any of the following:

   ▸ **Modify the Due Date**: With *configurable task cards* (see "*Customize Task Cards for a Project*" on page 95) enabled, double-click a basic task card, and then select the Due Date field on the configurable task card to edit it. With configurable task cards disabled, double-click a basic task card to open the **Task Details** dialog box. Enter or remove the due date for the task, and then select **Save**. Tasks with due dates will be placed on that date on the planning board. Tasks without due dates will be placed in the hopper.

   ▸ **Cut and paste**: Right-click your selection, and select **Cut Task**. Right-click a destination for your selection, such as a day column, activity band, planning bucket, or the hopper, and then select **Paste Task**. Your selection is moved.

   ▸ **Copy and paste**: Right-click your selection, and select **Copy Task**. Right-click a destination, and then select **Paste Task**. Your selection is duplicated. Hand-offs are not copied with tasks.

   ▸ **Drag and Drop**: Select a task, then drag and drop your selection to another destination. As you drag your selection, the longest duration in the selection is highlighted.

      Note When you move a task into a swimlane with existing assignments, the task changes its assignments to match the swimlane. A confirmation message will display if at least one swimlane attribute causes the task or

its dependent tasks to change.

▸ **Move to Hopper**: Right-click your selection, and select **Move to Hopper**. The due dates of the tasks in the selection are removed, and the tasks are placed in the hopper.

▸ **Move to Planning Board**: Right-click your selection, and select **Move to Planning Board**. Tasks in the selection are placed on the planning board with a start date of today or the next available work day.

▸ **Delete**: Right-click your selection, and select **Delete Task**. Select **Yes** to confirm.

5) All changes made to this page are saved automatically.

Tip

▸ Sort activity bands by Activity Name, Activity ID, Start Date, or Finish Date to organize your list of tasks before moving them across the planning board.

▸ If you cut and paste or drag and drop one or more chains of tasks, the most recently selected task in each selected chain is used as the driving task. A driving task's placement on the planning board, hopper, or weekly bucket determines its due date, and all other tasks in the same chain are placed on the planning board in relation to the driving task. The current hand-off mode determines the movement of the tasks in a chain.

▸ Paste your selection of tasks in a day column to maintain the assigned activity of each task in the selection. Paste your selection directly on an activity band to move all tasks in the selection to the activity that you selected.

▸ When moving a task into a planning bucket, the task due date is set to the first available valid work day of that time period. Select a bucket to display its time period on the planning board.

▸ You cannot move tasks with commitments into the hopper. You cannot move completed tasks.

▸ The borders of a task appear as dashed lines if the task occurs on a non-work day.

▸ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

▸   **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.

▸   **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

Modify Task Details on the Work Plan Page

You can modify task details on the Work Plan page in a variety of ways. Use the Task Details dialog box to view and edit all of the details associated with a specific task. Right-click a task card or select the icons on a task card to quickly access the most common task functions, including commitments, task completion, viewing discussions or constraints, and adding or removing hand-offs.

To modify task details on the Work Plan page:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ⩦ **Tasks**, and then select **Work Plan**.

3) On the **Work Plan** page, modify task details using any of the following methods:

  ▸ Right-click a task in the hopper or planning board, and then select **View Task Details**. In the **Task Details** dialog box, you can edit task information, commit or recommit to tasks (milestones do not support commitments), assign and manage constraints, adjust crew size, add hand-offs, and contribute to a task discussion.

  ▸ With *configurable task cards* (see "*Customize Task Cards for a Project*" on page 95) enabled, double-click a basic task card to edit the task details most important to you. Available options depend on the fields you added in the task card settings.

  ▸ Right-click a basic or configurable task card to access the most common task functions. Available options depend on the number of tasks selected, the selected task types, and whether the selected tasks have existing commitments or hand-offs.

  ▸ Cut and paste or click and drag a basic task card on the planning board to modify its **Due Date**. Click and drag the edges of a task to modify its duration and due date. Task milestones do not have durations. An activity band containing a planned task that exists outside its activity start date or after its end date will display a calendar with a status icon and have a dashed border. This band will also extend farther than other activity bands on the planning board.

    > **Note** When you move a task into a swimlane with existing assignments, the task changes its assignments to match the swimlane. A confirmation message will display if at least one swimlane attribute causes the task or its dependent tasks to change.

  ▸ On a task card in the planning board, select the ⊘ **Complete** icon to mark the task complete or the ⚏ **Commitments** icon to commit to a task without an existing commitment. Select the ⬤ **Pending** icon or the ⚏ **Commitments** icon to open the **Commitments** tab of the Task Details dialog box if a commitment already exists. These icons are also available in the info bar at the bottom of the page.

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

Tip

▸ To delete a task, open the **Task Details** dialog box, select **Delete**, and then select **Yes**. You can also select one or more task cards and press **Delete** to delete them.

▸ After a task is completed, you can no longer edit **Company**, **Assigned User**, **Duration**, **Due Date**, **Proposed Due Date**, or **Commitment** fields. Remove the **Completed Date** to enable these fields.

▸ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

▸ 🔗 **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.

▶ ⟳ **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

Add a Crew Size Estimate on the Work Plan Page

Add a crew size estimate to a task on the Work Plan page to make the detail more visible as you track task progression on the planning board. This can be done to tasks when they are still in the hopper and after they've been moved to the planning board by editing Task Details.

To adjust crew size estimates, you must have the Project Edit privilege for Tasks for My Company or Tasks for All Companies enabled at the workspace level.

> **Note** You can assign a crew size to any task type except for task milestones.

To add a crew size estimate to a task on the Work Plan page:

1) In the object selector, select ⤬ **Project**, select **View Projects List**, and then select a project name.
2) From the ☰ **Main Menu**, select ☰✓ **Tasks**, and then select **Work Plan**.
3) In the hopper or on the planning board, right-click a task, and then select **View Task Details**.
4) On the **General** tab, add an estimate in the **Crew Size** field. You can enter a number or use the up or down arrows.
5) Select **Save**.

Tip

Show or hide crew size on task cards from the project **Summary & Settings** page. Crew size is set to Show by default for new views, but it must be enabled for existing views.

Propose and Accept a Task Due Date on the Work Plan Page

When a task is part of a hand-off chain, directly modifying its due date may affect the due dates of other tasks in the chain. If the hand-off chain contains tasks from different companies, each company should be aware of the potential changes to their tasks. To solve this issue, updated due dates can be proposed without affecting the actual task due date. This enables the companies with tasks in the chain to review proposed due dates before they are accepted.

When a proposed due date is accepted, it is removed from the task and becomes the current task due date. If the accepted due date occurs on a non-work day, the Use Only Work Days setting is cleared and the due date is updated. If a task with a proposed due date is committed, the proposed due date is removed, and the current due date is updated to match the committed due date.

To learn more about task due dates, see *Understanding Tasks App Concepts* (on page 10).

To propose and accept a task due date on the Work Plan page:

1) In the object selector, select ⤬ **Project**, select **View Projects List**, and then select a project name.
2) From the ☰ **Main Menu**, select ☰✓ **Tasks**, and then select **Work Plan**.

3) On the **Work Plan** page, right-click a task in the hopper or planning board, and then select **View Task Details**.

4) In the **Task Details** dialog box, in the **Proposed Due Date** field, select a date by which the task must be completed.

5) Select **Save**.

6) When you are ready to accept the proposed due date, you can do either of the following:

   ‣ In the **Task Details** dialog box, select ✓ **Accept**.

   ‣ Right-click a basic or configurable task card, and then select **Accept Proposed Due Date**.

7) All changes made to this page are saved automatically.

Tip

‣ If *configurable task cards* (see "*Customize Task Cards for a Project*" on page 95) are enabled, you can add a proposed due date directly on the card.

‣ The 📇 **Proposed Due Date** icon on a task card or in the info bar indicates that the task has a proposed due date that has not been accepted.

‣ Overdue tasks display a calendar with a status icon to indicate that they need to be adjusted.

‣ An activity band containing a planned task that exists outside its activity start date or after its end date will display a calendar with a status icon and have a dashed border. This band will also extend farther than other activity bands on the planning board.

‣ You cannot propose a due date on completed tasks.

‣ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

‣ ⊘ **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.

   ‣ ⟳ **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

Manage Task Constraints on the Work Plan Page

Task constraints indicate the items that need to be addressed before work on the task can begin. When a task constraint is present, a status icon displays on the task card in the hopper or on the task card in the planning board. Clicking on the constraint icon opens the Task Details dialog box on the Constraints tab for full details and menu options to manage the constraint. Constraint details include the status of the constraint, the date it is needed by, who is responsible for addressing it, and the type of constraint. Icons next to the Date Needed field indicate if the constraint is overdue or needed within the next 7 days.

Use the Constraints tab in the Task Details dialog box to monitor the current status of all constraints assigned to a task. To only view tasks on the page that have at least one constraint, select **Tasks With Constraints** from the Constraints quick filter.

To learn more about task constraints, see *Understanding Tasks App Concepts* (on page 10).

Assign a Task Constraint

To assign a constraint to a task on the Work Plan page:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☰✓ **Tasks**, and then select **Work Plan**.

3) Right-click a task in the hopper or planning board, and then select **View Task Details**. In the **Task Details** dialog box, select the **Constraints** tab.

4) Select **Assign**. In the **Select Constraints** dialog box, search for a constraint in the **Available** list, and then select one or more constraints to associate with the current task.

5) Select **Select**.

6) Select **Save**.

7) All changes made to this page are saved automatically.

Edit or Remove a Task Constraint

To edit a task constraint on the Work Plan page:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☰✓ **Tasks**, and then select **Work Plan**.

3) In the hopper or planning board, hover over and select the **Constraints status icon** on a task card to open the **Constraints** tab in the **Task Details** dialog box. You can also access the **Constraints** tab by right-clicking a task in the hopper or planning board, and then selecting **View Task Details**.

4) In the **Task Details** dialog box, select the **Constraints** tab and edit the Constraint as needed in the **Constraints** detail window:

   ▸ View a constraint: Select a constraint. You will be taken to the **Constraints** page.

   ▸ Assign constraints: Select one or more constraints, and then select the ⚙ **Context** menu. Select **Assign** to assign the constraint to another task.

   ▸ Remove constraints: Select one or more constraints, and then select the ⚙ **Context** menu. Select **Remove** to remove and delete the selected constraint association to the task.

   > **Note** Removing a constraint from a task on the Work Plan page does not delete the constraint, it only removes the association to the task.

Tip

Select the ✏ **Notes** icon next to a constraint to view the notes associated with the constraint. Constraints without notes will not show this icon.

Commit to a Task on the Work Plan Page

Commit to tasks to agree to perform their work by a specified date. In the Task Details dialog box, you can track the commitment history of a task, including committed dates, due dates, and reasons missed. You cannot commit to task milestones or completed tasks. If a proposed due date exists for a task, it will be displayed on the Commitments tab. This enables you to review the proposed due date before selecting the same or a different due date for the commitment. When any task is committed, the proposed due date is removed from the task, and the current due date is updated to match the committed due date.

To learn more about task commitments, see **_Understanding Tasks App Concepts_** (on page 10).

To commit to a task on the Work Plan page:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☲ **Tasks**, and then select **Work Plan**.

3) Commit to a task using any of the following methods:

   ‣ Select the 🔗 **Commitments** icon on a planning board task card with no prior commitments to commit to the task without opening the **Task Details** dialog box. You can also select the icon in the info bar.

   ‣ Right-click a task in the hopper or planning board, and then select **View Task Details**. In the **Task Details** dialog box, select the **Commitments** tab. Select a **Due Date** for the task, and then select **Commit**. Select **Save**.

   ‣ Commit to one or more tasks by right-clicking a selection and selecting **Commit Tasks**. Only tasks in the selection without an existing commitment will be committed. For pending tasks, the committed due date is set to the task's current due date. For new tasks, the committed due date is set to today's date.

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

Tip

‣ To delete the most recent commitment, select the 🗑 **Delete** icon on the **Commitments** tab, and then select **Yes**. The task displays the due date of the next commitment in the list.

‣ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

‣   🔗 **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.

‣   🔄 **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

Recommit to a Task on the Work Plan Page

If you are unable to meet the due date of a previous commitment, you can recommit to work on the task. Select one or more reasons for missing the previous commitment, and then select a new due date for the recommitment. You can optionally add comments to further explain the recommitment. Track task commitment history on the Commitments tab of the Task Details dialog box. If a proposed due date exists for a task, it will be displayed on the Commitments tab. This enables you to review the proposed due date before selecting the same or a different due date for the recommitment. When a task is committed, the proposed due date is removed from the task, and the current due date is updated to match the committed due date.

To learn more about task commitments, see *Understanding Tasks App Concepts* (on page 10).

To recommit to a task on the Work Plan page:

1) In the object selector, select 🔗 **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☱ **Tasks**, and then select **Work Plan**.

3) Recommit to a task using either of the following methods:

   ‣ On a task with commitments, select the 💬 **Pending** icon or the 👥 **Commitments** icon on a task card or in the info bar, or right-click the task card and select **Recommit** to open the **Recommit Task** dialog box.

   ‣ Right-click a committed task on the planning board, and then select **View Task Details**. In the **Task Details** dialog box, select the **Commitments** tab.

4) In the **Recommit Task** or **Task Details** dialog box, complete the following fields:

   ‣ **Due Date**: Select a due date for the recommitment.

   ‣ **Reasons Missed**: Select one or more reasons for missing the previous commitment.

   > **Note** You can use the **Select Reasons Missed** dialog box to add new reasons. Select **Manage Reasons** to view the Reasons dictionary.

   ‣ (Optional) In the **Comments** field, add any comments you may have regarding the recommitment. Comments for each recommitment are visible in the Commitments detail window.

   ‣ Select **Recommit**.

   ‣ (Task Details dialog box only) Select **Save**.

5) All changes made to this page are saved automatically.

Tip

‣ To delete the most recent commitment, select the 🗑 **Delete** icon on the **Commitments** tab, and then select **Yes**. The task displays the due date of the next commitment in the list.

‣ You cannot commit to task milestones.

‣ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

- 🔗 **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.
    - 🔁 **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

Complete a Task on the Work Plan Page

- 102578_Demo

Mark a task or task milestone complete to indicate that all work has been performed on the task. After the task is completed, you cannot modify certain fields, including dates, company, and duration. To enable all fields on the task, remove the completed date.

When a task is marked complete, the completed date on the task is set to the task's due date if it is today's date or earlier. If the task's due date is blank or set to a future date, the completed date is set to today's date. A task's completed date can be modified to a past date after it is marked complete. A task's completed date cannot be set to a nonwork day if Use Only Work Days is enabled. Completing a task due in the future may affect the hand-off sequence of the task.

To complete a task on the Work Plan page:

1) In the object selector, select ⚲ **Project**, select **View Projects List**, and then select a project name.
2) From the ☰ **Main Menu**, select ⩼ **Tasks**, and then select **Work Plan**.
3) Complete a task using any of the following methods:
    - Right-click a task in the hopper or planning board, and then select **View Task Details**. In the **Task Details** dialog box, select ✓ **Complete**. Select **Save**.
    - Select the ⊘ **Complete** icon on a planning board task card.
    - Select a task in the hopper or planning board, and then select the ⊘ **Complete** icon in the info bar.
    - Right-click a selection of one or more tasks, and then select **Complete Tasks**.
4) All changes made to this page are saved automatically.

Tip

You cannot mark a task complete if:

- The task status is set to Pending and there are one or more commitments.
- The task is assigned to another user, and you do not have the required Commit to and Complete All Users' Tasks security privilege.

Task Plan Overview

Task Plan Overview Video

Add a task plan to the Work Plan page to help your project team visualize tasks and related activities that need to be accomplished throughout your project's lifecycle by arranging task cards on the planning board using swimlanes. When you add a task plan, you can identify swimlane categories that organize task cards by assigned user, company, activity code, task code, or Work Breakdown Structure (WBS). This will help your team more easily identify responsibilities and use the most efficient workload distribution during the planning phase. You can create multiple task plans and share them with your team, then manage their details as your project evolves. The name of the open task plan displays above the planning board, which is especially useful for teams working with several task plans.

Because a task plan can contain many shared objects, such as WBSs, the application makes it easy to collaborate with other users on your team who might be editing related items. For example, if another user deletes or reassigns a WBS that is used in a task plan, you'll receive a notification. The assignment will then shift to the newly designated or parent WBS node, depending on user selection.

Associate swimlanes with a task plan when you add the task plan on the Work Plan page from the **Actions** ▼ menu in the top toolbar. Enable full display of task cards with activities in swimlanes by selecting ▤ **Tasks and Activities**, or select ▦ **Tasks Only** to view only basic task cards in swimlanes on the planning board.

> **Note** You must have Configure Task Plan privileges enabled in Project permissions to add, edit or delete task plans.

Add or Open a Task Plan on the Work Plan Page

Add or open a task plan to display specific swimlane categories on the Work Plan page planning board. Creating a task plan with swimlanes can be especially useful when organizing task cards on the planning board by hierarchical objects such as WBS or codes. One of the most important details to consider is the starting level for your swimlanes, which is included in the total number of levels that display.

