Primavera P6 Professional

Help

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1

Welcome

Using the P6 Professional Help

P6 Professional can connect to a P6 Professional database or a P6 EPPM database. Some of the information in the documentation is relevant to only one of the databases. These topics are qualified in the title of the topic.

When a topic title is followed by (P6 Professional Only), the topic is relevant only when P6 Professional is connected to a P6 Professional database. When a topic title is followed by (P6 EPPM Only), the topic is relevant only when P6 Professional is connected to a P6 EPPM database.

Some topics include information that is relevant when connected to either database. These topics will not be qualified. For example, the information in the topic, "Create a project," applies when P6 Professional is connected to either database.

Other topics are generally relevant to both databases, but include some information that is only relevant when connected to a P6 Professional database and some that is only relevant when connected to a P6 EPPM database. In these cases, the topics include conditional phrases, such as:

- "When connected to a P6 Professional database..."
- "When P6 Professional is connected to a P6 EPPM database..."
- "(P6 EPPM Only)"
- "This icon only appears when P6 Professional is connected to a P6 Professional database."

Within our documentation, some content might be specific for cloud deployments while other content is relevant for on-premises deployments. Any content that applies to only one of these deployments is labeled accordingly.

Introducing P6 Professional

When P6 Professional is connected to a P6 EPPM database:

P6 Professional is a separate component of P6 EPPM that integrates traditional project management with streamlined resource and cost management.

It provides a set of robust features aimed primarily to address the needs of project planners and schedulers. (P6 Professional connected to a P6 EPPM database is not used to perform administrative or most enterprise-level tasks.)

P6 Professional features include the following:

- Support of work breakdown structures (WBS), user-defined fields and codes, critical-path-method (CPM) scheduling, and resource leveling.
- Multiple users can access the same projects concurrently.

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- Issue tracking
- Management by threshold
- A tracking feature that enables you to perform dynamic cross-project rollups of cost, schedule, and earned value
- Work products and documents that can be assigned to activities and managed centrally
- Visualizer, which allows you to create time-based Gantt and Timescaled Logic Diagram reports
- Resource and role administration
- A Report wizard that helps you create customized reports to extract any data from the P6 EPPM database

When P6 Professional is connected to a P6 Professional database:

P6 Professional is a comprehensive, multiproject planning and control software, built on Oracle and Microsoft SQL Server relational databases for enterprise-wide project management scalability. P6 Professional can stand alone for project and resource management, and it enables your organization to store and manage its projects in a central location. The module supports work breakdown structures (WBS), organizational breakdown structures (OBS), user-defined fields and codes, critical-path-method (CPM) scheduling, and resource leveling.

P6 Professional enables you to budget, prioritize, plan, administer, and manage multiple projects; optimize limited, shared resources; control changes; and consistently move projects to on-time and on-budget completion. It provides customizable interfaces, scalable and flexible tools, and easy integration with project management software outside of the P6 suite, including Oracle Contractor, Microsoft Project, and Microsoft Excel.

P6 Professional provides

- An enterprise project structure (EPS), which enables project managers to manage multiple projects, from the highest levels of the organization to the individuals that perform specific project tasks. Multiple users can access the same projects concurrently.
- Integrated risk management
- Issue tracking
- Management by threshold
- A tracking feature that enables you to perform dynamic cross-project rollups of cost, schedule, and earned value
- Work products and documents that can be assigned to activities and managed centrally
- Visualizer, which allows you to create time-based Gantt and Timescaled Logic Diagram reports
- Resource and role administration
- A Report wizard that helps you create customized reports to extract any data from the P6 Professional database

P6 Professional Cloud Connect

P6 Professional Cloud Connect allows P6 Professional to connect to an EPPM database across a wide area network, for example the internet. Cloud Connect enables P6 Professional to communicate with your P6 EPPM Cloud database.

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About P6 Professional Standalone

P6 Professional Standalone uses a *P6 Pro Standalone (SQLite)* database connection running on a SQLite database. A standalone implementation supports all of the Project Management functionality of P6 Professional except for the following:

- Update baseline
- Job Services – Jobs cannot be scheduled. However, the user can use the Windows scheduler to invoke the command-line interface to import, export, and run batch reports.
- Risk Analysis
- Any existing Java-based integration components developed by the customer using the P6 Remote Integration API (RMI) is not supported with a SQLite database.
- Advanced XML import options

> **Note**
>
> If you choose to continue to use Oracle XE database, the features listed above are retained.

Additionally, P6 Professional Standalone is single-user implementation. The only user in a P6 Professional Standalone implementation is an Admin Superuser. As a single-user implementation, any features intended for use in a multiple-user implementation are not available in P6 Professional Standalone, including:

- User administration
- Security profiles
- Email
- Project access (all projects are opened in shared mode)
- Checking out and checking in projects
- Saving or importing layouts for all users or other users

If you need a project management solution for multiple users, see the following documents to install an enterprise-wide solution:

- *P6 Professional Installation and Configuration Guide (Oracle Database)*
- *P6 Professional Installation and Configuration Guide (Microsoft SQL Server Database)*

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2

Getting Started

About Consent Notices

Consent notices alert you to the need to protect personal information (PI). You and your organization might be collecting, processing, storing, and transmitting PI while using P6 Professional. When you accept a consent notice, your consent covers the collection, processing, storing, and transmission of PI data in all areas of P6 Professional and means of retrieving data from P6 Professional including but not limited to project export, reports, documents, API, and data stored locally with the Primavera Cache Service.

You may be asked to provide consent to show that you understand the need to treat PI as secure data. You may also be asked to provide consent for your organization to collect, process, store, and transmit your PI. If you refuse consent, you will be denied access to P6 Professional.

You can withdraw your consent at any time by clicking Forget All User Acceptance on the Personal Information tab in User Preferences.

Viewing Your PI Data in P6 Professional

To see your PI in P6 Professional:

1. Choose Edit, User Preferences.
2. Click the Personal Information tab.

> **Tip**
>
> You can withdraw your previously given consent at any time by clicking Forget User Acceptance.

Workspace Basics

Symbols

The following symbols are displayed throughout the application, organized by type.

- General and admin symbols
- EPS, project, and WBS symbols
- Activity symbols
- Resource and role symbols

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- Report and layout symbols
- When connected to a P6 Professional database: Issue, risk, and threshold symbols
- When connection to a P6 EPPM database: Issue and threshold symbols
- Work product and document symbols

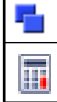
General and admin symbols

These symbols represent general data.

	Calendar
	Notebook topic
	Cost account, Funding source
	User
	This symbol appears only when P6 Professional connects to a P6 Professional database. OBS element
	This symbol appears only when P6 Professional connects to a P6 Professional database. Security profile
	This symbol appears only when P6 Professional connects to a P6 Professional database. Security profile privilege
	This symbol appears only when P6 Professional connects to a P6 Professional database. Funding source

EPS, project, and WBS symbols

These symbols represent EPS, project, and WBS data.

	EPS node
	Project (not open)
	Opened project
	What-if project
	What if project, checked out
	What if project, checked out, opened
	What if project, opened
	Checked out project
	Project, checked out, opened
	Project code
	Portfolio global
	WBS element, WBS category
	Expense item

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	Budget log item
	Baseline
	WBS milestone

Activity symbols

These symbols represent activity data.

	Activity (Not started)
	Activity has been marked as Started
	Activity has been marked as Finished
	Activity codes
	Activity successor
	Activity predecessor
	Activity resource assignment
	Activity step
	Activity role assignment
	This symbol appears only when P6 Professional connects to a P6 Professional database. Activity steps template

Resource and role symbols

These symbols represent resource and role data.

	Resource, Labor
	Resource, Non Labor
	Resource assigned to current project
	Resource code
	Resource units and prices
	Role
	Role code
	Resource assignment
	Assignment code
	Resource, Material
	Resource, Assign by role
	Resource associated with user
	Resource associated with user assigned to current project
	Resource, Non Labor assigned to current project
	Resource, Non Labor associated with user

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	Resource, Non Labor associated with user assigned to current project
	Resource Primary
	Role assigned to current project

Report and layout symbols

These symbols represent report and layout data.

	Report Group, Batch Reports
	Report
	Report Wizard
	Global or Project Layout
	User Specific Layout, Tracking Layout
	Filter

Issue, risk, and threshold symbols

These symbols represent issue or threshold data.

	Issue
	Threshold
	This symbol appears only when P6 Professional connects to a P6 Professional database. Risks

Work product and document symbols

These symbols represent work product or document data.

	Work Product or Document
	Work Product or Document Deliverable
	Document assigned to current project

Using main windows

There are eleven main windows in P6 Professional. You can open as many windows as necessary; each open window displays as a tab below the active tab title bar, which is just below toolbar area. To navigate between open windows, click the appropriate tab. To close a window, click the x to the right on the active tab title bar.

The name of the currently active window appears in the active tab title bar below the toolbar area. Some menu commands and toolbar icons pertain only to specific windows, so the currently active window, as well as the layout currently displayed in the active window, determines which menu commands and toolbar icons are enabled and disabled.

In each main window, you can use the Display or Layout Options bar, which appears at the top left of each window's workspace, to customize your view of global and project data. For

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example, you can show window details; customize table columns; group, sort, and filter data; customize fonts and colors; expand or collapse all grouped data; set layout options; and more.

> **Tip**
>
> You can also access all of the functionality available in the Display or Layout Options bar from toolbars and menus.

Opening windows

Global (Enterprise) data windows

The following windows display enterprise-level (global) data. You can open each of these windows from the Enterprise toolbar or Enterprise menu except where noted.

- Projects window — Use to globally review the global enterprise project structure (EPS), and to work with individual projects.
- Resources window — Use to add or modify your organization's resources.
- Reports window — Use to product reports for all projects or the open project. To open the Reports window, choose Tools, Reports, Reports.
- Tracking window — Use to display and create tracking layouts for the open project.

Project-specific data windows

The following windows display project-level data. You can open each of these windows from the Project toolbar or Project menu.

- Work Breakdown Structure window — Use to add or modify the open project's work breakdown structure (WBS).
- Activities Window — Use to work with activities in the open project.
- Resource Assignments window — Use to view, add, and delete resources assigned to activities.
- WPs and Docs window — Use to create and assign work products and documents for the open project.
- Project Expenses window — Use to work with expense items for the open project.
- Project Thresholds window — Use to add or delete thresholds for the open project.
- Project Issues window — Use to add or delete issues for the open project, review issue history, and notify other team members of issues.
- When connected to a P6 Professional database: Risks view — Use to add, delete, or calculate risks for the open project.

Closing windows

Windows that display enterprise-level (global) data remain open until you close them. Windows that display project-level data also remain open until you close them; however, project-level windows close automatically when you close all open projects.

To close a window, select the tab and then click the X in the active tab title bar.

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Tip

- You can choose the window you want to display by default when you launch the module.
- Window tabs are displayed in the order in which you opened them. To change the display order of window tabs, select a tab, then drag it to the appropriate location.

Using Hint Help

Field descriptions, called Hint Help, are provided for column values in various windows.

To access Hint Help

- Choose View, Hint Help. Move the mouse pointer over any column.
- Choose the Hint Help command again to turn off Hint Help.

Tip

When P6 Professional is connected to a P6 Professional database, you can also press Alt +F1 to access Hint Help.

Using the Status Bar and Layout Options bar

Windows and dialog boxes contain a number of special and unique features.

Status bar

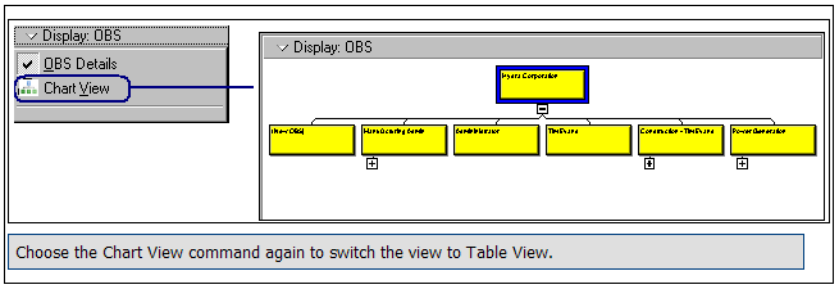
The Status bar is a message bar at the bottom of the window that displays information that can include the name of the current portfolio, the access mode, the data date, the current baseline, the job status of the last job request, the current user name, and the name of the database alias chosen at login as well as database type, where database type when connected to a P6 Professional database would display as (Professional) or where database type when connected to a P6 EPPM database would display as (EPPM).

Layout Options bar

Most windows and dialog boxes include an Options bar at the top of the screen that displays the name of the current layout and filter, and that you can click to display a number of commands that enable you to customize the current display. Click the Options bar to display a menu of the commands available for that window or dialog box.

You can also view hierarchical information, such as the work breakdown structure, in table (list) or chart view (hierarchy) format.

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> **Note**
>
> When you view data in chart view format, you can display up to 2,000 boxes.

Display window details

You can display detail information for many elements, such as projects, resources, and activities.

- To display details for a window, such as Projects or Activities, choose View, Show on Bottom, Details, or click on the Bottom Layout toolbar. See Bottom Layout Toolbar.
- To display details in a dialog box, such as Roles or OBS, click the Display Options bar in the dialog box, then choose the Details option.

Tile windows horizontally or vertically

You can tile windows horizontally or vertically by opening multiple tab groups. Tiling is useful when you are working in multiple windows and do not want to toggle back and forth between window tabs. For example, you could tile the WBS and Activities windows to simultaneously work with the open project's WBS and activity list.

When you tile horizontally, the workspace is split into top and bottom tab groups. When you tile vertically, the workspace is split into left and right tab groups. You can display as many window tabs as necessary in each tab group, but you can not display the same window tab in more than one tab group. You can create a maximum of one tab group for each main window.

> **Note**
>
> - For a tab group, only the active tab title bar appears, not a tab, when only one tab is open.
> - The name of the currently active tab appears in the active tab title bar.

To tile windows:

1. Open each window you want to work with.
2. To create a new tab group at the bottom of the screen, ensure the tab you want to move is the currently active tab. Then choose View, Tab Groups, New Horizontal Tab Group. If multiple views are tiled horizontally, the new view appears as the last group on the bottom.

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You can also create a new tab group by dragging the tab or active tab title bar to the bottom of the screen and releasing (dropping) it when you see the formation of a rectangular outline. Repeat if necessary.

3. To create a new tab group at the side of the screen, ensure the tab you want to move is the currently active tab. Then choose View, Tab Groups, New Vertical Tab Group. If multiple views are tiled vertically, the new view appears as the last group on the outer-most side. You can also create a new tab group by dragging the tab or active tab title bar to the side of the screen and releasing (dropping) it when you see the formation of a rectangular outline. Repeat if necessary.
4. To move additional tabs into an existing tab group, drag the tab or active tab title bar to the targeted tab group; release (drop) it when you see the formation of an outline with a tab under the active tab title bar of the targeted tab group. Repeat if necessary.
5. To remove all tab groupings and display all open tabs in one tab group, choose View, Tab Groups, Merge all Tab Groups.

Tip

Drag the horizontal splitter bar to increase or decrease the size of the top and bottom tab groups; drag the vertical splitter bar to increase or decrease the size of the left and right tab groups.

Wizards

Wizards are a great way to speed up your work. They quickly guide you through repetitive tasks, doing most of the work for you.

The wizards help you

- Create projects
- Add activities
- Add resources
- Create reports
- Import projects
- Export projects
- Check in projects
- Check out projects

You can choose to launch the New Activity and New Resource wizards automatically when you add a resource or activity. Other wizards are available when you select the applicable menu option, for example, project check in/check out, or when you select a dialog box option.

Navigate wizards

- To move between wizard windows, click Prev or Next. To save changes and close a wizard, click Finish. To exit a wizard without saving your changes, click Cancel.

Select and assign information

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Many of the fields provide a Select dialog box that lists the available entries.

1. Click ... in the field or Assign in the open tab or dialog box.
2. Select the item you want to use, then click

   . - Or - To replace a value, click

   . To remove a value, click

   .
3. If necessary, click .

> **Note**
>
> In some tabs and dialog boxes, you can remove an item by selecting it and clicking Remove.

Use shortcut menus

Instead of using standard menus and buttons, you can also use the right mouse button to access frequently used commands.

- To use shortcut menus, right-click an element or the white space in any window, then choose the appropriate command.

Select multiple items

- To select a group of items that are next to each other in the display, press the Shift key, click the first item in the group, then click the last item in the group.
- To select multiple items that are not next to each other in the display, press the Ctrl key, then click each item you want to select.

Quickly enter the same text in multiple table rows

In some table format display columns, you can use the Fill Down feature to quickly enter the same text in successive rows.

- To copy text from one row to successive rows within a column, select the row containing the text you want to copy and the rows you want to copy the text to, then choose Edit, Fill Down.

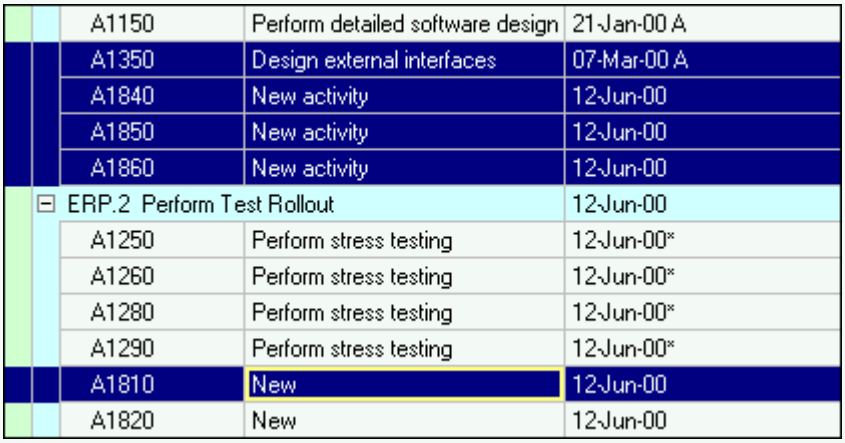
The following provides an example:

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Using the Fill Down function, you can quickly copy the activity name Design external interfaces from activity A1350 to activities A1840, A1850, and A1860.

