

Oracle
Primavera
What's New in OPPM

Version 24
May 2024

Copyright

Oracle Primavera What's New in OPPM

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2024 Releases

You can find out how we've improved Portfolio Management in 2023 either by release or by module.

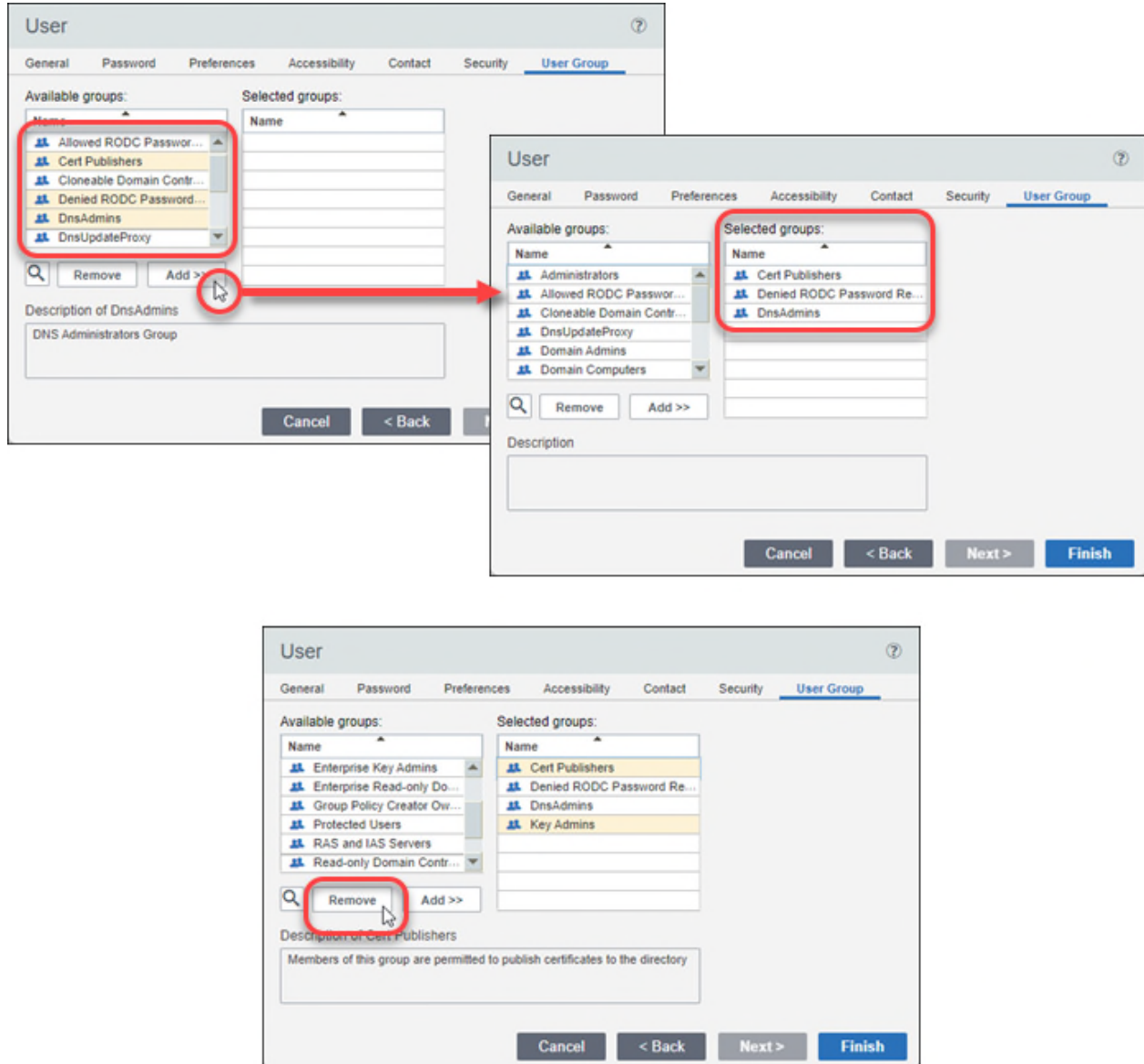
Release 24

API

Portfolio Management API Updates: The getUserInfo and getUserInfoByLogin methods have a new field. The isEnabled field is a boolean that determines whether or not the user is enabled in the system (true) or disabled (false).

Application

Adding Users to Multiple Groups: Users can be added to multiple groups swiftly and efficiently in the User Group tab of the User Wizard or the edit user window. You can also remove a user from one or more groups the same way.



User Group Folders: User Groups can be organized in folders. Folders in the User Groups page of the Setup module work in the same way as folders in other pages of the Setup module.

Name	Owner
Administrators	System Administrator
Enterprise Admins	System Administrator
Enterprise Key Admins	System Administrator
Key Admins	System Administrator

Name: Administrators
Owner: System Administrator
Description: No description

Contents: 4 User Groups

User Search Improvements: When you are searching for users, for example to assign access to objects, you can search for users or groups. The Search field automatically narrows the list of users and groups according to your search term as you type.

Member ⓘ

Select a user or group:

Search: Type:

Left Dialog (Search: d):

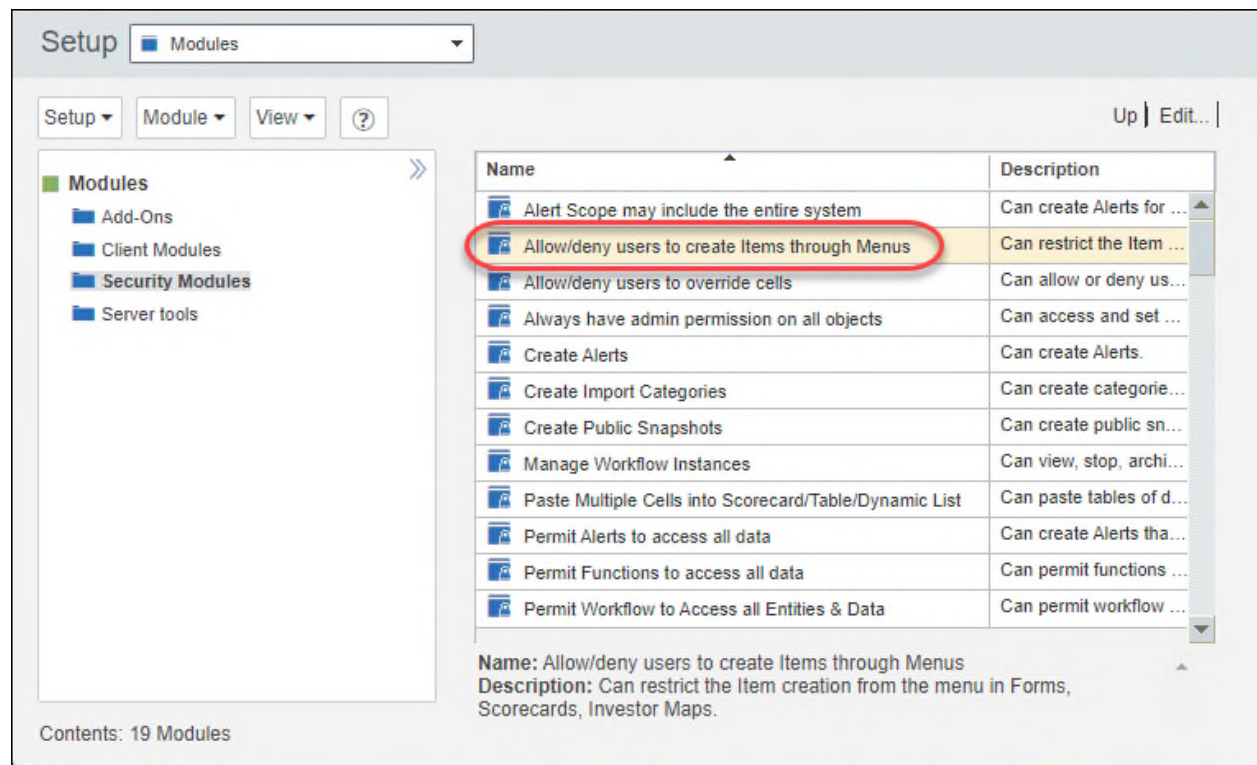
- Administrators
- Allowed RODC Password Replication Group
- Cloneable Domain Controllers
- Denied RODC Password Replication Group
- DnsAdmins
- DnsUpdateProxy
- Domain Admins
- Domain Computers
- Domain Controllers
- Domain Guests
- Domain Users
- Dorit - 123456789 123456789 123456789 1234...