You can add as many task plans as you need for planning purposes but be sure to name them something significant to the project or swimlanes that you associate to the task plan. You will see the name of the open task plan display above the planning board.

> **Note** You must have Configure Task Plan privileges enabled in Project permissions to add, edit, or delete task plans.

Add a Task Plan

To add a task plan from the Work Plan page:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

2) From the ≡ **Main Menu**, select ≡ỉ **Tasks**, and then select **Work Plan**.

3) From the **Actions** ▼ menu, select **Add Task Plan**.

4) Add task plan information in the **Add Task Plan** panel:

a. Create a name for your task plan in the **Task Plan Name** field.

b. Select a swimlane category from the following options in the **Swimlane** list:

- Activity Code
  - Activity Code: Select an activity code for your swimlanes.
  - How Many Levels?: Select the total number of code value levels to display for the selected code. You can display up to three levels of hierarchical code values.
- Assigned User
- Company
- Task Code
  - Task Code: Select a task code for your swimlanes.
  - How Many Levels?: Select the total number of code value levels to display for the selected code. You can display up to three levels of hierarchical code values.
- Work Breakdown Structure (WBS)
  - WBS: Select the starting point, or parent WBS level, for your swimlanes.
  - How Many Levels?: Select the total number of levels to display including the parent level and any children. You can display up to three levels including the parent, or starting level.

Note A minimum of one swimlane must be added to a task plan before you can create the task plan. You can add three swimlanes per task plan.

c. (Optional) Select **Add Swimlane** to add another swimlane category to the task plan.

5) Select **Add** to create the task plan and apply it to the planning board.

Open a Task Plan

To open a task plan on the Work Plan page:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.
2) From the ☰ **Main Menu**, select ☰⁞ **Tasks**, and then select **Work Plan**.
3) From the **Actions** ▼, select **Open Task Plan**.
4) Select a task plan from the ▼ **Select a Task Plan** menu in the **Open Task Plan** dialog box.
5) Select **Open** to open the task plan and apply it to the planning board. Any swimlane settings that you associated to the task plan will be visible on the planning board.

Edit or Close a Task Plan on the Work Plan Page

Edit an existing task plan to update its details or alter how swimlane information displays on the Work Plan page planning board as your project progresses. The name of the open task plan displays above the planning board.

> **Note** You must have Configure Task Plan privileges enabled in Project permissions to add, edit, or delete task plans.

Edit a Task Plan

To edit an existing task plan from the Work Plan page:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.
2) From the ☰ **Main Menu**, select ☰✓ **Tasks**, and then select **Work Plan**.
3) From the **Actions** ▼ menu, select **Edit Task Plans**.
4) Select a task plan and optionally update the following details:
   - **Task Plan Name**: Change the name of the task plan.
   - **Swimlane**: Adjust swimlane configuration. You can manage the details of up to three swimlanes, depending on how many exist in the open task plan.
   - **Delete**: Delete the task plan.
5) Select **Cancel** to discard your changes, or select **Save** to commit them.

Close a Task Plan

Once you're done updating and working in a task plan, select **Close Task Plan** from the **Actions** ▼ menu. This will close the open task plan and restore the previous view of the planning board.

Add a Task Plan: Example

This example demonstrates how to create a task plan to organize the Work Plan planning board to display specific WBS nodes for a project.

> **Note** You must have the Add Configure Task Plan privilege enabled in Project permissions to add task plans to a project.

A project manager wants to highlight tasks using the planning board to display certain WBS nodes that are part of a hotel project to facilitate a team discussion. As the planner, you've decided to create a task plan to better display related task information on the planning board using swimlanes. You must first create a task plan by adding all of the necessary information to display the number of swimlanes that you need on the planning board.

This screenshot demonstrates the steps the project planner uses to create a task plan,which begins with entering a task plan name and adding all of the details of the task plan.

Add a Task Plan

To add a task plan from the Work Plan page:

1) In the object selector, select ⅄ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☰ **Tasks**, and then select **Work Plan**.

3) Select the **Actions** ▼ menu, and then select **Add Task Plan**.

4) In the **Add Task Plan** panel complete the following:

   a. **Task Plan Name**: Create a name for your task plan, such as HOTEL WBS LEVEL 3.

   b. **Swimlane:** Select Work Breakdown Structure (WBS) as the swimlane category from the options in the list, and then complete the following:

      ▪ **WBS**: Select the starting point, or parent WBS level, for your swimlanes. In this case, the starting point is University Hill Hotel.

      ▪ **How Many Levels?** Select the total number of levels to display including the parent level and any children. You can display up to three levels including the parent, or starting level. In this example, the project manager chooses 3 levels, which means the parent level and two levels beneath it.

5) Select **Add** to create the task plan and apply it to the planning board.

This screenshot displays the planning board after the project planner in applies their new task plan. The only swimlanes that display, according to the settings for this task plan, are the parent level WBS, University Hotel, and two levels beneath it, Garage 1 and 2, and Building 1 and Building 2.
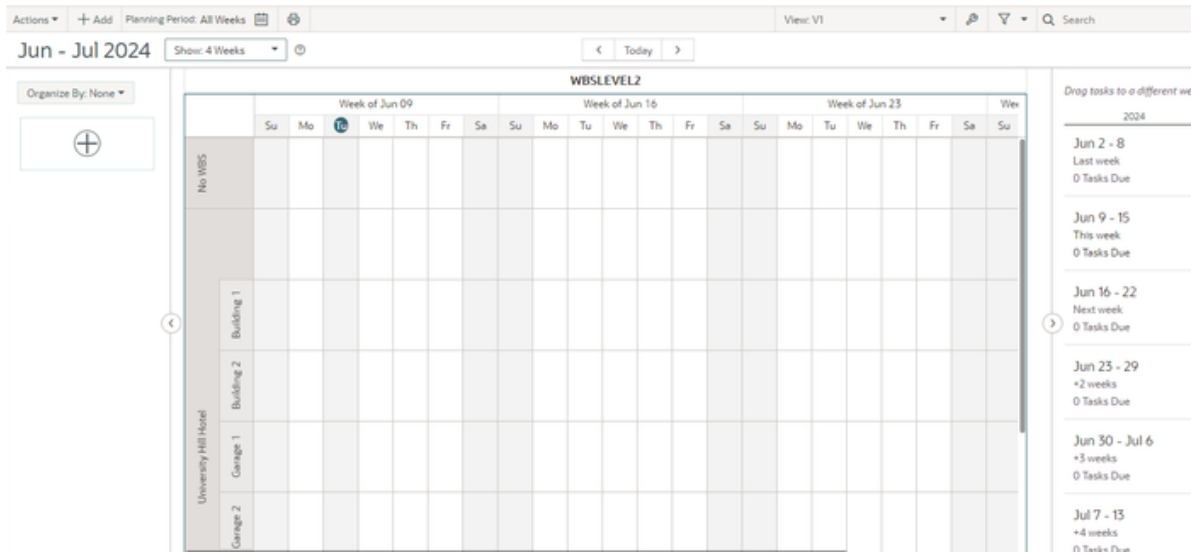
Use Swimlanes on the Planning Board

When you add or open a task plan on the Work Plan page, the planning board rearranges task cards by swimlanes, and the name of the open task plan displays above the planning board. Swimlanes arrange task cards on the planning board using horizontal lanes by any combination of assigned users, company, activity code, task code, or WBS depending on task plan settings applied to the Work Plan page. Organizing the planning board by swimlane categories enables you to track tasks based on the most relevant attributes for your project and to visualize responsibility in the workflow. Swimlane headers reflect the color selections made for task attributes in the Color Tasks by option in the Summary & Settings panel. This enables you to quickly identify companies or codes by color. See **Configure Task Color at the Project-level** (see "**Configure Task Color Defaults for a Project**" on page 73).

Display a task plan with swimlane categories on the Work Plan page planning board, and save the task plan to evaluate different plan versions later. Select and highlight specific swimlanes to help draw attention to task cards in specific swimlanes during planning sessions with other project members.

You can move existing tasks freely among swimlanes in the planning board or to and from the hopper. Add a new task directly to a swimlane using its right-click menu, then modify the details directly from the Work Plan page. An activity band without task assignments displays by default beneath the associated WBS or activity code value. This helps you quickly identify unassigned areas to be moved, or create task assignments.

> **Note** You must have the Configure Task Plan privilege enabled in

Project permissions to add, edit, or delete task plans.

To move existing task and activity data into or out of swimlanes on the planning board:

▸ **Cut and paste**: Right-click your selection, and select **Cut Task**. Right-click a destination for your selection, such as a day column, activity band, planning bucket, swimlane or the hopper, and then select **Paste Task**. Your selection is moved.

▸ **Copy and paste**: Right-click your selection, and select **Copy Task**. Right-click a destination, and then select **Paste Task**. Your selection is duplicated. Hand-offs are not copied with tasks.

▸ **Click and drag**: Click and drag your selection to another destination. If you drag and drop from one swimlane into another swimlane, the field assignment will change to match the destination swimlane.

▸ **Move to Hopper**: Right-click your selection, and select **Move to Hopper**. The due dates of the tasks in the selection are removed, and the tasks are placed in the hopper.

▸ **Move to Planning Board**: Right-click your selection, and select **Move to Planning Board**. Tasks in the selection are placed on the planning board with a start date of today or the next available work day.

> **Note** When you move a task into a swimlane with existing assignments, the task changes its assignments to match the swimlane. A confirmation message will display if at least one swimlane attribute causes the task or its dependent tasks to change.

▸ **Delete**: Right-click your selection, and select **Delete Task**. Select **Yes** to confirm.

To declutter the planning board:

▸ Select ⊟ **Tasks and Activities** in the upper toolbar. This option displays all task data with activity bands in the hopper and in swimlanes on the planning board. Tasks can be added to the "No Activity" band if they do not have assigned activities.

▸ Select ⊞ **Tasks Only** in the upper toolbar. This option allows you to declutter the planning board and to only view basic task information in swimlanes.

▸ Select **Hide Empty Lanes** toggle in the lower toolbar. This option is toggled on by default, so that the planning board hides empty swimlanes from view.

▸ Select **Hide No Data Lanes** toggle in the lower toolbar. This option is toggled to **Hide No Data Lanes**, by default, so that the planning board hides swimlanes with no data from view.

▸ Select ▽ **Quick Filters** and apply a filter. See *Configure and Apply Tasks Quick Filters* (on page 94).

> **Note** Applying too many filters to the Work Plan page can filter out all swimlanes and an empty state message will display. In the message, select **Manage Filters** to open the Filters tab in the Manage Views panel, and then adjust settings.

Tip

- To change an activity assignment on a task, move it over an activity band and drop it into the activity band in the swimlane.
- Print the planning board or create a PDF of your task plan that can be shared with your team. To learn more about printing options for the planning board, see ***Print the Planning Board*** (on page 133).

Customize Task Cards for a Project

Customize Task Cards Video

The Work Plan page and the Hand-offs page support the display of multiple task card types. You can customize default task cards, and apply them to both the Hand-offs page and the Work Plan page. Alternatively, you can create separate task card styles for the two Task pages. 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 is 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 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_gui de/224775.htm#t224775***).

When configurable task cards 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. When you create a task, the task card will immediately be opened and the name field will be in edit mode. 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. To customize task card settings for a project, you must have the Edit privilege enabled for projects.

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) ***Navigate to the project settings page*** (see page 208)
2) Select the **Tasks** tab, and then select **Cards**.
3) On the **Cards** page, in the **Card Appearance** list, choose a page whose task card display you'd like to customize:
   - **Default**: Select this option to customize default task cards on both the **Hand-offs** page and **Work Plan** page.
   - **Hand-offs page**: Select this option to customize task cards on the **Hand-offs** page.
   - **Work Plan page**: Select this option to customize task cards on the **Work Plan** page.
4) In the **Basic Task Card** section, configure basic task card settings. View the changes in the **Preview** section:
   - **Show Task Icons**: Display icons on basic task cards on the planning board.

‣ **Show Crew Size**: Display the crew size estimate and icon on basic task cards. This option is enabled by default.

‣ **Wrap Text on Tasks**: Wrap long task names to the next line of a basic task card.

5) In the **Configurable Task Card** section, select **Enable Configurable Task Card**, and then customize. View the changes in the **Preview** section:

‣ 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.

6) In the **Icons** dropdown, choose to show task icon at the top of the card, bottom or the card, or not at all.

7) In the **Font Size** dropdown, choose to show a standard font size across all fields or enable each field value to fit the available cell space.

8) Select **Apply**.

9) All changes made to this page are saved automatically.

Tip

‣ 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.

Customize the Work Plan Display

You can customize the hopper and planning board sections of the Work Plan page according to your preferences. Display up to six weeks at a time on the planning board. Group tasks in the hopper by activity, WBS, Activity Code, Task Code, Company, or None. Apply filters to reduce the number of visible tasks. Enable activity bands to sort the display of tasks according to their assigned activity name, ID, start date, or finish date. Tasks not associated with any activities are displayed below a band called "No Activity." Activity bands containing assigned tasks display the number of tasks beside the activity name. You can right-click or expand the activity band for more task information.

To customize the Work Plan display:

1) In the object selector, select ⤴ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☰⌄ **Tasks**, and then select **Work Plan**.

3) You can perform the following actions in different areas of the **Work Plan** page to customize the display:

▸ Select 🔧 **Settings** to configure *planning period filters* (see "*Configure and Apply Filtering*" on page 184), *quick filters* (see "*Configure and Apply Tasks Quick Filters*" on page 94), task cards, page-specific *formatting options* (see "*Configure Formatting*" on page 201), and task counts.

▸ In the **Show** list on the **Work Plan page**, select **Day** to display tasks by individual days. Select a **Weeks** option to display between one and six weeks on the planning board. The number of displayed weeks may be constrained by the current planning period.

▸ Change the time period displayed on the planning board by selecting the previous or next arrows above the planning board. Select **Today** to return the planning board display to the current day or week.

With a custom planning period enabled, select ≪ **Skip to beginning** or ≫ **Skip to end** to change the planning board display to the first or last day or week in the period.

> **Note** Select ⑦ **More Info** in the planning board options to view the current planning period dates.

▸ Select ⊞ **Tasks Only** to display only tasks and task milestones in the hopper and planning board. Select ☰ **Tasks and Activities** to display tasks and task milestones grouped by their assigned activities.

> **Note** When a task's due date falls outside of its assigned activity's start and finish dates, the activity grouping band border appears as a dashed line.

▸ Select options from the **Organize By** list in the hopper to group tasks and consolidate items by shared categories.

- **Activity:** Group tasks by activity. Use the arrow to expand additional activity sort order choices: **Name**, **ID**, **Start Date**, or **Finish Date.** Each selection has an ascending or descending option.
- **Code**: Group tasks by **Activity Code** or **Task Code**.

▸ Select options from the **Organize By** list in the planning board to modify planning board views. Select **Best Fit** to minimize unused space. Tasks with hand-off chains are grouped largest to smallest by chain length, and then alphabetically. Select **Company** to group tasks by their assigned companies. When grouping by company, task hand-off chains are ignored.

▸ Drag the edge of any column on the planning board to change the size of all columns. This enables you to zoom in or out of the timescale. If the column size is decreased enough, smaller cards are used to represent tasks. This enables the application to display more tasks on the planning board. You can still move a card to change its due date, drag its edge to change its duration, and view status icons displayed on the card. Right-click a card to modify task details, commitments, and hand-offs, mark the task complete, or delete the task. Increase the column widths to return the task cards to their normal appearance.

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

Tip

You can control whether activities in the Work Plan display by activity ID only or by activity ID and activity name by configuring Name and ID Display Format options on the Preferences page. See *Configure Name and ID Display Format* (*https://docs.oracle.com/cd/E80480_01/help/en/user/84776.htm#t84776*).

Configure and Apply Tasks Quick Filters

You can use quick filters to refine the data displayed on a page. Configure which filters you want to appear in the quick filters list.   In the quick filters list, select one or more values on which to filter. Use multiple quick filters to further reduce how much data is displayed. For example, you can create a filter to show only specific task codes related to Company A and Company B on the Work Plan page. Clear a filter to show more results. Quick filter value selections are not saved with the view.

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

▸ Hand-offs
▸ Work Plan
▸ Constraints
▸ Task List

To configure and apply Tasks quick filters:

1) Navigate to a page, and then select 🔧 **Settings**.
2) In the **Manage Views** panel, select the **Quick Filters** tab.
3) In the **Show** section, select the quick filters you want to show in the quick filters list.
4) Select **Save**, and then select ✕ **Close**.
5) In the ▽ **Quick Filters** list, select applicable filter values, or select all.
6) To remove an applied filter, expand a filter list, and then select **Clear Filter**.

    To remove all applied filters, in the **Quick Filters** list, select **Clear All**.

