



What's New

New Features in Primavera P6 EPPM 21

Features introduced in 21.12

Spotlight

Delete Obsolete Enterprise Data Items on the Basis of Usage Analysis: During Enterprise Data Usage Analysis, P6 marks the data items matching all of the conditions you specified in the Display Usage Data dialog box. You can also manually clear or mark the Select Column option for individual data items. To delete the marked data permanently from your database, you can select Delete Data from the Actions menu.

Other Enhancements

View the List of Projects Using an Enterprise Data Item During Usage Analysis: When you analyze enterprise data usage on the Resource Tab of the Administration Page, the Roles Tab of the Administration Page, or the OBS Page, the Inactive Project Count and Active Project Count columns show the number of each type of project using each enterprise data item in the list. Where there are one or more projects using a data item, you can click on the number of projects to see a list of the projects using that data item. This list is filtered to show only the projects to which you have access.

Manage Enterprise Data Documentation Revised: The description of the process of managing enterprise data has been clarified. The process is described at a high level in the About Managing Data Enterprise Data topic, while detailed steps are supplied in two new topics called Analyzing Enterprise Data Usage and Deleting Obsolete Enterprise Data. Descriptions of the columns added to a view when you get usage data for enterprise data items have been included in the Help topics for each of the affected pages.

Synchronize Planning Assignment Dates with Project Dates: On the Planning Page, you can select the Synchronize Resource Dates item on the Actions menu to synchronize the assignment's start and finish dates with those of the project. When you synchronize resources, if you select the Life or Project assignments to Project dates option, the start and finish dates for all assignments with the Life of Project option selected, will be changed to match the planned start and finish dates of the project. If you select the All resource planning assignments to Forecast dates option, the start and finish dates for all assignments will be changed to match the forecast start and finish of the project.

Split Planning Assignments: During your planning, you might find that some resources become overloaded with work. One way to resolve overallocation of units to a resource is to assign some of its total units to another resource using the Split Resource Assignments feature.

Improvements on the Planning Page: On the Planning page of the Resources section changes to the spreadsheet cells or total units cells of assignments are implemented immediately, without the need to

save the page. You can show other assignments to a project or WBS when your view is filtered to a specific resource, role, resource team, role team, or resource code. The view will still be grouped by the original data type but will also show other assignments that exist for that project or WBS. This feature is available on the Actions menu. You can cut, copy, and paste an assignment from one project or WBS element into another.

Additional Filtering Options for the Status Updates Page: As well as Project ID, you can now filter the Grid View of the Status Updates Page by Activity ID, Activity Name, Status, Step Name, Type, WBS Code, or WBS Name.

Features introduced in 21.11

Spotlight

Resource Planning: The Planning page is available in the Resources section. It is a valuable tool to establish resource demand on a proposed project without detailed activity creation. You can filter the view to see the assignments for a single project, a group of projects assigned to a portfolio or project code, a single resource or role, a group of resources or roles assigned to a code, or a resource team. Use this page to specify, review, or modify project-level and WBS-level allocation data for individual resources and roles. This high-level allocation data can be maintained through the life of the project and referenced when planning resources at a more detailed level. Although resources might not be assigned to specific activities early in the project lifecycle, the Planning page enables you to plan a time commitment for a resource against a project. Assigning resources to projects in the early stages of project development can help to prevent resource overallocation..

Other Enhancements

Enhanced Customize View Options on Resource Analysis Page: You can now view actual units and remaining units for a resource on the Analysis spreadsheet. Select the appropriate options on the Customize View dialog box of the Analysis page to view the desired data on the spreadsheet.

Grid View for Approvals Status Updates Page: You can review status updates your team members made to their assigned activities in a grid format by clicking Switch to Grid View on the Status Updates page. The grid view provides options to print and export the data. You can also use the customize view options for filtering, grouping, and sorting the columns on the grid.

Unused or Unwanted Global Data Enhancements: You can now manage resources, roles, and Organization Breakdown Structure (OBS) data using the Get Usage Data option on the Actions menu on the Resources, Roles, and OBS pages.

Global Filters on My Activities and Timesheets Pages of P6 Team Member Web: Administrators or users with appropriate privileges can create, edit, and delete global filters on the My Activities and Timesheets pages of P6 Team Member Web. Other users can view the filtering criteria and use the global filters as needed. Select Manage Filters under the Filters icon to create global filters.

Resource Calendars: When P6 Professional is connected to a P6 EPPM database, you can differentiate between the types of resource calendars you are importing from the P6 XML template. The Type column in the Advanced section of the Import Options dialog box labels the calendars as personal or shared.