Tip

The rows you select to copy to can be next to each other as shown in the preceding graphic, or not directly adjacent, as shown in the following graphic.



A1150	Perform detailed software design	21-Jan-00 A
A1350	Design external interfaces	07-Mar-00 A
A1840	New activity	12-Jun-00
A1850	New activity	12-Jun-00
A1860	New activity	12-Jun-00
⊟ ERP.2 Perform Test Rollout		12-Jun-00
A1250	Perform stress testing	12-Jun-00*
A1260	Perform stress testing	12-Jun-00*
A1280	Perform stress testing	12-Jun-00*
A1290	Perform stress testing	12-Jun-00*
A1810	New	12-Jun-00
A1820	New	12-Jun-00

- The Fill Down feature can also be used to copy text to rows above the first row you select. The text will always be copied from the first row you select to the subsequent rows you select. Select multiple rows by pressing the Ctrl key as you click each row you want to copy to.
- You can also copy the values in a range of cells from one row of a spreadsheet to another part of the same row, or to a range of cells on another row.

Copy and paste a range of cells

In some spreadsheets, you can copy the values in a range of cells from one row of a spreadsheet to another row.

- To copy a range of cells from one row of a spreadsheet first you must select the cells you want to copy. Click the first cell in the range that you want to copy, hold down SHIFT, then select the last cell in the range you want to copy. Then either:
  Right-click and choose Range Copy

  Or use the shortcut Shift + Ctrl + C
- To paste the range of cells to another area of the same row, or to another row entirely, select the first cell in the range that you want to paste to and either:
  Right click and choose Range Past

  Or use the shortcut Shift + Ctrl + V

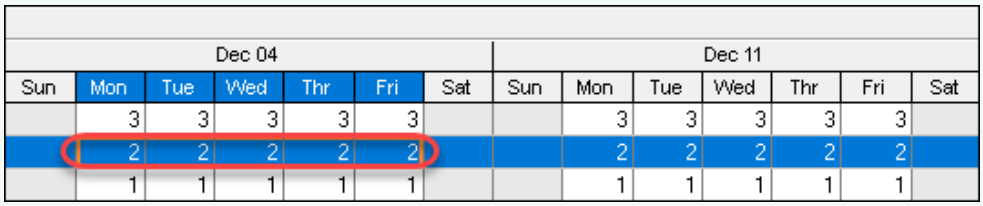
When you copy a range of cells, only the values in those cells are copied, not the labels. Therefore it is possible to copy data from a range of cells measured in one unit and paste those cells into a row measured in another unit.

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Tip

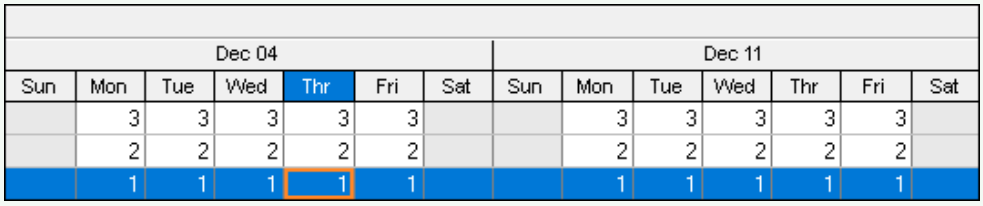
When you paste a range of cells, read-only cells are automatically skipped. For example:

- If you select to copy the cells for Monday to Friday of a given week.



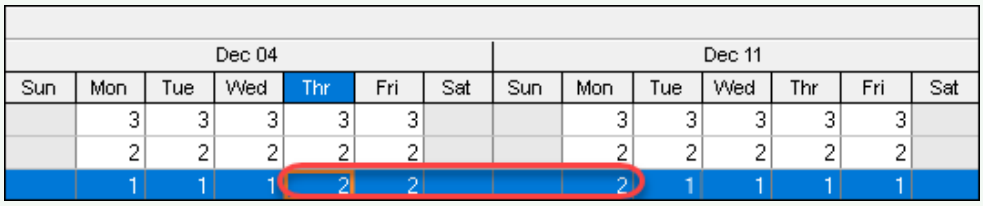
	Dec 04						Dec 11						
Sun	Mon	Tue	Wed	Thr	Fri	Sat	Sun	Mon	Tue	Wed	Thr	Fri	Sat
	3	3	3	3	3			3	3	3	3	3	
	2	2	2	2	2			2	2	2	2	2	
	1	1	1	1	1			1	1	1	1	1	

Then select a Thursday as the start of the range to paste to.



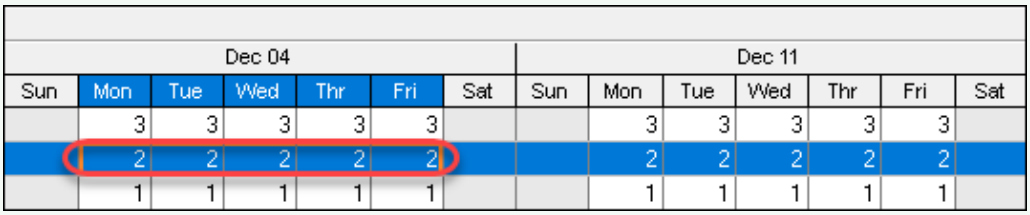
	Dec 04						Dec 11						
Sun	Mon	Tue	Wed	Thr	Fri	Sat	Sun	Mon	Tue	Wed	Thr	Fri	Sat
	3	3	3	3	3			3	3	3	3	3	
	2	2	2	2	2			2	2	2	2	2	
	1	1	1	1	1			1	1	1	1	1	

The values are pasted into Thursday, Friday, and Monday. The values are not pasted into Saturday and Sunday because those cells are read-only.



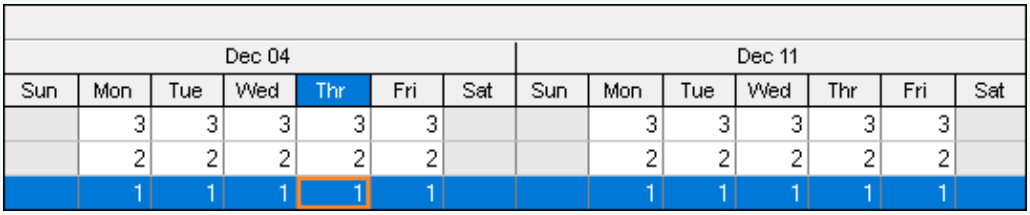
	Dec 04						Dec 11						
Sun	Mon	Tue	Wed	Thr	Fri	Sat	Sun	Mon	Tue	Wed	Thr	Fri	Sat
	3	3	3	3	3			3	3	3	3	3	
	2	2	2	2	2			2	2	2	2	2	
	1	1	1	2	2			2	1	1	1	1	

- If the data does not paste correctly into Microsoft Excel, use the Paste Special menu item in Excel and paste the data as CSV format.



	Dec 04						Dec 11						
Sun	Mon	Tue	Wed	Thr	Fri	Sat	Sun	Mon	Tue	Wed	Thr	Fri	Sat
	3	3	3	3	3			3	3	3	3	3	
	2	2	2	2	2			2	2	2	2	2	
	1	1	1	1	1			1	1	1	1	1	

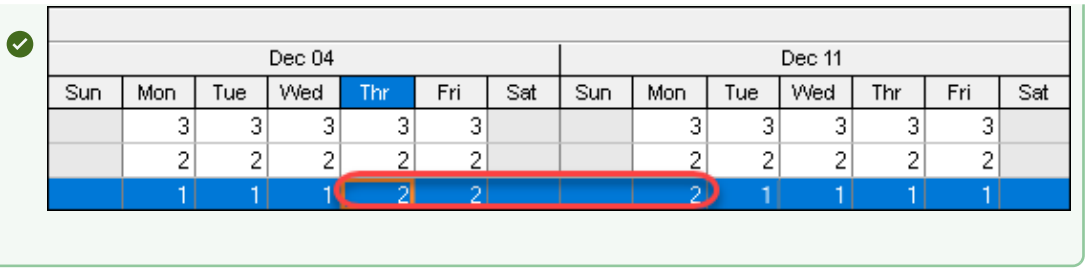
Then select a Thursday as the start of the range to paste to.



	Dec 04						Dec 11						
Sun	Mon	Tue	Wed	Thr	Fri	Sat	Sun	Mon	Tue	Wed	Thr	Fri	Sat
	3	3	3	3	3			3	3	3	3	3	
	2	2	2	2	2			2	2	2	2	2	
	1	1	1	1	1			1	1	1	1	1	

The values are pasted into Thursday, Friday, and Monday. The values are not pasted into Saturday and Sunday because those cells are read-only.

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	Dec 04						Dec 11						
Sun	Mon	Tue	Wed	Thr	Fri	Sat	Sun	Mon	Tue	Wed	Thr	Fri	Sat
	3	3	3	3	3			3	3	3	3	3	
	2	2	2	2	2			2	2	2	2	2	
	1	1	1	2	2			2	1	1	1	1	

Using the HTML editor

The HTML editor enables you to add, edit, and format notes and descriptions for the selected data item. Using the editor, you can insert images, links, tables, bulleted lists, and numbered lists into notebook and description fields. You can also copy content from another source and paste it into the editor.

Accessing the HTML Editor

To display the HTML editor, go to one of the following locations in the module, then click Modify to open the editor.

- Activity Details > Notebook tab
- Activity Details > Steps tab
- When connected to a P6 Professional database: Activity Step Templates dialog box (choose Enterprise, Activity Step Templates)
- When connected to a P6 Professional database: Cost Accounts dialog box (choose Enterprise, Cost Accounts)
- Expense Details > Description tab
- When connected to a P6 Professional database: Funding Sources dialog box (choose Enterprise, Funding Sources)
- Issue Details > Notes tab
- When connected to a P6 Professional database: Organizational Breakdown Structure dialog box > General tab (choose Enterprise, OBS)
- Project Details > Notebook tab
- Resource Details > Notes tab
- Roles dialog box > General tab (Enterprise, Roles)
- WBS Details > Notebook tab
- WP & Doc Details > Description tab

Working with the HTML editor

The content you add or edit in the HTML editor appears in the description or notes area of the dialog box or tab from which you opened the editor. To save your changes and display them in the dialog box/tab, click OK in the editor. Your changes do not appear in the dialog box/tab until you click OK, which also closes the editor.

The HTML editor toolbar contains the following icons:

Icon	Description

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	Opens the Font dialog box, in which you can select text font, style, size, and effects such as underlining and color.
	Aligns the selected row or text in the center of the editor window.
	Aligns the selected row or text on the left side of the editor window.
	Aligns the selected row or text on the right side of the editor window.
	Starts or ends a bulleted list in the selected row.
	Starts or ends a numbered list in the selected row.
	Outdents the selected row or text.
	Indents the selected row or text.
	Opens the Picture dialog box. In the dialog box, you can select the image you want to insert, type alternate text for the image, and set alignment, border, and spacing options.
	Opens the Hyperlink dialog box, in which you can choose a web protocol and specify the appropriate URL.
	Inserts a three-row by three-column table. You can not modify the number of rows or columns in the table.

> **Note**
>
> Right-clicking in the HTML editor presents options you can use to cut, paste, copy,or delete selected areas; to undo or redo the previous action; to print; to remove previously applied formatting; to insert a table, or to open the Font, Hyperlink, or Picture dialog box.

Using Hot Keys

The following tables list the menu options that have hot keys. If an option is not listed, it does not have a hot key.

File Menu (Alt-F)

Hot Key	Command
Alt-F, N	New
Alt-F, O	Open
Alt-F, C	Close All
Alt-F, U	Page Setup
Alt-F, S	Print Setup
Alt-F, V	Print Preview
Alt-F, P	Print
Alt-F, I	Import
Alt-F, E	Export
Alt-F, D	Send Project
Alt-F, H	Check In

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Alt-F, K	Check Out
Alt-F, L	Select Project Portfolio
Alt-F, M	Commit Change
Alt-F, R	Refresh Data
Alt-F, J	Lists the last four projects that were opened and opens the project then selected.
Alt-F, X	Exit

Edit Menu (Alt-E)

Hot Key	Command
Alt-E, T	Cut
Alt-E, C	Copy
Alt-E, P	Paste
Alt-E, A	Add
Alt-E, L	Delete
Alt-E, O	Dissolve
Alt-E, I	Assign
Alt-E, I, R	Resources
Alt-E, I, L	Resources by Role
Alt-E, I, O	Roles
Alt-E, I, C	Activity Codes
Alt-E, I, P	Predecessors
Alt-E, I, S	Successors
Alt-E, K	Link Activities
Alt-E, V	Unlink Activities
Alt-E, W	Fill Down
Alt-E, L	Select All
Alt-E, F	Find
Alt-E, N	Find Next
Alt-E, R	Replace
Alt-E, S	Spell Check
Alt-E, U	User Preferences

View Menu (Alt-V)

Hot Key	Command
Alt-V, O	Layout
Alt-V, W	Show on Top
Alt-V, H	Show on Bottom
Alt-V, M	Timescale
Alt-V, F	Filter By
Alt-V, G	Group and Sort By
Alt-V, P	Progress Spotlight
Alt-V, T	Attachments
Alt-V, N	Table Font and Row
Alt-V, R	Arrange Children

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Alt-V, L	Align Children
Alt-V, X	Chart Box Template
Alt-V, N	Chart Font and Colors
Alt-V, H	Hint Help
Alt-V, S	Status Bar
Alt-V, Z	Zoom
Alt-V, E	Expand All
Alt-V, C	Collapse All
Alt-V, T	Toolbars

Project Menu (Alt-P)

Hot Key	Command
Alt-P, A	Activities
Alt-P, S	Resource Assignments
Alt-P, W	WBS
Alt-P, E	Expenses
Alt-P, D	Work Products and Documents
Alt-P, T	Thresholds
Alt-P, I	Issues
Alt-P, R	Risks
Alt-P, P	Set Default Project

Enterprise Menu (Alt-N)

Hot Key	Command
Alt-N, P	Projects
Alt-N, E	Enterprise Project Structure
Alt-N, C	Tracking
Alt-N, F	Project Portfolios
Alt-N, R	Resources
Alt-N, O	Roles
Alt-N, O	OBS
Alt-N, S	Resource Codes
Alt-N, J	Project Codes
Alt-N, C	Activity Codes
Alt-N, C	Calendars
Alt-N, E	Resource Shifts
Alt-N, V	Activity Step Templates
Alt-N, A	Cost Accounts
Alt-N, F	Funding Sources
Alt-N, U	Resource Curves
Alt-N, N	External Applications

Tools Menu (Alt-T)

Hot Key	Command

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Alt-T, S	Schedule
Alt-T, L	Level Resources
Alt-T, A	Apply Actuals
Alt-T, U	Update Progress
Alt-T, Z	Summarize
Alt-T, Z, O	Open Projects
Alt-T, Z, A	All Projects
Alt-T, J	Job Services
Alt-T, O	Store Period Performance
Alt-T, G	Global Change
Alt-T, M	Monitor Thresholds
Alt-T, I	Issue Navigation
Alt-T, P	Reports
Alt-T, P, P	Reports
Alt-T, P, G	Report Groups
Alt-T, P, B	Batch Reports
Alt-T, W	Report Wizard
Alt-T, P	Publish
Alt-T, P, P	Project Web Site
Alt-T, P, A	Activity Layouts
Alt-T, P, T	Tracking Layouts

Admin Menu (Alt-A)

Hot Key	Command
Alt-A, U	Users
Alt-A, S	Security Profiles
Alt-A, P	Admin Preferences
Alt-A, C	Admin Categories
Alt-A, C	Currencies
Alt-A, F	Financial Period Calendars

Help Menu (Alt-H)

Hot Key	Command
Alt-H, L	Local Help
Alt-H, O	Online Help
Alt-H, A	About Primavera P6 Professional

Using Shortcut Keys

The following tables list the menu options that have shortcut keys. If an option is not listed, it does not have a shortcut key.

File Menu (Alt+F)

Shortcut	Command

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Ctrl+N	New
Ctrl+O	Open
Ctrl+W	Close All
Ctrl+P	Print
<F10>	Commit Changes
<F5>	Refresh Data

Edit Menu (Alt+E)

Shortcut	Command
Ctrl+Z	Undo
Ctrl+X	Cut
Ctrl+C	Copy
Ctrl+V	Paste
<Ins>	Add
<Del>	Delete
Ctrl+F	Find
<F3>	Find Next
Ctrl+R	Replace
<F7>	Spell Check

View Menu (Alt+V)

Shortcut	Command
Alt+<F1>	Hint Help

Tools Menu (Alt+T)

Shortcut	Command
<F9>	Schedule
<Shift> + <F9>	Level Resources
<Shift> + <F12>	Disable Auto-Reorganization

Help Menu (Alt+H)

Shortcut	Command
Ctrl+<F1>	Local Help
Ctrl+Alt+<F1>	Online Help

Sharing your feedback with us

From time to time, we will open a feedback survey through which you can share your feedback about working with P6 Professional. When you log in, you'll see a dialog box asking you to Help Us Improve. You can either take the survey at that time, or you can request to be reminded later.