Tip

The **Work Plan** page supports additional quick filter functionality:

▸ To quickly set additional activities or WBS as quick filter objects, select one or more activity bands or WBS nodes in the hopper or planning board, right-click the selection, and then select **Set Activities as Quick Filter** or **Set WBS as Quick Filter**. To do this, the **Activity** and **WBS** quick filters must be added to the view.

▸ To apply codes as quick filter objects, select one or more codes in the hopper or the planning board, right-click the selection, and then select **Set Code as Quick Filter**. To do this, you must first add **Codes** quick filters to the view and select up to five codes from the list of available options.

▸ You can select and apply parent, subordinate, or all objects in a hierarchy as quick filter objects. First select the parent level to expand all child levels beneath the selection. Select **Set Code as Quick Filter** or **Select WBS as Quick Filter**, and then select the objects.

View Activity Details in the Tasks App

On pages in the Tasks app, select an activity name to view information about the activity, including displays general activity details and task counts by category.

To use this feature on the Work Plan page, the Tasks and Activities grouping option must be selected or the task plan must be open and set to **Tasks and Activities** view. On the Hand-offs page, the page must be organized by Activity. On the Task list page, the table must be grouped by Activity or the Activity column must be displayed.

You can also perform this task on the Task List page in the context of a program.

To view activity details in the Tasks app:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☲ **Tasks**, and then select **Work Plan**, **Hand-offs**, or **Task List**.

   Beside each activity name the total number of tasks displays. If no number displays, there are no assigned tasks.

3) Select an activity name to display the activity detail popover containing more task information. The activity detail popover displays project, WBS, and activity details, such as percent complete, duration information, and total float, as well as the following task counts:

   ▶ **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.

Tip

▶ Select the activity name when viewing activity details to go directly to the activity on the Activities page.

▶ Task counts are for public tasks only and do not include private tasks.

▸ When activity date indicators are enabled, the activity details display indicators for the Start and Finish dates of activities that have actual dates or assigned constraints. When the As Late As Possible constraint is selected, the constraint indicator is not displayed. See Configure Activity Date Indicators to enable indicators.

▸ To make Activity Start and Finish dates more prominent in the Task List Page table, you can configure Activity Start and Activity Finish dates as columns. Select 🔧 **Settings**, and then select **Columns**.

▸ To choose which task counts to display in the popover, select 🔧 **Settings**, and then select **Task Counts**.

Set Task Notification Preferences

Changes in task details have the potential to impact your project's schedule performance. You can stay better informed on task updates by setting up task notifications. When a proposed due date is entered on a task or if a task becomes overdue, you can choose to receive a notification in the application's Inbox, your email, or both. You can adjust the number of notifications you receive by selecting a notification frequency of immediate, daily, or weekly. You can also choose to be notified for all tasks or only those tasks to which you are assigned.

All users can set their own notification preferences if they have access to the project. Users with the privilege to set notification preferences for others can also configure notification preferences on behalf of other users and configure a default set of preferences for all users assigned to at least one task in the project. This privilege is intended for application administrators and superintendents responsible for overseeing other users. The default set of preferences do not apply to users who configure their own set of preferences or have their own set of preferences configured for them.

Task notification preferences are set per project and can be configured on the Work Plan, Hand-offs, and Task List pages. The preferences are the same across all pages. Notifications are disabled by default for all users.

To set task notification preferences:

1) In the object selector, select ⤳ **Project**, select **View Projects List**, and then select a project name.

2) From the ≡ **Main Menu**, select ⩗ **Tasks**, and then select **Work Plan**, **Hand-offs**, or **Task List**.

3) Select the **Actions** ▼ menu, and then select **Set Notification Preferences**.

4) In the **Set Notification Preferences** dialog box, select **Assign User** to add or remove users from the list, or select the option whose preferences you want to set:

> **Note** This section is only visible to users with the required privilege.
> Users without the privilege will only see preferences for themselves.

▸ **My Preferences**: Configure your own notification preferences.

▸ **Task Assigned User (default preferences)**: Configure the default notification preferences for all users assigned to at least one task. These preferences do not apply to users with their own configured preferences.

  ▸ **Existing User**: Select the name of a user in the list to configure notification preferences on their behalf.

5) In the **Preferences** section, configure the following settings for the **Overdue Due Date** and **Proposed Due Date** notification types:

> **Note** Each notification type has its own set of preferences and notifications.

  a. **Inbox**: A notification is sent to the selected user's application Inbox.
  b. **Email**: A notification is sent to the selected user's email.
  c. **Frequency**:
    ▪ **Immediate**: A notification is sent as soon as a task meets your notification criteria.
    ▪ **Daily Digest**: A daily notification is sent at midnight with a list of tasks that currently meet the notification criteria.
    ▪ **Weekly Digest**: A weekly notification is sent at midnight on Sunday with a list of tasks that currently meet the notification criteria.

6) Select **Receive notifications for only my assigned tasks** to limit notifications to only tasks to which the selected user is assigned. If this option is disabled, the selected user will receive notifications on all tasks in the project that meet their notification criteria.

7) Select **Set**.

8) All changes made to this page are saved automatically.

Tip

  ▸ When a notification is received on the Inbox page or in an email, select **View Task** to view the relevant tasks on the **Task List** page.

  ▸ Select the ⚙ **Context** menu next to an existing user to delete them from the list. The **My Preferences** and **Task Assigned User** options cannot be removed.

Search the Work Plan Page

The search function on the Work Plan page enables you to search for activities, codes, companies, swimlanes, tasks, task milestones, or WBSs located in the hopper or planning board. Search results are displayed below the search field.

> **Note** To search swimlanes, a task plan with swimlanes must be open.

To use the search function on the Work Plan page:

1) In the object selector, select ⼈ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ⧉ **Tasks**, and then select **Work Plan**.

3) In the **Search** field on the toolbar, enter a search term. Results matching the string will appear automatically.

4) Select a search result to scroll to and highlight that item in the hopper or on the planning board.

Print the Planning Board

Customize the planning board on the Work Plan page, and then send it to a printer or create a PDF. On the planning board, configure options such as planning period, task filtering, quick filters, and formatting. You can also open a task plan with swimlanes on the planning board. These planning board settings and options affect the display of tasks in your print layout. Additional settings, such as those applied in the Calendars Dictionary, might also impact print display. For example, the task color changes to gray on nonwork days on the Planning Board. In the print settings, configure page formatting, date ranges, and display options. Enable headers and footers to include links, images, color legends, and fields variables.

> **Note** To display colors and ensure that your Gantt charts print correctly, enable the background graphics and colors options in your browser's print settings.

To print the planning board on the Work Plan page:

1) In the object selector, select ⚶ **Project**, select **View Projects List**, and then select a project name.
2) From the ☰ **Main Menu**, select ☴ **Tasks**, and then select **Work Plan**.
3) Configure the page view according to your needs, including filtering and formatting.
4) In the **Show** list, select **Day** to display tasks by individual days. Select a **Weeks** option to display between one and six weeks on the planning board. The number of displayed weeks may be constrained by the current planning period.

> **Note** With **Day** selected, you cannot edit week options in the print settings.

5) Select 🖶 **Print** to open the **Print Planning Board** panel.
6) In the **Settings** panel, configure the following options:
   a. **Page**:
      - **Paper Size**: Select a standard paper size or enter custom print dimensions.
      - **Orientation**: Select a **Landscape** or **Portrait** page orientation.
      - **Margins**: select the length of the top, left, right, and bottom margins of the layout.

      > **Note** You can also click and drag the borders in the print preview to adjust each margin.

      - **Show Watermark**: Select this option, and then enter text to appear as a watermark on each page.
      - **Pages**: Print all pages or a specific range of pages.
   b. **Date Range**:
      - Select **Selected Weeks** to print the weeks currently displayed on the planning board. The number of weeks displayed is controlled by the **Planning Period** and **Show** list settings.

- Select **Custom Week Range (up to 1 year)** to choose a custom time span, from the start of one week to the end of another week. The number of available weeks may be constrained by the current planning period.

c. **Scaling**:

- **Auto**: Select this option to automatically fit the maximum number of days on one page, equivalent to a 100% zoom level.
- **Fit to** [number] **of pages wide:** Enter a specific number of horizontal pages by which to constrain the layout.
- **Zoom to**: Enter a value to scale the view based on a zoom percentage.

d. **Options**:

- **Weeks Per Page**: Choose to print up to six weeks per page. The limit is determined by the number of weeks you selected in the **Show** list and the current **Planning Period**.
- **Font Size**: Modify the size of the text in the main content area of the print preview.
- **Show Task Icons**: Select this option to display icons on task cards.
- **Show Crew Size**: Select this option to display crew size on task cards.
- **Wrap Text on Tasks**: Select this option to wrap long task names to the next line of a task card.
- **Page Break on Activities**: Select this option to start a new page for each activity on the planning board. To use this option, ☰ **Tasks and Activities** must be selected on the planning board.

7) To modify the print header or footer settings, hover over the print preview, and select ✎ **Edit Header** or ✎ **Edit Footer**.

8) In edit mode, use the floating toolbar to configure the following header and footer options:

- With text selected, apply bold, italics, or underline formatting, and change the size and color of the text.
- **Alignment**: Align each line of text to the left, center, or right side of a section.
- **Insert Link**: Add link text and a URL. Choose to open the link in a new browser tab or window, or open the link in the current browser tab.
- **Color Legend**: Add a color legend to the selected section of the header or footer.
- **Add Image**: Insert the company logo, the image for the current project, or the image for the current workspace.
- **Add Revision Box**: Add a revision box to the selected section. Text can be entered in edit mode or after printing.
- **Add Field**: Add field variables to the selected section.

  Note Field variable text that is only partially formatted may not display properly. Ensure the entire variable is formatted correctly.

- **Toggle Dividers**: Toggle the display of section divider lines in the printout.
- **Sections**: Display up to three separate sections in the header or footer.

9) In the **Settings** panel, configure separate options to show the header and footer on all pages, only the first page, or only the last page of the print layout.

10) Select **Return to Preview** to exit the edit mode.

11) In the thumbnail selector, select individual page thumbnails to review the order, number, and appearance of the pages in the print layout. Continue to modify print settings according to your needs.

12) When you are finished, select **Print** to print the layout to a PDF file. You can then view the layout or print it to a physical format.

Tip

▸ Use the floating toolbar to adjust the zoom settings of the print preview. Select ⚬ **Continuous** to enable continuous scrolling of the print preview.

Constraints Overview

Use the Constraints page to identify and categorize the issues, materials, and deliverables in your project that may prevent you from beginning work on a task. Assign each task constraint to the company and user responsible for addressing it. Provide separate dates for when the constraint is promised to be resolved, when the constraint needs to be resolved, and when the constraint is actually resolved. For each constraint, you can enter a detailed description, upload or link related files, and associate it with one or more existing tasks, and link it to document packages in Aconex.

By default, this page displays a planning period of six weeks (one week before the current week and four weeks after the current week). Constraints outside the planning period may not be visible. You can edit the current planning period settings by selecting ▦ **Planning Period** on the page toolbar. You can also edit planning period and other settings in the Manage Views panel. See *Configure and Apply Filtering* (on page 184) for more information.

To learn more about the concepts used on this page, see *Understanding Tasks App Concepts* (on page 10).

Add a Task Constraint on the Constraints Page

Use the Constraints page to identify any issues or items that may delay the start of a task. This could be a document, drawing, issue, inspection, material, or approval. You can specify the constraint type during creation.

When adding a constraint, you should designate a responsible party, the date the constraint is promised by, and the date the constraint is needed by. Icons are displayed in the Date Needed field if the constraint is needed in the next 7 days or if it is overdue. After a constraint has been resolved, it can be delivered.

The Status field in the table indicates the current state of each constraint. Constraints without a Promised Date are marked Not Planned. Constraints with a Promised Date are marked Planned. Constraints with a Delivered Date are marked Delivered.

To learn more about task constraints, see *Understanding Tasks App Concepts* (on page 10).

To add a task constraint on the Constraints page:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ≡⅝ **Tasks**, and then select **Constraints**.

3) On the toolbar, select ＋ **Add**. In the new row, complete the following fields:

   ‣ **Name**: The name of the constraint.

   ‣ **ID**: The unique ID of the constraint.

   ‣ **Type**: The type of the constraint.

   ‣ **Responsible Company**: The company responsible for addressing the constraint. By default, a new constraint is assigned to the current user's company.

   ‣ (Optional) **Responsible Party**: The user responsible for addressing the constraint. The selected user's company is always displayed in the Responsible Company field. By default, a new constraint is assigned to the current user.

   ‣ (Optional) **Promised Date**: The date by which the responsible party agrees to deliver the constraint.

   ‣ **Date Needed**: The date by which the constraint must be delivered without impacting an associated task.

   ‣ (Optional) **Delivered Date**: The date that the constraint is actually delivered. This date cannot be in the future.

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

Tip

In the table, select a constraint, and then select the ⚙ **Context** menu to add a new constraint, delete the constraint, duplicate the constraint, or deliver the constraint.

Assign a Task to a Constraint on the Constraints Page

Identify the tasks that will be impacted by each constraint on the Constraints page. Identified tasks display in the Impacted Tasks column on the Constraints page within the grid. If a task can't begin before a constraint is resolved, then it should be associated with that constraint. You can assign multiple tasks to a single constraint, and the same task can be assigned to multiple constraints. Task data on the Constraints page is read-only.

To assign a task to a constraint on the Constraints page:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ≡⅝ **Tasks**, and then select **Constraints**.

3) In the table, select a constraint, and then select the **Impacted Tasks** detail window.

4) In the detail window, select ＋ **Assign**, and then select one or more tasks to associate with the current task constraint.

5) Select **Select**.

6) All changes made to this page are saved automatically.

Tip

▸ In the **Impacted Tasks** detail window, select one or more tasks, and then select the ⚙️ **Context** menu to assign a new task to the current constraint or remove the selected tasks from the constraint.

▸ Select a task name from the **Impacted Tasks** detail window to view the task on the Task List page.

▸ You cannot assign a private task to a constraint.

Add Constraint Notes

The Notes detail window enables you to provide additional details for each task constraint on the Constraints page. This may be a detailed description of the constraint, excerpts from a specification, or text copied from an email chain. Text that is pasted will retain its formatting, but you can also format the text using the included tools.

To add constraint Note

1) In the object selector, select ⤜ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☲ **Tasks**, and then select **Constraints**.

3) In the table, select a constraint, and then select the **Notes** detail window.

4) In the detail window, enter and format your constraint notes.

5) All changes made to this page are saved automatically.

Deliver a Constraint

After a constraint has been resolved, you can deliver the constraint. The delivered date of the constraint is automatically set to the current date, but you can modify this from the Delivered Date column. The Status of the constraint is updated to Delivered.

To deliver a constraint:

1) In the object selector, select ⤜ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☲ **Tasks**, and then select **Constraints**.

3) On the **Constraints** page, select a constraint row, select the ⚙️ **Context** menu, and then select **Deliver**.

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

Tip

▸ Clear the **Delivered Date** column to remove the delivery of the constraint and return the status to Not Planned (if no Promised Date is set) or Planned (if a Promised Date is set).

▸ To deliver multiple constraints at one time, use **Ctrl** + click to select multiple constraints, select the ⚙️ **Context** menu, and then select **Deliver**.

▸ You can also deliver a constraint by entering a date in the **Delivered Date** column.

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.

Tip

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

Link a File to an Object

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

The following objects support the Files detail window:

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

To link a file to an object:

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

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

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

Tip

▶ Add files at the project level on the Projects page. This enables you to link a file to one or more objects in the project, such as activities, WBSs, or risks.
▶ To remove a linked file, select the file, select the ⚙ **Context** menu, and select **Unlink**.

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Link a Constraint to an Aconex Package

A package in Aconex is a collection of documents grouped together for a specific purpose, such as a package of design drawings for a project. Linking a package to a task constraint makes it easier to track document status changes without exiting Primavera Cloud. The Aconex Package detail window enables users managing projects in Oracle Primavera Cloud and in Aconex to link an Aconex package for each task constraint on the Constraints page.

Prerequisites

Before you can link an Aconex package to a constraint, you should ensure that the following prerequisites are completed:

- ▶ **Privileges**: You must have the project-level Enable privilege for Link Constraint to Aconex Package for the associated project in Oracle Primavera Cloud.
- ▶ **Application Links**: The project in Aconex and Oracle Primavera Cloud must be linked in Construction and Engineering Lobby. See Link Projects that are Managed in Multiple Applications in the Lobby Help.
- ▶ **Additional Configuration Settings for Identity Domain Account Users**: Oracle Primavera Cloud environments that have been configured to use single sign-on (SSO) in their identity domain must be updated with additional configuration settings to enable linking packages from Aconex to Task Constraints in Primavera Cloud. See Using an Identity Domain in the Oracle Primavera Cloud Application Administration Guide.