Right Dialog (Search: dom):

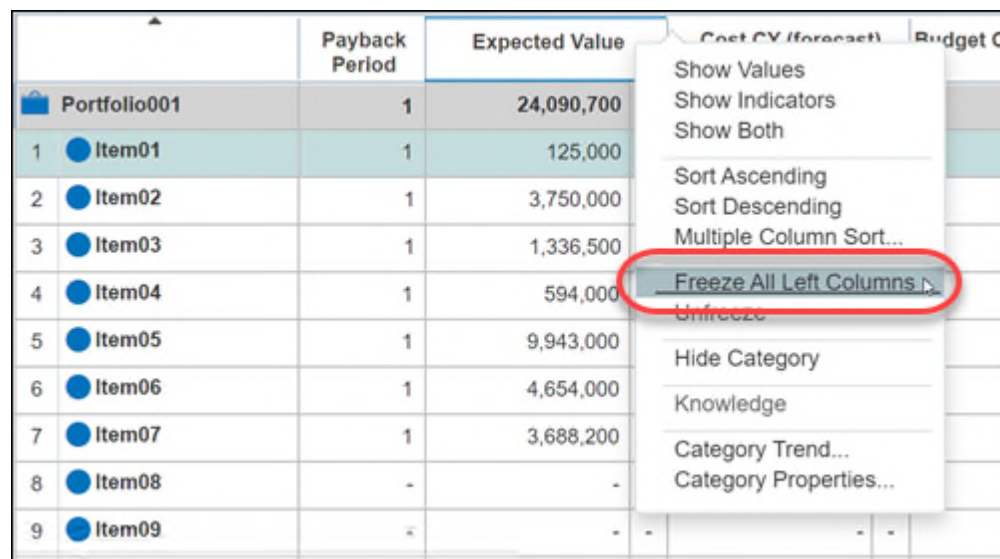
- Cloneable Domain Controllers
- Domain Admins
- Domain Computers
- Domain Controllers
- Domain Guests
- Domain Users
- Enterprise Read-only Domain Controllers
- Read-only Domain Controllers

Cancel OK

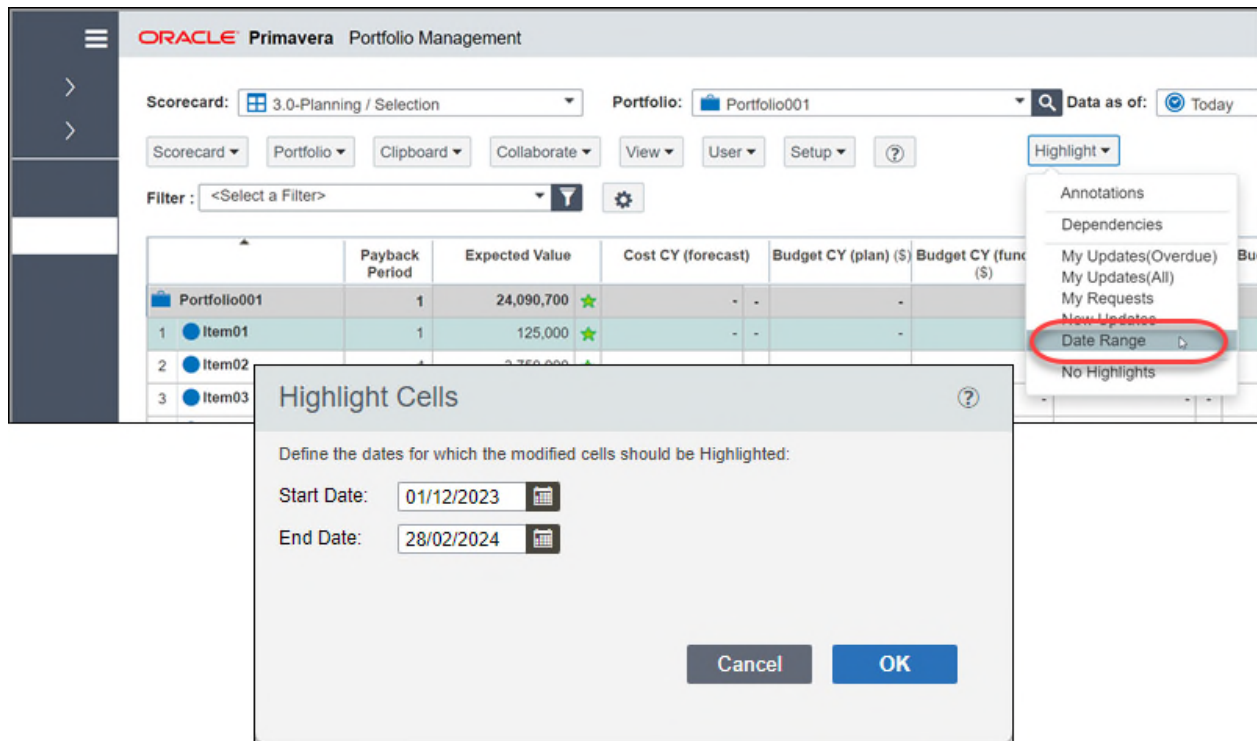
New Security Module: A new Security Module allows you to prevent users from adding new items from menus. To prevent users (or groups of users) from adding new items from menus, add appropriate permissions to the "Allow/deny users to create Items through Menus" module.



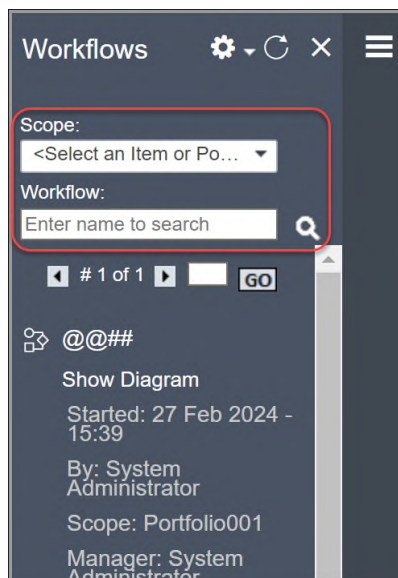
Freeze Left Columns in Dynamic Lists: You can freeze the left-most columns of a dynamic list. Similarly to sorting a column, you can right-click the column heading of a dynamic list to freeze all columns to the left of the selected column, or to unfreeze all frozen columns in the dynamic list.



Identify Data Changed During A Date Range in Scorecards: Identifying modified scorecard data is now simpler. A new option has been added to the Highlight menu that allows you quickly to identify cells in which the data has been modified between dates you specify.