Features introduced in 21.10

Spotlight

Role and Resource Picker Enhancements: You can now assign roles and resources to activities using an enhanced picker. The new picker does not close after each assignment, and therefore, you do not need to select the same roles or resources again to assign them to another activity. Also, improved search capabilities in the resource picker allow you to narrow your search results to specific criteria using new operators such as “Does not contain”, “Starts with”, and “Ends with”.

Other Enhancements

Unused or Unwanted Global Data Enhancements: You can now manage assignment codes, role codes, resource codes, issue codes, and global and resource calendars using the Get Usage Data option under the Actions menu on the respective Enterprise Data pages. See “Manage Unused or Unwanted Global Data” under “Features introduced in 21.8” below for details on how this feature works. You can also refer to P6 Help for additional information on this feature.

Reset Own Password and Unlock Account (On-Premises): On-premises users of P6 Web or Team Member Web can now reset their password and unlock their account if they get locked out. No more sending emails to get your password reset. Simply click the Forgot Password/Unlock Account link and follow the on-screen instructions to reset your password and unlock your account. This option is available only when the mail server has been configured.

View Selection for Multiple View Pages: You can select the view you want to see whenever you visit a multiple view page, such as Projects EPS, Activities, and Assignments and Resources Assignments. Check the Display View Picker check box under the My Preferences – View tab if you want to be able to choose the view that displays for the multiple view pages. If left unchecked, the previous view will load by default.

Filter Enhancement for WBS Hierarchy in P6 Team Member Web: You can now view an activity’s WBS along with its parent on the Select Parent dialog box while filtering activities by WBS. Use My Preferences – View tab to choose whether you want to show the activity’s WBS along with its parent or just the WBS.

Features introduced in 21.9

Spotlight

Import Template Enhancement: On the Primavera XML Import Template page, you can now manage how Resource Calendars are handled when importing them, separate from Global calendars.

Other Enhancements

Earned Value Management (EVM) fields displayed at the assignment level: Calculated Assignment level EVM fields are now displayed in the Assignment Details tab of the Activities page, and on the Earned Value details tab of the Assignment page.

Unused or Unwanted Global Data Enhancements: You can now manage risk categories, project codes, and activity codes. See “Manage Unused or Unwanted Global Data” under “Features introduced in 21.8” below for details on how this feature works.

P6 EPPM Rest API is available: Introduced the Primavera P6 Enterprise Project Portfolio Management (P6 EPPM) REST API, a flexible interface to P6 EPPM functionality based on the Representational State Transfer (REST) architectural style.” See the Welcome page of our Documentation site for a link to this guide.

Features introduced in 21.8

Spotlight

Activities View Enhancements: You can add the Baseline 2, Baseline 3, and Financial Period columns to the Activities page, using the Custom View page. You can also add Financial Period columns to the Assignment Detail tab, Project Assignment page, and Resource Assignment page, using the Custom View page..

Other Enhancements

Remove Unnecessary Financial Period Information From Your View: You can configure your user preferences to specify the financial periods you want to see. Periods that fall outside your specified dates will not show in the columns tab of the Manage Views dialog box and if columns from periods outside your specified range have been added to views, they will not be visible when you open those views.

Manage Unused or Unwanted Global Data: You can easily view all unused or unwanted Project, Activities, Assignment, Role, Resource, Risk, Issues, Document UDF data, and as an administrator, delete any unwanted data from your database. This can improve performance and reduce your database size.

Here is a summary of how to use this feature, based on Project UDFs. You can choose other UDF types.

1. Go to the Administration tab/Enterprise Data/Project UDFs.
2. On the Project UDFs page, in the Actions drop down, select Get Usage Data.
3. In the wizard:
 - a. On the Obsolete Projects screen, select which types of projects you want to consider obsolete by checking the relevant values.
 - b. On the Usage screen, set the date that you want to use to identify UDFs that have not been used for a while.
 - c. On the Project UDFs Columns screen, choose the UDF statuses that you want mark checked in Select column.
 - d. Click Select.
4. On the Projects UDFs page, sort the Select column, click on the first obsolete UDF (checked in the Select column), then go the bottom of the list and shift+click.
5. Click on the Context menu (gear icon) that appears to the left of any of the selected rows, and choose Delete <n> Rows. All the rows will be deleted.

Filtered Portfolios: When P6 Professional is connected to a P6 EPPM database, users are able to view filtered portfolios in read-only mode and can be applied from the Selected Project Portfolio dialog box.

Features introduced in 21.7

Spotlight

Choose Import Options for Responsible Manager and Separate Import Options for Global and EPS Activity Codes: When importing projects, you can select the import action to use for the Responsible Manager assigned to the project, and you can select different import actions for importing Global Activity Codes from the import action for importing EPS Activity Codes.