To link a task constraint to an Aconex package in Oracle Primavera Cloud:

1) In the object selector, select ⟑ **Project**, select **View Projects List**, and then select a project name.
2) From the ☰ **Main Menu**, select ☰ **Tasks**, and then select **Constraints**.
3) In the table, select a constraint, and then select the **Aconex Package** detail window.
4) Select the linked Aconex project that contains the packages you need, and then select **Connect**.
5) In the detail window, select **Link Aconex Package** to open the **Link Aconex Package** dialog box.
6) Select the project that you need. If you have multiple Aconex accounts linked in Lobby, a new browser tab will open where you can select the account you need. Select the account from the **Account Selection** list. For users with only one Aconex account, you will automatically be taken to your list of packages.

> **Note** Ensure that the Aconex account linked to your Lobby account is the same account associated to the linked project in Primavera Cloud, or the project will not display in the list.

7) Select the package from the list of packages associated with the Aconex project. You can use the search bar or sort by Package Number or Package Title.
8) Select **Link** to link the package to the constraint. You can unlink a package using the context menu beside the package title.

9) After a package is linked to a constraint, you can click on the Aconex package title to quickly open it in Aconex and view the package details. Select **Open** when prompted to confirm that you will be opening it in Aconex.

Configure and Apply Tasks Quick Filters

You can use quick filters to refine the data displayed on a page. Configure which filters you want to appear in the quick filters list. In the quick filters list, select one or more values on which to filter. Use multiple quick filters to further reduce how much data is displayed. For example, you can create a filter to show only specific task codes related to Company A and Company B on the Work Plan page. Clear a filter to show more results. Quick filter value selections are not saved with the view.

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

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

To configure and apply Tasks quick filters:

1) Navigate to a page, and then select 🔧 **Settings**.
2) In the **Manage Views** panel, select the **Quick Filters** tab.
3) In the **Show** section, select the quick filters you want to show in the quick filters list.
4) Select **Save**, and then select ✕ **Close**.
5) In the ▽ **Quick Filters** list, select applicable filter values, or select all.
6) To remove an applied filter, expand a filter list, and then select **Clear Filter**.

   To remove all applied filters, in the **Quick Filters** list, select **Clear All**.

Tip

The **Work Plan** page supports additional quick filter functionality:

▶ To quickly set additional activities or WBS as quick filter objects, select one or more activity bands or WBS nodes in the hopper or planning board, right-click the selection, and then select **Set Activities as Quick Filter** or **Set WBS as Quick Filter**. To do this, the **Activity** and **WBS** quick filters must be added to the view.

▶ To apply codes as quick filter objects, select one or more codes in the hopper or the planning board, right-click the selection, and then select **Set Code as Quick Filter**. To do this, you must first add **Codes** quick filters to the view and select up to five codes from the list of available options.

▶ You can select and apply parent, subordinate, or all objects in a hierarchy as quick filter objects. First select the parent level to expand all child levels beneath the selection. Select **Set Code as Quick Filter** or **Select WBS as Quick Filter**, and then select the objects.

Configure the Constraints Page Table

You can add, sort, align, hide, pin, adjust to fit the content in the columns, and rename a column directly from the Constraints page table. Each column in the table supports a menu with several options that vary depending on the column. Pinned columns are located in a section at the beginning of the table. They do not move when the rest of the table is scrolled horizontally. This makes it easier to see the most important constraint fields, such as Name or State, when a large number of columns are displayed.

All of the configured column header options will be saved to the current Named View for the page except for the adjust to fit and alignment options.

To configure the Constraints page table:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.
2) From the ☰ **Main Menu**, select ⩫ **Tasks**, and then select **Constraints**.
3) To add columns to the table:
   a. Select the ＋ **Open Column Selector** icon.
   b. In the column dropdown, select ▢ **Show** or ⦸ **Hide**, next to a column name, to add or remove the column from the table.
4) To configure an existing column, select ⌄ **Open Column Menu**, or right-click a column title, and then select any of the following:
   ▸ **Sort**: Hover over the Sort option and then select to sort the column by Ascending or Descending. Use Ctrl + click to add the column to an existing sort sequence.
   ▸ **Align Column**: Hover over **Align Column** and then select **Align Left**, **Align Center**, and **Align Right** to determine the alignment of the content in your columns.
   ▸ **Hide Column**: Remove the column from the table.
   ▸ **Adjust to fit content**: Expand or shrink the width of the column to fit its contents. You can also double-click a column's right edge to adjust it.
   ▸ **Pin Column**: Adds the column to the pinned section of the Task List table. You can also click and drag columns between the pinned and unpinned sections.
   ▸ **Rename Column**: Displays the **Rename a Column** popover. If a new column name is not entered in the **Rename Column** popover and **Rename** is selected, the column name field will be blank. After a column is renamed, the custom name can be reset to the original name by selecting **Reset** in the **Rename Column** popover.
5) All changes made to this page are saved automatically.

Tip

▸ To change the column order, click and drag a column title.
▸ To manage additional view settings, select 🔧 **Settings** and see *Configure View Settings* (on page 178).

Task List Overview

Use the Task List page to create, manage, and commit to tasks in a table format. The page enables you to customize the configuration of the table using named views. The Gantt view provides a graphical display of your tasks along a timeline. Add hand-offs between tasks using the Gantt view or Hand-offs detail window. The Task List page supports the use of public tasks, which are visible to everyone, or private tasks, which are only visible to you. You can also open the Task List page in the context of a program to manage the tasks of multiple projects simultaneously.

By default, this page displays a planning period of six weeks (one week before the current week and four weeks after the current week). Tasks outside the planning period may not be visible.

You can edit the current planning period settings by selecting ▦ **Planning Period** on the page toolbar. You can also edit planning period and other settings in the Manage Views panel. See ***Configure and Apply Filtering*** (on page 184).

To learn more about the concepts used on this page, see ***Understanding Tasks App Concepts*** (on page 10).

Create a Task on the Task List Page

On the Task List page, create tasks and task milestones manually, or use Microsoft Excel to create or update multiple tasks simultaneously. Quickly create or duplicate tasks using cut, copy, and paste functionality.

To create a task:

▸ ***Add a Task or Task Milestone on the Task List Page*** (on page 143)
▸ ***Create a Task by Import*** (on page 107)
▸ ***Cut or Copy and Paste a Task on the Task List Page*** (on page 146)

Add a Task or Task Milestone on the Task List Page

Add tasks to detail the work to be performed on your project. Add task milestones to mark the distinct phases of your project. Tasks on the Task List page can be set to public or private. When a task milestone is added, it is automatically set to public.

Depending on your needs, tasks can be added in a variety of ways. The Add button on the toolbar adds a new task with default values. You can also add a task to a specific group in the table, add a task as a predecessor or successor to an existing task, or copy and paste an existing task to duplicate it.

To learn more about tasks, see ***Understanding Tasks App Concepts*** (on page 10).

To add a task or task milestone on the Task List page:

1) In the object selector, select �X **Project** or ⚬ **Program**, and then select a project or a program from the list.
2) From the ☰ **Main Menu**, select ☲ **Tasks**, and then select **Task List**.
3) Add a task or task milestone using any of the following methods:

   a. Using the toolbar:

      1. On the toolbar, select ✛ **Add**. In the new row, complete the following fields:

> **Note:** To add a task in the context of a program, the page must be grouped by **Project**.

      2. **Task Name**: Enter a task name.

      3. **Type**: Select **Task**. This is the default option.

> **Note**
>
> - You can change the task type if the task is not complete and has no commitments.
> - Task milestones do not support the Assigned User, Duration, Start Date, Use Only Work Days, or Visibility fields.

      4. **Visibility**: Select the visibility of the task.

- **Public**: Visible to everyone in your assigned company and the Primavera Cloud owning company.
- **Private**: Only visible to you.

      5. **Company**: Select a company name.

> **Note** When adding a task, the **Company** field will default to the company that is assigned to the user who added the task. When a task has a color associated with the value assigned to the color by attribute, the color is displayed in the grid column and in the Gantt chart.

   b. Add tasks directly to a specific group:

- When the page is grouped by a field, right-click or select the menu for a task in a group, and then select **Add Above** or **Add Below**. A new task is added under to the selected group. If the page is not grouped, tasks added using this method are given default values.

   c. Add tasks with hand-offs:

- Right-click a task, and then select **Add Task Before**, **Add Task After**, **Add Task Milestone Before**, or **Add Task Milestone After**. A new task with default values is added as a predecessor or successor to the existing task.

   d. Using copy and paste:

- Right-click a selection of one or more tasks, and then select **Copy Rows**. Right-click a grouping band or activity within the group, and then select **Paste Row**. The tasks are added to the group.

> **Note**
>
> - If you copy and paste a large number of tasks—more than 100 records up to the 500 task limit—your action becomes a background process and takes more time to complete. When all tasks have been copied and pasted successfully, you will receive an in-app

> notification and an inbox message.
>
> ▪ Hand-offs will only be copied when the associated tasks that precede and succeed the hand-offs are selected and copied at the same time.

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

Create a Task by Import

Creating tasks and task milestones using Microsoft Excel enables you to use data from an outside system which can save you time from manual entry.

To create or update a task:

1) ***Download an Import Template for Importing Tasks*** (on page 107)
2) ***Import Tasks from Microsoft Excel*** (on page 108)

Download an Import Template for Importing Tasks

Download a Microsoft Excel template to use when importing tasks and task milestones. The template contains standard task fields that you can populate for new and existing tasks, as well as all current configured task fields.

To download an import template:

1) In the object selector, select ⤴ **Project**, select **View Projects List**, and then select a project name.
2) From the ≡ **Main Menu**, select ≣ **Tasks**, and then select **Work Plan** or **Task List**.
3) Select the **Actions** ▼ menu, and then select **Download Import Template**.

Tip

▸ The import template is downloaded as a Microsoft Excel file with the default file name TasksImportTemplate.
▸ The top two rows of the worksheet are required when importing tasks from a spreadsheet. You can delete unused columns, but do not change the data in these rows.
▸ You cannot import tasks in the context of a program.
▸ Review the Instructions worksheet on the first tab of the spreadsheet for helpful tips on populating the import template.

Import Tasks from Microsoft Excel

You can import tasks and task milestones into the application from a Microsoft Excel (.xls or .xlsx) file. After downloading the import template, follow the instructions to create or update tasks in the spreadsheet. You cannot update committed or completed tasks. 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 tasks from Microsoft Excel:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☰✔ **Tasks**, and then select **Work Plan** or **Task List**.

3) Select the **Actions** ▼ menu, and then select **Import**.

4) In the **Import Tasks** dialog box, select ••• **Browse**, select a file, and select **Import**.

Tip

You cannot import tasks in the context of a program.

Cut or Copy and Paste a Task on the Task List Page

To save time entering data, the Task List page supports cut, copy, and paste operations for tasks and task milestones. The cut operation enables you to easily move tasks around in the table. Use the copy operation to duplicate tasks in the table. You can perform these operations on a single task, or you can perform them on multiple activities. When the new tasks are created, they are automatically assigned a task ID according the auto numbering settings defined for the project. Hand-offs are not included in copied tasks.

To cut or copy and paste tasks on the Task List page:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☰✔ **Tasks**, and then select **Task List**.

3) In the table, select one or more task or task milestone rows, select the ⚙ **Context** menu, and then select **Cut Rows** or **Copy Rows**.

4) Select a new row in the table, select the ⚙ **Context** menu, and then select **Paste Rows**.

5) All changes made to this page are saved automatically.

Tip

▶ If you copy and paste a large number of tasks—more than 100 records up to the 500 task limit—your action becomes a background process and takes more time to complete. When all tasks have been copied and pasted successfully, you will receive an in-app notification and an inbox message.

▶ Hand-offs will only be copied when the associated tasks that precede and succeed the hand-offs are selected and copied at the same time.

▶ If you copy a task with a crew size estimate to create a task milestone, the crew size estimate will clear. Task milestones cannot have crew size estimates.

▶ You can cut, copy, and paste tasks across a variety of grouping bands. When pasting tasks across group bands, the new tasks will assume the attribute of the group band into which it is pasted. For example, if a task is copied or cut from the Company A grouping and pasted in the Company B grouping, the Company attribute of the new task will be changed to Company B.

▶ You cannot cut, copy, or paste tasks on the Task List page in the context of a program.

Modify Tasks on the Task List Page

Edit task details on the Task List page using the columns in the table. Modify task names, dates, assigned company, and other details. Add hand-offs to tasks from the Context menu or the Hand-offs detail window. Assign constraints to tasks to indicate the items that are preventing the tasks from starting. You can also edit some task details, including hand-offs, in the Gantt view.

Several task details can be modified by selecting individual task icons. See *Task Icon Reference* (on page 173) for icon descriptions.

To modify tasks on the Task List page:

▶ *Assign a User to a Task on the Task List Page* (on page 147)
▶ *Add Duration to a Task on the Task List Page* (on page 148)
▶ *Add a Due Date to a Task on the Task List Page* (on page 149)
▶ *Propose and Accept a Task Due Date on the Task List Page* (on page 149)
▶ *Add a Crew Size Estimate on the Task List Page* (on page 148)
▶ *Add a Hand-off on the Task List Page* (on page 150)
▶ *Assign a Task to an Activity or Modify an Activity on the Task List Page* (on page 152)
▶ *Modify Tasks in the Task List Gantt Chart* (on page 153)
▶ *Assign a Constraint to a Task on the Task List Page* (on page 154)
▶ *Add a File in a Task Detail Window* (on page 156)
▶ *Commit to a Task on the Task List Page* (on page 155)
▶ *Recommit to a Task on the Task List Page* (on page 159)
▶ *Complete a Task on the Task List Page* (on page 160)
▶ *Assign a Code to a Task* (on page 159)

Assign a User to a Task on the Task List Page

You can assign a user to a task to designate the user responsible for the task. The user you assign to the task must belong to the company assigned to the task. Task milestones cannot be assigned a user.

To assign a user to a task on the Task list page:

1) In the object selector, select ⋏ **Project** or ⸛ **Program**, and then select a project or a program from the list.
2) From the ☰ **Main Menu**, select ☲ **Tasks**, and then select **Task List**.
3) In the table, select the task.
4) In the **Assigned User** column, select the user.
5) All changes made to this page are saved automatically.

Tip

To remove the assigned user from a task, open the **Select Assigned User** dialog box, and select **Remove**.

Add a Crew Size Estimate on the Task List Page

Crew sizes provide another way for lean planners to easily track staffing needs for specific tasks in a project. Add a crew size estimate to a task, and then view it with other task details on any page that supports tasks. To adjust crew size estimates, you must have the workspace Edit privilege for Tasks for My Company or Tasks for All Companies enabled for a project.

> **Note** You can assign a crew size to any task type except for task milestones. If you copy a task with a crew size estimate to create a task milestone, the crew size estimate will clear.

To add a crew size estimate to a task on the Task List page:

1) In the object selector, select 👤 **Project** or 🎯 **Program**, and then select a project or a program from the list.
2) From the ≡ **Main Menu**, select ≡✓ **Tasks**, and then select **Task List**.
3) In the table, select the task.
4) In the **Crew Size** column, double-click in a row and enter the number of people needed to complete the task.

Tip

The Crew Size column displays by default for new views. For existing views, you need to *configure your view settings* (see "*Configure a Column*" on page 180) to display the Crew Size column.

Add Duration to a Task on the Task List Page

Add duration to a task to specify the amount of time the task will take to complete. After adding a duration and due date, your tasks will display on the Gantt chart according to their sequence. You can view specific details about task duration by hovering over the task on the Gantt chart. Because task milestones indicate the beginning or end of a phase in your project, they do not have duration.

To add duration to a task on the Task list page:

1) In the object selector, select 👤 **Project** or 🎯 **Program**, and then select a project or a program from the list.
2) From the ≡ **Main Menu**, select ≡✓ **Tasks**, and then select **Task List**.
3) In the table, select the task.
4) In the **Duration** column, enter a value for the duration of the task.

> **Note** The value of the entered duration must be in whole days greater than zero.

5) All changes made to this page are saved automatically.

Tip

▸ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

▸   🔗 **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.

     ▸   🔄 **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

Add a Due Date to a Task on the Task List Page

Define the due date for a task or task milestone to specify when it is expected to be completed. After adding a duration and due date, your tasks will display on the Gantt chart according to their sequence.

To learn more about task due dates, see *Understanding Tasks App Concepts* (on page 10).

To add a due date to a task on the Task list page:

1) In the object selector, select ⟨icon⟩ **Project** or ⟨icon⟩ **Program**, and then select a project or a program from the list.
2) From the ☰ **Main Menu**, select ⟨icon⟩ **Tasks**, and then select **Task List**.
3) In the table, select the task.
4) In the **Due Date** column, select a due date for the task.
5) All changes made to this page are saved automatically.

Tip

▸ To select a due date that occurs on a non-work day, select the task, and then clear the check box in the Use Only Work Days column. Task milestones can always be assigned to a non-work day.

▸ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

▸   🔗 **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.

     ▸   🔄 **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

Propose and Accept a Task Due Date on the Task List Page

When a task is part of a hand-off chain, directly modifying its due date may affect the due dates of other tasks in the chain. If the hand-off chain contains tasks from different companies, each company should be aware of the potential changes to their tasks. To solve this issue, updated due dates can be proposed without affecting the actual task due date. This enables the companies with tasks in the chain to review proposed due dates before they are accepted.