Improved Search in Workflows Guide Pane: In the Workflows guide pane section of the navigation pane, you can search for a workflow by Scope or Workflow name. Readability in the workflows guide pane is also improved.



Customize Workflow Email Text: You can change the text of emails users receive when a workflow task is assigned to them. In the Instance Defaults tab of the setup window of any workflow, click Edit Workflow Task Email to configure both the subject line and body of emails associated with that email.

The screenshot shows the 'Workflow' setup window with the 'Instance Defaults' tab selected. In the 'Customize workflow task email' section, the 'Edit Workflow Task Email' button is highlighted with a red circle. A red arrow points from this button to the 'Edit Workflow Task Email Subject & Message' dialog box. The dialog box has a title bar with a question mark icon. It contains a 'Keywords' list on the left with items like '[Scope Name]', '[Step Description]', '[Step Manager]', '[Step Name]', '[Task Description]', '[Task Name]', '[Workflow Description]', '[Workflow Manager]', '[Workflow Name]', and '[Workflow Started]'. A '>>' button is next to the list. The 'Subject' field contains 'PPM Workflow Task - Workflow: [Workflow Name]'. The 'Message' field contains a template: 'The following workflow task has been generated for you. Workflow: [Workflow Name] Started: [Workflow Started] Manager: [Workflow Manager] Description: [Workflow Description] Step: [Step Name] Manager: [Step Manager] Description: [Step Description] Task: [Task Name] Scope: [Scope Name] Description: [Task Description]'. At the bottom of the dialog are 'Cancel' and 'OK' buttons. The main window has 'Cancel', '< Back', 'Next >', and 'Finish' buttons at the bottom.

Choose to Color Cell Backgrounds Instead of Using Indicators: When you define scorecards to use indicator categories derived from functions, use the Bgc option to change the background color of the cell according to the indicator value instead of showing an indicator.

Scorecard ?

General **Categories** In Folders Security Knowledge

*Name	Data as of	Name Label	Date La...	Val	Ref	Ind	Bgc
<input type="checkbox"/> Rank	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Priority	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Funding Status ...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Life Cycle	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Payback Period	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Expected Value	< User-select...	<Name>		✓	—	✓	—
<input type="checkbox"/> Cost CY (foreca...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Budget CY (plan)	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Budget CY (fun...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Budget CY (defi...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Budget CY (prop)	< User-select...	<Name>		✓	—	✓	—
<input type="checkbox"/> Cost Remaining...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Cost Remaining...	< User-select...	<Name>		✓	—	—	—

Description of Expected Value

NPV adjusted for strategy and risk

Note: For copy/paste operations, use copy & paste buttons present on UI. Keyboard shortcuts (e.g. 'Ctrl + C' or 'Ctrl + V' for a windows machine) will not work on this UI.

Cancel < Back Next > Finish

id	Expected Value	Co
1	24,090,700	★
1	125,000	★
1	3,750,000	★
1	1,336,500	★
1	594,000	★

Scorecard ?

General **Categories** In Folders Security Knowledge

*Name	Data as of	Name Label	Date La...	Val	Ref	Ind	Bgc
<input type="checkbox"/> Rank	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Priority	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Funding Status ...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Life Cycle	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Payback Period	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Expected Value	< User-select...	<Name>		✓	—	✓	—
<input type="checkbox"/> Cost CY (foreca...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Budget CY (plan)	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Budget CY (fun...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Budget CY (defi...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Budget CY (prop)	< User-select...	<Name>		✓	—	✓	—
<input type="checkbox"/> Cost Remaining...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Cost Remaining...	< User-select...	<Name>		✓	—	—	—

Description of Expected Value

NPV adjusted for strategy and risk

Note: For copy/paste operations, use copy & paste buttons present on UI. Keyboard shortcuts (e.g. 'Ctrl + C' or 'Ctrl + V' for a windows machine) will not work on this UI.

Cancel < Back Next > Finish

id	Expected Value	Co
1	24,090,700	
1	125,000	
1	3,750,000	
1	1,336,500	
1	594,000	

Add Hover-Over Descriptions in Forms: You can define hover-over tool tips for table Labels and Titles in forms. Use the description field of the dynamic cell controls of any label, to provide help about the information that appears in that part of the table.

Table

General **Properties** In Folders Security

Planned Capital Cost	Prior Years	Current Year	Next Year	Year After
Planned Capital Cost	OpCap PY (plan)	OpCap CY (plan)	OpCap CY+1 (plan)	OpCap CY+2 (plan)
Planned Expenses	OpExp PY (plan)	OpExp CY (plan)	OpExp CY+1 (plan)	OpExp CY+2 (plan)
Total Cost	Cost PY (plan)	Cost CY (plan)	Cost CY+1 (plan)	Cost CY+2 (plan)
Planned Gross Return	Gross Return PY (plan)	Gross Return CY (plan)	Gross Return CY+1 (plan)	Gross Return CY+2 (plan)

View: ☒ Design ☐ Preview

☒ Header

Height: 2

Row:
Insert
Delete
↑ ↓

Column:
Insert
Delete
← →
Width: 308

Cell:
Type: Label
Background: Light (Normal)

Label: Total Cost

Description: The sum of Planned Capital Cost and Planned Expenses.

Apply:
☐ Type
☐ Category
☐ Data as-of
☐ Background
☐ Mandatory
☐ Read-Only
To Row
To Column

Cancel < Back Next > Finish

Business Case & Financial Plan_03.001

Planned Capital Cost	Prior Years	Current Year	Next Year	Year After
Planned Capital Cost				
Planned Expenses				
Total Cost				
The sum of Planned Capital Cost and Planned Expenses.				
Planned Gross Return				

Add Categories to Alerts: You can add categories to alert messages. Categories are added to alert messages in the same way as keywords.

The screenshot shows the 'Edit Subject & Message' dialog box. It has a title bar with a question mark icon. The main area is divided into sections for 'Keywords', 'Subject', 'Message', and 'Category'. The 'Keywords' section on the left lists various placeholders like '[Added Item Name]', '[Alert Name]', etc. The 'Subject' section has a text box containing '[Alert Name]'. The 'Message' section has a larger text box containing a template message: '[Added Item Name] has been [Added/Created] [Scope Name]. [Description] For inquiries contact [Alert Owner]'. The 'Category' section at the bottom left has a dropdown menu with 'Description' selected, and a red circle highlights this selection. A red arrow points from the 'Description' category to the '[Description]' placeholder in the message text. At the bottom right are 'Cancel' and 'OK' buttons.

Edit Subject & Message ⓘ

Customize your Subject and Message with free text and Keywords:

Keywords:

- [Added Item Name]
- [Added/Created]
- [AddedItemID]
- [Alert Name]
- [Alert Owner]
- [Event Date-Time]
- [Item/Portfolio]
- [Scope Name]
- [ScopeID]

Subject:

[Alert Name]

Message:

[Added Item Name] has been [Added/Created] [Scope Name]. [Description] For inquiries contact [Alert Owner].