Alternatively, you can choose to participate in the feedback survey at a time more convenient to you, by opening the Feedback item on the Help menu.

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Working with Toolbars and Menus

Reset toolbars and menus to factory defaults

You can reset all P6 Professional toolbars and menus, or an individual toolbar, to factory default settings. When you reset toolbars, only P6 Professional toolbars are reset, not custom ones.

- To reset all toolbars and menus, choose View, Reset All Toolbars. When you reset all toolbars and menus, all modifications to P6 Professional toolbars and menus are lost.
- To reset an individual toolbar, choose View, Toolbars, Customize. On the Toolbars tab, select the toolbar you want to reset, then click Reset. You can also reset an individual toolbar when you show or hide toolbar icons.

Customizing Toolbars

Customizing toolbars

The module provides customizable toolbars that enable you to quickly access all available windows, dialog boxes, and associated functionality. You can:

- Show or hide toolbars
- Show or hide toolbar icons
- Move toolbars
- Move toolbar icons
- Lock toolbars in position
- Delete icons from toolbars
- Set toolbar display options
- Customize a toolbar icon
- Create a custom toolbar

Tip

The state of your toolbars is saved each time you close the module. To undo all changes to toolbars, you can reset toolbars to restore them to the factory default settings.

Show or hide toolbars

Many toolbars display by default; however, some additional toolbars are available for you to display. For example, you can display a Reports toolbar if you routinely produce reports.

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To show or hide an individual toolbar:

1. Right-click anywhere in the toolbar area or choose View, then point to Toolbars.
2. Select the toolbar you want to show or hide. A checkmark next to the toolbar name indicates that it is currently displayed. After selecting the toolbar you want to show or hide, the menu closes.

To show or hide multiple toolbars:

1. Choose View, Toolbars, Customize.
2. On the Toolbars tab, mark the checkbox next to each toolbar you want to display, and clear the checkbox next to each toolbar you want to hide.
3. Click Close.

> **Tip**
>
> You can revert to the default settings for an individual toolbar, or for all toolbars.

Show or hide toolbar icons

Although some icons display on toolbars by default, you can show or hide any icon on any displayed toolbar.

1. For toolbars displayed horizontally, click the black triangle on the right side of the toolbar you want to customize.
   For toolbars displayed vertically, click the black triangle at the bottom of the toolbar you want to customize.
2. Point to Add or Remove Buttons.
   The menu that appears lists the icons for the toolbar, in the left-to-right or top-to-bottom order in which they appear in the row or column.
3. Choose each icon you want to show or hide.
   The menu remains open while you select icons. A checkmark indicates the icon is currently selected for display.
4. Click anywhere outside the menu to close it.

> **Tip**
>
> You can revert to the default settings for an individual toolbar, or for all toolbars. To reset an individual toolbar, choose Reset Toolbar in the menu you used in this procedure.

Move toolbars

When you display a toolbar, it is placed in its default location, which can be above or beside the workspace. You can drag any toolbar to a different location anywhere in the toolbar area or the workspace.

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- For toolbars displayed horizontally, hover over ▯ on the left end of the toolbar until the cursor changes to a crosshair, then drag the toolbar to the appropriate location.
- For toolbars displayed vertically, hover over ▭ at the top of the toolbar until the cursor changes to a crosshair, then drag the toolbar to the appropriate location.
- For floating toolbars (toolbars you've moved from the toolbar area to the workspace area), click the title bar, then drag it.

Tip

- Floating toolbars always appear in the workspace, regardless of the active window.
- To reshape a floating toolbar, hover over any edge of the toolbar until the cursor changes to an arrow, then drag the cursor.
- You can move the Menu bar.
- You can revert to the default settings for an individual toolbar, or for all toolbars.

Move toolbar icons

Using your mouse, you can change the position of icons within a toolbar, or move an icon to a different toolbar.

1. Choose View, Toolbars, Customize, to open the Customize dialog box.
   Opening the Customize dialog box switches the toolbars into Edit mode, which enables you to move icons. You do not need to use the Customize dialog to move icons; however, you must leave the dialog open to enable you to move icons.
2. To move an icon, select it in the toolbar, then drag it to the appropriate location.
   You can place the icon at the beginning or end of any displayed toolbar, or between any two displayed icons. You can not place the icon outside of a displayed toolbar.
3. When you are finished moving icons, click Close in the Customize dialog box.

Tip

You can revert to the default settings for an individual toolbar, or for all toolbars.

Lock toolbars in position

You can lock toolbars that reside in the toolbar area into their current positions to prevent you from moving them.

- To lock all toolbars in their current positions, choose View, Lock All Toolbars. A checkmark next to Lock All Toolbars indicates that all toolbars are currently locked.

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Tip

- You can still resize floating toolbars when the toolbars are locked.
- To unlock toolbars, choose the Lock All Toolbars command again.
- When you lock toolbars, the ▯ and ▭ are removed from each toolbar to prevent you from moving them.

Delete icons from toolbars

You can delete an icon from any currently displayed toolbar. To delete an icon:

1. Choose View, Toolbars, Customize. Opening the Customize dialog box switches the toolbars into Edit mode, which enables you to delete icons. You do not need to use the Customize dialog to delete icons; however, you must leave the dialog open to enable you to delete icons.
2. Right-click on the icon you want to delete, then choose Delete. Repeat for each icon you want to delete.
3. Click Close in the Customize dialog box. When you close the Customize dialog box, the toolbars revert to their previous state, minus any previously displayed icons that you deleted.

Tip

When you delete an icon, it is no longer available for display. To recover deleted icons, you must revert to the default settings for an individual toolbar, or for all toolbars.

Set toolbar display options

You can set display options that apply to all toolbars. For example, you can show large icons or include shortcut keys in screen tips.

1. Choose View, Toolbars, Customize.
2. Click the Options tab.
3. Mark or clear the available checkboxes as necessary.
4. Click Close.

Customize a toolbar icon

You can individually customize icons in the module. To customize an icon:

1. Choose View, Toolbars, Customize. Opening the Customize dialog box switches the toolbars into Edit mode, which enables you to customize icons. You do not need to use the Customize dialog to customize icons; however, you must leave the dialog open to enable you to customize icons.
2. Right-click on the icon you want to customize to display a menu.
3. In the menu, do any of the following to customize the selected icon:

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- To edit the icon's name, click in the Name field, highlight the existing name, then type a new name. When you choose to display text for the selected icon on the toolbar, this is the name that is displayed. This name does not replace the icon name that displays in screen tips.
- To display only the icon on the toolbar, choose Default Style. This option is selected by default.
- To hide the icon image and display only the icon name on the toolbar, choose Text Only (Always).
- To display the icon image and icon name on the toolbar, choose Image and Text.
- To add a separator before the icon in the toolbar, choose Begin a Group.

4. When you are finished customizing icons, click Close in the Customize dialog box.

Tip

From the icon right-click menu, you can also do the following:

- To reset the selected icon to its default settings, choose Reset.
- To delete the selected icon, choose Delete.

Create a custom toolbar

Rather than customizing existing toolbars, you can create custom toolbars that include only the icons you want to display in groups meaningful to you. For example, you could create one toolbar that includes only the icons you need for your work, then hide all other toolbars.

To create a custom toolbar:

1. Choose View, Toolbars, Customize.
2. On the Toolbars tab, click New.
3. In the New Toolbar dialog box, specify a name for the toolbar, then click OK. When you click OK, a new toolbar is added docked at the top of the window, below all other toolbars in the toolbar area on its own row.
4. In the Customize dialog box, click the Commands tab.
5. In the Categories list, select a category to view the available commands for that category.
6. Select the command you want to move to the custom toolbar, then drag it to the new custom toolbar row or column that was created when you added the toolbar. Repeat this step for each command you want to add to the toolbar.

Tip

- With the Customize dialog box open, you can select any displayed toolbar icon, then drag it to a custom toolbar.
- To rename or delete a custom toolbar, choose View, Toolbars, Customize. On the Toolbars tab, select the custom toolbar, then click Rename or Delete. You can not rename or delete predefined toolbars.

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Customizing Menus

Customizing menus

The module provides customizable toolbars that enable you to quickly access all available windows, dialog boxes, and associated functionality. You can:

- Change the display order of menus
- Move menu commands
- Delete menus and menu commands
- Customize a menu command
- Create a custom menu

> **Tip**
>
> The state of your toolbars and menus are saved each time you close the module. To undo all changes to toolbars and menus, you can reset toolbars and menus.

Change the display order of menus

You can change the left-to-right display order of menus in the Menu bar.

1. Choose View, Toolbars, Customize. Opening the Customize dialog box switches the menus into Edit mode, which enables you to move menus. You do not need to use the Customize dialog to move menus; however, you must leave the dialog open to enable you to move menus.
2. Click the menu label you want to move, then drag it left or right. You can place the menu at the beginning or end of the Menu bar, or in between any two menus.

> **Tip**
>
> You can revert to the default settings for all toolbars and menus.

Move menu commands

You can move menu commands from one menu to another, or rearrange commands in a single menu. For example, you could rearrange all menu commands to list the commands you use most often at the top of each menu, or you could add all the commands you use frequently to a single menu.

1. Choose View, Toolbars, Customize. Opening the Customize dialog box switches the menus into Edit mode, which enables you to move menu commands. You do not need to use the Customize dialog to move menu commands; however, you must leave the dialog open to enable you to move menu commands.
2. Click the menu label to expand the menu, then click the command you want to move.

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3. Drag the command to the menu label in which you want to place the command (this expands the menu), then continue dragging the command to place it in the appropriate position within the expanded menu. You must complete this step even if you want to move the command within the same menu.

> **Tip**
>
> You can revert to the default settings for all toolbars and menus.

Delete menus and menu commands

You can delete a command from any menu, and you can delete menus. To delete a menu or menu command:

1. Choose View, Toolbars, Customize. Opening the Customize dialog box switches the menus into Edit mode, which enables you to delete commands and menus. You do not need to use the Customize dialog to delete commands and menus; however, you must leave the dialog open to enable you to delete commands and menus.
2. To delete a menu, right-click the menu label, then choose Delete. To delete a command, click the menu label that contains the command you want to delete, then right-click the command and choose Delete.

> **Tip**
>
> When you delete a menu or command, it is no longer available for display. To recover deleted menus and commands, you must revert to the default settings for all toolbars and menus.

Customize a menu command

You can individually customize menu commands in the module. To customize a command:

1. Choose View, Toolbars, Customize. Opening the Customize dialog box switches the menus into Edit mode, which enables you to customize commands. You do not need to use the Customize dialog to customize commands; however, you must leave the dialog open to enable you to customize commands.
2. Click the menu label that contains the command you want to customize, then right-click the command.
3. In the menu, do any of the following to customize the selected command:
   - To edit the command's name, click in the Name field, highlight the existing name, then type a new name.
   - To add a separator before the command in the menu, choose Begin a Group.
4. When you are finished customizing commands, click Close in the Customize dialog box.

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Tip

From the command right-click menu, you can also do the following:

- To reset the selected command to its default settings, choose Reset.
- To delete the selected command, choose Delete.

Create a custom menu

You can create custom menus that contain only the commands you require for your work.

1. Choose View, Toolbars, Customize. Opening the Customize dialog box switches the menus into Edit mode, which enables you to customize menus. You do not need to use the Customize dialog to customize menus; however, you must leave the dialog open to enable you to customize menus.
2. Right-click any menu label.
3. To edit the menu label, click in the Name field, highlight the existing name, then type a new name. For example, you could change the menu label to My Menu or My Commands.
4. Customize your menu.

Tip

You can revert to the default settings for all toolbars and menus.

Menu, Toolbar, and Icon Reference

Menu bar

Use the Menu bar to access all available functionality in the module. You can change the location of the Menu bar, and you can customize the commands that appear in each menu. You can not hide the Menu bar.

The following tables list the commands available in each menu, provide a brief description of each command's function, and list the active windows in which the command is enabled. For menu commands that have corresponding icons, the tables list the toolbars on which the corresponding icons are located.

The Menu bar contains the following menus:

- File Menu
- Edit Menu
- View Menu
- Project Menu
- Enterprise Menu
- Tools Menu

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- When connected to a P6 Professional database: Admin Menu
- Help Menu

> **Tip**
>
> The icons and shortcut keys, if any, associated with each menu command are displayed next to the commands in each menu.

File Menu

File Menu (Alt+F)

Command	Function	Enabled when active window is:	Corresponding toolbar
New	Creates a new project. If you set your user preferences to use the Create a New Project wizard when creating projects, choosing this command launches the wizard. If you set your user preferences to not use the wizard when creating projects, a new project with the default project name (NEWPROJ-n) is added to the list of projects in the Projects window.	All	Standard Toolbar
Open	Launches the Open Project dialog box. Select the projects you want to open.	All	Standard Toolbar
Close All	Closes all open projects. All open windows that display project-specific data, such as the Activities and Work Breakdown Structure windows, are automatically closed when you choose this command.	All	Standard Toolbar
Page Setup	Opens the Page Setup dialog box. In the Page Setup dialog box, you can define page size and orientation, set scaling options, change the size of margins, and define a header and footer.	All	Print Toolbar
Print Setup	Opens the Print Setup dialog box. In the Print Setup dialog box, you can select a printer and define printer properties.	All	Print Toolbar

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Print Preview	Opens the Print Preview window. In the Print Preview window, you can define page and print settings, publish the contents of the selected window to an HTML file, and print the contents of the selected window.	All	Print Toolbar
Print	Enables you to print the currently selected window, select a printer, and set printer options.	All	Print Toolbar
Import	Starts the Import wizard. Use the Import wizard to import projects, resources, or roles from other Oracle applications, Microsoft Project, or Microsoft Excel.	All	Action Toolbar
Export	Starts the Export wizard. Use the Export wizard to export projects, resources, or roles to other Oracle applications, Microsoft Project, or Microsoft Excel. You can also export projects in UN/CEFACT, IPMDAR, and CPP format.	All	Action Toolbar
Send Project	Creates an XER export file of the open project, automatically opens your email system, and attaches the XER file to the body of the email message. The subject line of the email is automatically populated with the name of the project. This command is enabled when you open a project.	All	Action Toolbar
Exchange Data >	This submenu provides options for you to exchange data with other applications. The options which appear here differ depending the applications integrated with P6 Professional and the configuration of the integration.	All	None
Check In	Starts the Check In wizard. Use the Check In wizard to check in open projects you currently have checked out.	All	Action Toolbar

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Check Out	Starts the Check Out wizard. Use the Check Out wizard to check out any open project.	All	Action Toolbar
Select Project Portfolio	Opens the Select a Portfolio dialog box. Use the Select a Portfolio dialog box to open a portfolio. When you open a portfolio, the module closes all open projects, then displays the projects contained in the selected portfolio in the Projects window. Opening a portfolio does not open the projects contained in the portfolio. You must open the projects you want to work with from the Projects window, which displays all of the projects contained in the open portfolio.	All	Action Toolbar
Commit Changes	Commits your changes to the database.	All	Standard Toolbar
Refresh Data	Refreshes to display the most current data.	All	Standard Toolbar
Recent Projects >	Displays the three most recently opened projects. Select the project you want to again open.	All	None
Exit	Closes the module.	All	None

Edit Menu

Edit Menu (Alt+E)

Command	Function	Enabled when active window is:	Corresponding toolbar
Undo	Changes data back to its previous state before your last action.	Activities, Resources, and Resource Assignments	Edit Toolbar
Cut	Cuts the selected data object.	All except Tracking and Resource Assignments	Edit Toolbar
Copy	Copies the selected data object.	All	Edit Toolbar
Paste	Pastes a copied or cut data object. This command is enabled after you copy or cut a data object.	All	Edit Toolbar

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Add	Adds a data item in the active window. For example, in the Activities window, choosing this command adds an activity.	All	Edit Toolbar
Delete	Deletes the selected data object.	All except Tracking	Edit Toolbar
Dissolve	Deletes the selected activity and joins its predecessor and successor activities with a finish to start relationship. This command is enabled when you select an activity that has a predecessor and successor.	Activities	Edit Toolbar
Assign > Resources	Opens the Assign Resources dialog box. In this dialog box, you can assign resources, remove existing resource assignments, and replace resource assignments.	Activities	Assign Toolbar
Assign > Resources by Role	Opens the Assign Resources by Role dialog box. In this dialog box, you can assign resources based on the selected activity's current role assignments.	Activities	Assign Toolbar
Assign > Roles	Opens the Assign Roles dialog box. In this dialog box, you can assign roles, remove existing role assignments, and replace role assignments.	Activities	Assign Toolbar
Assign > Activity Codes	Opens the Assign Activity Codes dialog box. In this dialog box, you can assign activity code values and remove existing activity code value assignments.	Activities	Assign Toolbar
Assign > Predecessors	Opens the Assign Predecessors dialog box. In this dialog box, you can assign predecessor activities and remove existing predecessor relationships.	Activities	Assign Toolbar
Assign > Successors	Opens the Assign Successors dialog box. In this dialog box, you can assign successor activities and remove existing successor relationships.	Activities	Assign Toolbar