Other Enhancements

Resource Overallocation Clarified in P6 Help: Information has been added to the P6 Help to explain how to identify overallocated resources in the Resource View of the Analysis Page and the Assign Resource Dialog Box.

Features introduced in 21.6

Spotlight

Show Stored Period Data in the Resource Analysis Histogram: A user preference setting allows you to display actual and earned value data using stored financial period data in the histograms on the Resource Analysis page. The default behavior of P6 provides a linear spread of actual and earned value units and costs that does not account for the data stored in financial periods. To view data according to the stored period data, select the Display actual and earned value using financial period data option in the Earned Value Settings section of the General section of the Global tab of My Preferences.

Other Enhancements

Greater Control Over the Number of Activities in the Timesheets Page of P6 Team Member Web:

Timesheets can become overwhelming when they include too many activities. New defaults for options on the Open Timesheet Settings dialog box encourage users to add only the activities they need to update. To reduce the number of visible activities, new standard filters on the Timesheets page allow users to filter their view by activity status.

Version and Database Name Available in P6 and Team Member Web: In P6 go to the My Preferences Page to see the version of P6 you are using and the name of the database to which your instance is connected. In P6 Team Member Web, you can see the version of P6 Team Member Web you are using and the name of the database to which your instance is connected on any page.

Type Ahead Search in the Views List: You can click the Views list and start typing the name of a view to filter the views list as you type.

Print Gantt Charts From Project Start to Project Finish: In the Print Options window, click Edit Content and in the Settings panel, select Timescale. On the Start list, select Project Start and on the End list, select Project Finish. **Sharing Filters with Other Users:** If more than one user needs to use the same filter, you can create multiple user filters in the Activities, EPS, and Assignment pages. Only the user who created a shared.

Features introduced in 21.5

Spotlight

Resource and Role Cost Spreads Consider Rate Changes Over Time: An application setting allows P6 to reflect changing resource and role rates in cost spreads in the resource analysis, capacity planning, team usage, and assignments pages as well as the usage chart in the resource and role assignment pickers. Other affected areas of the software are publishing, summarizing, live assignment spreads, integration with Primavera Unifier, reports, and Analytics. Total costs have always been calculated to consider changes in resource and role rates, however until this release, costs spreads were linear. The setting on the General Page of Application Settings defaults to spreading cost based on a Linear Spread, but can be changed to Units Spread to allow actual cost, actual overtime cost, actual regular cost, at completion costs, period actual cost, period at completion cost, planned cost, remaining early cost, remaining late cost, staffed remaining early cost, staffed remaining late cost, unstaffed remaining early cost, and unstaffed remaining late cost spreads to account for changes in resource and role rates. If you select to change from Linear Spread to Units Spread, you must run Recalculate Assignment Costs for all projects. When P6 Professional is connected to an EPPM database, changing resource and role rates in cost spreads are reflected in the Resource Usage Spreadsheet and Profile, Activity Usage Spreadsheet and Profile, Tracking View, Resource Assignments window, and Activity Usage Spreadsheets and Profiles. Other affected areas of the software are publishing and reports..

Other Enhancements

Sharing Filters with Other Users: If more than one user needs to use the same filter, you can create multiple user filters in the Activities, EPS, and Assignment pages. Only the user who created a shared filter can modify or delete the filter. Any user who has access to the filter can copy and paste it to create a new version for which they are the owner.

Preventing Users from Rejecting Approved Timesheets: A setting on the Timesheets page of Application Settings can be configured to prevent users from rejecting approved timesheets. The setting can be configured to prevent any rejection of approved timesheets, or to prevent approved timesheets from being rejected if they were submitted before the current timesheet period, or before the current calendar month.

Resolve User Lock-Out for P6 Professional Cloud Connect: When a user has become locked out of P6 Professional Cloud Connect, the cause is sometimes that the record in the database which stores their user preferences has become corrupt. Administrators can delete user preferences on the User Administration page for those users to allow them back into P6 Professional Cloud Connect. When you delete a user's preferences, that user's preferences will be reset to the defaults so they might choose to re-configure their preferences when they are able to log back into P6 Professional Cloud Connect. If the user has access to P6, they can delete their preferences themselves on the My Preferences page.

Features introduced in 21.4

Spotlight

Export Projects in IPMDAR Format: You can export projects and their associated activities and resource assignments in IPMDAR format. IMPDAR is a project export format required by the US Department of Defense. The IPMDAR export generates a zip file containing a collection of JSON files which constitute the IPMDAR data.