Category:

☒ Description

Paste Link & Scope ID

Paste Link & Added Item ID

Restore Defaults

Locale:

English (United Kingdom)

Cancel OK

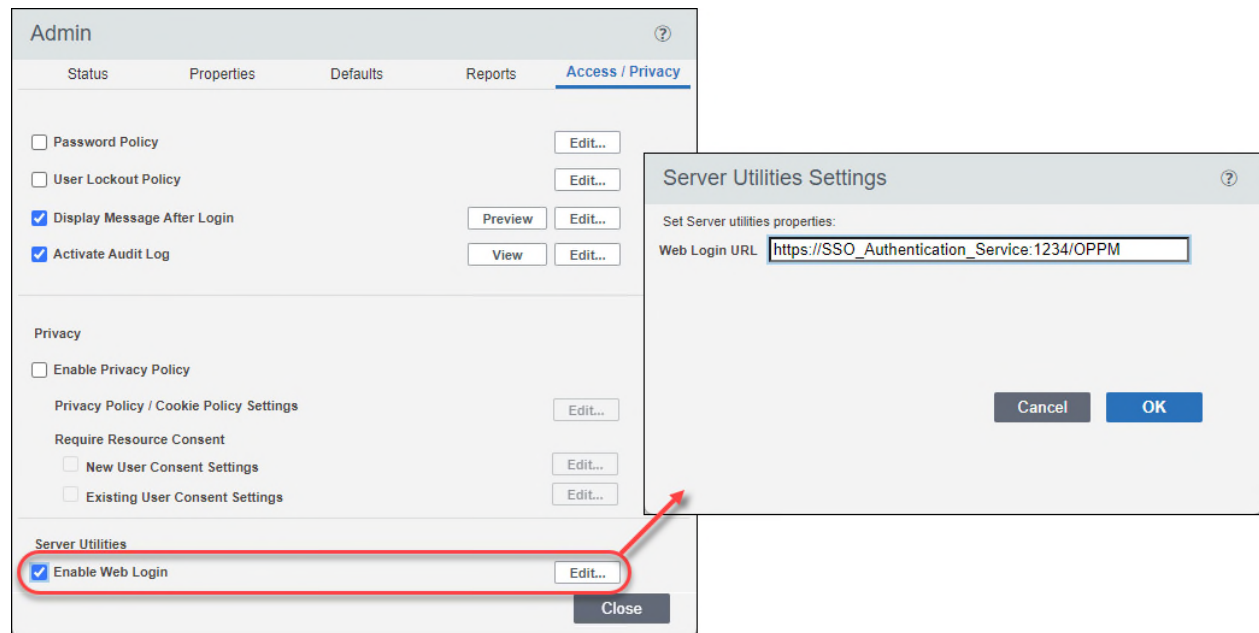
DoNothing Added to Advanced Function Reserved Words: A new reserved word has been added for use with Return statements in advanced functions; DoNothing. If a function returns DoNothing, no further processing of that function takes place and the cell will not be updated or added. For example, a user might want to calculate a result if the Domain is either "Applications" or "Assets" but not if the Domain has any other value.

The screenshot shows the 'Advanced Functions Editor' window. On the left, under 'Expression Builder', there are fields for Method (set to 'getCell'), Indicator, Category (set to '<Select a Category>'), Value List (set to '<Select a Value List>'), and Value. Below these is a 'Properties List' containing: Address, Email, IsEnabled, Reserved Words, CurrentPhaseIndex, green, red, today, yellow, and DoNothing. The 'DoNothing' item is highlighted with a red circle. A tooltip at the bottom left states: 'To insert property to script double click it or click the '>>' button.' To the right of the expression builder is a large 'Script' text area. At the top right of the script area is a 'Test' button. At the bottom right of the window are 'Cancel' and 'OK' buttons.

Security

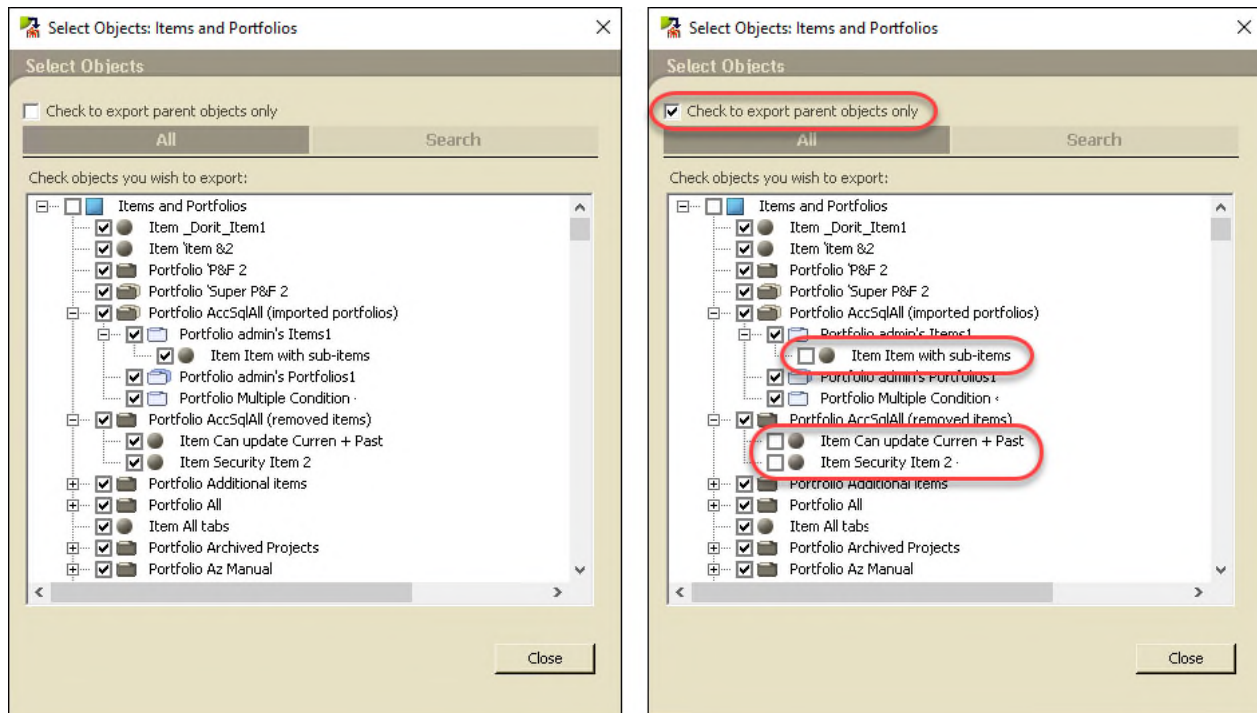
Improved Security for Bridge for Project Management and Active Directory Sync: If you use the optional Bridge for Project Management systems or the Active Directory Synchronization Tool, a new process is required as a prerequisite to setting up a new Bridge or Active Directory Synchronization connection or to use an existing connection. The process of Generating a Security Key for Encryption is described in the Primavera Portfolio Management Installation and Configuration Guide.

Web Login and Single Sign-On: Web login (including SSO) can be enabled and configured to allow authentication for users when logging into the following server utilities: Action Queue, Viewer, Database Cleanup Utility, Import Portfolio Management Package, Export Portfolio Management Package, and Schedule Portfolio Management Tasks.



Utilities

Export Only Parent Objects: Selecting parent objects only when exporting a package is easier and more efficient. A new checkbox has been added in the Select Objects window of the Export PPM Package application. Use the 'Check to export parent objects only' checkbox to select only parent objects in the list. When this checkbox is marked, the selected portfolio and all its child portfolios will be selected for export, but the items and candidates will not be selected.



Modules

You can find out how we've improved Portfolio Management in 2024 either by release or by module.