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Link Activities	Creates a finish-to-start relationship between the activities you select in the Activities window. This action creates relationships based on the order in which the selected activities are listed. This command is enabled when you select more than one activity in the Activity Table or Activity Network.	Activities	Edit Toolbar
Unlink Activities	Removes relationships between the selected activities.	Activities	Edit Toolbar
Renumber Activity IDs	Opens the Renumber Activity IDs dialog box. Use the Renumber Activities IDs dialog box to specify how to renumber selected activity IDs.	Activities	None
Fill Down	When you select multiple rows in a table, choosing this command copies text from one row to successive rows in a column.	All windows with table views.	Edit Toolbar
Select All	Selects all data items in the active window. For example, in the Activities window, choosing this command selects all activities.	All	Edit Toolbar
Find	Opens the Find dialog box. In this dialog box, you can search for a value you specify in the active window. **Tip** In windows that can display multiple views simultaneously (for example, a table and chart), before you start the search, you must select an object in the area of the window in which you want to conduct the search.	All	Find Toolbar
Find Next	Finds the next occurrence of the search criteria you previously entered in the Find dialog box.	All	Find Toolbar
Replace	Replaces text found in search results with new text you specify.	All	Find Toolbar

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Spell Check	Starts the spelling checker. Use the spelling checker to check spelling for all displayed data objects in the active window.	All	Edit Toolbar
User Preferences	Opens the User Preferences dialog box. Use the User Preferences dialog box to specify your settings and preferences, including how to display time, date, and currency information. You can also set options to send email, specify startup options, and change your password.	All	Layout Toolbar

View Menu

View Menu (Alt+V)

Command	Function	Enabled when active window is:	Corresponding toolbar
Layout	Enables you to create, open, or save a layout. The available options correspond to the currently active window.	Activities, Projects, Resource Assignments, Work Breakdown Structure, Tracking	Layout Toolbar
Show on Top	Enables you to choose the type of layout you want to display in the top portion of the active window. The available options correspond to the currently active window.	Activities, Projects, Resources, Resource Assignments, Work Breakdown Structure	Top Layout Toolbar
Show on Bottom	Enables you to choose the type of layout you want to display in the bottom portion of the active window. The available options correspond to the currently active window.	All	Bottom Layout Toolbar
Bottom Layout Options	Enables you to customize the tabs that display in Activity Details.	Activities	None
Bars	Opens the Bars dialog box. Use the Bars dialog box to specify the style and labels for the bars in a Gantt Chart. This command is enabled when you display a Gantt Chart in the active window.	Activities, Projects, Tracking, Work Breakdown Structure	Layout Toolbar

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Barchart Options	Opens the Bar Chart Options dialog box. Use the Bar Chart Options dialog box to customize your current Gantt Chart display.	Activities	Layout Toolbar
Columns	Opens the Columns dialog box. Use the Columns dialog box to customize the columns that display in the active window. The available options vary for each window. This command is enabled when you display a table view in the active window.	All except Reports	Layout Toolbar
Timescale	Opens the Timescale dialog box. Use the Timescale dialog box to specify the timescale you want to display in the current Gantt Chart, profile, or spreadsheet layout.	Activities, Projects, Resource Assignments, Tracking, Work Breakdown Structure	Layout Toolbar
Filter By	Opens the Filters dialog box. Use the Filters dialog box to select a predefined filter or to create a custom filter. The available options vary for each window.	All except Project Expenses and Work Breakdown Structure	Layout Toolbar
Group and Sort By	Opens the Group and Sort dialog box. Use the Group and Sort dialog box to specify grouping and sorting criteria. The available options vary for each window.	All	Layout Toolbar
Progress Line	Shows or hides the progress line in a Gantt Chart. The progress line shows the progress of activities and how the project is performing relative to the baseline project.	Activities	Tools Toolbar
Progress Spotlight	Enables or disables the Progress Spotlight feature. When Progress Spotlight is enabled, the module highlights the activities that fall between the last data date and the new data date in the Gantt Chart.	Activities	Tools Toolbar

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Attachments	Enables you to add curtain and text attachments, and to show or hide all curtain attachments. Curtain attachments highlight a specific time period in a Gantt Chart, while text attachments display custom text you enter in a Gantt Chart. This command is enabled when you display a Gantt Chart in the Activities window.	Activities	Display Toolbar
Line Numbers	Numbers each row in the Activities view.	Activities	Layout Toolbar
Activity Critical Path	Enables you to filter the view to show only the activities on a critical path to a selected activity. This command is enabled when you display an Activity table or Gantt Chart in the active window.	Activities	Tools Toolbar
Check Schedule	Enables you to filter the available activities to those that fail specific tests in the Check Schedule Report. This command is enabled when you display an Activity table or Gantt Chart in the active window.	Activities	Tools Toolbar
Table Font and Row	Opens the Table, Font and Row dialog box. Use the Table Font and Row dialog box to change the appearance of text, color, and the height of rows in your display. The available options vary for each window.	All	Layout Toolbar
Activity Network	When the Activity Network is displayed in the top layout of the Activities window, you can set Activity Network options, open an Activity Network layout, or save the Activity Network layout.	Activities	Top Layout Toolbar

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Arrange Children	Enables you to arrange children horizontally or vertically in chart views. This command is disabled when you display a table or Gantt Chart in the active window.	Projects, Resources, Work Breakdown Structure	Top Layout Toolbar
Align Children	Aligns children to the left, right, or center in chart views. This command is disabled when you display a table or Gantt Chart in the active window.	Projects, Resources, Work Breakdown Structure	Top Layout Toolbar
Chart Box Template	Enables you to apply an existing chart box template to the current layout, or customize your own. This command is disabled when you display a table or Gantt Chart in the active window.	Projects, Resources, Work Breakdown Structure	Top Layout Toolbar
Chart Font and Colors	Enables you to customize fonts and colors in chart views. This command is disabled when you display a table or Gantt Chart in the active window.	Projects, Resources, Work Breakdown Structure	None
Launch	Enables you to open the selected work product or document's private or public file and its associated application. This command is enabled when the selected document has a defined private or public file location.	WPs & Docs	Edit Toolbar
Hint Help	Enables or disables Hint Help.	All	Display Toolbar
Zoom	Enables you to zoom in or out of a timescaled layout (Gantt Chart, spreadsheet, or profile). You can also re-size chart views to fit the entire chart into the visible area.	Activities, Projects, Resource Assignments, Tracking, Work Breakdown Structure	Display Toolbar
Expand	Expands all collapsed elements in a grouped or hierarchical table view.	All	Display Toolbar
Collapse All	Collapses all expanded elements in a grouped or hierarchical table view.	All	Display Toolbar

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Collapse To	Opens the Collapse To dialog box. Use the Collapse To dialog box to select the grouping band you want to collapse or expand in the current layout. The selection available in the list is based on the grouping bands displayed in the current layout.	Activities, Projects, Resource Assignments, Tracking, Work Breakdown Structure	Display Toolbar
Toolbars	Enables you to choose the toolbars you want to display.	All	None
Reset All Toolbars	Resets all toolbars, default icons, and toolbar locations back to factory defaults.	All	Display Toolbar
Lock All Toolbars	Set to lock toolbars in their current positions.	All	Display Toolbar
Tab Groups	Enables you to merge or create new tab groups.	All	Display Toolbar

Project Menu

Project Menu (Alt+P)

Command	Function	Enabled when active window is:	Corresponding toolbar
Activities	Opens the Activities window. Use the Activities window to create, view, and edit activities for the open project.	All	Project Toolbar
Additional Activities View	Opens an additional Activities window next to the first. The layout of the additional activities view can be configured and saved independently of the original activities view.	All	Project Toolbar
Resource Assignments	Opens the Resource Assignments window. Use the Resource Assignments window to view all resource assignments, grouped by resource, for all currently opened projects. You can also display resource cost and quantity information in a spreadsheet.	All	Project Toolbar

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WBS	Opens the WBS window. Use the Work Breakdown Structure window to create, view, and edit the open project's work breakdown structure (WBS).	All	Project Toolbar
Assign Baselines	Opens the Assign Baselines dialog box. Use the Assign Baselines dialog to assign project, primary, secondary, and tertiary baselines to a project.	All	Project Toolbar
Maintain Baselines	Opens the Maintain Baselines dialog box. Use the Maintain Baselines dialog box to create, delete, copy, or restore baselines for the open project.	All	Project Toolbar
Expenses	Opens the Project Expenses window. Use the Project Expenses window to add, edit, and delete expense items for activities in the open project.	All	Project Toolbar
Work Products and Documents	Opens the WPs & Docs window. Use the WPs & Docs window to create and maintain work product and document records for the open project, such as records for standards, procedures, guidelines, and templates.	All	Project Toolbar
Thresholds	Opens the Project Thresholds window. Use the Project Thresholds window to create, view, edit, and monitor thresholds for the open project. You can monitor a threshold at the work breakdown structure (WBS) level or the activity level to identify issues.	All	Project Toolbar
Issues	Opens the Project Issues window. Use the Project Issues window to add, edit, and delete issues for the open project and to send Email notifications about issues.	All	Project Toolbar

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Risks	This command appears only when P6 Professional is connected to a P6 Professional database. Opens the Risks view. Use the Risks view to add, edit, assign, and delete risks for the open project. You can also calculate a risk's exposure values and its overall impact on the project's schedule and costs.	All	Project Toolbar
Set Default Project	Opens the Set Default Project dialog box. When you open multiple projects, use this dialog box to specify which project to open by default, which project's settings to use when you schedule or level, and which project to use by default when you add new information to the database.	All	Project Toolbar

Enterprise Menu

Enterprise Menu (Alt+N)

Command	Function	Enabled when active window is:	Corresponding toolbar
Projects	Opens the Projects window. Use the Projects window to set up the EPS, add new projects, and manage multiple projects.	All	Enterprise Toolbar
Enterprise Project Structure	This command appears only when P6 Professional is connected to a P6 Professional database. Opens the Enterprise Project Structure (EPS) dialog box. Use the Enterprise Project Structure (EPS) dialog box to define the EPS - the hierarchical structure of your database of projects.	All	Enterprise Toolbar
Tracking	Opens the Tracking window. Use the Tracking window for monitoring a project's progress using different types of layouts.	All	Enterprise Toolbar

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Project Portfolios	Opens the Project Portfolios dialog box. Use the Project Portfolios dialog box to add, edit, and delete portfolios.	All	Enterprise Toolbar
Resources	Opens the Resources window. Use the Resources window to maintain both your organization's resource hierarchy and individual resource information.	All	Enterprise Toolbar
Roles	Opens the Roles dialog box. Use the Roles dialog box to add, edit, and delete roles. You can also use the Roles dialog box to assign roles to resources, define up to five price/unit rates for each role, and specify role availability over time.	All	Enterprise Toolbar
OBS	This command appears only when P6 Professional is connected to a P6 Professional database. Opens the Organizational Breakdown Structure dialog box. Use the Organizational Breakdown Structure dialog box to create, view, and edit the organizational breakdown structure (OBS). You can also use this dialog box to view a list of users who can access an OBS element's project information.	All	Enterprise Toolbar
Resource Codes	Opens the Resource Codes dialog box. Use the Resource Codes dialog box to create, edit, and delete resource codes. You can use these codes to sort, filter, group, and report on project data across the enterprise.	All	Dictionaries Toolbar
Role Codes	Opens the Role Codes dialog box. Use the Role Codes dialog box to create, edit, and delete role codes. You can use these codes to sort, filter, group, and report on project data across the enterprise.	All	Dictionaries Toolbar

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Project Codes	This command appears only when P6 Professional is connected to a P6 Professional database. Opens the Project Codes dialog box. Use the Project Codes dialog box to create, edit, and delete global and project codes and values. Use these codes and values to sort, filter, group, and report activity information.	All	Dictionaries Toolbar
Activity Codes	Opens the Activity Codes dialog box. Use the Activity Codes dialog box to create, edit, and delete global, project, and EPS activity codes and values. Use these codes and values to sort, filter, group, and report activity information. You can also use this dialog box to assign colors to activity code values, applicable only in the context of Visualizer drawings, to activity code values. See Activity codes and values for more information.	All	Dictionaries Toolbar
User Defined Fields	Opens the User Defined Fields dialog box. Use the User Defined Fields dialog box to add an unlimited number of custom fields and values to the project database.	All	Dictionaries Toolbar
Calendars	Opens the Calendars dialog box. Use the Calendars dialog box to create, edit, and delete global, project, and resource calendars. You can also view calendar assignments, and you can specify a default global calendar.	All	Dictionaries Toolbar
Resource Shifts	Opens the Resource Shifts dialog box. Use the Resource Shifts dialog box to define shift calendars for resources.	All	Dictionaries Toolbar

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Activity Step Templates	This command appears only when P6 Professional is connected to a P6 Professional database. Opens the Activity Step Templates dialog box. Use the Activity Step Templates dialog box to create templates containing groups of steps common to multiple activities. You can then assign these templates to activities.	All	Dictionaries Toolbar
Cost Accounts	This command appears only when P6 Professional is connected to a P6 Professional database. Opens the Cost Accounts dialog box. Use the Cost Accounts dialog box to maintain your organization's cost accounts. You can assign these cost accounts to activities in any project.	All	Dictionaries Toolbar
Funding Sources	This command appears only when P6 Professional is connected to a P6 Professional database. Opens the Funding Sources dialog box. Use the Funding Sources dialog box to set up a funding sources dictionary containing any non-profit, government-allocated, or other funding sources for easy assignment to budget items.	All	Dictionaries Toolbar
Stored Images	Opens the Images Manager dialog box. Use the Pictures dialog box to upload pictures to the database for use in reports.	All	None
Resource Curves	Opens the Resource Curves dialog box. Use the Resource Curves dialog box to add, delete, or modify resource curves. Curves are used to allocate resources and costs over the duration of an activity.	All	Dictionaries Toolbar
External Applications	Opens the External Applications dialog box. Use the External Applications dialog box to set up links with external applications.	All	None

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Tools Menu

Tools Menu (Alt+T)

Command	Function	Enabled when active window is:	Corresponding toolbar
Schedule	Opens the Schedule dialog box. In this dialog box, you can schedule the open projects and set scheduling options.	All	Tools Toolbar
Level Resources	Opens the Level Resources dialog box. In this dialog box, you can level resources and set resource leveling options.	All	Tools Toolbar
Apply Actuals	Opens the Apply Actuals dialog box. In this dialog box, you can update the schedule by applying actuals up to the data date you select for each open project.	All	Tools Toolbar
Update Progress	Opens the Update Progress dialog box. In this dialog box, you can estimate progress for spotlighted or selected activities.	Activities	Tools Toolbar
Recalculate Assignment Costs	Opens the Recalculate Assignment Costs dialog box. In this dialog box, you can recalculate resource and role assignment costs for all activities in the open projects.	All	Tools Toolbar
Summarize	Enables you to summarize open projects or all projects. To choose which projects you want to summarize, point to Summarize, then select an option.	All	Tools Toolbar
Job Services	This command appears only when P6 Professional is connected to a P6 Professional database. Opens the Job Services dialog box. In this dialog box, you can create jobs and schedule them to run automatically on any number of projects or EPS nodes at a specified time.	All	Tools Toolbar

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Store Period Performance	Opens the Store Period Performance dialog box. In this dialog box, you can store past period actuals for any open project in defined financial periods.	All	Tools Toolbar
Job Status	This command appears only when P6 Professional is connected to a P6 EPPM database. Opens the Job Status dialog box. In this dialog box, you can view the status of all jobs submitted in P6 EPPM, such as apply actuals or summarize jobs that were run from P6 Professional and sent to run as an ASAP service.	All	Tools Toolbar
Disable Auto-Reorganization	Enables or disables automatic reorganization. By default, automatic reorganization is enabled. When you turn on Disable Auto-Reorganization, the module does not automatically reorder the currently active window according to your recent changes.	All	Tools Toolbar
Global Change	Opens the Global Change dialog box. In this dialog box, you can make changes to all activities, resource assignments, or project expenses, or a selected group of these items, at one time.	All	Tools Toolbar
Monitor Thresholds	Opens the Monitor Thresholds dialog box. In this dialog box, you can monitor all of the open project's thresholds at once.	All	Tools Toolbar
Issue Navigator	Opens the Issue Navigator dialog box. In this dialog box, you can track the open project's issues, including associated activities, resources, and work breakdown structure (WBS) elements.	All	Tools Toolbar

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Visualizer	Opens the Primavera P6 Visualizer. This command is enabled when the Activities view is active. See Launching P6 Visualizer from P6 Professional for more information.	Activities	Tools Toolbar
Approvals > Timesheets	Opens the Timesheets window. Use the timesheets window to view, approve, or reject timesheets, select delegates to act as a Project Manager approver or Resource Manager approver.	All	Tools Toolbar
Reports > Reports	Opens the Reports window. Use the Reports window to create, edit, run, delete, import, and export global and project reports.	All	Enterprise Toolbar
Reports > Report Groups	Opens the Report Groups dialog box. Use the Report Groups dialog box to define report groups for organizing your global and project reports.	All	Reports Toolbar
Reports > Batch Reports	Opens the Batch Reports dialog box. Use the Batch Reports dialog box to define report batches for running global and project reports.	All	Reports Toolbar
Reports > Report Preferences	This command appears only when P6 Professional is connected to a P6 Professional database. Opens the Report Preferences dialog box. Use the Report Preferences dialog box to define three default sets of headers, footers, and custom labels for reports. These default settings apply to all projects and can be viewed by all users, but you must have Add/Edit/Delete Global Reports global privilege, as defined in P6, to edit these settings.	All	Tools Toolbar
Report Wizard	Starts the Report Wizard. Use the Report Wizard to create new reports and modify existing wizard reports.	All	Reports Toolbar