When a proposed due date is accepted, it is removed from the task and becomes the current task due date. If the accepted due date occurs on a non-work day, the Use Only Work Days setting is cleared and the due date is updated. If a task with a proposed due date is committed, the proposed due date is removed, and the current due date is updated to match the committed due date.

To learn more about task due dates, see **Understanding Tasks App Concepts** (on page 10).

To propose and accept a task due date on the Task List page:

1) In the object selector, select ⅄ **Project** or ⅜ **Program**, and then select a project or a program from the list.

2) From the ☰ **Main Menu**, select ☲ᣞ **Tasks**, and then select **Task List**.

3) On the **Task List** page, select a task.

4) In the **Proposed Due Date** column, select a proposed due date for the task.

5) When you are ready to accept the proposed due date, right-click the task or select the ⚙ **Context** menu, and then select **Accept Proposed Due Date**.

6) All changes made to this page are saved automatically.

Tip

▶ The 🗓 **Proposed Due Date** icon in the **State** column indicates that the task has a proposed due date that has not been accepted.

▶ You cannot propose a due date on completed tasks.

▶ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

▶ 🔗 **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.

▷ 🔁 **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

Add a Hand-off on the Task List Page

Add hand-offs between tasks and task milestones to order the work in a logical sequence. A hand-off signifies the next task to be performed after its preceding task has been completed. Use the Hand-offs detail window to add predecessor or successor tasks. Use the Gantt chart to view your tasks and hand-offs in a time-phased format. Hand-offs can be created between tasks with the same, different, or no activity assignments. You can add hand-offs between two tasks, between two task milestones, or between a task and a task milestone.

To learn more about hand-offs, see **Understanding Tasks App Concepts** (on page 10).

To add a hand-off on the Task List Page:

1) In the object selector, select ⅄ **Project** or ⅜ **Program**, and then select a project or a program from the list.

2) From the ☰ **Main Menu**, select ☲ᣞ **Tasks**, and then select **Task List**.

3) Add a hand-off using any of the following methods:

   a. Using the **Hand-offs** detail window:

      1. In the table, select a task or task milestone, and then select the **Hand-offs** detail window.

      2. In the **Predecessor Levels** or **Successor Levels** section, select ✛ **Add**, and then select one or more tasks to add as predecessors or successors to the current task. The default number of levels is three for new user views.

      3. In the **Hand-off Flow** detail window, use the Pan, Zoom In, Zoom Out, or Zoom to Fit option to see the complete hand off flow for a large number of tasks. This includes the full chain of tasks including any that may have been filtered from the main grid.

         In the same detail window, you can also use the Zoom Reset option, or Hide Hand-offs option.

> **Note** The **Select Task** dialog box enables you to filter the list of available tasks by tasks with the same activity assignment as the current task or by tasks with any activity assignment. This includes any task without an activity assignment.

      4. Select **Select**.

      5. In the **Type** field, select the hand-off relationship between the two tasks.

      6. (Optional) In the **Lag** field, enter the lag for the hand-off relationship. Select **Lag - Use Only Work Days** if you want the lag duration to only include work days.

   b. Using the right-click menu:

      ▪ Right-click a task, and then select **Add Task Before**, **Add Task After**, **Add Task Milestone Before**, or **Add Task Milestone After**. A hand-off path is created between the original task and the new task, even if the original task has existing hand-offs.

   c. Using group selection:

      ▪ Select a group of tasks, right-click the selection, and then select **Add Hand-offs**. Hand-offs are created between the tasks in the order that they were selected, except for tasks with due dates, which are arranged in the chain from earliest to latest.

   d. Using the Hand-off Flow detail window:

      1. In the table, select a task or task milestone, and then select the Hand-off Flow detail window.

      2. Right-click a task, and then select Add Task Before, Add Task After, Add Task Milestone Before, or Add Task Milestone After. A hand-off path is created between the original task and the new task, even if the original task has existing hand-offs.

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

Tip

▶ A Finish to Start hand-off is created by default when a successor task's due date is after the predecessor's due date. A Finish to Finish hand-off is created by default when both tasks have the same due date. The hand-off type for tasks with different due dates can be Finish to Start, Finish to Finish, or Start to Start. The hand-off type for tasks with the same due date can only be Finish to Finish.

▶ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

▶   **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.

   ▶   **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

Assign a Task to an Activity or Modify an Activity on the Task List Page

If there are tasks or task milestones in your project that are associated with an activity, you can assign them to that activity, or modify existing tasks for that activity. This enables you to keep track of the tasks required to complete an activity. Multiple tasks can be assigned to an activity. The activity type must be Activity Dependent or Resource Dependent. Private tasks assigned to an activity will remain private. You can group, sort, and filter tasks in the table or Gantt chart according to their assigned activity and other activity details. For example, you can modify columns to display the Activity Start date and create a filter for Activity Finish dates.

To assign a task to an activity:

1) In the object selector, select **Project** or **Program**, and then select a project or a program from the list.

2) From the **Main Menu**, select **Tasks**, and then select **Task List**.

3) In the table, select the task.

4) Do one of the following:

   ▶ In the **Activity** column, select the activity to which you want to assign the task.

   ▶ Right-click one or more tasks and 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.

   ▶ In the **Hand-off Flow** detail window, right-click a task and select **Assign Activity**.

5) All changes made to this page are saved automatically.

Tip

▶ You can add a new task directly to an existing activity and modify additional details, such as assigning a project-level code, from the Tasks detail window on the Activities page. See *Modify Activity Details* (*https://docs.oracle.com/cd/E80480_01/English/user_guides/schedule_management_user_guide/178415.htm#t178415*) in the Schedule Management User Guide.

‣ You can check on the status of your tasks in the Task Summary panel by selecting the **Task Summary** icon from the **Work Plan**, **Task List**, or **Hand-offs** pages. View specific categories of tasks according to your needs. See Task Summary Overview.

Modify Tasks in the Task List Gantt Chart

The Task List Gantt chart provides a graphical representation of the durations and sequence of tasks across a timeline. You can modify tasks and task milestones directly in the chart. You can add tasks, adjust their durations and dates, and sequence them by creating task hand-offs. Hover over a task to view its start date, finish date, and its duration. For task milestones, you can create hand-offs and view the milestone finish date.

To modify task details in the Gantt chart:

1) In the object selector, select ⋏ **Project** or ⁂ **Program**, and then select a project or a program from the list.

2) From the ☰ **Main Menu**, select ≡⃗ **Tasks**, and then select **Task List**.

3) Select the 🗐 **Gantt** icon.

4) In the **Gantt** chart, you can make the following changes:

   ‣ To create a task, right-click a row, and then select **Add Above** or **Add Below**. Enter a task name.

   > **Note** If you want the task to be a milestone, select **Task Milestone** in the **Type** column. Task milestones appear as diamonds in the chart.

   ‣ To modify a task's start or finish date and its duration, select the left edge or right edge of a task bar and drag it to a new date. The new date and duration are shown next to the bar as you drag it.

   ‣ To modify a task's start and finish dates without changing its duration, select the middle of the bar and drag it to a new date. The new start and finish dates are shown next to the bar as you drag it.

   ‣ To add a task hand-off, hover over the left edge or right edge of a task bar. Select the circle that appears, and drag it to an edge of a different task bar. A popover shows the proposed hand-off relationship. You can also do this for task milestones.

   ‣ To delete a hand-off, right-click a hand-off line, and then select **Remove Hand-off**.

   ‣ To delete a task or task milestone, right-click a task bar or diamond, and select **Delete**.

5) All changes made to this page are saved automatically.

Tip

‣ You can select multiple task bars and edit their durations or dates at the same time.

‣ You cannot modify the dates or duration of a completed task. You cannot modify the dates or duration of activity bars.

‣ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

▸   🔗 **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.

▸   🔄 **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

Assign a Constraint to a Task on the Task List Page

Assign constraints to a task to indicate the items that need to be addressed before work on the task can begin. Constraint details include the type of constraint, its status, who is responsible for addressing the constraint, and the dates by which it is promised, needed, and actually delivered. Icons next to the Date Needed field indicate if the constraint is overdue or needed within the next 7 days.

Use the Constraints detail window to monitor the statuses of all constraints assigned to a task. To only view tasks on the page that have at least one constraint, select **Tasks with Constraints** from the Constraints quick filter.

To learn more about task constraints, see *Understanding Tasks App Concepts* (on page 10).

To assign a constraint to a task on the Task List Page:

1) In the object selector, select 🔱 **Project** or ⚙ **Program**, and then select a project or a program from the list.

2) From the ≡ **Main Menu**, select ≡✓ **Tasks**, and then select **Task List**.

3) In the table, select a task or task milestone, and then select the **Constraints** detail window.

4) In the detail window, select ➕ **Assign**, and then select one or more constraints to associate with the current task.

5) Select **Select**.

6) All changes made to this page are saved automatically.

7) The constraints shown in the **Constraints** detail window are read-only. Select a constraint name to view and edit it on the **Constraints** page.

Tip

▸   You cannot assign a constraint to a private task.

▸   In the **Constraints** detail window, select one or more constraints, and then select the ⚙ **Context** menu to remove the selected constraints from the task. Select a constraint name to view it on the **Constraints** page.

▸   Select the 📝 **Notes** icon next to a constraint to view the notes associated with the constraint. Constraints without notes will not show this icon.

Commit to a Task on the Task List Page

Commit to tasks to agree to perform their work by a specified date. In the Commitments detail window, you can track the commitment history of a task, including committed dates, due dates, reasons missed, and comments. You cannot commit to private tasks, task milestones, or completed tasks. If a proposed due date exists for a task, it will be displayed in the Commit Task dialog box. This enables you to review the proposed due date before selecting the same or a different due date for the commitment. When a task is committed, the proposed due date is removed from the task, and the current due date is updated to match the committed due date.

To learn more about task commitments, see **Understanding Tasks App Concepts** (on page 10).

To commit to a task on the Task List page:

1) In the object selector, select ⋏ **Project** or ⊶ **Program**, and then select a project or a program from the list.

2) From the ☰ **Main Menu**, select ≡⌄ **Tasks**, and then select **Task List**.

3) Commit to a task using one of the following methods:

   ‣ In the table, select a task, select the ⚙ **Context** menu, and then select **Commit**. In the **Commit Task** dialog box, select a **Due Date** for the commitment. Select **Commit**.

   ‣ Commit to one or more tasks by right-clicking a selection and selecting **Commit Tasks**. Only tasks in the selection without an existing commitment will be committed. For pending tasks, the committed due date is set to the task's current due date. For new tasks, the committed due date is set to today's date.

   ‣ In the table, select a task, in the Hand-off Flow detail window, right-click a task and select Commit.

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

Tip

▸ The **Commitments** detail window contains a task's entire commitment history, but you can also add the **Original Committed Due Date** and **Current Committed Due Date** columns to the table to quickly reference the progression of each task's commitment dates.

▸ To delete the most recent commitment, in the **Commitments** detail window, select a commitment, select the ⚙ **Context** menu, and then select **Delete**. The task displays the due date of the next commitment in the list.

▸ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

▸ 🔗 **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.

   ‣ 🔗 **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

Working with Task Files

You can link files from the project library to project tasks to provide team members with access to relevant documentation to aid in task completion. You can also upload new files to add to the project library and link to tasks.

Members of your project team can add, delete, and edit task files based on their assigned security privileges.

Add a File in a Task Detail Window

Use the **Files** tab in a Task detail window to add relevant files that support your data. For example, you might add instructions, drawings, pictures, or product specifications.

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

Link a File to an Object

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

The following objects support the Files detail window:

▸ Activities
▸ Funds
▸ Logs
▸ PBSs
▸ Portfolio Funds
▸ Projects

▶ Project Funds

▶ Risks

▶ Scope Assignments

▶ Scope Items

▶ Strategies

▶ Submittals

▶ Tasks

▶ Task Constraints

▶ WBSs

▶ Work Packages

To link a file to an object:

1) Navigate to a page whose object supports files.

2) In the table, select an object row, and then select the **Files** detail window.

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

3) In the **Files** detail window, select ⊘ **Link**.

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

5) Select **OK**.

Tip

▶ Add files at the project level on the Projects page. This enables you to link a file to one or more objects in the project, such as activities, WBSs, or risks.

▶ To remove a linked file, select the file, select the ⚙ **Context** menu, and select **Unlink**.

Preview a File

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

Tip

▶ Oracle Primavera Cloud supports the preview of .mp4 and .ogg video file types and .mp3 and .wav audio file types. You must download other video and audio file types to preview them.

▶ Virus scanning is completed on all files uploaded or checked in to the application. You can't preview a file until virus scanning is completed and you refresh the page.

Update a File

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

Check Out a File

Update a file by checking out the file, making changes, and then checking the file in. You can check out a file from the File List page or a Files detail window.

To check out a file:

▸ In a file row, select the ⚙ **Context** menu, and then select **Check Out**.

Tip

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

Check In a File

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

To check in a file:

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

Tip

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

Assign a Code to a Task

Assign codes to tasks to help track them based on attributes they share. When managing a large number of tasks, you can use views to filter and group tasks by code. You can assign workspace-level and project-level codes to tasks.

To assign a code value to a task from the Task List page:

1) In the object selector, select ⅄ **Project**, select **View Projects List**, and then select a project name.
2) From the ☰ **Main Menu**, select ≡⅋ **Tasks**, and then select **Task List**.
3) In the **Task List**, select a task.
4) In the code column, select ••• to open the settings dialog for the code.

> **Note** The code must be configured as a column in your current view settings for it to be visible in the Task List grid.

5) In the settings dialog, select a code value from the list of available options, or create a new value using the **New Code Value Name** and **New Code Value ID** fields. New values are added to the list of options for the selected code.
6) All changes made to this page are saved automatically.

> **Note** You must be working in a project to assign a project-level code to a task from the Task List.

Tip

You can also assign a code to a task when working on the Activities page using **Activity Details** window. In the **Tasks** detail window, and then select 🔧 **Task Grid Settings** to add code columns to the grid. In the code field, select ••• to assign a code.

Recommit to a Task on the Task List Page

If you are unable to meet the due date of a previous commitment, you can recommit to work on the task. Select one or more reasons for missing the previous commitment, and then select a new due date for the recommitment. You can optionally add comments to further explain the recommitment. Track task commitment history in the Commitments detail window. If a proposed due date exists for a task, it will be displayed in the Recommit Task dialog box. This enables you to review the proposed due date before selecting the same or a different due date for the recommitment. When a task is committed, the proposed due date is removed from the task, and the current due date is updated to match the committed due date.

To learn more about task commitments, see *Understanding Tasks App Concepts* (on page 10).

To recommit to a task on the Task List page:

1) In the object selector, select ⅄ **Project** or ✦ **Program**, and then select a project or a program from the list.
2) From the ☰ **Main Menu**, select ≡⅋ **Tasks**, and then select **Task List**.

3) In the table, select the task, select the ⚙ **Context** menu, and then select **Recommit**.

4) In the **Recommit Task** dialog box, complete the following fields:

▸ **Due Date**: Select a due date for the recommitment.

▸ **Reasons Missed**: Select one or more reasons for missing the previous commitment.

> **Note** You can use the **Select Reasons Missed** dialog box to add new reasons. Select **Manage Reasons** to view the Reasons dictionary.

▸ (Optional) In the **Comments** field, add any comments you may have regarding the recommitment. Comments for each recommitment are visible in the Commitments detail window.

▸ Select **Recommit**.

5) All changes made to this page are saved automatically.

Tip

▸ The **Commitments** detail window contains a task's entire commitment history, but you can also add the **Original Committed Due Date** and **Current Committed Due Date** columns to the table to quickly reference the progression of each task's commitment dates.

▸ To delete the most recent commitment, in the **Commitments** detail window, select a commitment, select the ⚙ **Context** menu, and then select **Delete**. The task displays the due date of the next commitment in the list.

▸ You cannot commit to task milestones.

▸ If a task is part of a hand-off chain, changing its due date directly, accepting a proposed due date, or setting a new committed due date will cause the task and other tasks in the chain to be moved. The current hand-off mode determines the movement of a hand-off chain when any of the tasks in the chain are modified:

▸ 🔗 **Keep Hand-offs**: Maintain hand-off logic, but allow for the addition or consumption of slack between tasks.

▸ 🔄 **Break Hand-offs**: Only maintain hand-off logic until the slack between two tasks reaches zero.

Complete a Task on the Task List Page

Mark a task or task milestone complete to indicate that all work has been performed on the task. After the task is completed, you cannot modify certain fields, including dates, company, and duration. To enable all fields on the task, remove the completed date.

When a task is marked complete, the completed date on the task is set to the task's due date if it is today's date or earlier. If the task's due date is blank or set to a future date, the completed date is set to today's date. A task's completed date can be modified to a past date after it is marked complete. A task's completed date cannot be set to a nonwork day if Use Only Work Days is enabled. Completing a task due in the future may affect the hand-off sequence of the task.