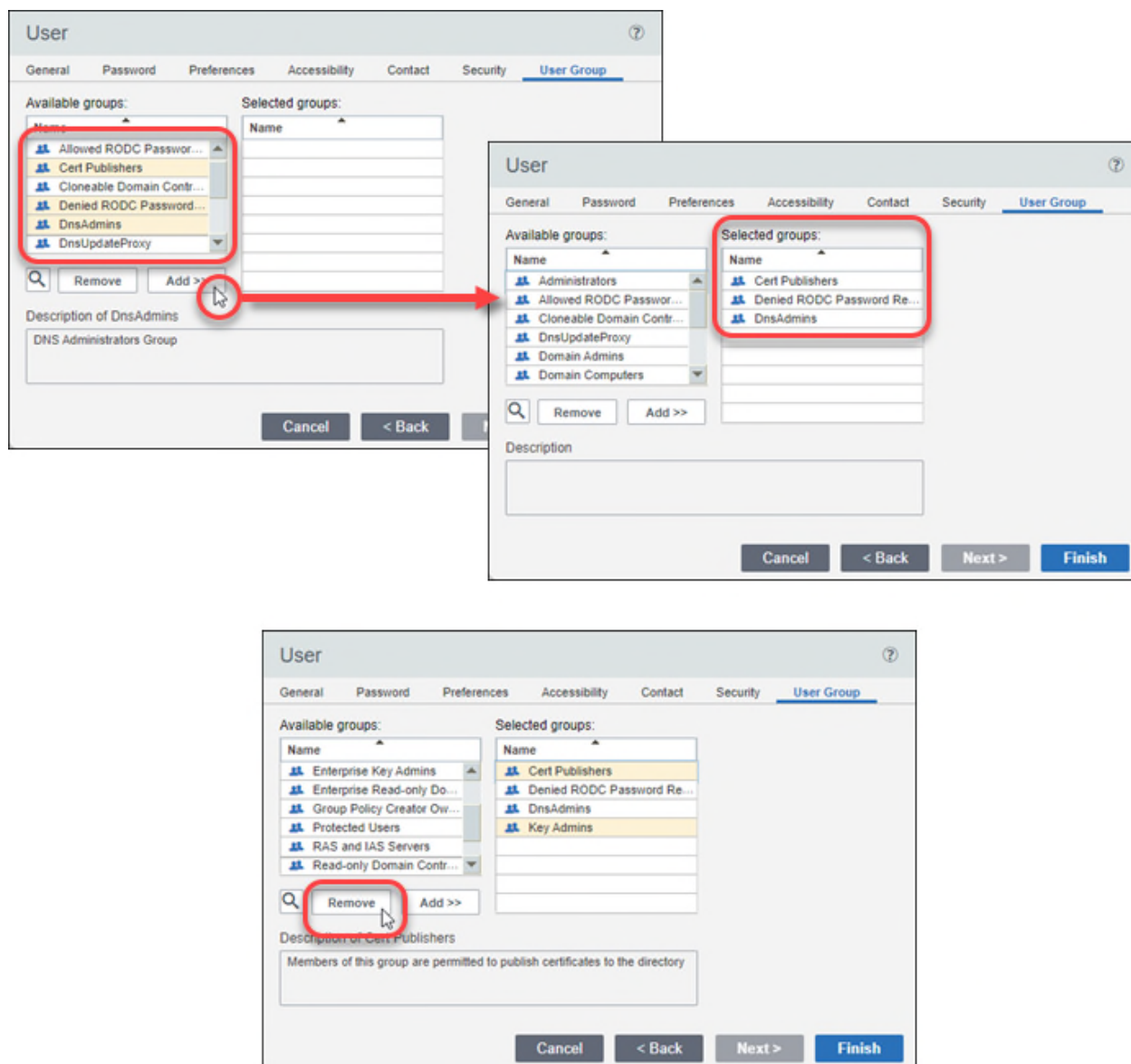
For example, to see all the new features we introduced in 24, choose **Release 24**. To see how we've improved Security during 2024, choose **Security**.

API

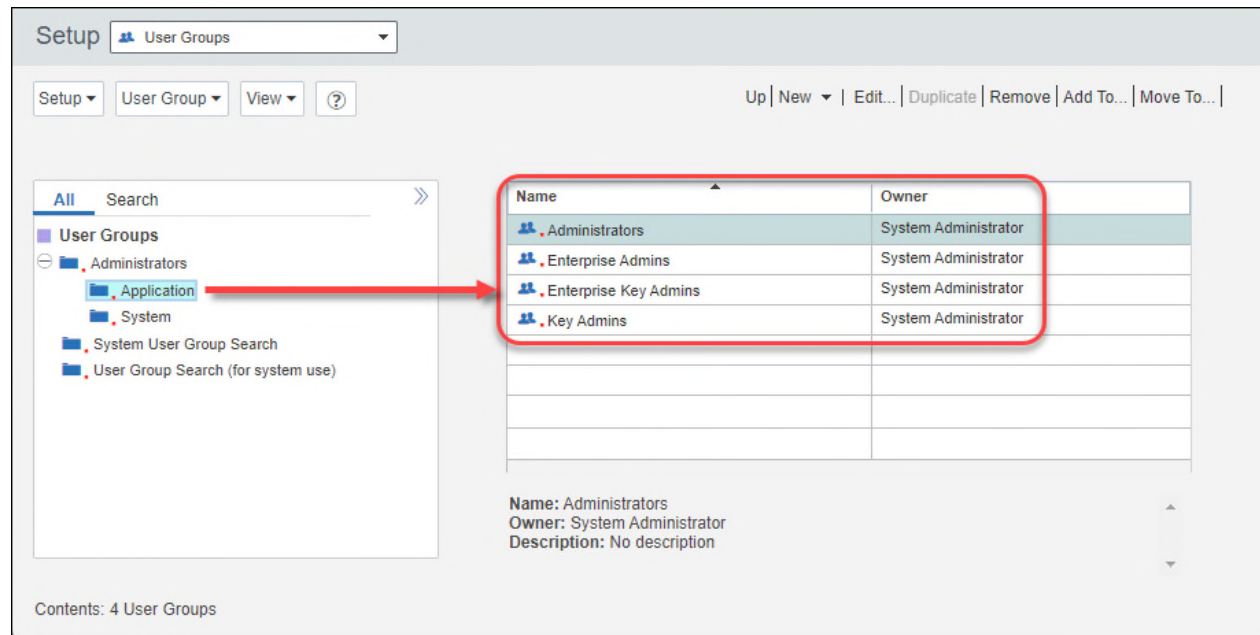
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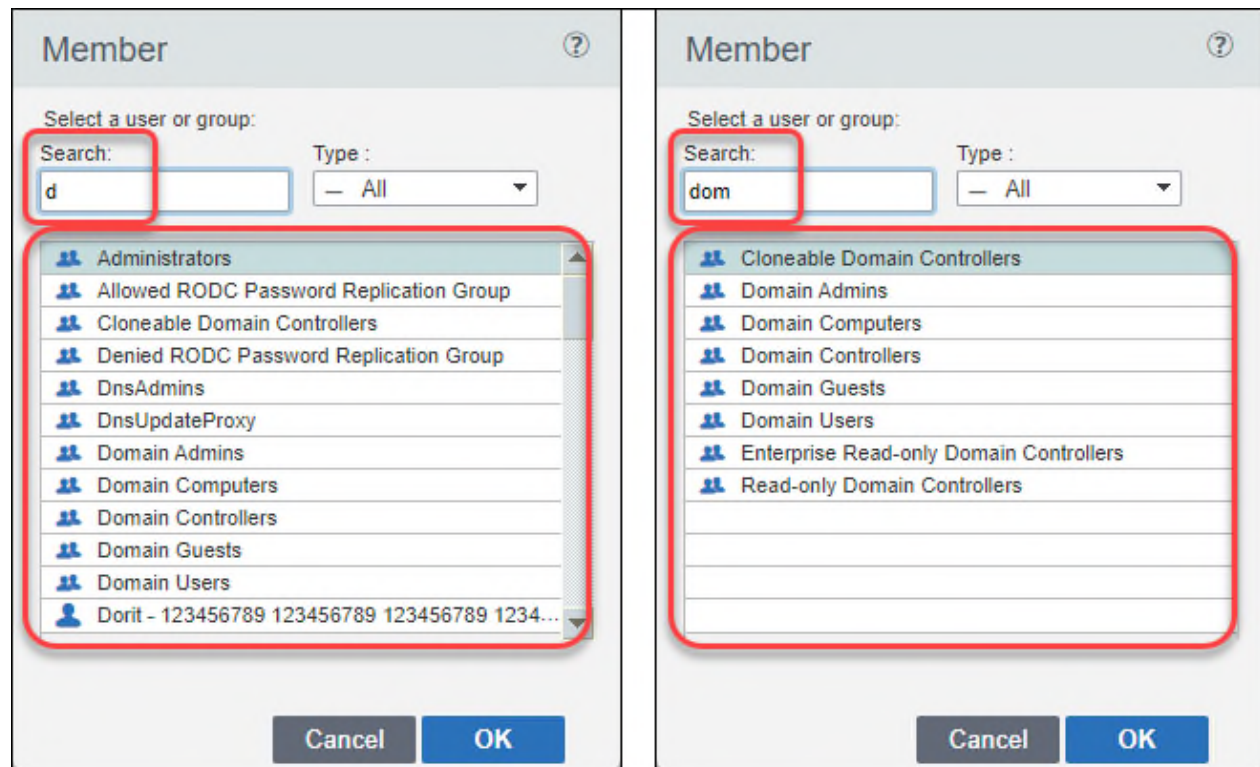
Adding Users to Multiple Groups: Users can be added to multiple groups swiftly and efficiently in the User Group tab of the User Wizard or the edit user window. You can also remove a user from one or more groups the same way.