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Publish > Project Web Site	Opens the Publish Project Web Site dialog box. Use the Publish Project Web Site dialog box to save the project information you specify as HTML files. You can then publish these files as a Web site on an intranet or the Internet.	All	Publish Toolbar
Publish > Activity Layouts	Opens the Select Activity Layouts to Publish dialog box. Use the Select Activity Layouts to Publish dialog box to specify the activity layouts to publish to the project Web Site.	All	Publish Toolbar
Publish > Tracking Layouts	Opens the Select Tracking Layouts to Publish dialog box. Use the Select Tracking Layouts to Publish dialog box to specify Tracking layouts to publish on the project Web site.	All	Publish Toolbar
Schedule Comparison	Launches Visualizer. Use Visualizer to create a Schedule Comparison layout that compares selected data fields in a revised project and its corresponding original project, or a revised project and a corresponding baseline.	All	Tools Toolbar

Admin Menu (P6 Professional Only)

Admin Menu (Alt+A)

Command	Function	Enabled when active window is:	Corresponding toolbar
Users	Opens the Users dialog box. Use the Users dialog box to add and remove users, and assign global and project profiles to users.	All	Administrator Toolbar (P6 Professional Only)
Security Profiles	Opens the Security Profiles dialog box. Use the Security Profiles dialog box to create, edit, and delete security profiles, or user access types.	All	Administrator Toolbar (P6 Professional Only)

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Admin Preferences	Opens the Admin Preferences dialog box. Use the Admin Preferences dialog box to specify default settings established by the project administrator. You can also set the location for the online help.	All	Administrator Toolbar (P6 Professional Only)
Admin Categories	Opens the Admin Categories dialog box. Use the Admin Categories dialog box to define standard categories and values that you can apply to all projects.	All	Administrator Toolbar (P6 Professional Only)
Currencies	Opens the Currencies dialog box. Use the Currencies dialog box to set up the currencies you want to use for costs.	All	Administrator Toolbar (P6 Professional Only)
Financial Period Calendars	Opens the Financial Period Calendars dialog box. Use the Financial Period Calendars dialog box to define global customized financial period calendars. Users can store a project's period performance (past period actuals) for any predefined period of the financial period calendar assigned to the project.	All	Administrator Toolbar (P6 Professional Only)

Help Menu

Help Menu (Alt+H)

Command	Function	Enabled when active window is:	Corresponding toolbar
Local Help...	Opens the local version of P6 Professional Help.	All	Display Toolbar
About Primavera P6 Professional...	Provides information about the software and includes contact information.		None
Online Help...	Opens the URL specified in the P6 Professional Online Help URL section on the Options tab of the Admin Preferences dialog box.	All	Display Toolbar
What's New...	Opens the online Cumulative Features Overview document.	All	Display Toolbar

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Share Your Feedback	Opens the feedback survey.	All	None

Tip

The Feedback... option appears in the Help menu only when Oracle's feedback survey is open. Because the survey is offered periodically (not continuously), Feedback... might not always be available. When the survey is closed, the Feedback... option is hidden from the Help menu.

Action Toolbar

Use the Action toolbar to perform actions such as import, export, check in, and check out.

By default, this toolbar is not displayed.

The following table provides information about each available icon on the toolbar.

Icon	Function	Corresponding menu command
	Starts the Import wizard. Use the Import wizard to import projects, resources, or roles from other Oracle applications, Microsoft Project, or Microsoft Excel.	File > Import
	Starts the Export wizard. Use the Export wizard to export projects, resources, or roles to other Oracle applications, Microsoft Project, or Microsoft Excel.	File > Export
	Creates an XER export file of the open project, automatically opens your email system, and attaches the XER file to the body of the email message. The subject line of the email is automatically populated with the name of the project. This icon is enabled when you open a project.	File > Send Project
	This icon appears only when P6 Professional is connected to a P6 EPPM database. Sends the open project to a Primavera Unifier Schedule sheet.	File > Send to Unifier
	Starts the Check In wizard. Use the Check In wizard to check in open projects you currently have checked out.	File > Check In
	Starts the Check Out wizard. Use the Check Out wizard to check out any open project.	File > Check Out

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	Opens the Select a Portfolio dialog box. Use the Select a Portfolio dialog box to open a portfolio. When you open a portfolio, the module closes all open projects, then displays the projects contained in the selected portfolio in the Projects window. Opening a portfolio does not open the projects contained in the portfolio. You must open the projects you want to work with from the Projects window, which displays all of the projects contained in the open portfolio.	File > Select Project Portfolio

Tip

- The import, export, check in, and check out icons on this toolbar display by default when you choose to show the toolbar.
- The icons on this toolbar do not have corresponding shortcut keys.

Administrator Toolbar (P6 Professional Only)

Use the Administrator toolbar to perform administrative functions, such as adding users, defining currencies, and setting administrative preferences. By default, this toolbar is not displayed.The following table provides information about each available icon on the toolbar.

Icon	Function	Displays by default?	Corresponding menu command
	Opens the Users dialog box. Use the Users dialog box to add and remove users, and assign global and project profiles to users.	No	Admin > Users
	Opens the Security Profiles dialog box. Use the Security Profiles dialog box to create, edit, and delete security profiles, or user access types.	No	Admin > Security Profiles
	Opens the Admin Preferences dialog box. Use the Admin Preferences dialog box to specify default settings established by the project administrator.	Yes	Admin > Admin Preferences

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	Opens the Admin Categories dialog box. Use the Admin Categories dialog box to define standard categories and values that you can apply to all projects.	No	Admin > Admin Categories
	Opens the Currencies dialog box. Use the Currencies dialog box to set up the currencies you want to use for costs.	No	Admin > Currencies
	Opens the Financial Period Calendars dialog box. Use the Financial Period Calendars dialog box to define global customized financial period calendars. Users can store a project's period performance (past period actuals) for any predefined period of the financial period calendar assigned to the project.	No	Admin > Financial Periods

Tip

- The icons on this toolbar are available to all users; however, your ability to perform any administrative function is determined by the security privileges enabled in your assigned security profile.
- To show icons on the toolbar that do not display by default, you must customize the toolbar.
- The icons on this toolbar do not have corresponding shortcut keys.

Assign Toolbar

Use the Assign toolbar to assign resources, roles, activity code values, predecessors, successors, and activity step templates to the activity you select in the Activities window.

This toolbar is displayed by default, and all of the icons on this toolbar are enabled when the Activities window is active.

The following table provides information about each available icon on the toolbar.

Icon	Function	Corresponding menu command
	Opens the Assign Resources dialog box. In this dialog box, you can assign resources, remove existing resource assignments, and replace resource assignments.	Edit > Assign > Resources

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	Opens the Assign Resources by Role dialog box. In this dialog box, you can assign resources based on the selected activity's current role assignments.	Edit > Assign > Resources by Role
	Opens the Assign Roles dialog box. In this dialog box, you can assign roles, remove existing role assignments, and replace role assignments.	Edit > Assign > Roles
	Opens the Assign Activity Codes dialog box. In this dialog box, you can assign activity code values and remove existing activity code value assignments.	Edit > Assign > Activity Codes
	Opens the Assign Predecessors dialog box. In this dialog box, you can assign predecessor activities and remove existing predecessor relationships.	Edit > Assign > Predecessors
	Opens the Assign Successors dialog box. In this dialog box, you can assign successor activities and remove existing successor relationships.	Edit > Assign > Successors
	Opens the Assign Activity Step Templates dialog box, which you can use to assign activity step templates.	None

Tip

- All of the icons on this toolbar display by default.
- The icons on this toolbar do not have corresponding shortcut keys.
- You can right-click on an activity to access a shortcut menu that includes most of the options described in the table.

Bottom Layout Toolbar

Use the Bottom Layout toolbar to customize the bottom layout of the active window. This toolbar is displayed by default.

The following table provides information about each available icon on the toolbar.

Icon	Function	Enabled when active window is:	Corresponding menu command
	Shows or hides window details in the bottom layout. Use window details to view or edit information for the selected item.	All except Tracking	View > Show on Bottom > Details

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	Shows or hides the Activity Usage Spreadsheet in the bottom layout.	Activities	View > Show on Bottom > Activity Usage Spreadsheet
	Shows or hides the Activity Usage Profile in the bottom layout.	Activities	View > Show on Bottom > Activity Usage Profile
	Shows or hides the Resource Usage Spreadsheet in the bottom layout.	Activities	View > Show on Bottom > Resource Usage Spreadsheet
	Shows or hides the Resource Usage Profile in the bottom layout.	Activities	View > Show on Bottom > Resource Usage Profile
	Shows or hides Trace Logic in the bottom layout.	Activities	View > Show on Bottom > Trace Logic
	Shows or hides the bottom layout. When you hide the bottom layout, the top layout enlarges to fill the entire work area.	All except Reports	View > Show on Bottom > No Bottom Layout

Tip

- All of the icons on this toolbar display by default.
- The icons on this toolbar do not have corresponding shortcut keys.
- To set options for the bottom layout in the Activities, WBS, Projects, and Tracking windows, right-click anywhere in the bottom layout of the active window and choose an available option.

Dictionaries Toolbar

Use the Dictionaries toolbar to access dialog boxes in which you can view, add, edit, and delete enterprise-level dictionary data, such as codes, user-defined fields (UDFs), calendars, and resource curves.

By default, this toolbar is not displayed.

The following table provides information about each available icon on the toolbar.

Icon	Function	Corresponding menu command
	Opens the Resource Codes dialog box. Use the Resource Codes dialog box to create, edit, and delete resource codes. You can use these codes to sort, filter, group, and report on project data across the enterprise.	Enterprise > Resource Codes

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	This icon appears only when P6 Professional is connected to a P6 Professional database. Opens the Project Codes dialog box. Use the Project Codes dialog box to create, edit, and delete global and project codes and values. Use these codes and values to sort, filter, group, and report activity information.	Enterprise > Project Codes
	Opens the Activity Codes dialog box. Use the Activity Codes dialog box to create, edit, and delete global, project, and EPS activity codes and values. Use these codes and values to sort, filter, group, and report activity information. You can also use this dialog box to assign colors to activity code values, only in the context of Visualizer drawings, to activity code values. See Activity codes and values for more information.	Enterprise > Activity Codes
	Opens the User Defined Fields dialog box. Use the User Defined Fields dialog box to add an unlimited number of custom fields and values to the project database.	Enterprise > User Defined Fields
	Opens the Calendars dialog box. Use the Calendars dialog box to create, edit, and delete global, project, and resource calendars. You can also view calendar assignments, and you can specify a default global calendar.	Enterprise > Calendars
	Opens the Resource Shifts dialog box. Use the Resource Shifts dialog box to define shift calendars for resources.	Enterprise > Resource Shifts
	This icon appears only when P6 Professional is connected to a P6 Professional database. Opens the Activity Step Templates dialog box. Use the Activity Step Templates dialog box to create templates containing groups of steps common to multiple activities. You can then assign these templates to activities.	Enterprise > Activity Step Templates
	This icon appears only when P6 Professional is connected to a P6 Professional database. Opens the Cost Accounts dialog box. Use the Cost Accounts dialog box to maintain your organization's cost accounts. You can assign these cost accounts to activities in any project.	Enterprise > Cost Accounts

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	This icon appears only when P6 Professional is connected to a P6 Professional database. Opens the Funding Sources dialog box. Use the Funding Sources dialog box to set up a funding sources dictionary containing any non-profit, government-allocated, or other funding sources for easy assignment to budget items.	Enterprise > Funding Sources
	Opens the Resource Curves dialog box. Use the Resource Curves dialog box to add, delete, or modify resource curves. Curves are used to allocate resources and costs over the duration of an activity.	Enterprise > Resource Curves

Tip

- All of the icons on this toolbar display by default, and are always enabled, when you choose to show the toolbar.
- The icons on this toolbar do not have corresponding shortcut keys.

Display Toolbar

Use the Display toolbar to zoom in and out of the current display, expand or collapse data elements, show or hide Hint Help, and add attachments. This toolbar is displayed by default.

The following table provides information about each available icon on the toolbar.

Icon	Function	Displays by default?	Enabled when active window is:	Shortcut keys	Corresponding menu command
	Zooms in on a timescaled layout (Gantt Chart, spreadsheet, or profile). Zooming in displays a shorter range of time using smaller time intervals, for example, zooming from a quarterly to monthly to weekly display.	Yes	Activities, Projects, Resource Assignments, Tracking, WBS	None	View > Zoom > Zoom In

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	Zooms out of a timescaled layout (Gantt Chart, spreadsheet, or profile). Zooming out displays a longer range of time using larger time intervals, for example, zooming from a weekly to monthly to quarterly display.	Yes	Activities, Projects, Resource Assignments, Tracking, WBS	None	View > Zoom > Zoom Out
	Re-sizes chart views to fit the entire chart into the visible area. This icon is enabled when you display a chart view in the active window.	Yes	Activities, Projects, Resources, WBS	None	View > Zoom > Zoom to Best Fit
	Resets all toolbars, default icons, and toolbar locations back to factory defaults.	No	All	None	View > Reset All Toolbars
	Locks toolbars in their current positions.	No	All	None	View > Lock All Toolbars
	Enables you to create a new tab group at the bottom of the screen.	Yes	All	None	View > Tab Groups > New Horizontal Tab Group
	Enables you to remove all tab groupings and display all open tabs in one tab group.	Yes	All	None	View > Tab Groups > New Vertical Tab Group
	Enables you to create a new tab group at the side of the screen.	Yes	All	None	View > Tab Groups > Merge all Tab Groups
	Enables or disables Hint Help.	Yes	All	None	View > Hint Help

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	Expands all collapsed elements in a grouped or hierarchical table view.	No	All	Ctrl+Add	View > Expand All
	Collapses all expanded elements in a grouped or hierarchical table view.	No	All	Ctrl+Subtract	View > Collapse All
	Opens the Collapse To dialog box. Use the Collapse To dialog box to select the grouping band you want to collapse or expand to in the current layout. The selection available in the list is based on the grouping bands displayed in the current layout.	No	Activities, Projects, Resource Assignments, Tracking, WBS	None	View > Collapse To

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	Enables you to add curtain and text attachments, and to show or hide all curtain attachments. Curtain attachments highlight a specific time period in a Gantt Chart, while text attachments display custom text you enter in a Gantt Chart. To add a curtain attachment to a Gantt Chart, click the icon, point to Curtain, then choose Add to open the Curtain Attachment dialog box. To show or hide all curtain attachments, click the icon, point to Curtain, then choose the appropriate option. To add a text attachment to a Gantt Chart, click the icon, then choose Text to open the Text Attachment dialog box. Use the Text Attachment dialog box to create formatted text and insert it in a Gantt Chart. This icon is enabled when you display a Gantt Chart in the Activities window.	No	Activities	None	View > Attachments

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	Opens the local P6 Professional Help. The topic that displays when you open the Help reflects the currently active window. If the Always launch Online Help for the F1 shortcut key and context-sensitive help setting is not selected in the P6 Professional Online Help URL section of the Admin Preferences dialog box, the local help will launch when clicking the Help icon or button in the open dialog box. This icon is enabled when no dialog box is open. To access the Help topic for a dialog box, click the Help icon or button in the open dialog box.	Yes	All	Ctrl+F1	Help > Local Help

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	Opens the Online P6 Professional Help. The topic that displays when you open the Online Help reflects the currently active window. If the Always launch Online Help for the F1 shortcut key and context-sensitive help setting is selected in the P6 Professional Online Help URL section of the Admin Preferences dialog box, click the Help icon or button in the open dialog box to access the online help topic for a dialog box.	Yes	All	Ctrl+Alt+F1	Help > Online Help

Tip

To show icons on the toolbar that do not display by default, you must customize the toolbar.

Edit Toolbar

Use the Edit toolbar to add, delete, cut, copy, and paste data objects, dissolve and link activities, undo an action, and much more. This toolbar is displayed by default.

The following table provides information about each available icon on the toolbar.

Icon	Function	Displays by default?	Enabled when active window is:	Shortcut keys	Corresponding menu command
	Adds a data item in the active window. For example, in the Activities window, clicking this icon adds an activity.	Yes	All except Tracking	Ins or Insert	Edit > Add

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	Deletes the selected data object.	Yes	All except Tracking	Del or Delete	Edit > Delete
	Cuts the selected data object.	Yes	All except Tracking and Resource Assignments	Ctrl+X	Edit > Cut
	Copies the selected data object. **Tip** This icon is enabled in the Resource Assignments window so that you can copy resource assignments and paste them into another application, such as Microsoft Excel. You cannot paste a resource assignment row in the Resource Assignments window.	Yes	All except Tracking	Ctrl+C	Edit > Copy
	Pastes a copied or cut data object. This icon is enabled after you copy or cut a data object.	Yes	All except Tracking and Resource Assignments	Ctrl+V	Edit > Paste
	Deletes the selected activity and joins its predecessor and successor activities with a finish to start relationship. This icon is enabled when you select an activity that has a predecessor and successor.	No	Activities	None	Edit > Dissolve

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	Creates a finish-to-start relationship between the activities you select in the Activities window. This action creates relationships based on the order in which the selected activities are listed. This icon is enabled when you select more than one activity in the Activity Table or Activity Network.	No	Activities	None	Edit > Link Activities
	Removes relationships between the selected activities.	No	Activities	None	Edit > Unlink Activities
	Changes data back to its previous state before your last action.	No	Activities, Resources, Resource Assignments	Ctrl+Z	Edit > Undo
	When you select multiple rows in a table, clicking this icon copies text from one row to successive rows in a column.	No	All except Reports and Tracking	Ctrl+E	Edit > Fill Down
Select All	Selects all data items in the active window. For example, in the Activities window, clicking this icon selects all activities.	No	All except Tracking	Ctrl+A	Edit > Select All
	Starts the spelling checker. Use the spelling checker to check spelling for all displayed data objects in the active window.	No	All except Tracking	F7	Edit > Spell Check

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	Opens the selected work product or document's private file and its associated application. This icon is enabled when the selected document has a defined private file location.	No	WPs & Docs	None	View > Launch > Private Document
	Opens the selected work product or document's public file and its associated application. This icon is enabled when the selected document has a defined public file location.	No	WPs & Docs	None	View > Launch > Public Document
	Opens the Issue History dialog box. Use the Issue History dialog box to view and add comments about the selected issue's history.	No	Project Issues	None	Right-click on an issue, then choose Issue History.
	Opens the Notify Issue dialog box. Use the Notify Issue dialog box to send email about the selected issue.	No	Project Issues	None	Right-click on an issue, then choose Notify.
	Monitors the selected threshold to identify issues.	No	Project Thresholds	None	None

Tip

To show icons on the toolbar that do not display by default, you must customize the toolbar.