To complete a task on the Task List page:

1) In the object selector, select ⅄ **Project** or ⅏ **Program**, and then select a project or a program from the list.
2) From the ≡ **Main Menu**, select ≡⅋ **Tasks**, and then select **Task List**.
3) Complete a task using any of the following methods:
   ▸ In the table, select the task, select the ⚙ **Context** menu, and then select **Complete**.
   ▸ In the **Complete** column, select the ✓ **Complete** icon.
   ▸ Right-click a selection of one or more tasks, and then select **Complete Rows**.
   ▸ In the Hand-off Flow detail window, right-click a task, and then select **Complete.**
4) All changes made to this page are saved automatically.

Tip

You cannot mark a task complete if:

▸ The task status is set to Pending and there are one or more commitments.
▸ The task is assigned to another user, and you do not have the required Commit to and Complete All Users' Tasks security privilege.

Configure and Apply Tasks Quick Filters

You can use quick filters to refine the data displayed on a page. Configure which filters you want to appear in the quick filters list.   In the quick filters list, select one or more values on which to filter. Use multiple quick filters to further reduce how much data is displayed. For example, you can create a filter to show only specific task codes related to Company A and Company B on the Work Plan page. Clear a filter to show more results. Quick filter value selections are not saved with the view.

The functionality described in this topic applies to the following Tasks app pages:
▸ Hand-offs
▸ Work Plan
▸ Constraints
▸ Task List

To configure and apply Tasks quick filters:

1) Navigate to a page, and then select 🔧 **Settings**.
2) In the **Manage Views** panel, select the **Quick Filters** tab.
3) In the **Show** section, select the quick filters you want to show in the quick filters list.
4) Select **Save**, and then select ✕ **Close**.
5) In the ▽ **Quick Filters** list, select applicable filter values, or select all.
6) To remove an applied filter, expand a filter list, and then select **Clear Filter**.
   To remove all applied filters, in the **Quick Filters** list, select **Clear All**.

Tip

The **Work Plan** page supports additional quick filter functionality:

▶ To quickly set additional activities or WBS as quick filter objects, select one or more activity bands or WBS nodes in the hopper or planning board, right-click the selection, and then select **Set Activities as Quick Filter** or **Set WBS as Quick Filter**. To do this, the **Activity** and **WBS** quick filters must be added to the view.

▶ To apply codes as quick filter objects, select one or more codes in the hopper or the planning board, right-click the selection, and then select **Set Code as Quick Filter**. To do this, you must first add **Codes** quick filters to the view and select up to five codes from the list of available options.

▶ You can select and apply parent, subordinate, or all objects in a hierarchy as quick filter objects. First select the parent level to expand all child levels beneath the selection. Select **Set Code as Quick Filter** or **Select WBS as Quick Filter**, and then select the objects.

View Activity Details in the Tasks App

On pages in the Tasks app, select an activity name to view information about the activity, including displays general activity details and task counts by category.

To use this feature on the Work Plan page, the Tasks and Activities grouping option must be selected or the task plan must be open and set to **Tasks and Activities** view. On the Hand-offs page, the page must be organized by Activity. On the Task list page, the table must be grouped by Activity or the Activity column must be displayed.

You can also perform this task on the Task List page in the context of a program.

To view activity details in the Tasks app:

1) In the object selector, select ⅄ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☰✓ **Tasks**, and then select **Work Plan**, **Hand-offs**, or **Task List**.

Beside each activity name the total number of tasks displays. If no number displays, there are no assigned tasks.

3) Select an activity name to display the activity detail popover containing more task information. The activity detail popover displays project, WBS, and activity details, such as percent complete, duration information, and total float, as well as the following task counts:

▶ **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.

Tip

▶ Select the activity name when viewing activity details to go directly to the activity on the Activities page.

▶ Task counts are for public tasks only and do not include private tasks.

▶ When activity date indicators are enabled, the activity details display indicators for the Start and Finish dates of activities that have actual dates or assigned constraints. When the As Late As Possible constraint is selected, the constraint indicator is not displayed. See Configure Activity Date Indicators to enable indicators.

▶ To make Activity Start and Finish dates more prominent in the Task List Page table, you can configure Activity Start and Activity Finish dates as columns. Select 🔧 **Settings**, and then select **Columns**.

▶ To choose which task counts to display in the popover, select 🔧 **Settings**, and then select **Task Counts**.

Set Task Notification Preferences

Changes in task details have the potential to impact your project's schedule performance. You can stay better informed on task updates by setting up task notifications. When a proposed due date is entered on a task or if a task becomes overdue, you can choose to receive a notification in the application's Inbox, your email, or both. You can adjust the number of notifications you receive by selecting a notification frequency of immediate, daily, or weekly. You can also choose to be notified for all tasks or only those tasks to which you are assigned.

All users can set their own notification preferences if they have access to the project. Users with the privilege to set notification preferences for others can also configure notification preferences on behalf of other users and configure a default set of preferences for all users assigned to at least one task in the project. This privilege is intended for application administrators and superintendents responsible for overseeing other users. The default set of preferences do not apply to users who configure their own set of preferences or have their own set of preferences configured for them.

Task notification preferences are set per project and can be configured on the Work Plan, Hand-offs, and Task List pages. The preferences are the same across all pages. Notifications are disabled by default for all users.

To set task notification preferences:

1) In the object selector, select ⼈ **Project**, select **View Projects List**, and then select a project name.

2) From the ≡ **Main Menu**, select ≡✓ **Tasks**, and then select **Work Plan**, **Hand-offs**, or **Task List**.

3) Select the **Actions** ▼ menu, and then select **Set Notification Preferences**.

4) In the **Set Notification Preferences** dialog box, select **Assign User** to add or remove users from the list, or select the option whose preferences you want to set:

> **Note** This section is only visible to users with the required privilege.
> Users without the privilege will only see preferences for themselves.

   ▸ **My Preferences**: Configure your own notification preferences.

   ▸ **Task Assigned User (default preferences)**: Configure the default notification preferences for all users assigned to at least one task. These preferences do not apply to users with their own configured preferences.

   ▸ **Existing User**: Select the name of a user in the list to configure notification preferences on their behalf.

5) In the **Preferences** section, configure the following settings for the **Overdue Due Date** and **Proposed Due Date** notification types:

> **Note** Each notification type has its own set of preferences and notifications.

   a. **Inbox**: A notification is sent to the selected user's application Inbox.

   b. **Email**: A notification is sent to the selected user's email.

   c. **Frequency**:

   ▪ **Immediate**: A notification is sent as soon as a task meets your notification criteria.

   ▪ **Daily Digest**: A daily notification is sent at midnight with a list of tasks that currently meet the notification criteria.

   ▪ **Weekly Digest**: A weekly notification is sent at midnight on Sunday with a list of tasks that currently meet the notification criteria.

6) Select **Receive notifications for only my assigned tasks** to limit notifications to only tasks to which the selected user is assigned. If this option is disabled, the selected user will receive notifications on all tasks in the project that meet their notification criteria.

7) Select **Set**.

8) All changes made to this page are saved automatically.

Tip

▸ When a notification is received on the Inbox page or in an email, select **View Task** to view the relevant tasks on the **Task List** page.

▸ Select the ⚙ **Context** menu next to an existing user to delete them from the list. The **My Preferences** and **Task Assigned User** options cannot be removed.

Configure the Task List Page Table

You can add, sort, align, group by, hide, pin, adjust to fit the content in the columns, and rename a column directly from the Task List table without opening the view settings. Each column in the table supports a menu with several options that vary depending on the column. Pinned columns are located in a section at the beginning of the Task List table. They do not move when the rest of the table is scrolled horizontally. This makes it easier to see the most important task fields, such as Name or State, when a large number of columns are displayed.

Columns that support grouping can be grouped from the menu. Additional grouping options, such as grouping interval and sort order, must be modified from the Manage Views panel. All of the column header options configured, except for the adjust to fit and alignment options, will be saved to the Named View currently set for the page.

To configure the Task List page table:

1) In the object selector, select ⋏ **Project** or ⚇ **Program**, and then select a project or a program from the list.

2) From the ☰ **Main Menu**, select ☰✓ **Tasks**, and then select **Task List**.

3) To add columns to the table:

   a. Select the ＋ **Open Column Selector** icon.

   b. In the column dropdown, next to a column name, select ⬭ **Show** or ⬬ **Hide** to add or remove the column from the table.

4) To configure an existing column, right-click a column title or select ⌄ **Open Column Menu**, and then select any of the following:

   ▸ **Sort**: Hover over the Sort option and then select to sort the column by Ascending or Descending. Use Ctrl + click to add the column to an existing sort sequence.

   ▸ **Align Column**: Hover over **Align Column** and then select from **Align Left**, **Align Center**, and **Align Right** to determine the alignment of the content in your columns.

   ▸ **Group By Column**: Group activities by the selected column. You can also group by multiple columns or turn off a column grouping. This option is only available for fields that support grouping.

   ▸ **Hide Column**: Remove the column from the table.

   ▸ **Adjust to fit content**: Expand or shrink the width of the column to fit its contents. You can also double-click a column's right edge to adjust it.

   ▸ **Find and Replace**: Displays the Find and Replace popover. If the column is read-only, then only **Find** is displayed. This option is only available for string fields.

   ▸ **Pin Column**: Adds the column to the pinned section of the Task List table. You can also click and drag columns between the pinned and unpinned sections.

   ▸ **Rename Column**: Displays the **Rename a Column** popover. If a new column name is not entered in the **Rename Column** popover and **Rename** is selected, the column name field will be blank. After a column is renamed, the custom name can be reset to the original name by selecting **Reset** in the **Rename Column** popover. Any changes to the column name are saved to your current view.

5) All changes made to this page are saved automatically.

Tip

▸ Select 🔧 **Settings** to manage all page view settings. See *Configure View Settings* (on page 178) for more information.

▸ The Task Name or ID field must always be displayed.

▸ Click and drag a column title to change the column order.

▶ Rename string field values in the table using find and replace. Search for a string in a column and replace a single instance or all instances with a new string. Find and replace enables you to rename many values at the same time, such as task names, code values, or configured field values.

Task List 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

Completed Date

The date when the task was completed.

Current Committed Due Date

The current due date of the task commitment.

Due Date

The date by which the task is expected to be completed.

Original Committed Due Date

The original due date of the task commitment.

Proposed Due Date

The date proposed for the task due date. Proposed Due Dates do not affect task Due Dates until they are accepted.

Start Date

The date when the task is set to begin.

If the task is set to allow non-work days, the date is calculated as Due Date minus Duration plus 1 day.

If the task is not set to allow non-work days, the date is calculated as Due Date minus the sum of Duration plus Non-Work Days, plus 1 day.

This is a read-only field.

Durations

Duration

The total amount of expected time required to complete the task, in days.

Slack

The amount of time a task can be delayed before it affects the start date of its most immediate successor. This is a read-only field.

General

Activity

The activity to which the task is assigned. The activity must have a Type of Activity Dependent or Resource Dependent.

Assigned User

The person responsible for the task.

Commitment Count

The number of commitments on a task.

Company

The name of the company that owns the task.

Constraint Count

The number of constraints assigned to the selected task or task milestone.

Constraint Impact

Indicates whether the selected task or task milestone has any constraints assigned.

Crew Size

The number of people planned to work on the task.

Flag

Identifies tasks that are important to the user. Select a flag on a task to mark it as important. This field cannot be removed from the view.

ID

The unique identifier assigned to the task.

Predecessor Count

The number of predecessor hand-offs assigned to the task.

State

Indicates if a task is in any of the following states:

The task's dates are outside of its assigned activity Start and Finish dates.

The assigned activity is complete but the task is not.

The task is complete but the assigned activity is not.

The task is overdue.

The task is committed and the number of commitments.

The task is pending and should be recommitted.

This field is read-only and cannot be removed from the view.

Status

The current status of the task. Valid values are New, Pending, Committed, and Completed. This is a read-only field.

Status - Completion

Indicates the completion status of the activity and its assigned tasks.

Status - Dates

Indicates the overall date status of the activity's assigned tasks.

Outside Activity: A task's dates are outside of the activity's Start and Finish dates.

Inside Activity: All of the tasks' dates are within the activity's Start and Finish dates.

No Tasks Assigned: No tasks are assigned to the activity.

This is a read-only field.

Successor Count

The number of successor hand-offs assigned to the task.

Task Check - Commitments

Tasks that contain commitments to due dates.

Task Check - Due This Week

Tasks that are due within the calendar week from Sunday to Saturday.

Task Check - Overdue

Tasks that have not been completed by their due date.

Task Check - Pending

Tasks that have a due date but are not committed, or tasks that are committed but the due date has been changed.

Task Check - Planned Outside Activity Dates

Tasks with due dates that occur before the activity start date or after the activity end date.

Task Check - Scheduled on Non-work Days

Task Check - Tasks with Slack

Task slack is the amount of time a task can be delayed before it impacts the start date of the most immediate hand-off successor.

Task Check - Unaccepted Proposed Due Date

Tasks that have a proposed due date value that has not yet been accepted.

Task Check - Unassigned

Tasks that do not have a user assigned.

Task Check - Unplanned

Tasks without a due date.

Type

The type of task. Valid values are Task and Task Milestone.

Use Only Work Days

Enables the user to allow only the project calendar's work days and ignore non-work days when determining the value for Start and Due Date.

Visibility

The visibility of task. Valid values are Private and Public.

WBS

The WBS that the activity is associated with.

Tasks Analysis Overview

Evaluating Task Performance Video

The Analysis page in the Tasks app displays a variety of charts that are useful for monitoring project task performance. The page includes charts that track overall project task performance, task performance by company, and the most common reasons for work delays. You can filter the display of data by the current week, across a six-week time period, or across a custom date range. You can also use quick filters to limit the analysis results by one or more companies. The data in each chart represents the most current task information.

Project Planned Percent Complete

The Planned Percent Complete (PPC) metric indicates the completion performance of your project's committed tasks over time. Calculated as the number of completed tasks divided by the number of task commitments, PPC enables you to track your actual work against your planned work. Daily PPC metrics are calculated up to and including the previous day. Weekly PPC metrics are calculated up to and including the previous week. Individual bars in the chart display the PPC value for the corresponding time period. Hover over past bars to show committed, completed, and PPC values for the tasks in the time period. Bars for the current day and week display PPC as Pending since PPC is only calculated up to the previous day or week. Future period bars display the number of committed tasks.

You can enable the display of two PPC values above the chart. The **Total Project PPC** value is calculated from the beginning of the project up to the previous week. The **Time Frame PPC** value is calculated for the committed tasks that fall within the selected time frame. You can configure additional options in the chart settings.

Company Planned Percent Complete

Each bar in the chart represents the PPC value of tasks assigned to a particular company in your project. This metric enables you to view each company's task completion performance against what they had planned. Company PPC is only calculated up to and including the previous day or week.

Reasons for Missed Commitments

There are many reasons why the completion of a task may be delayed. When a commitment date is missed, the task must be recommitted with a new date and a reason for missing the commitment. Metrics for reasons for missed commitments are tracked on tasks with recommitted due dates up to and including the previous day. Use the chart to track the reasons for delayed tasks. Reasons with high occurrences may prompt you to take action to reduce them. You can toggle the chart format between a bar chart and a pie chart.

Reasons for Missed Commitments Over Time

Track the number of missed commitments over time to view trends in the usage of a particular reason by time and by company. Each bar represents the total number of missed commitments for a time period, and each colored section of a bar represents a different reason for missing a commitment. Hover over a colored section to view the number of times a reason has been used during that time period, a breakdown of the usage by company, and the reason's usage as a percentage of all reasons used during that time. You can also toggle the display of individual reasons across the entire chart. The values in this chart are calculated up to and including the previous day.

Company Planned Percent Complete Over Time

Each line in the chart represents the PPC value of tasks assigned to a single company as it changes over time. Hover over a plot point to view the Company PPC value for that particular time period. Some PPC values may be shared by more than one company. To view all the plot points on a PPC value, use the Quick Filter to toggle the display of companies across the Analysis page, or select a company name on the X-axis of the chart to only toggle that company's line. Company PPC is only calculated up to and including the previous day or week.

View Tasks Analysis Metrics

Use the Analysis page to view various task performance metrics. Filter task data by the current week, over a six-week time period, or over a custom date range. Use quick filters to limit the analysis results to the companies you choose.

To view Tasks analysis metrics:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

2) From the ≡ **Main Menu**, select ≡✓ **Tasks**, and then select **Analysis**.

3) In the **Time Frame** list, select one of the following:

  ‣ **This Week**: Displays the current week's task metric data.

  ‣ **6 Week Window**: Displays task metric data for the previous four weeks, the current week, and the next week.

  ‣ **Custom**: Displays weekly task metric data for a user-defined date range:

    ▪ **From**: Select a start date for the custom time period.

    ▪ **To**: Select an end date for the custom time period.

4) In the **Quick Filters** list, select the companies you want to include in the analysis results.