User Group Folders: User Groups can be organized in folders. Folders in the User Groups page of the Setup module work in the same way as folders in other pages of the Setup module.



User Search Improvements: When you are searching for users, for example to assign access to objects, you can search for users or groups. The Search field automatically narrows the list of users and groups according to your search term as you type.



New Security Module: A new Security Module allows you to prevent users from adding new items from menus. To prevent users (or groups of users) from adding new items from menus, add appropriate permissions to the "Allow/deny users to create Items through Menus" module.

Setup Modules

Setup Module View ? Up Edit...

Modules

- Add-Ons
- Client Modules
- Security Modules**
- Server tools

Name	Description
Alert Scope may include the entire system	Can create Alerts for ...
Allow/deny users to create Items through Menus	Can restrict the Item ...
Allow/deny users to override cells	Can allow or deny us...
Always have admin permission on all objects	Can access and set ...
Create Alerts	Can create Alerts.
Create Import Categories	Can create categorie...
Create Public Snapshots	Can create public sn...
Manage Workflow Instances	Can view, stop, archi...
Paste Multiple Cells into Scorecard/Table/Dynamic List	Can paste tables of d...
Permit Alerts to access all data	Can create Alerts tha...
Permit Functions to access all data	Can permit functions ...
Permit Workflow to Access all Entities & Data	Can permit workflow ...

Name: Allow/deny users to create Items through Menus
Description: Can restrict the Item creation from the menu in Forms, Scorecards, Investor Maps.

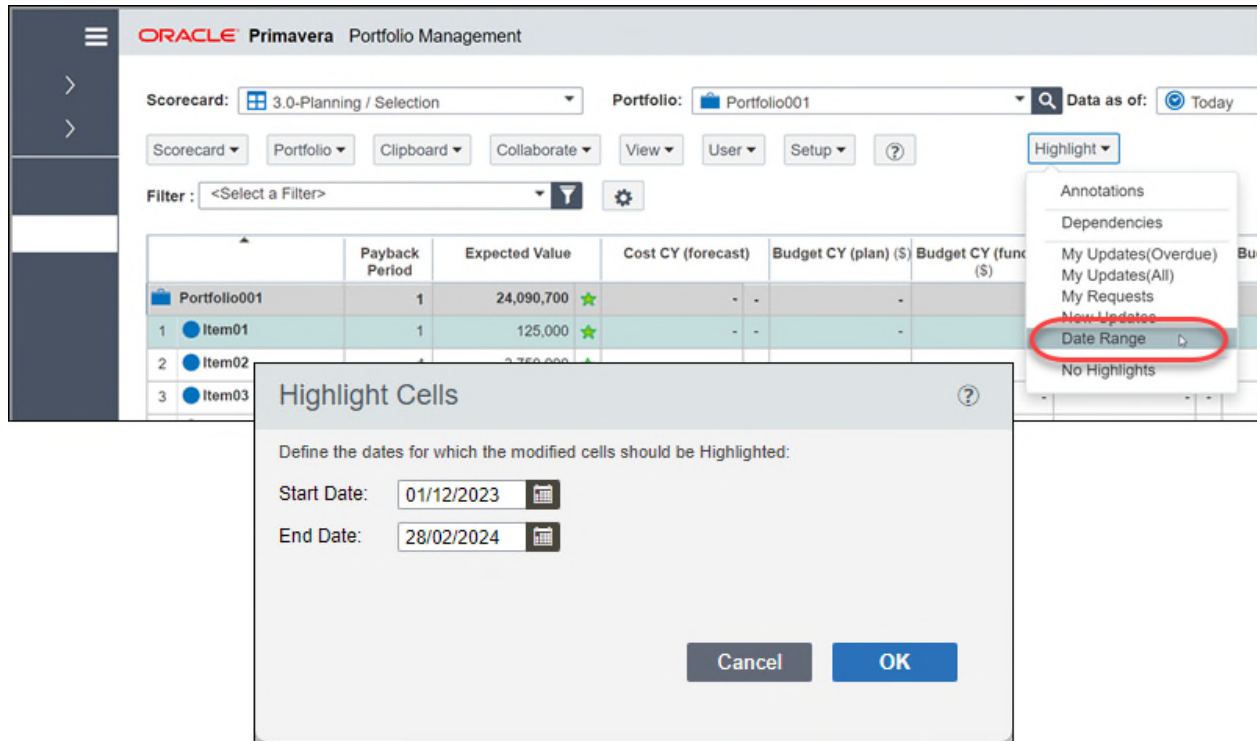
Contents: 19 Modules

Freeze Left Columns in Dynamic Lists: You can freeze the left-most columns of a dynamic list. Similarly to sorting a column, you can right-click the column heading of a dynamic list to freeze all columns to the left of the selected column, or to unfreeze all frozen columns in the dynamic list.