Enterprise Toolbar

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Use the Enterprise toolbar to access windows and dialog boxes in which you can view, add, edit, and delete enterprise-level data, such as the EPS, resources, roles, and reports. This toolbar is displayed by default.

The following table provides information about each available icon on the toolbar.

Icon	Function	Displays by default?	Corresponding menu command
	Opens the Projects window. When connected to a P6 Professional database: Use the Projects window to set up the EPS, add new projects and manage multiple projects. When connected to a P6 EPPM database: Use the Projects window to add new projects and manage multiple projects.	Yes	Enterprise > Projects
	Opens the Resources window. Use the Resources window to maintain both your organization's resource hierarchy and individual resource information.	Yes	Enterprise > Resources
	Opens the Reports window. Use the Reports window to create, edit, run, delete, import, and export global and project reports.	Yes	Tools > Reports
	Opens the Tracking window. Use the Tracking window for monitoring a project's progress using different types of layouts.	Yes	Enterprise > Tracking
	This icon appears only when P6 Professional is connected to a P6 Professional database. Opens the Enterprise Project Structure (EPS) dialog box. Use the Enterprise Project Structure (EPS) dialog box to define the EPS—the hierarchical structure of your database of projects.	No	Enterprise > Enterprise Project Structure
	Opens the Project Portfolios dialog box. Use the Project Portfolios dialog box to add, edit, and delete portfolios.	No	Enterprise > Project Portfolios

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	Opens the Roles dialog box. Use the Roles dialog box to add, edit, and delete roles. You can also use the Roles dialog box to assign roles to resources, define up to five price/unit rates for each role, and specify role availability over time.	No	Enterprise > Roles
	This icon appears only when P6 Professional is connected to a P6 Professional database. Opens the Organizational Breakdown Structure dialog box. Use the Organizational Breakdown Structure dialog box to create, view, and edit the organizational breakdown structure (OBS). You can also use this dialog box to view a list of users who can access an OBS element's project information.	No	Enterprise > OBS

Tip

- To show icons on the toolbar that do not display by default, you must customize the toolbar.
- The icons in this toolbar are always enabled.
- The icons on this toolbar do not have corresponding shortcut keys.

Find Toolbar

Use the Find toolbar to search for and replace values you specify in the active window.

By default, this toolbar is not displayed.

The following table provides information about each available icon on the toolbar.

Icon	Function	Shortcut keys	Corresponding menu command

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	Opens the Find dialog box. In this dialog box, you can search for a value you specify in the active window. **Tip** In windows that can display multiple views simultaneously (for example, a table and chart), before you start the search, you must select an object in the area of the window in which you want to conduct the search.	Ctrl+F	Edit > Find
	Finds the next occurrence of the search criteria you previously entered in the Find dialog box.	F3	Edit > Find Next
	Replaces text found in search results with new text you specify.	Ctrl+R	Edit > Replace

> **Tip**
>
> All of the icons on this toolbar display by default when you choose to show the toolbar.

Layout Toolbar

Use the Layout toolbar to customize the layout of the active window and to access user preferences. This toolbar is displayed by default.

The following table provides information about each available icon on the toolbar.

Icon	Function	Displays by default?	Enabled when active window is:	Corresponding menu command
	Opens the New Layout dialog box. Use the New Layout dialog box to create a custom tracking layout.	No	Tracking	View > Layout > New
	Opens the Open Layout dialog box. Use the Open Layout dialog box to select and display a different layout, and to import and export layouts.	No	Activities, Projects, Resource Assignments, WBS, Tracking	View > Layout > Open
	Saves the currently displayed layout.	No	Activities, Projects, Resource Assignments, Work Breakdown Structure, Tracking	View > Layout > Save

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	Saves the currently displayed layout as a new layout.	No	Activities, Projects, Resource Assignments, Work Breakdown Structure, Tracking	View > Layout > Save As
	Opens the Bars dialog box. Use the Bars dialog box to specify the style and labels for the bars in a Gantt Chart. This icon is enabled when you display a Gantt Chart in the active window.	Yes	Activities, Projects, Tracking, Work Breakdown Structure	View > Bars
	Enables you to select a predefined column layout or to customize the columns that display in the active window. The available options vary for each window. To customize columns, click the icon, then choose Customize. This icon is enabled when you display a table view in the active window.	Yes	All except Reports	View > Columns
	Opens the Timescale dialog box. Use the Timescale dialog box to specify the timescale you want to display in the current Gantt Chart, profile, or spreadsheet layout.	Yes	Activities, Projects, Resource Assignments, Tracking, Work Breakdown Structure	View > Timescale
	Enables you to select a predefined filter or to create a custom filter. The available options vary for each window. To create a custom filter, click the icon, then choose Customize.	Yes	All except Work Breakdown Structure and Project Expenses	View > Filter By

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	Enables you to select a predefined grouping and sorting option, or to specify your own grouping and sorting criteria. The available options vary for each window. To customize grouping and sorting, click the icon, then choose Customize.	Yes	All	View > Group and Sort By
	Numbers each row in the Activities view. This icon is enabled when you display an Activity table, Gantt Chart, or Activity Usage Spreadsheet in the active window.	Yes	Activities	View > Line Numbers
	Opens the Table, Font and Row dialog box. Use the Table Font and Row dialog box to change the appearance of text, color, and the height of rows in your display. The available options vary for each window.	Yes	All	View > Table Font and Row
	Opens the User Preferences dialog box. Use the User Preferences dialog box to specify your settings and preferences, including how to display time, date, and currency information. You can also set options to send email, specify startup options, and change your password.	Yes	All	Edit > User Preferences

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Tip

- To show icons on the toolbar that do not display by default, you must customize the toolbar.
- The icons on this toolbar do not have corresponding shortcut keys.
- You can also click the Display or Layout options bar in the active window to access most of the functionality available from this toolbar.

Move Toolbar

Use the Move toolbar to move the selected object around in hierarchy views. This toolbar is displayed by default.

The following table provides information about each available icon on the toolbar.

Icon	Function
	Moves the selected object up one row in the hierarchy.
	Moves the selected object down one row in the hierarchy.
	Moves the selected object to the left in the hierarchy. Moving an object to the left moves it up to the next level in the hierarchy.
	Moves the selected object to the right in the hierarchy. Moving an object to the right moves it down to the next level in the hierarchy.

Tip

- All of the icons on this toolbar display by default.
- The icons on this toolbar do not have corresponding shortcut keys or menu options.

Print Toolbar

Use the Print toolbar to print the contents of the open window, preview print output, and define page and print settings. This toolbar is displayed by default.

The following table provides information about each available icon on the toolbar.

Icon	Function	Displays by default?	Shortcut keys	Corresponding menu command
	Enables you to print the currently selected window, select a printer, and set printer options.	Yes	Ctrl+P	File > Print

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	Opens the Print Preview window. In the Print Preview window, you can define page and print settings, publish the contents of the selected window to an HTML file, and print the contents of the selected window.	Yes	None	File > Print Preview
	Opens the Page Setup dialog box. In the Page Setup dialog box, you can define page size and orientation, set scaling options, change the size of margins, and define a header and footer.	No	None	File > Page Setup
	Opens the Print Setup dialog box. In the Print Setup dialog box, you can select a printer and define printer properties.	No	None	File > Print Setup

Tip

To show icons on the toolbar that do not display by default, you must customize the toolbar.

Project Toolbar

Use the Project toolbar to access windows and dialog boxes in which you can view, add, edit, and delete project-level data, such as activities, the WBS, and resource assignments. This toolbar is displayed by default, and the icons are enabled when any project is open.

The following table provides information about each available icon on the toolbar.

Icon	Function	Displays by default?	Corresponding menu command
	Opens the Activities window. Use the Activities window to create, view, and edit activities for the open project.	Yes	Project > Activities

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	Opens an additional activities view alongside the first. Use the additional activities view to compare projects or projects and baselines. Each view can be configured independently.	Yes	Project > Additional Activities View
	Opens the Work Breakdown Structure window. Use the Work Breakdown Structure window to create, view, and edit the open project's work breakdown structure (WBS).	Yes	Project > WBS
	Opens the Resource Assignments window. Use the Resource Assignments window to view all resource assignments, grouped by resource, for all currently opened projects. You can also display resource cost and quantity information in a spreadsheet.	Yes	Project > Resource Assignments
	Opens the WPs & Docs window. Use the WPs & Docs window to create and maintain work product and document records for the open project, such as records for standards, procedures, guidelines, and templates.	Yes	Project > Work Products and Documents
	Opens the Project Expenses window. Use the Project Expenses window to add, edit, and delete expense items for activities in the open project.	Yes	Project > Expenses
	Opens the Project Thresholds window. Use the Project Thresholds window to create, view, edit, and monitor thresholds for the open project. You can monitor a threshold at the work breakdown structure (WBS) level or the activity level to identify issues.	No	Project > Thresholds
	Opens the Project Issues window. Use the Project Issues window to add, edit, and delete issues for the open project and to send Email notifications about issues.	No	Project > Issues

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	This icon appears only when P6 Professional is connected to a P6 Professional database. Opens the Risks view. Use the Risks view to add, edit, assign, and delete risks for the open project. You can also calculate a risk's exposure values and its overall impact on the project's schedule and costs.	No	Project > Risks
	Opens the Assign Baselines dialog box. Use the Assign Baselines dialog to assign project, primary, secondary, and tertiary baselines to a project.	No	Project > Assign Baselines
	Opens the Maintain Baselines dialog box. Use the Maintain Baselines dialog box to create, delete, copy, or restore baselines for the open project.	No	Project > Maintain Baselines
	Opens the Set Default Project dialog box. When you open multiple projects, use this dialog box to specify which project to open by default, which project's settings to use when you schedule or level, and which project to use by default when you add new information to the database.	No	Project > Set Default Project

Tip

To show icons on the toolbar that do not display by default, you must customize the toolbar. The icons on this toolbar do not have corresponding shortcut keys.

Publish Toolbar

Use the Publish toolbar to publish a project Web site, activity layouts, and tracking layouts.

By default, this toolbar is not displayed.

The following table provides information about each available icon on the toolbar.

Icon	Function	Corresponding menu command

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	Opens the Publish Project Web Site dialog box. Use the Publish Project Web Site dialog box to save the project information you specify as HTML files. You can then publish these files as a Web site on an intranet or the Internet.	Tools > Publish > Project Web Site
	Opens the Select Activity Layouts to Publish dialog box. Use the Select Activity Layouts to Publish dialog box to specify the activity layouts to publish to the project Web Site.	Tools > Publish > Activity Layouts
	Opens the Select Tracking Layouts to Publish dialog box. Use the Select Tracking Layouts to Publish dialog box to specify Tracking layouts to publish on the project Web site.	Tools > Publish > Tracking Layouts

Tip

- All of the icons on this toolbar display by default when you choose to show the toolbar.
- The icons on this toolbar do not have corresponding shortcut keys.

Reports Toolbar

Use the Reports toolbar to run, modify, import, and export reports, and to create report groups and batches.

By default, this toolbar is not displayed.

The following table provides information about each available icon on the toolbar.

Icon	Function	Enabled when active window is:	Corresponding menu command
	Opens the Run Report dialog box. Use the Run Report dialog box to compile and print the selected report. This icon is enabled when you select a report.	Reports	Right-click on a report, then choose Run > Report.
	Opens the Run Batch dialog box. Use the Run Batch dialog box to compile and print the selected report batch.	Reports	Right-click in the Reports window, then choose Run > Batch.

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	Opens the Report Editor window, if the selected report was previously modified using the Report Editor. If the selected report has not been previously modified using the Report Editor, you are prompted to confirm that you want to use the Report Editor to modify it. The Report Editor enables you to create highly customized reports. You can use the Report Editor to modify reports that you create in the Report Wizard and to create new reports. If you modify a wizard report in the Report Editor, when you reopen the report in the wizard, you lose all of the modifications made in the Report Editor. This icon is enabled when you select a report.	Reports	Right-click on a report, then choose Modify.
	Opens the Import Report dialog box. Use the Import Report dialog box to specify how you want to import a report from another P6 EPPM or P6 Professional application.	Reports	Right-click on a report, then choose Import.
	Opens the Save As dialog box. Use the Save As dialog box to export and save the report to a file location you specify. This icon is enabled when you select a report.	Reports	Right-click on a report, then choose Export.
	Starts the Report Wizard. Use the Report Wizard to create new reports and modify existing wizard reports. **Tip** To create a new report using the Report Wizard, in the Reports window, click on the Edit toolbar.	All	Tools > Report Wizard
	Opens the Report Groups dialog box. Use the Report Groups dialog box to define report groups for organizing your global and project reports.	All	Tools > Reports > Report Groups

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	Opens the Batch Reports dialog box. Use the Batch Reports dialog box to define report batches for running global and project reports.	All	Tools > Reports > Batch Reports

Tip

- All of the icons on this toolbar display by default when you choose to show the toolbar.
- The icons on this toolbar do not have corresponding shortcut keys.

Standard Toolbar

Use the Standard toolbar to perform standard functions, such as opening, closing, and creating projects. This toolbar is displayed by default.

The following table provides information about each available icon on the toolbar.

Icon	Function	Displays by default?	Shortcut keys	Corresponding menu command
	Creates a new project. If you set your user preferences to use the Create a New Project wizard when creating projects, clicking this icon launches the wizard. If you set your user preferences to not use the wizard when creating projects, a new project with the default project name (NEWPROJ-n) is added to the list of projects in the Projects window.	Yes	Ctrl+N	File > New
	Launches the Open Project dialog box. Select the projects you want to open.	Yes	Ctrl+O	File > Open

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	Closes all open projects. All open windows that display project-specific data, such as the Activities and Work Breakdown Structure windows, are automatically closed when you click this icon.	Yes	Ctrl+W	File > Close All
	Commits your changes to the database.	No	F10	File > Commit Changes
	Refreshes to display the most current data.	No	F5	File > Refresh Data

Tip

To show icons on the toolbar that do not display by default, you must customize the toolbar.

Tools Toolbar

Use the Tools toolbar to schedule and summarize projects, level resources, update progress, apply actuals, store period performance, and much more. This toolbar is displayed by default.

The following table provides information about each available icon on the toolbar.

Icon	Function	Displays by default?	Enabled when active window is:	Shortcut keys	Corresponding menu command
	Opens the Primavera P6 Visualizer. See Launching P6 Visualizer from P6 Professional for more information.	Yes	Activities	None	Tools > Visualizer
	Opens the Schedule dialog box. In this dialog box, you can schedule the open projects and set scheduling options.	Yes	All	F9	Tools > Schedule

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	Opens the Check Schedule dialog box. In this dialog box, you can configure the parameters for the check schedule report.	Yes	Activities	None	Tools > Check Schedule
	Opens the Level Resources dialog box. In this dialog box, you can level resources and set resource leveling options.	Yes	All	Shift+F9	Tools > Level Resources
	Enables or disables the Progress Spotlight feature. When Progress Spotlight is enabled, the module highlights the activities that fall between the last data date and the new data date in the Gantt Chart.	Yes	Activities	None	View > Progress Spotlight
	Shows or hides the progress line in a Gantt Chart. The progress line shows the progress of activities and how the project is performing relative to the baseline project.	Yes	Activities	None	Tools > Progress Line
	Opens the Update Progress dialog box. In this dialog box, you can estimate progress for spotlighted or selected activities.	Yes	Activities	None	Tools > Update Progress

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	Opens the Global Change dialog box. In this dialog box, you can make changes to all activities, resource assignments, or project expenses, or a selected group of these items, at one time.	No	All	None	Tools > Global Change
	Opens the Apply Actuals dialog box. In this dialog box, you can update the schedule by applying actuals up to the data date you select for each open project.	No	All	None	Tools > Apply Actuals
	Enables or disables automatic reorganization. By default, automatic reorganization is enabled. When you turn on Disable Auto-Reorganization, the module does not automatically reorder the currently active window according to your recent changes.	No	All	Shift+F2	Tools > Disable Auto-Reorganization

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	When connected to a P6 Professional database: Enables you to summarize open projects, or summary-only projects, or all projects. When connected to a P6 EPPM database: Enables you to summarize open projects, or all projects. To choose which projects you want to summarize, click ▼ next to Summarize, then select an option.	No	All	None	Tools > Summarize
	Enables you to summarize all projects.	No	All	None	Tools > Summarize > All Projects
	Enables you to summarize open projects.	No	All	None	Tools > Summarize > Open Projects
	This icon appears only when P6 Professional is connected to a P6 Professional database. Opens the Job Services dialog box. In this dialog box, you can create jobs and schedule them to run automatically on any number of projects or EPS nodes at a specified time.	No	All	None	Tools > Job Services

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	Opens the Store Period Performance dialog box. In this dialog box, you can store past period actuals for any open project in defined financial periods.	No	All	None	Tools > Store Period Performance
	Opens the Monitor Thresholds dialog box. In this dialog box, you can monitor all of the open project's thresholds at once.	No	All	None	Tools > Monitor Thresholds
	Opens the Recalculate Assignment Costs dialog box. In this dialog box, you can recalculate resource and role assignment costs for all activities in the open projects.	No	All	None	Tools > Recalculate Assignment Costs
	Opens the Issue Navigator dialog box. In this dialog box, you can track the open project's issues, including associated activities, resources, and work breakdown structure (WBS) elements.	No	All	None	Tools > Issue Navigator

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	This icon appears only when P6 Professional is connected to a P6 Professional database. Opens the Job Status dialog box. In this dialog box, you can view the status of all jobs submitted in P6 EPPM, such as apply actuals or summarize jobs that were run from P6 Professional and sent to run as an ASAP service.	No	All	None	Tools > Job Status

Tip

To show icons on the toolbar that do not display by default, you must customize the toolbar.