Other Enhancements

Team Members Can View and Update Primary Constraint Dates: You can edit project preferences to allow team members to view the Primary Constraint field in P6 Team Member Web and P6 for Android. You can also choose to allow team members to update the field.

Maintain Relationships With External Projects When Importing From Primavera XML Files: When you import projects from a Primavera XML file, you can choose whether to retain relationships between activities in the project and those in external projects.

Improved Accuracy for Identifying Baseline Activities: An administrative setting determines whether P6 matches activities in the project with their corresponding activities in the baseline using the Activity ID/Code or the internal GUID (Globally Unique ID) of the activity. The default is to use the Activity ID/Code.

Improved Efficiency when Integrating P6 EPPM with Primavera Cloud and Primavera Unifier via Primavera Gateway: When you use Primavera Gateway to integrate P6 EPPM with Primavera Cloud and Primavera Unifier, sending data between the applications only sends the projects that have changed since the last time you exchanged data with the integrated product. This functionality uses the fields Updated Since Objects - EPS, Project, WBS and Update Since Date.

Features introduced in 21.3

Spotlight

Preview Changes Before Updating Baselines: To help protect the integrity, veracity, and credibility of your organization's baselines, you can preview the changes that would result from your selected baseline update options before committing to making the update.

Other Enhancements

Make Multiple User Accounts Inactive Quickly and Easily: You can select one or more user accounts in the User Administration table and make them inactive. An inactive user cannot log into any P6 EPPM application, including P6 Team Member Web, P6 for Android, P6 for iOS, and P6 EPPM Web Services. To re-activate a user, assign access to any module on the module access detail window for the user.

Let Team Members Know When You Change Details of Their Status Update: When you change data for a status update in the Override Updates for Activity dialog box, you can select to notify the team member by email so they know which data you changed before you approved their status update.

Reorganization of Data in the Progress Panel in P6 Team Member Web: The progress panel in P6 Team Member Web shows the most important information about the activity on the Status tab. Steps, Codes and User Defined Fields are shown on the Activity Details tab.

Features introduced in 21.2

Spotlight

New Features Description Dialog: When a user logs into P6 for the first time after an upgrade to the system, they can view a description of the new features in that release. This can be switched off for all users in the General page of Application Settings.

Other Enhancements

Show Hint Help in P6 Web: Show Hint Help in P6 Web to provide a full description of columns when you hover over the column heading. You can switch on Show Hint Help using the icon of a question mark in a circle. Alternatively you can use the shortcut Alt+F1. Show Hint Help is available in the EPS, Activities, and both Assignments pages of P6.

Choose How to Number Activities When You Copy and Paste: When you paste a group of copied activities, you can choose to renumber the newly created activities automatically, based on the selected activities, or by providing a prefix, starting number, and increment value. You can also choose to replace a number of characters at the start of the activity ID.

Team Members Can Easily Identify Critical Activities: Critical activities are indicated with a warning icon in P6 for Android, P6 for iOS, and P6 Team Member Web. The icon is an exclamation point inside a triangle.

Define Which Activities Show as Due or Overdue to Team Members: In P6 Team Member Web Application Settings, you can configure definitions for due and overdue. These definitions are used to determine which activities and assignment show in the Due and Overdue filters My Activities pages in P6 for Android, P6 for iOS, and P6 Team Member Web.

Features introduced in 21.1

Spotlight

Allow Team Members to See Suspend and Resume Dates in P6 Team Member: Project managers can configure the visible activity fields in a project's preferences to allow team members access to suspend and resume dates for activities in P6 Team Member Web, P6 for Android, P6 for iOS, and Email Statusing Service. The project manager can also specify whether team members can update the suspend and resume dates..

Other Enhancements

Prevent Automatic Reordering of Lists and Regrouping of Tables When Items Change: Automatic reorganization of data in your views can slow you down when you are changing a large amount of data. You can switch off automatic reorganization from the Actions menu in the Activities, EPS and Assignments Pages and the Resources and Roles tabs of the Administration Page of the Resources section.

Quickly and Easily Unlink Activities: You can unlink activities from their successors and predecessors using the Unlink Activities option in the Row Actions menu in the grid view of the Activities page.

Quickly and Easily Renumber Activities: You can renumber a selection of activities, using the Renumber Activity IDs option in the Row Actions menu in the grid view of the Activities page.

Changes to Views: You can specify that read-only cells in the view should be highlighted with a gray background. Also the column selector, available from the column headings area, enables you to add and hide columns in the view quickly and simply.

Select the Financial Period Calendar to Assign When Importing a New Project: When you import projects from a Primavera XML file, you can select the financial period calendar to assign to any projects you choose to import with the Create New import action.

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Oracle Primavera P6 EPPM What's New

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