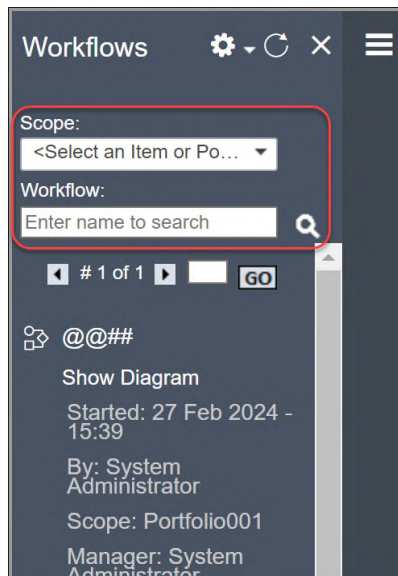
	Payback Period	Expected Value	Cost CY (forecast)	Budget CY
Portfolio001	1	24,090,700		
1 Item01	1	125,000		
2 Item02	1	3,750,000		
3 Item03	1	1,336,500		
4 Item04	1	594,000		
5 Item05	1	9,943,000		
6 Item06	1	4,654,000		
7 Item07	1	3,688,200		
8 Item08	-	-		
9 Item09	-	-		

Show Values
Show Indicators
Show Both
Sort Ascending
Sort Descending
Multiple Column Sort...
Freeze All Left Columns
Unfreeze
Hide Category
Knowledge
Category Trend...
Category Properties...

Identify Data Changed During A Date Range in Scorecards: Identifying modified scorecard data is now simpler. A new option has been added to the Highlight menu that allows you quickly to identify cells in which the data has been modified between dates you specify.



Improved Search in Workflows Guide Pane: In the Workflows guide pane section of the navigation pane, you can search for a workflow by Scope or Workflow name. Readability in the workflows guide pane is also improved.



Customize Workflow Email Text: You can change the text of emails users receive when a workflow task is assigned to them. In the Instance Defaults tab of the setup window of any workflow, click Edit Workflow Task Email to configure both the subject line and body of emails associated with that email.

The screenshot shows the 'Workflow' setup window with the 'Instance Defaults' tab selected. In the 'Customize workflow task email:' section, the 'Edit Workflow Task Email' button is circled in red. A red arrow points from this button to the 'Edit Workflow Task Email Subject & Message' dialog box.

Edit Workflow Task Email Subject & Message

Customize your Subject and Message with free text and Keywords:

Keywords:

- [Scope Name]
- [Step Description]
- [Step Manager]
- [Step Name]
- [Task Description]
- [Task Name]
- [Workflow Description]
- [Workflow Manager]
- [Workflow Name]
- [Workflow Started]

Subject:

PPM Workflow Task - Workflow: [Workflow Name]

Message:

The following workflow task has been generated for you.

Workflow: [Workflow Name]
Started: [Workflow Started]
Manager: [Workflow Manager]
Description: [Workflow Description]

Step: [Step Name]
Manager: [Step Manager]
Description: [Step Description]

Task: [Task Name]
Scope: [Scope Name]
Description: [Task Description]

Buttons: Cancel, OK

Choose to Color Cell Backgrounds Instead of Using Indicators: When you define scorecards to use indicator categories derived from functions, use the Bgc option to change the background color of the cell according to the indicator value instead of showing an indicator.

Scorecard ?

General **Categories** In Folders Security Knowledge

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<input type="checkbox"/> Priority	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Funding Status ...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Life Cycle	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Payback Period	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Expected Value	< User-select...	<Name>		✓	—	✓	—
<input type="checkbox"/> Cost CY (foreca...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Budget CY (plan)	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Budget CY (fun...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Budget CY (defi...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Budget CY (prop)	< User-select...	<Name>		✓	—	✓	—
<input type="checkbox"/> Cost Remaining...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Cost Remaining...	< User-select...	<Name>		✓	—	—	—

Description of Expected Value

NPV adjusted for strategy and risk

Note: For copy/paste operations, use copy & paste buttons present on UI. Keyboard shortcuts (e.g. 'Ctrl + C' or 'Ctrl + V' for a windows machine) will not work on this UI.

Cancel < Back Next > Finish

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Scorecard ?

General **Categories** In Folders Security Knowledge

*Name	Data as of	Name Label	Date La...	Val	Ref	Ind	Bgc
<input type="checkbox"/> Rank	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Priority	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Funding Status ...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Life Cycle	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Payback Period	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Expected Value	< User-select...	<Name>		✓	—	✓	—
<input type="checkbox"/> Cost CY (foreca...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Budget CY (plan)	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Budget CY (fun...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Budget CY (defi...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Budget CY (prop)	< User-select...	<Name>		✓	—	✓	—
<input type="checkbox"/> Cost Remaining...	< User-select...	<Name>		✓	—	—	—
<input type="checkbox"/> Cost Remaining...	< User-select...	<Name>		✓	—	—	—

Description of Expected Value

NPV adjusted for strategy and risk

Note: For copy/paste operations, use copy & paste buttons present on UI. Keyboard shortcuts (e.g. 'Ctrl + C' or 'Ctrl + V' for a windows machine) will not work on this UI.

Cancel < Back Next > Finish

id	Expected Value	Co
1	24,090,700	
1	125,000	
1	3,750,000	
1	1,336,500	
1	594,000	

Add Hover-Over Descriptions in Forms: You can define hover-over tool tips for table Labels and Titles in forms. Use the description field of the dynamic cell controls of any label, to provide help about the information that appears in that part of the table.

Table

General

Properties

In Folders

Security

Planned Capital Cost	Prior Years	Current Year	Next Year	Year After
Planned Capital Cost	OpCap PY (plan)	OpCap CY (plan)	OpCap CY+1 (plan)	OpCap CY+2 (plan)
Planned Expenses	OpExp PY (plan)	OpExp CY (plan)	OpExp CY+1 (plan)	OpExp CY+2 (plan)
Total Cost	Cost PY (plan)	Cost CY (plan)	Cost CY+1 (plan)	Cost CY+2 (plan)
Planned Gross Return	Gross Return PY (plan)	Gross Return CY (plan)	Gross Return CY+1 (plan)	Gross Return CY+2 (plan)

View

Design

Preview

Header

Height: 2

Row

Insert

Delete

Column

Insert

Delete

Width: 308

Cell

Type: Label

Background: Light (Normal)

Label: Total Cost

Description: The sum of Planned Capital Cost and Planned Expenses.

Apply

Type

Category

Data as-of

Background

Mandatory

Read-Only

To Row

To Column

Cancel

Back

Next

Finish

Business Case & Financial Plan_03.001

Planned Capital Cost	Prior Years	Current Year	Next Year	Year Af
Planned Capital Cost				
Planned Expenses				
Total Cost				
Planned Gross Return				

Add Categories to Alerts: You can add categories to alert messages. Categories are added to alert messages in the same way as keywords.

The screenshot shows the 'Edit Subject & Message' dialog box. It has a title bar with a question mark icon. Below the title bar, it says 'Customize your Subject and Message with free text and Keywords:'. The dialog is divided into several sections:

- Keywords:** A list of keywords on the left, including '[Added Item Name]', '[Added/Created]', '[AddedItemID]', '[Alert Name]', '[Alert Owner]', '[Event Date-Time]', '[Item/Portfolio]', '[Scope Name]', and '[ScopeID]'. A '>>' button is next to the list.
- Subject:** A text box containing '[Alert Name]'.
- Message:** A text box containing '[Added Item Name] has been [Added/Created] [Scope Name]. [Description] For inquiries contact [Alert Owner]'. The '[Description]' placeholder is circled in red, and a red arrow points from the 'Description' category in the 'Category' section to it.
- Category:** A dropdown menu showing 'Description' with a small square icon to its left. A '>>' button is next to it. This entire section is circled in red.
- Paste Link & Scope ID** and **Paste Link & Added Item ID** buttons.
- Restore Defaults** button.
- Locale:** A dropdown menu showing 'English (United Kingdom)'.
- Cancel** and **OK** buttons at the bottom right.