Top Layout Toolbar

Use the Top Layout toolbar to customize the top layout of the active window. This toolbar is displayed by default.

The following table provides information about each available icon on the toolbar.

Icon	Function	Displays by default?	Enabled when active window is:	Corresponding menu command
	Shows or hides the table view in the top layout.	Yes	Activities, Projects, Resources, WBS	View > Show on Top > Table
	Shows or hides the Gantt chart in the top layout.	Yes	Activities, Projects, WBS	View > Show on Top > Gantt Chart
	Shows or hides the Activity Network in the top layout. To set Activity Network options, open an Activity Network layout, or save the Activity Network layout, click the icon, then choose the appropriate option.	Yes	Activities	View > Show on Top > Activity Network

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	Shows or hides relationship lines in the Gantt Chart.	Yes	Activities	None
	Shows or hides a chart view.	Yes	Projects, Resources, WBS	View > Show on Top > Chart View
	Shows or hides the Activity Usage Spreadsheet in the top layout.	No	Activities	View > Show on Top > Activity Usage Spreadsheet
	Shows or hides columns in the Project/Gantt Profile.	No	Tracking	None
	Shows or hides the top window in the Project/Gantt Profile.	No	Tracking	None
	Shows or hides the Resource Usage Spreadsheet in the top layout.	No	Resource Assignments	View > Show on Top > Resource Usage Spreadsheet
	Arranges children horizontally or vertically in chart views. Click the icon to select an option.	No	Projects, Resources, WBS	View > Arrange Children
	Aligns children in chart views. Click the icon to select an option.	No	Projects, Resources, WBS	View > Align Children
	Enables you to apply an existing chart box template to the current layout, or customize your own. Click the icon to select an option.	No	Projects, Resources, WBS	View > Chart Box Template

Tip

- To show icons on the toolbar that do not display by default, you must customize the toolbar.
- The icons on this toolbar do not have corresponding shortcut keys.

Setting User Preferences

Define user preferences

1. Choose Edit, User Preferences.
2. Click the Time Units tab and define how to display time information.
3. Click the Dates tab and specify a format for dates.

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4. Click the Currency tab and select a view currency. Also, specify how to format currency data.
5. Click the Email tab and enter your email settings. If P6 Professional is connected to a SQL Lite database, the Email tab is not available.
6. Click the Assistance tab and specify which wizards to use.
7. Click the Application tab and set your startup options. You can also select how you want labels on grouping bands to display and define the range of financial periods that are available for display as columns. In addition, you can set the time interval that P6 Professional polls the database for job alerts, which are created every time a job you submit completes or fails.
8. Click the Password tab and modify your password. If P6 Professional is running in LDAP authentication mode, password management is handled through the directory server. You cannot change your password through the module and the Password tab does not appear in the User Preferences dialog box. If P6 Professional is connected to a Cloud Connect database, password management is handled through P6. You cannot change your password through P6 Professional and the Password tab does not appear in the User Preferences dialog box.
9. Click the Resource Analysis tab. Define the parameters for viewing all project data in the Resource Usage profile and how to display and calculate time-distributed data.
10. Click the Calculations tab and choose how you want the units, duration, and units/time calculated when adding or removing multiple resource assignments on activities. You can also choose to always use a resource's or role's units/time, overtime factor, and price/unit when a resource and role share an assignment on the same activity.
11. For Oracle or SQL Server installations, click the Startup Filters tab and choose to display current project data or all data in the enterprise. You can also choose whether resource summary data will load at startup.
12. Click the Personal Information tab, and enter your contact details. You can withdraw your acceptance for your details to be kept in the system ny clicking Forget User Acceptance. If P6 Professional is running in LDAP authentication mode, your contact details are managed through the directory server and you cannot change your contact details in the module.

Tip

See Future period bucket planning FAQ for information on how user preference settings affect your planning if you manually plan future period resource allocation in the Resource Usage Spreadsheet.

Define how to display time information

You can specify how to display time information, such as time units, activity durations, resource rates, and resource availability.

1. Choose Edit, User Preferences.
2. Click the Time Units tab.
3. In the Units Format section, select the unit of time you want to display for work efforts, and resource prices and availability.
4. Mark the Sub-unit checkbox to display sub-units in the next smaller time increment.

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5. Select the number of decimal places to display for time unit values.
6. Mark the Show Unit Label checkbox to display the time unit abbreviation with the time value.
7. Type an example of the time unit.
8. In the Durations Format section, select the unit of time you want to display for activity duration values.
9. Mark the Sub-unit checkbox to display sub-units in the next smaller time increment.
10. Select the number of decimal places to display for activity duration values.
11. Mark the Show Duration Label checkbox to display the time unit abbreviation with the duration value.
12. Type an example of the duration value.
13. Choose how to display resource units per time, either as a percentage or as units per duration.

> **Tip**
>
> If you manually plan future period resource/role allocation in the Resource Usage Spreadsheet, you should set the Units Format and Durations Format according to the time periods in which you plan your work. For example, if you plan future work in daily time periods, you should set the Units Format to Hour and the Durations Format to Day. Similarly, if you plan future work in weekly time periods, you should set the Units Format to Hour or Day, and the Durations Format to Week.

Specify a format for dates

1. Choose Edit, User Preferences.
2. Click the Dates tab.
3. In the Date Format section, select the order in which you want all dates to appear.
4. In the Time section, specify how or whether you want to display time.
5. In the Options section, select the date formatting options you want to apply.

Select a view currency

1. Choose Edit, User Preferences.
2. Click the Currency tab.
3. Select the currency in which to view cost data.
4. Indicate whether to show the currency symbol and decimal digits for the selected currency.

Specify a format for currency

1. Choose Edit, User Preferences.
2. Click the Currency tab.

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3. Mark the Show Currency Symbol checkbox to display the currency symbol before currency values.
4. Mark the Show Decimal Digits checkbox to display decimals for currency values.

Define how to display codes

1. Choose Edit, User Preferences.
2. Click the Application tab.
3. Indicate whether to show the code value or code description for assigned codes.

> **Tip**
>
> This setting affects how you see codes in table view columns in P6 Professional.

Enter email settings

You can access your email account to send email messages.

1. Choose Edit, User Preferences.
2. Click the email tab.
3. Select the mail protocol for your email system.
4. In the Profile Name field, type the profile name, login, or username you use to access your email server.
   Click Password, then type the password associated with the selected profile name.
5. In the Outgoing Mail Server (SMPT) field, type the SMTP server name or address to use to send outgoing email.
6. In the Security list, select the security protocol required to access the SMTP server.
7. Type the SMTP Port number for the SMTP server.
8. Optionally, in the User Name field, type the user name from which to send email.
   If you type a user name, click Password and enter the password associated with the selected user name.
9. Optionally, in the User Email Address field, type the email address to which you want your return email sent.
   If you do not enter a return email address, all email is returned to the address you used to send the email.

Set wizard options

You can specify whether you want wizards to help you add activities and resources.

1. Choose Edit, User Preferences.
2. Click the Assistance tab.
3. To use the New Resource wizard, mark the Use New Resource Wizard checkbox.
4. To use the New Activity wizard, mark the Use New Activity Wizard checkbox.

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Change my password

1. Choose Edit, User Preferences.
2. Click the Password tab.
3. Click Password.
4. Type a new password.

> **Note**
>
> The rules governing passwords depend on which type of database you are connected to and how certain settings are configured. See the tip below for further information.

5. The rules for pass
6. Type the password again to verify it.
7. Click OK.

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Tip

The rules governing passwords depend on which type of database you are connected to and how certain settings are configured.

When P6 Professional is running in LDAP authentication mode:

- Password management is handled through the directory server.
- You cannot change your password through P6 Professional and the Password tab does not appear in the User Preferences dialog box.

When P6 Professional is connected to a Cloud Connect database:

- Password management is handled through P6.
- You cannot change your password through P6 Professional and the Password tab does not appear in the User Preferences dialog box.

When P6 Professional is connected to a Standalone or PPM database:

- If Enable password policy is enabled in the Password Policy field of the Admin Preferences dialog box, you must enter a password that is between 8 and 20 alphanumeric characters and contains at least one number and one letter.
- If Enable password policy is disabled, your password must be between 1 and 20 alphanumeric characters long.

When P6 Professional is connected to a P6 EPPM database:

- When the Password Policy is enabled in Application Settings in P6, the password must be between 8 and 20 alphanumeric characters and contain at least one number and one letter.
- When the Password Policy is disabled in Application Settings in P6, the password must be between 1 and 20 alphanumeric characters.
- P6 does not allow blank passwords.
- Passwords are case-sensitive.
- Passwords that were set before the new password policy was enabled are valid and usable.
- Passwords are required.

Set startup options

You can specify the window you want to display each time you start the application.

1. Choose Edit, User Preferences.
2. Click the Application tab.
3. In the Startup Window section, select the window to display each time you start the module.
4. Mark the Show the Issue Navigator Dialog at Startup checkbox to view the Issue Navigator each time you open the module.
5. Mark the Show the Welcome Dialog at Startup checkbox to view the Welcome dialog box each time you open the module.

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Select startup filters

1. Choose Edit, User Preferences.
2. Click the Startup Filters tab.
3. Select the appropriate option for each data element listed. You can choose to view data for your current projects only or all data in the enterprise.
   - Startup filters are available for Oracle and SQL Server installations. Startup filters are disabled for stand-alone installations.

Load resource summary data at startup

1. Choose Edit, User Preferences.
2. Click the Startup Filters tab.
3. Select the Resource and role summaries option to load resource summary data at startup.

> **Note**
>
> If you choose to load the data at startup, P6 Professional may take longer to start and some views may take longer to load.
>
> When connected to a P6 Professional database, in addition to the resource summary data that may be affected in P6 Professional and P6 EPPM databases, resource and role data may be affected during project summarization.

Select calculation options for resource and role assignments

1. Choose Edit, User Preferences.
2. Click the Calculations tab.
3. In the Resource Assignments section, specify how to calculate remaining values when new resource assignments are added to or removed from activities.
   Choose Preserve the Units, Duration, and Units/Time for existing assignments if you want units, durations, and units/time to remain constant when additional resources are assigned to an activity.

   Choose Recalculate the Units, Duration, and Units/Time for existing assignments based on the activity Duration Type if you want to calculate a resource assignment's remaining values based on the activity's duration type specified in the Activity Details General tab.
4. In the Assignment Staffing section, specify how you want the module to calculate costs for an assignment when you replace a resource on an existing activity assignment or when you assign both a resource and a role to the same activity assignment.
   When replacing a resource on an existing activity assignment, choose to always use the units/time and overtime factor of the current assignment or of the new resource replacing the existing assignment; or, choose to be prompted to select which units/time and overtime factor you want to use each time you replace a resource on an existing activity assignment.

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When assigning a resource to an existing role assignment or when assigning a role to an existing resource assignment, choose to always use the price/unit of the resource or role; or, choose to be prompted to select which price/unit you want to use each time you assign a resource and a role to an activity assignment.

Tip

If you manually plan future period resource allocation in the Resource Usage Spreadsheet, your selections on the Calculations tab can affect the values you manually enter in future periods for an assignment.

Note

- For Fixed Duration and Units activities P6 Professional will not recalculate the actual units for existing resource assignments if they have negative units/time, units, or cost values.
- If you choose to always use the role's price/unit, the Rate Source is set to Role in the Activity Details, Resources tab. If you choose to always use the resource's price/unit, the Rate Source is set to Resource. The price/unit value used to calculate costs for the assignment is determined by the rate type you select in the Rate Type field (rate types are resource- and role-specific).

Working with Projects

Projects

A project is a set of activities and associated information that constitutes a plan for creating a product or service. A project has a start and finish date and consists of some or all of the following: activities, resource assignments, a work breakdown structure (WBS), an organizational breakdown structure (OBS), calendars, relationships, baselines, expenses, issues, thresholds, and project-specific codes, reports, and work products and documents.

Create a project

To create a new project:

1. Choose File, New. This launches the Create a New Project wizard.
2. Select the EPS to which you want to add the new project.
3. Type a project ID and a project name for the new project.
4. Specify a project planned start date for the project and if necessary, a must finish by date. When you add a must finish by date, the calendar defaults to the date and time of the project's finish date. When the Finish is blank, the calendar defaults to the current system date and time.
5. Select a responsible manager. The OBS element you select here appears at the top of the new project's OBS.

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6. Select the rate type you want the project to use by default for new resource and role assignments.
7. Click Finish.

You can configure the project properties by choosing Enterprise, Projects, and then display Project Details. Refer to the appropriate help topics for step-by-step instructions.

Open a project

When starting the module

1. Log in to P6 Professional.
2. To open an existing project, click Open Existing on the Welcome dialog box. To open the last project you worked with, click Open Last.
3. From the Open Project dialog box, click the project or EPS node you want to open, or press the Ctrl key and select more than one project, then click Open.
4. Use the Enterprise toolbar, Project toolbar, Enterprise menu, or Project menu to open the window you want to work with, such as Projects, Resources, or Activities.

From within the module

1. Choose File, Open. You can also click

   on the Standard toolbar. To view more information about each project, click the Display Options bar and choose Columns, Customize. Then, add the appropriate columns to the dialog box.
2. Select the project you want to open.
3. In the Access Mode section, choose Exclusive, Shared, or Read Only to specify how you want to open the project. Depending on your security profile or the way in which other users have opened the project, some of these options may not be available.
4. To view a list of users currently working in the selected project, click Users.
5. Click Open.

> **Note**
>
> - When you open a project from the Open Project dialog box, any projects currently open are closed. To open multiple projects at the same time, select each project you want to open in the Open Project dialog box.
> - Only one user at a time can have Exclusive access to a project. When you open a project in Exclusive mode, other users can open it only in Read-Only mode.
> - You must have the Check In/Check Out Projects and Open Projects Exclusively project privilege to open projects using Exclusive mode. Similarly, Exclusive mode is enabled only if you have the Check In/Check Out Projects and Open Projects Exclusively project privilege for all the EPSs and projects you select.

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Specify a default project

When you work with multiple projects, you can designate one project as the project that opens by default. You can also specify which project's settings to use when you schedule or level, and which project to use by default when you add new information to the database.

1. Choose Project, Set Default Project.
2. Mark the checkbox in the Default column next to the project you want to open by default. This project's scheduling and leveling settings are used for calculating the schedule (manually or via the Job Services feature, when connected to a P6 Professional database) and it becomes the default destination for new items such as activities or issues unless you group data by WBS and select a different project before adding new items.

Define a what-if project

P6 Professional enables you to create projects for examining "what-if" scenarios, known as what-if projects. You might choose to copy a project before changing its status to "What-If" so that this change does not impact other projects in the EPS.

1. Open the project whose status you want to change to “what-if.”
2. Choose Enterprise, Projects and display Project Details.
3. Click the General tab.
4. Select What-If in the Status field.

> **Note**
>
> Changing a project's status requires the appropriate access rights.

Commit data to the database

- To commit changes, choose File, Commit Changes. Committing changes writes data to the database immediately. Closing also automatically commits data changes.

Refresh data

Use the Refresh Data command to display the most current version of project data, including changes made to the project by other users.

- Choose File, Refresh Data, or press F5.

Copy and paste a project

1. Open the project you want to copy
2. Choose Enterprise, Projects, then select the project you want to copy.
3. Choose Edit, Copy, or click the Copy icon on the Edit toolbar.

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4. Select the position in the EPS where you want to copy the project.
5. Choose Edit, Paste, or click Paste icon on the Edit toolbar.
6. In the Copy Project Options dialog box, mark the checkbox next to each type of information you want to copy.
7. Click OK.

> **Note**
>
> - You must group the projects by EPS in order to copy Summary Data.
> - If you select Do Not Show This Window Again in the Copy Options dialog box settings are retained until you reopen the module.
> - If you want to copy or move a project and have the copied or moved project's Responsible Manager value automatically changed to another value, then you need to first open the project to copy or move and group and sort the Projects view by Responsible Manager. Then copy or move the project to the appropriate responsible manager.
> - The administrator should not assign any of the following privileges to users who should not have access to view cost information while copying and pasting project/EPS or assigning WBS and Fill Down on the WBS column in the Activities view: View Project Costs/Financials, Edit WBS Costs/Financials, and Edit EPS Costs/Financials.
> - When connected to a P6 EPPM database: P6 Professional uses a job service to copy projects and EPS nodes. This means that you can carry on working while the project or EPS is copied in the background. To see the progress of the job, choose Tools, Job Status. You must group the projects by EPS in order to copy projects and EPS nodes using the job service.