5) Hover over individual bars for additional chart details.

Tip

‣ With the **6 Week Window** or **Custom** filters selected, select ⑦ **Date range of data** to view the dates specified by the filter.

‣ In the **Project Planned Percent Complete** chart, select 🔧 **Settings** to configure the following chart options:

▸ In the **Planned Percent Complete (PPC)** section, under **When calculating PPC, honor Company quick filter?**, select **Yes** to only include companies that are selected in the quick filter in the PPC calculation, or select **No** to ignore the quick filter and include all companies in the calculation.

▸ In the **Show** section, enable or disable the **Total Project PPC** label, the **Time Frame PPC** label, and a **Zero PPC** label on bars with a 0% PPC value.

▸ In the **Reasons for Missed Commitments** chart, select **Bar Chart** or **Pie Chart** to change the display of the data.

▸ In the **Company Planned Percent Complete Over Time** chart, select a company name in the X-axis to toggle the display of its line.

Task Summary Overview

The Task Summary panel is a tool in the Tasks app that enables you to view high-level status information for the public tasks and task milestones in your project. This can be useful in planning meetings when tracking or monitoring your tasks according to their statuses. The panel contains a configurable selection of checks that indicate certain details about your tasks, including overdue status, tasks with slack, tasks with commitments, and unplanned tasks. Some checks include minimum criteria threshold values that determine if a task will be included in the check's count. You can prioritize and update your tasks according to their various statuses.

Task Summary details, including check criteria values, can be modified in the project settings. Individual checks can be enabled or disabled according to your organization's needs.

The Task Summary panel is available at the project level for the **Work Plan**, **Hand-offs**, and **Task List** pages.

Configure Task Summary Settings

The Task Summary tool consists of checks that monitor various project metrics. Each check can be enabled or disabled in the project settings. Some checks also have minimum criteria values that can be modified. Individual checks can be enabled or disabled according to your organization's needs. Completed tasks are not included in any of the check results.

To configure settings for the Task Summary tool:

1) *Navigate to the project settings page* (see page 208).
2) Select the **Tasks** tab, and then select **General**.
3) In the **Task Summary Settings** section, configure the following settings:

   ▸ For each check, select the **Active** option to include the selected check in the Task Summary panel.

   ▸ For each check that supports minimum criteria values, in the **Minimum Criteria** field, enter a new value.

4) Select **Save**.

Tip

If you are accessing the **Tasks** tab for the first time, you may be prompted to run the Task Summary checks. Select **Run** to run the checks.

This setting is used in the following apps:

⊟✓ **Tasks**

View the Task Summary Panel

Use the Task Summary panel to view a high-level status overview for the tasks in your project. This enables you to prioritize and update your tasks according to their status. The panel includes a variety of checks that can be configured in the project settings. Some checks also have configurable minimum criteria threshold values.

To view the Task Summary panel:

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

2) From the ≡ **Main Menu**, select ⊟✓ **Tasks**, and then select **Work Plan**, **Hand-offs**, or **Task List**.

3) Select ♥ **Task Summary**.

4) In the panel, select a check to view the check's description and the tasks that meet the check's criteria. Select a task to indicate it on the page.

5) Modify the task's details that relate to a check. All changes made to this page are saved automatically.

6) Select the ↻ **Refresh** icon in the Task Summary panel to recalculate all checks and view updated values.

Tip

▸ If you are accessing the **Tasks Summary** panel for the first time, you may be prompted to run the Task Summary checks. Select **Run** to run the checks.

▸ Filtered tasks that meet a check's criteria are still included in the panel. Filtered tasks appear with a ⑦ **More Info** icon next to them, but the tasks are not selectable. Clear the relevant filters to be able to select the task in the panel.

▸ Completed tasks are not included in the checks.

▸ Checks can also be added as columns on the **Task List** page.

Task Summary Reference

The Task Summary tool is used in the Tasks app to monitor various metrics related to your project's tasks. Use this topic to refer to the name and description for each check. Some checks also support minimum criteria values. The default criteria values are listed below.

Check Name	Description	Default Minimum Criteria
Overdue	Tasks that have not been completed by their due date.	1 day

Due This Week	Tasks that are due within the calendar week from Sunday to Saturday based on the Task Time Zone Setting.	Not Applicable
Tasks With Slack	Task slack is the amount of time a task can be delayed before it impacts the start date of the most immediate hand-off successor.	1 day
Commitments	Tasks that contain commitments to due dates.	1 commitment
Unassigned	Tasks that do not have a user assigned.	Not Applicable
Pending	Tasks that have a due date but are not committed, or tasks that are committed but the due date has been changed.	Not Applicable
Unplanned	Tasks without a due date.	Not Applicable
Planned Outside Activity Dates	Tasks with due dates that occur before the activity start date or after the activity end date.	Not Applicable
Scheduled on Non-work Days	Tasks that occur on non-work days as defined by the project calendar when Use Only Work Days is selected.	Not Applicable
Unaccepted Proposed Due Date	Tasks that have a proposed due date value that has not yet been accepted.	Not Applicable

Task Icon Reference

There are a variety of icons on pages in the Tasks app that indicate different task details. Some icons can be selected to quickly update the corresponding task. Others can be selected to open the relevant tab of the Task Details dialog box. Hover over an icon for more information.

Task icons can be found on the following pages in the Tasks app:

▶ *Hand-offs* (see "*Hand-offs Overview*" on page 83): Icons may be shown on task cards, in the Task Details dialog box, and in the info bar for a selected task. Some icons can be selected in the info bar.

▶ *Work Plan* (see "*Work Plan Overview*" on page 102): Icons may be shown and selected on task cards on the planning board and in the info bar for a selected task. Some icons are shown in the Task Details dialog box.

▶ *Task List* (see "*Task List Overview*" on page 143): Icons are read-only in the State column in the table. The Task Complete icon can be selected in the Complete column.

The table below lists each task icon, its description, and possible interactions.

Task Icons

Icon	Icon Description	Interactions
⊞ **Commitments**	Indicates that a task has existing commitments. A task with one commitment only displays the icon. A task with multiple commitments displays the number of commitments next to the icon.	Select the icon on a task with no commitments to commit to the task. Select the icon on a task with existing commitments to open the Recommit Task dialog box. This icon is read-only on the Task List page.
⚠ **Constraints**	Indicates that a task has an existing constraint.	Select the icon to view more information about the constraint.
⊠ **Crew Size**	Indicates that a task has a crew size estimate. The icon displays beside the estimate.	This icon is read-only on all the pages.
▬ **Discuss**	Indicates that a task has an existing discussion. This icon displays regardless of completion status.	Select the icon to open and view any existing discussions.
⬀ **Hand-offs**	Indicates that a task has existing hand-offs. This icon is only shown on the Work Plan page and in the info bar on the Hand-offs page.	Select the icon on the Work Plan page to open the Hand-off Flow detail window. This icon is read-only on the Hand-offs page.

Overdue Task or Planned Task Outside Activity Dates	Indicates that a task is overdue or the task exists outside the assigned activity date range based on the time zone setting configured in the project settings. For an overdue task that is not yet committed, update its due date or complete the task to resolve the issue. If the task is committed, recommit or complete the task to resolve the issue. For planned tasks outside of the activity start date or the activity end date, adjust the task details or activity details to resolve the issue.	This icon is read-only on all pages.
Pending	Indicates that a task has a due date that does not match the due date of its latest commitment. Recommit to resolve the issue.	Select the icon to open the Recommit Task dialog box. This icon is read-only on the Task List page.
Proposed Due Date	Indicates that a task has a proposed due date that has not been accepted. Accept the proposed due date to resolve the issue.	This icon is read-only on all pages.

⚠ **Status**	Indicates the status of a task in relation to its assigned activity.	This icon is read-only on the Task List page.
	The following statuses are possible:	
	▸ The task's dates are outside of its assigned activity's Start and Finish dates. On the Work Plan page, the activity band will also display a dashed border and extend farther than other bars on the planning board. ▸ The assigned activity is complete but the task is not. ▸ The task is complete but the assigned activity is not.	
	This icon is only shown on the Task List page.	
⊘ **Task Complete**	Indicates the completion status of a task.	Select the icon to mark the task complete or not complete.
	If unfilled, the task is not complete. If filled, the task is complete.	

Using Touch-Screen Gestures in Primavera Cloud

You can use touch-screen devices to navigate pages, open menus, select items, and enter data in the Primavera Cloud web application. The gestures required to perform actions in the application are described below.

> **Note** Touch-screen functionality is not officially supported for Primavera Cloud and has not been fully tested. Some gestures may not work with all devices or specific device browsers.

The following actions can be performed using touch-screen gestures:

Common Page Actions

▶ **Select**: Tap a table cell, row, icon, button, list, menu, or link to select it.

▶ **Edit cell in a table**: Tap the cell to select it. Tap and hold your finger on the cell for a full second, and then release your finger. You can now edit the value.

▶ **Select multiple rows in a table**: This action is not supported in Primavera Cloud using a touch-screen device.

▶ **Focus on a Gantt bar**: Open a Gantt chart view on a page. Double tap a row in the chart to shift the timescale to display the beginning of the bar.

▶ **Zoom**: Pinch outward with two fingers to zoom in. Pinch inward with two fingers to zoom out.

Page-Specific Actions

Activities Page

▶ **Create an activity relationship between Gantt bars**: In the Gantt chart, tap an activity bar. On either edge of the bar, tap the circle, which represents the start of the relationship. Drag your finger to the edge of another activity bar. A popover shows the proposed relationship. Release your finger to create the relationship.

▶ **Modify an activity bar's start and finish dates**: In the Gantt chart, tap an activity bar to select it. Tap and hold your finger on the selection for a full second, and then drag your finger to another day in the chart. The new start and finish dates are shown next to the bar as you drag it.

Hand-offs Page

▶ **Select a task card**: Tap the task card to select it and open the task card or Task Details dialog box.

▶ **Select multiple task cards**: Do either of the following:

  ▸ Tap each task card that you want to select. Tap a selected card to deselect it. Tap another part of the screen to deselect all selected cards.

  ▸ Select the ⬚ **Select** tool in the diagram toolbar, and then tap and drag to highlight multiple tasks.

▶ **Right-click a selection**: Tap one or more cards to select them. Tap and hold your finger on the selection for a full second, and then release your finger. The right-click menu is displayed.

▶ **Add a hand-off**: Tap a single task card. On either edge of the card, tap the circle, which represents the start of a hand-off. Tap a different task card, and then tap a circle on the edge of the card to complete the hand-off line.

Task List Page

▶ **Add a hand-off between Gantt bars**: In the Gantt chart, tap a task bar. Tap the circle that appears, and drag your finger to the edge of a different task bar. A popover shows the proposed hand-off relationship. Release your finger to create the relationship. You can also do this for task milestones.

▶ **Modify a task bar's start and finish dates**: In the Gantt chart, tap a task bar to select it. Tap and hold your finger on the selection for a full second, and then drag your finger to another day in the chart. The new start and finish dates are shown next to the bar as you drag it.

Work Plan Page

▶ **Open the task details**: With configurable task cards disabled, tap a task card to open the Task Details dialog box.

▶ **View a configurable task card**: With configurable task cards enabled, tap a task card to view the configurable task card. Tap the Task Details icon in the header of the configurable task card to open the Task Details dialog box.

▶ **Edit a configurable task card**: When viewing a configurable task card, tap a field to edit its value. Editable fields will show an edit icon in the corner of the field. Read-only fields will not show this icon.

▶ **Select multiple task cards**: This action is not supported on the Work Plan page using a touch-screen device.

▶ **Right-click a task card**: Tap and hold your finger on the task card for a full second, and then release your finger. The right-click menu is displayed.

▶ **Move a task card**: Tap and hold your finger on a task card for a full second, and then drag your finger to another day, activity band, or planning bucket.

▶ **Modify task duration**: Tap and hold your finger for a full second on the left edge or right edge of a task card, and then drag it to another day on the planning board. As you drag your selection, the new duration is highlighted.

▶ **Modify the planning board timescale**: Tap and drag a column header on the planning board to change the size of all columns. This enables you to zoom in or out of the timescale. If the column size is decreased enough, smaller cards are used to represent tasks. This enables the application to display more tasks on the planning board. You can still move a card to change its due date, drag its edge to change its duration, and view status icons displayed on the card. Increase the column widths to return the task cards to their normal appearance.

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.

Note

▪ 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 🔧 **Settings**.

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.

Tip

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 🔧 **Settings**.

2) In the **Manage Views** panel, select a view.

3) Select the ⚙ **Context** menu, and then select **Set Active**.

Tip

▸ 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 🔧 **Settings**.

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) Position the columns in the **Selected Columns** section by:

  ▸ Using the up and down arrows to change the positioning of the columns.

  ▸ 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) In the **Standard Column Options** section, select from the following to enable additional column options:

  ▸ **Show Discussion Indicator**: Select to show or hide the discussion icon in a table.

  ▸ **Show Row Numbers** (Activities List page and Task List page only): Select to show or hide row numbers in the grid.

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**.

Tip

Additional formatting options for the table are available from the ⚙ **Context** menu in the table header. Access the ⚙ **Context** menu beside a row selection for additional row-specific formatting options, including, but not limited to the following:

▸ **Expand All** or **Collapse All** 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 🔧 **Settings**.
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**.

Tip

▸ On the page, select ▽ **Filters** to open the **Manage Filters** panel where you can 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 183).

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 182).

> **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 🔧 **Settings**.
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**.

Tip

▸ 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 where you can 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.

> **Note**
>
> - For information on configuring a saved filter, see *Configure a Saved*

> *Filter* (on page 182).

- View options may vary per page.

To configure and apply filtering options:

1) Navigate to a page, and then select 🔧 **Settings**.
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 🔧 **Settings**.
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**.

Tip

▸ Use the **Show/Hide empty groups** toggle on the **Activities** page, **Schedule Comparison** page, or **Task List** 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 205)
2) Select ⚒ **Settings**.
3) In the **Settings** panel, select the **Comparison Panel** tab.
4) 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**
5) 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 ⚒ **Settings**.
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. Gantt bars reflect specific activity Start dates, Finish dates, and durations based on the bar's type. Some bars, such as the Current bar on the Activities page, have additional configuration options.

To configure Gantt chart bars:

1) *Navigate to the Activities page* (see page 205).

2) Select 🔧 **Activities Grid Settings**.

3) In the **Manage Views** panel, select the **Bars** tab.

4) To add a new bar, and configure bar settings, do the following:

a. Select **Configure**, 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** picker, 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. Select **Color by Activity Code** if you want to color your activities according to their assigned code values, 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.

f. Click and drag one or more bars to change the order in which they appear.

5) To configure the Current bar for the **Activities** list, use the **Bar Type** list to select **Current**.

6) In the **Bar Type** list, select an activity bar type and modify its appearance individually with any of the following options:

▸ In the **Height** list, specify a bar height. This option is not available for Start and Finish Milestones.

▸ If **Show Progress** is enabled, you can select a progress color using the **Progress Color** picker. Optionally, you can select a pre-configured style from the **Progress Style** list.

▸ In the **Bar Color** picker, select a bar color to apply a bar color. Optionally you can select a theme from the **Theme** list to apply a pre-configured color theme for all bars in the Gantt chart.

▸ Select **Show Critical** to represent critical activities with a red bar instead of the colors selected for the Current bar.

7) Make selections in the **Color Bars Using Code Assignments** section to override bar colors and progress using colors associated with activity codes.

▸ Select **Override Progress Colors**, and then select an activity code from the list.

▸ Select **Override Bar Colors**, and then select an activity code from the list.

▸ Select **Modify Code Settings** to configure the code value colors in the corresponding Codes dictionary.

> **Note** If an activity is not assigned to a code that has an overriding color, it will use the activity type's configuration settings.

8) 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.

9) 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.

10) Select **Close**.

Tip

▸ 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 Summary Bars on the Activities Page

Configure and display summary bars for activity groups on the Activities page for a program or project schedule when using the Gantt chart. Enable multiple summary bars in the Gantt chart to summarize each activity grouping across multiple activity dates. There is no limit to the number of summary bars that you can create in a view.

Each summary bar can have different configurations so that each bar is clearly distinguishable in the Gantt chart. This is especially useful for schedulers and other stakeholders who need to see how groups of activities are performing against the original schedule.

To add and configure a Gantt summary bar:

1) *Navigate to the Activities page* (see page 205).

2) Select ✎ **Activities Grid Settings**.

3) In the **Manage Views** panel, select the **Bars** tab.

4) To add a summary bar and configure bar settings, do the following:

    a. Select **Configure**, select ✛ **Add** ▼, and then select **Summary 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** picker, select a color for the bar.

    e. Enable **Show Expanded Summary Bars** to show summary bars for an expanded and collapsed grouping band in the Gantt view. When this option is disabled, a summary bar will only display if its corresponding grouping band is collapsed.

    f. Click and drag the center of the bar to reposition it.

    g. (Optional) Add and configure additional summary bars as needed.

    h. Remove a summary bar by selecting ⊗ **Delete Summary Bar** beside the bar.