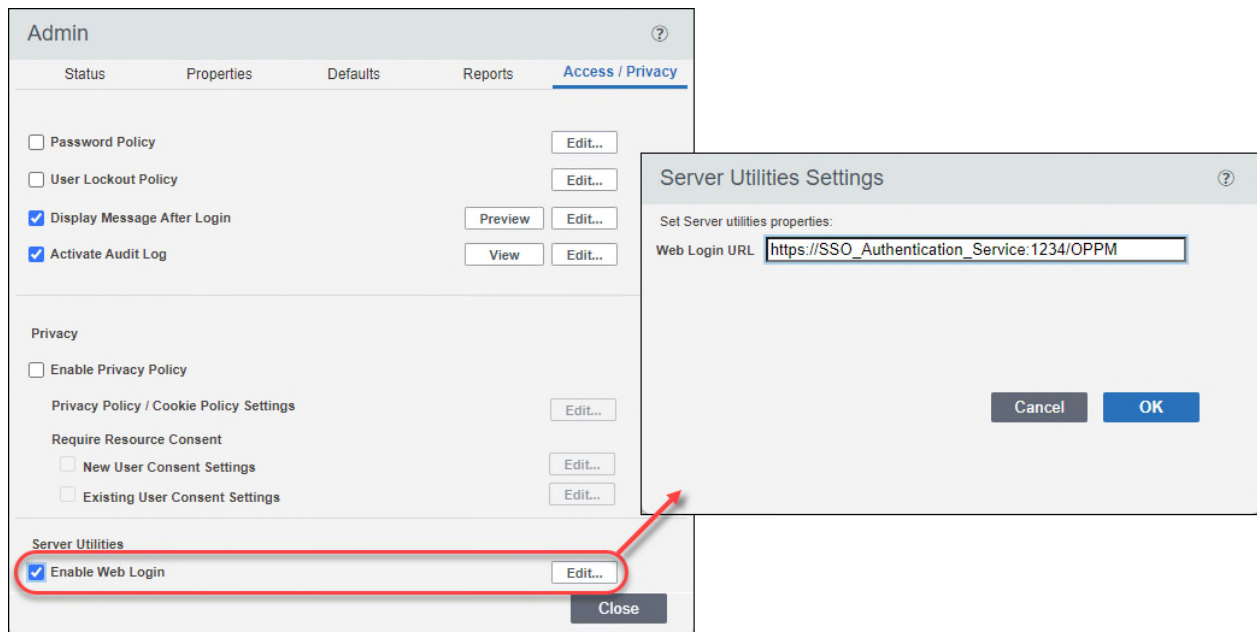
DoNothing Added to Advanced Function Reserved Words: A new reserved word has been added for use with Return statements in advanced functions; DoNothing. If a function returns DoNothing, no further processing of that function takes place and the cell will not be updated or added. For example, a user might want to calculate a result if the Domain is either "Applications" or "Assets" but not if the Domain has any other value.

The screenshot shows the 'Advanced Functions Editor' dialog box. On the left, under 'Expression Builder', there are fields for Method (set to 'getCell'), Indicator, Category (set to '<Select a Category>'), Value List (set to '<Select a Value List>'), and Value. Below these is a 'Properties List' containing: Address, Email, IsEnabled, Reserved Words (highlighted), CurrentPhaseIndex, green, red, today, yellow, and DoNothing (circled in red). A note at the bottom left says 'To insert property to script double click it or click the '>>' button.' with a '>>' button. On the right, there is a 'Script:' area with a 'Test' button. At the bottom right are 'Cancel' and 'OK' buttons.

Security

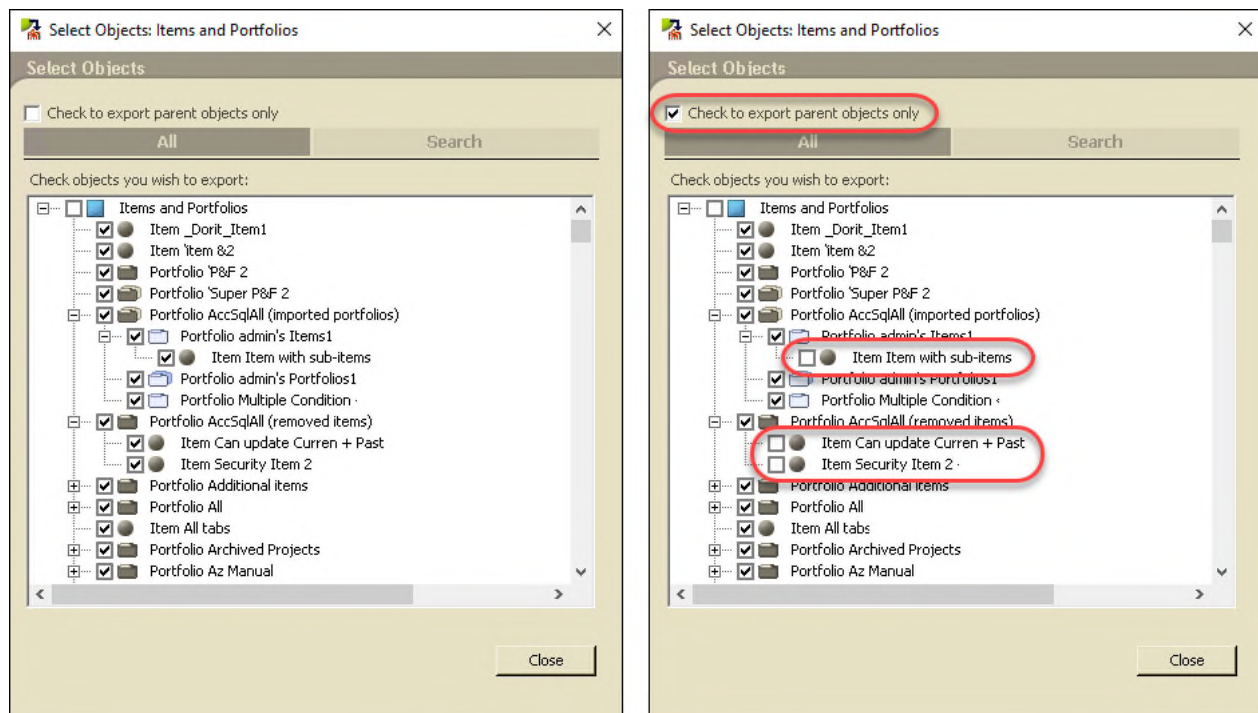
Improved Security for Bridge for Project Management and Active Directory Sync: If you use the optional Bridge for Project Management systems or the Active Directory Synchronization Tool, a new process is required as a prerequisite to setting up a new Bridge or Active Directory Synchronization connection or to use an existing connection. The process of Generating a Security Key for Encryption is described in the Primavera Portfolio Management Installation and Configuration Guide.

Web Login and Single Sign-On: Web login (including SSO) can be enabled and configured to allow authentication for users when logging into the following server utilities: Action Queue, Viewer, Database Cleanup Utility, Import Portfolio Management Package, Export Portfolio Management Package, and Schedule Portfolio Management Tasks.



Utilities

Export Only Parent Objects: Selecting parent objects only when exporting a package is easier and more efficient. A new checkbox has been added in the Select Objects window of the Export PPM Package application. Use the 'Check to export parent objects only' checkbox to select only parent objects in the list. When this checkbox is marked, the selected portfolio and all its child portfolios will be selected for export, but the items and candidates will not be selected.



Previous Releases

To view documentation for older releases, click on the release level below:

- 20 Documentation Library
- 19 Documentation Library
- 18 Documentation Library
- 16 R1 Documentation Library
- 15 R1 Documentation Library
- 9.1 Documentation Library
- 9.0 Documentation Library