5) 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 **Close**.

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 ⅄ **Project** or ⁂ **Program**, and then select a project or a program from the list.

2) From the ☰ **Main Menu**, select ☷ **Tasks**, and then select **Task List**.

3) Select ✎ **Settings**.

4) In the **Manage Views** panel, select the **Bars** tab.

5) 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.

6) In the **Height** list, specify a bar height. Options include Small, Medium, and Large.

7) 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.

Select **Close**.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*** (***https://docs.oracle.com/cd/E80480_01/English/user_guides/task_management_user_ guide/246213.htm***) 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 🔧 **Settings**.

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. Non-working time shading depends on what the project calendar defines as a workweek. For example, if a workweek is defined as Monday through Friday, then Saturday and Sunday are shaded as non-working days. Exception times, such as holidays, are not shaded.
▸ **Progress Spotlight** (Activities page only): Enables the Progress Spotlight highlighting feature in the Gantt chart.

4) In the **Timescale** section, define a timescale for the Gantt chart:

▸ **Calendar Dates**: Select **Show Calendar Dates**, and then further specify the timescale options:
- **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).

▸ **Ordinal Dates** (Activities page only): On the Activities page, you can display ordinal dates as a more flexible timescale option outside of the current schedule. Applying this option displays date intervals as sequential numbers, beginning from the ordinal start date specified in the settings. Ordinal dates that precede the ordinal start date display a negative number. Depending on the context of a project or a program, terminology may differ and is noted below. Select **Show Ordinal Dates**, and then further specify the timescale options:
- **Start**: Select a timescale for the start date.

  Project Planned Start (Project)/Earliest Planned Start (Program): The Gantt chart displays data on the project's planned start date, or the program's earliest planned start date.

Project Planned Finish (Project)/ Earliest Planned Finish (Program): The Gantt chart displays data on the project's planned finish date, or the program's earliest planned finish date.

Data Date (Project)/ Earliest Data Date (Program): The Gantt chart displays the first data date for the project or the earliest data date for a program.

Current Date: The Gantt chart displays data on the current date.

Current Week: The Gantt chart displays data for the current week.

Current Month: The Gantt chart displays data for the current month.

Custom Date: The Gantt chart displays data on a custom date.

- **Timescale Interval**: This value sets the duration of time for the proposed schedule. Selectable options are **Day**, **Week**, **Month**, **Quarter**, or **Year**.

- **Show Interval Row**: This option displays the selected timescale interval row above each ordinal date row.

> **Note** If **Show Calendar Dates** is selected, you will not be able to select or deselect **Show Interval Row**.

- **Custom Prefix**: Select this option to create a custom prefix for your interval on the Gantt chart.

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**.

Tip

▸ You can also enable some or all of these options by selecting ⚙ **Gantt Settings** under the Gantt chart.

▸ For more information about using Ordinal Dates, see Apply Ordinal Dates to Gantt Charts on the Activities Page.

▸ Tasks bars are colored by specific attributes. Go to *Project Settings* (*https://docs.oracle.com/cd/E80480_01/English/user_guides/task_management_user_guide/246213.htm*) to modify this option.

Configure Gantt Curtains on the Activities Page

Gantt curtains can be customized using various colors, opacity options, and sizes, depending on the needs of your project team. Preview your changes before applying them to the schedule.

Create multiple curtain styles and manage them as needed from the Manage Views panel, or directly from the Activities grid when in Gantt view. See Gantt Curtains Overview for more information.

To enable and configure Gantt curtains from the Manage Views panel:

1) *Navigate to the Activities page* (see page 205)
2) Select ⚲ **Activities Grid Settings**.
3) In the **Manage Views** panel, select the **Gantt** tab, and then select the **General** tab.
4) In the **Show** section, select **Curtains** to display curtains in Gantt view.
5) At the top of the panel, select the **Curtains** tab to configure curtain settings.
6) Select ✛ **Add** to create a new curtain, and then customize it using the following options in the grid:

    a. **Name**: Add a name for the Gantt curtain.

    b. **Description**: Add a significant description for your project team. This description displays with the Name and Start and Finish dates when a user hovers over the curtain name.

    c. **Start**: Enter the starting point for the curtain to display.

    d. **Finish**: Enter a finishing point for the curtain to close.

    The default length of the curtain relates to the selected timescale. For example, if the timescale is set to Week/Day, then the default length is 1 week.

    e. **Color**: Apply a color to the curtain. The default selection is mint green.

    f. **Opacity**: Select an opacity level for your curtain. The range is 0 to 100%, with 100% being the default value.

    g. **Visibility**: Select this option to show or hide the curtain in Gantt view. When you create a new curtain, this option is selected by default.

7) 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:

    f. Select **Save**.

Tip

You can delete one or more curtains from the Curtains menu in the Gantt tab. Select one or more curtain rows, and then select **Delete** from

the ⚙ **Context** menu beside the curtain name.

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.

To configure Activity Network settings:

1) *Navigate to the Activities page* (see page 205).
2) Select 🔧 **Activities Grid Settings**.
3) In the **Manage Views** panel, select the view to configure.
4) Select the **Network Setting** tab.
5) 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.
6) In the **Preview** section, you can preview the display of an activity box based on your selected fields.
7) 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.
8) Select **Close**.

Configure Quick Filters

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

> **Note**
> - 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 🔧 **Settings**.
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.

> **Note**
>
> ▪ 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 🔧 **Settings**.

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 🔧 **Settings**.

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**.

Tip

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 🔧 **Settings**.
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

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 🔧 **Settings**.
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, specified below.

> **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 🔧 **Settings**.

2) In the **Manage Views** or **Settings** panel, select the **Formatting** tab.

3) In the **Row, Column, and Cell Formatting** section, review the list of formatting changes that were made directly to table elements on a page. Delete these formatting changes from a view using the ⚙ **Context** menu.

4) In the **Read-only Styling** section, select **Highlight Read-only cells** to highlight read-only cells on the page.

5) (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.

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**.

Tip

For more information about directly formatting table elements on a page, see ***Configure Cell, Column, and Row Formatting***

(***https://docs.oracle.com/cd/E80480_01/English/user_guides/risk_management_user_guide/253130.htm***).

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
▸ Risk Register
▸ Task List

To customize table formatting:

1) In the object selector, select a project or a program.

2) Navigate to the **Activities**, **Risk Register**, 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.

Note

- 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 review your selected formatting options from the **Manage Views** or **Settings** panel. See *Configure Formatting* (***https://docs.oracle.com/cd/E80480_01/help/en/user/159438.htm***) .

- 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.

Tip

‣ 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.

‣ Additional formatting options for the table are available from the ⚙ **Context** menu in the table header. Access the ⚙ **Context** menu beside a row selection for additional row-specific formatting options, including, but not limited to the following:

‣ **Expand All** or **Collapse All** hierarchical data for an object in a single table row from the row's ⚙ **Context** menu. To expand all or collapse all hierarchical data for all object rows, use the ⚙ **Context** menu in the table header.

‣ Collapse a selection to a certain grouping band level by selecting the **Collapse To** option, and then selecting the grouping band you want to collapse in the current layout. The selection available in the list is based on the grouping bands displayed in the current view.

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

Configure 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) In the object selector, select ⚕ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ☰ **Tasks**, and then select **Hand-offs**.

3) Select 🔧 **Settings**.

4) In the **Manage Views** panel, select the **Plan By** tab.

5) In the **Available** section, select the options you want to appear in the **Plan By** filters list.

6) 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.

7) (Optional) To display WBS and Code value grouping bands hierarchically select **Display lanes for WBS and Code values hierarchically.**

8) 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 **Close**.

Tip

▸ For more information on how to configure codes, review the *Codes Overview* (on page 54) 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 ⋏ **Project**, select **View Projects List**, and then select a project name.

b) From the ☰ **Main Menu**, select ▤ **Schedule** or ▦ **Scope**, and then select **WBS**.

Navigate to the Activities page

1) In the object selector, select ⋏ **Project** or ⚬ **Program**, and then select a project or a program from the list.

2) From the ☰ **Main Menu**, select ▤ **Schedule**, and then select **Activities**.

Navigate to the project Activities page

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

2) From the ☰ **Main Menu**, select ▤ **Schedule**, and then select **Activities**.

Navigate to the Baselines page

a) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

b) From the ☰ **Main Menu**, select ▦ **Scope** or ▤ **Schedule**, and then select **Baselines**.

Navigate to the Baselines or Activities page

1) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

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 ⋏ **Project**, select **View Projects List**, and then select a project name.

a) From the ☰ **Main Menu**, select ▤ **Schedule**, and then select **Schedule Comparison**.

Navigate to the workspace resource page

a) In the object selector, select ⬚ **Workspace**, select **View Workspaces List**, and then select a workspace name.

b) From the ≡ **Main Menu**, select ⧑ **Resources**, and then select **Resource List**.

Navigate to the project resources page

a) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

b) From the ≡ **Main Menu**, select ⧑ **Resources**, and then select **Resource List**.

Navigate to the workspace or project resources page

a) In the object selector, select ⬚ **Workspace** or ⋏ **Project**, and then select **View Workspaces List** or **View Projects List**. Select a workspace name or project name.

b) From the ≡ **Main Menu**, select ⧑ **Resources**, and then select **Resource List**.

Navigate to the workspace role page

a) In the object selector, select ⬚ **Workspace**, select **View Workspaces List**, and then select a workspace name.

b) From the ≡ **Main Menu**, select ⧑ **Resources**, and then select **Role List**.

Navigate to the project roles page

a) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

b) From the ≡ **Main Menu**, select ⧑ **Resources**, and then select **Role List**.

Navigate to the workspace or project roles page

a) In the object selector, select ⬚ **Workspace** or ⋏ **Project**, and then select **View Workspaces List** or **View Projects List**. Select a workspace name or project name.

b) From the ≡ **Main Menu**, select ⧑ **Resources**, and then select **Role List**.

Navigate to the workspace resource assignments page

a) In the object selector, select ⬚ **Workspace**, select **View Workspaces List**, and then select a workspace name.

b) From the ≡ **Main Menu**, select ⧑ **Resources**, and then select **Assignment List**.

Navigate to the project or program resource assignments page

a) In the object selector, select ⋏ **Project** or ⋇ **Program**, and then select a project or a program from the list.

b) From the ≡ **Main Menu**, select ⣿ **Resources** or ☰ **Schedule**, and then select **Assignment List**.

Navigate to the workspace resource analysis page

a) In the object selector, select ⛶ **Workspace**, select **View Workspaces List**, and then select a workspace name.

b) From the ≡ **Main Menu**, select ⣿ **Resources**, and then select **Analysis**.

Navigate to the project or program resource analysis page

a) In the object selector, select ⋏ **Project** or ⋇ **Program**, and then select a project or a program from the list.

b) From the ≡ **Main Menu**, select ⣿ **Resources**, and then select **Analysis**.

Navigate to the files page

1) In the object selector, select ⋏ **Project**, ▥ **Portfolio**, ⋇ **Program**, or ♀ **Idea**, and then select an object from the list.

a) From the ≡ **Main Menu**, select ▭ **Files**, and then select **File List**.

Navigate to the project files page

a) In the object selector, select ⋏ **Project**, select **View Projects List**, and then select a project name.

b) From the ≡ **Main Menu**, select ▭ **Files**, and then select **File List**.

Navigate to the project or portfolio files page

a) In the object selector, select ⋏ **Project** or ▥ **Portfolio**, and then select a project or portfolio from the list.

b) From the ≡ **Main Menu**, select ▭ **Files**, and then select **File List**.

Navigate to the project Details page

a) In the object selector, select ⋏ **Project**.

b) In the object selector, beside a project name, select **•••**, and then select ⚙ **View Summary & Settings**.

c) On the **Summary & Settings** page, select **Details**.

Navigate to the project settings page

a) In the object selector, select ⅄ **Project**.

b) In the object selector, beside a project name, select •••, and then select ⚙ **View Summary & Settings**.

c) On the **Summary & Settings** page, select **Settings**.

Navigate to the program settings page

1) In the object selector, select ❖ **Program**.

2) In the object selector, beside a program name, select •••, and then select ⚙ **View Summary & Settings**.

a) On the **Summary & Settings** page, select **Settings**.

Navigate to the program codes page

1) In the object selector, select ❖ **Program**.

a) In the object selector, beside a program name, select •••, and then select ⚙ **View Summary & Settings**.

b) On the **Summary & Settings** page, select **Program Codes**.

Navigate to a dictionary page

a) In the object selector, beside an object name, select •••, and then select ⚙ **View Summary & Settings**.

b) On the **Summary & Settings** page, select **Dictionaries**.

Navigate to the Calendars dictionary page

a) In the object selector, select ▣ **Workspace**.

b) In the object selector, beside a workspace name, select •••, and then select ⚙ **View Summary and Settings**.

c) On the **Summary & Settings** page, select **Dictionaries**, and then select **Calendars**.

Navigate to the Codes dictionary page

a) In the object selector, select ▣ **Workspace**.

b) In the object selector, beside a workspace name, select •••, and then select ⚙ **View Summary & Settings**.

c) On the **Summary & Settings** page, select **Dictionaries**, and then select **Codes**.

Navigate to the Curve Profiles dictionary page

1) In the object selector, select ⧉ **Workspace**.
2) In the object selector, beside a workspace name, select •••, and then select ⚙ **View Summary & Settings**.
3) On the **Summary & Settings** page, select **Dictionaries**, and then select **Curve Profiles**.

Navigate to the Units of Measure dictionary page

a) In the object selector, select ⧉ **Workspace**.
b) In the object selector, beside a workspace name, select •••, and then select ⚙ **View Summary & Settings**.
c) On the **Summary & Settings** page, select **Dictionaries**, and then select **Units of Measure**.

Navigate to the Locations dictionary page

a) In the object selector, select ⧉ **Workspace**.
b) In the object selector, beside a workspace name, select •••, and then select ⚙ **View Summary & Settings**.
c) On the **Summary & Settings** page, select **Dictionaries**, and then select **Locations**.

Navigate to the Currencies dictionary page

a) In the object selector, select ⧉ **Workspace**.
b) In the object selector, beside a workspace name, select •••, and then select ⚙ **View Summary & Settings**.
c) On the **Summary & Settings** page, select **Dictionaries**, and then select **Currencies**.

Navigate to the project Calendars dictionary page

a) In the object selector, select ⅄ **Project**.
b) In the object selector, beside a project name, select •••, and then select ⚙ **View Summary & Settings**.
c) On the **Summary & Settings** page, select **Dictionaries**, and then select **Calendars**.

Navigate to the project Codes dictionary page

a) In the object selector, select ⅄ **Project**, select **View Projects List**, and then select a project name.
b) From the ☰ **Main Menu**, select ⚙ **Summary & Settings**.
c) On the **Summary & Settings** page, select **Dictionaries**, and then select **Codes**.

Navigate to an object configuration page

a) In the object selector, select ⧉ **Workspace**, select **View Workspaces List**, and then select a workspace name.

b) From the ☰ **Main Menu**, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** page, select **Defaults & Options**, and then select an object.

Navigate to the Activity configuration page

1) In the object selector, select ⧉ **Workspace**.

2) In the object selector, beside a workspace name, select •••, and then select ⚙ **View Summary & Settings**.

a) On the **Summary & Settings** page, select **Defaults & Options**.

b) On the **Defaults & Options** page, select **Activity**.

Navigate to the File configuration page

a) In the object selector, select ⧉ **Workspace**.

b) In the object selector, beside a workspace name, select •••, and then select⚙ **View Summary & Settings**.

c) On the **Summary & Settings** page, select **Defaults & Options**, and then select **File**.

Navigate to the Project configuration page

a) In the object selector, select ⧉ **Workspace**.

b) In the object selector, beside a workspace name, select •••, and then select⚙ **View Summary & Settings**.

c) On the **Summary & Settings** page, select **Defaults & Options**, and then select **Project**.

Navigate to the Program configuration page

a) In the object selector, select ⧉ **Workspace**.

b) In the object selector, beside a workspace name, select •••, and then select⚙ **View Summary & Settings**.

c) On the **Summary & Settings** page, select **Defaults & Options**, and then select **Program**.

Navigate to the Resource/Role configuration page

1) In the object selector, select ⧉ **Workspace**.

2) In the object selector, beside a workspace name, select •••, and then select ⚙ **View Summary & Settings**.

a) On the **Summary & Settings** page, select **Defaults & Options**, and then select **Resource/Role**.

Navigate to the Resource Assignment configuration page

a) In the object selector, select 🗗 **Workspace**.

b) In the object selector, beside a workspace name, select •••, and then select ⚙ **View Summary & Settings**.

c) On the **Summary & Settings** page, select **Defaults & Options**, and then select **Resource Assignment**.

Navigate to the WBS configuration page

a) In the object selector, select 🗗 **Workspace**.

b) In the object selector, beside a workspace name, select •••, and then select ⚙ **View Summary & Settings**.

c) On the **Summary & Settings** page, 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**.