Close a project

- Choose File, Close All.

Delete a project

- Choose Enterprise, Projects, select the project you want to delete, then choose Edit, Delete.

> **Note**
>
> When connected to a P6 Professional database: When you delete an EPS node, all projects beneath it are also deleted.

Using Portfolios

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Portfolios

A portfolio consists of projects grouped together in some way that is meaningful to you. For example, one portfolio might contain projects that are the responsibility of a specific business unit, while another portfolio contains only projects budgeted for the next fiscal year.

Use portfolios to limit the amount of data you display in the Open Project dialog box and Projects window. Only project data for the projects in the selected portfolio is loaded.

Portfolios can be:

- *manual* portfolios that include projects added to the portfolio manually;
- *filtered* portfolios that select the projects to include in a portfolio on the basis of criteria you specify. Filtered portfolios must be created in P6. You cannot create, modify, or delete filtered portfolios in P6 Professional.

Tip

- Filtered portfolios created in P6 will only appear in P6 Professional after the *Filter Portfolio Stale Period* configured on the Data Limits tab of Application Settings in P6 has elapsed.
- When projects become eligible for inclusion in a filtered portfolio created in P6, P6 Professional users must re-open the portfolio or re-start P6 Professional to be able to see the new projects.

Create a portfolio

1. Choose Enterprise, Project Portfolios.
2. Click Add.
3. Type a name to identify the portfolio.
4. Click the General tab and choose which users you want to have access to the portfolio. If you select Shared Users, click the User Access tab and add users to the portfolio. You can also type a description for the portfolio in the General tab.
5. Click the Projects tab and add projects to the portfolio.
6. Click Close.

Note

To display portfolio details in the lower portion of the Project Portfolios dialog box, click the Display Options bar, then choose Details.

Add projects to a portfolio

1. Choose Enterprise, Project Portfolios.
2. Select the portfolio to which you want to add projects.

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3. Click the Projects tab.
4. Click Assign.
5. Select the projects you want to add. To add multiple projects, hold down the Ctrl key, then click each project you want to add to the portfolio. All projects the user has access to are listed, not just those in the current portfolio.
6. Click Assign.
7. Click Close.

> **Note**
>
> - To add a project, you must have edit rights to the selected portfolio.
> - You cannot add projects to a filtered portfolio. Filtered portfolios select the projects on the basis of criteria specified in their filter.

Add users to a portfolio

1. Choose Enterprise, Project Portfolios.
2. Select the portfolio to which you want to add users.
3. Click the User Access tab.
4. Click Assign.
5. Select the users you want to add.
6. Click Assign.
7. Click Close.

> **Note**
>
> To add a user, you must be the owner of the selected portfolio. You are the owner if you created the portfolio.

Remove projects from a portfolio

1. Choose Enterprise, Project Portfolios.
2. Select the portfolio from which you want to remove projects.
3. Click the Projects tab.
4. Select the projects you want to remove. To remove multiple projects, hold down the Ctrl key, then click each project you want to remove from the portfolio.
5. Click Remove.
6. Click Yes.

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> **Tip**
>
> You cannot remove projects from a filtered portfolio. Filtered portfolios select the projects on the basis of criteria specified in their filter.

Change a portfolio name

1. Choose Enterprise, Project Portfolios.
2. Select the portfolio whose name you want to change, then click the General tab. To display portfolio details in the lower half of the Project Portfolios dialog box, click the Display Options bar, then choose Details.
3. In the Name field, type a new name for the portfolio.

> **Tip**
>
> You cannot change the name of a filtered portfolio.

Change the current portfolio

1. Choose File, Select Project Portfolio.
2. Select the portfolio you want to open.
3. Click OK.
4. Click Yes.

> **Note**
>
> All projects and project-related windows (Activities, WBS, Resource Assignments, etc.) currently open will be closed.

Delete a portfolio

1. Choose Enterprise, Project Portfolios.
2. Select the portfolio you want to delete.
3. Click Delete.
4. Click Yes.

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Tip

- If a user is working within a portfolio you delete, the user will not see an immediate impact. When the user chooses Refresh, a message will indicate that the portfolio has been deleted. If a new portfolio is not selected, all projects are loaded.
- You cannot delete a filtered portfolio in P6 Professional.

View portfolio details

1. Choose Enterprise, Project Portfolios.
2. Select the portfolio whose details you want to review. To display portfolio details in the lower half of the Project Portfolios dialog box, click the Display Options bar, then choose Details.
3. Click the General tab to view a description of the portfolio.
4. Click the Projects tab to view the projects included in the portfolio.
5. Click the User Access tab to view the user access rights for the portfolio.

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3

Structuring Projects

Setting up and starting to work with the EPS

Enterprise Project Structure overview

The Enterprise Project Structure (EPS) forms the hierarchical structure of your database of projects. Each EPS node (or folder) can be subdivided into multiple levels to represent the work that needs to be done in your organization. The number of levels and their structure depend on the scope of your projects and how you want to summarize data.

You can use the EPS to

- Perform top-down budgeting and resource and cost analysis
- Organize work breakdown and organizational breakdown structures into one common structure
- Manage multiple projects from the highest levels of the organization to the individuals that perform specific project tasks
- Implement coding standards for flexible reporting
- Maintain appropriate security throughout the enterprise

All projects in the enterprise exist within the EPS hierarchy, a graphical representation of your project structure.

When P6 Professional is connected a P6 EPPM database you can define the EPS using either P6 Professional or P6.

The levels and structure of your company's EPS depends on the scope of your projects and how you want to summarize data. You can define one or multiple root nodes, up to 50 combined WBS/EPS levels and as many projects as necessary to complete the required work set forth by the operations executive and project managers in your organization.

Before you begin defining your company's EPS, you should become familiar with the structures and procedures established for your enterprise, such as codes, calendars, and other company-wide standards. Once the EPS hierarchy is defined, you can begin to develop projects by adding information, activities, and resources.

Defining the Enterprise Project Structure

All projects in the enterprise exist within the EPS hierarchy, a graphical representation of your project structure. A root node is automatically created for the hierarchy during installation.

The levels and structure of your company's EPS depends on the scope of your projects and how you want to summarize data. You can use the Admin Preferences, Data Limits tab to define one or multiple root nodes, up to 50 combined WBS/EPS levels and as many projects

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as necessary to complete the required work set forth by the operations executive and project managers in your organization.

Before you begin defining your company's EPS, you should become familiar with the structures and procedures established for your enterprise, such as codes, calendars, and other company-wide standards. Once the EPS hierarchy is defined, you can begin to develop projects by adding information, activities, and resources.

Set up the EPS structure

You can use P6 Professional or P6 to set up the EPS. If you use P6 Professional, choose Enterprise, Projects to specify project details such as dates, resource and budget information, and so on.

When you create the enterprise project structure, you must identify an OBS element, or person responsible for each node and project within the EPS. For steps on defining the OBS.

1. Choose Enterprise, Enterprise Project Structure.
2. Click the EPS Name column where you want to add a new element.
3. Click Add.
4. Type an ID and name for the EPS node. In the Responsible Manager field, select an OBS element for the new element.
5. If necessary, you can change the hierarchical position of the new element by clicking the arrow keys.
6. Click Close.
7. Choose Enterprise, Projects then specify project details such as dates, resource and budget information, and so on.

> **Note**
>
> A default root node displays in the top left position in the hierarchy. All projects listed below it are part of the same structure. You can also define multiple root nodes to separate various components of your enterprise. For example, you might want to exclude inactive or what-if projects from the main enterprise. To define a root node, click the left arrow key to move an EPS element to the top left position in the hierarchy, then add the hierarchy of projects below this node.

Add a project to the EPS hierarchy

Once you set up the EPS structure, you can add an unlimited number of projects as follows:

1. Choose Enterprise, Projects, then select the EPS node or root element to which you want to add a project.
2. Click ✚ on the Edit Toolbar or choose Edit, Add.
3. Follow the instructions in the Create a New Project Wizard. To quickly add a new project using the default settings, click Finish on the Create a New Project Wizard.
4. Use the detail tabs across the bottom of the Project window to add details specific to this project.

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Show or hide details in the EPS hierarchy

- To expand or collapse individual elements of the EPS hierarchy, click the plus sign (+) or minus sign (-).
- To expand or collapse all elements of the EPS hierarchy, choose View, Expand All or Collapse All. You can also right-click in the EPS hierarchy and choose Expand All or Collapse All.

Delete an EPS node or project

1. Choose Enterprise, Projects, then select the EPS node or project that you want to delete. Choose Edit, Delete.
2. Click Yes to confirm.

> **Tip**
>
> When you delete an EPS node, all projects in that branch of the hierarchy are also removed. To save projects in a branch before deleting it, first copy and paste those projects to another area of the hierarchy.

Copy an EPS node or project

1. Choose Enterprise, Projects, then select the EPS node or project you want to copy.
2. Choose Edit, Copy.
3. Click the location in the EPS where you want to paste the new EPS node/project.
4. Choose Edit, Paste.
5. Mark the checkboxes beside any optional information you want to include in the copied EPS node or project in the Copy Project Options, Copy WBS Options, and Copy Activity Options dialog boxes.

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Note

- When connected to a P6 EPPM database: You cannot paste data into a different EPS node, if you do not have the privilege to export data from the original parent EPS node.
- When connected to a P6 EPPM database: When you copy an EPS node, any template projects in that EPS are copied even though you cannot see them in P6 Professional.
- When connected to a P6 EPPM database: P6 Professional uses a job service to copy projects and EPS nodes. This means that you can carry on working while the project or EPS is copied in the background. To see the progress of the job, choose Tools, Job Status.
- The administrator should not assign any of the following privileges to users who should not have access to view cost information while copying and pasting project/EPS or assigning WBS and Fill Down on the WBS column in the Activities view: View Project Costs/Financials, Edit WBS Costs/Financials, and Edit EPS Costs/Financials.
- You must group the projects (to copy) by EPS in order to copy Summary Data.

Tip

When you select an EPS node to copy, all of the selected EPS node's subordinate EPS nodes/projects are also copied, even if you do not select them.

Defining the WBS

Work Breakdown Structure

A WBS is a hierarchy of work that must be accomplished to complete a project, which defines a product or service to be produced. The WBS is structured in levels of work detail, beginning with the deliverable itself, and is then separated into identifiable work elements.

Each project has its own WBS hierarchy with the top level WBS element being equal to that of each EPS node or project. Each WBS element may contain more detailed WBS levels, activities, or both.

When creating a project, the project manager typically develops the WBS first, assigns documents to each WBS element, and then defines activities for performing the element's work. In addition to document and activity assignments, each WBS element also has an assigned calendar, specific earned value calculation settings, and an assigned OBS element responsible for all work included in the WBS element.

Using a WBS for top-down planning

Using a WBS at the planning stages of a project is beneficial for summary rollups of data not yet associated with projects.

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The WBS hierarchy can contain anticipated dates, planned budgets, and summary values. Financial information is used interchangeably between projects and their WBS elements, so you can use the preestablished budget amounts and funding information you set for WBS elements immediately for their project and activity counterparts. The budget and spending plan can stand alone to represent financial data for the WBS level, or it can reflect the budget distribution data established for the project. Summary information can be rolled up to any WBS level you specify.

Using weighted milestones in the work breakdown structure

The module provides various ways to calculate performance percent complete. One method is to assign weighted milestones at the WBS level. For each WBS element, select the WBS Milestones Percent Complete option on the Earned Value tab, then define as many milestones as you need and assign a level of significance or weight to each of them. As progress occurs and you mark each milestone complete, P6 Professional calculates the WBS element's performance percent complete based on the weight of the milestone, independent of its lower-level activities.

WBS status types

P6 Professional recognizes four status types for WBS elements: Planned, Active, Inactive, and What-If.

Planned WBS elements

If a WBS element's status is Planned, then the WBS is in the planning phase. Work has not yet begun.

Active WBS Elements

If a WBS element's status is Active, then the WBS is currently underway.

Inactive WBS Elements

If a WBS element's status is Inactive, then the WBS has ceased or is placed on hold.

What-If WBS Elements

If a WBS element's status is What -If, then the WBS is being analyzed before establishing a more permanent schedule.

View the WBS

- Choose Project, WBS. To view the WBS as a graphical chart, choose View, Show on Top, Chart View. To view the WBS as a table in column format, choose View, Show on Top, Table. To view the WBS as a table in a column format with a corresponding Bar Chart, choose View, Show on Top, Gantt Chart.

> **Tip**
>
> You can also select the same View commands by clicking the Display Options bar.

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Display work breakdown structure details

- Choose Project, WBS, then choose View, Show on Bottom, Details.

Add a WBS element

1. Choose Project, WBS.
2. Select the WBS element to which you want to add a child WBS element, then click

   on the Edit toolbar or choose Edit, Add. The new WBS element is indented one level under the selected WBS element. You can change the position of the WBS element using the arrows on the Move toolbar.
3. Click the General tab, then type the element's code and name. Use the remaining fields on this tab as follows: Status - select the status for the selected WBS element. Responsible Manager – select the name of the selected WBS element's root OBS (organizational breakdown structure) element. Anticipated Dates – enter expected start and finish dates for the WBS element. These dates are used during the project planning stage and are not affected by scheduling. These dates are used to set Start and Finish dates for the WBS during the project planning stage when activities are not added to the WBS. When activities are added, WBS Start and Finish dates are rolled up from the earliest start and latest finish dates from the WBS activities.
4. To calculate the performance percent complete based on WBS weighted milestones, click the WBS Milestones tab.

Edit a work breakdown structure element

1. Choose Project, WBS.
2. Select the WBS element you want to edit. To change the element's position in the WBS, click the appropriate arrow buttons. Note that the maximum number of WBS levels is set in the Data Limits tab of the Admin Preferences dialog box when P6 Professional is connected to a P6 Professional database and is set in P6 Settings page when P6 Professional is connected to a P6 EPPM database.
3. Click the Display Options bar and choose Show on Bottom, WBS Details to view or modify information in the General and WBS Milestones tabs.

> **Tip**
>
> You can also directly edit some WBS information in the WBS table by double-clicking the information you want to change.

Assign WBS weighted milestones

1. Choose Project, WBS.

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2. Select the WBS element to which you want to assign weighted milestones, then click the Earned Value tab.
3. In the Technique for Computing Performance Percent Complete area, choose WBS Milestones Percent Complete.
4. Click the WBS Milestones tab.
5. Click Add, then type a name of the task or portion of work signifying a milestone for the selected WBS element in the WBS Milestone column.
6. Click the corresponding field in the Weight column, then type a number indicating the significance of this milestone relative to the others listed.
7. Mark the checkbox in the Completed column when each milestone is complete. The WBS element's percent complete is calculated based on the weight of the completed milestone in relation to the remaining milestones.

> **Note**
>
> - If all weighted milestones for a WBS element have a value of 1.0 and you have a total of four milestones, marking one as Completed would indicated that the WBS element is 25% complete. If this same milestone had a weight of 9.0, and the other three had 1.0 weights, marking it Completed would indicate that the WBS element is 75% complete. The module uses the following formula to calculate percent complete from weighted milestones: Actual Weight of Completed Milestones/ Total Possible Weight of All Milestones.
> - Applying this formula to the previous example, the completed milestone has a weight of 9.0, and is divided by the total weight of all milestones (12.0), to equal 75% complete.

Determine a WBS element's status

1. Choose Project, WBS.
2. Select the WBS element whose status you want to view or change.
3. Click the General tab, then view the Status field in the lower left section of the tab. Choose from four status types for WBS elements: Planned, Active, Inactive, and What-If.

> **Note**
>
> If a WBS element belongs to a parent WBS element, the element has the same status as its parent element.

Change the work breakdown structure chart display

1. Choose Project, WBS, then choose View, Show on Top, Chart View.
2. Choose View, Chart Font and Colors.
3. To change the appearance of text, click Font, then select a new font.
4. To change the display's background color, click Back Color, then select a new color.

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5. To change the WBS box color, click Box Color, then select a new color.

> **Tip**
>
> To change the displayed information, choose View, Chart Box Template, then an information type.

Change the work breakdown structure table display

1. Choose Project, WBS, then choose View, Show on Top, Table.
2. Choose View, Table Font and Row.
3. To change the appearance of text, click Font, then select a new font.
4. To change the display's background color, click Color, then select a new color.
5. To change the amount of space between rows, increase or decrease the number in the Row Height field.
6. Click Apply to view the changes.

Move around the WBS chart

You can change the level of detail that appears onscreen by clicking the following Display toolbar icons.

-  Zoom In magnifies the view.
-  Zoom Out reduces the size of elements in the view.
-  Zoom to Best Fit adjusts information to fit in the window.

Copy and paste a work breakdown structure element

1. Choose Project, WBS. If you are copying from one project to another, ensure that the View, Group and Sort By option is set to Default.
2. Select the WBS element you want to copy, then choose Edit, Copy.
3. Select the WBS element to which you want to copy the element, then choose Edit, Paste.
4. In the Copy WBS Options dialog box, mark the items you want to include in the copied WBS, then click OK. If the Activities checkbox is marked, the Copy Activity Options dialog box appears.
5. In the Copy Activity Options dialog box, mark the checkbox next to each type of information you want to copy, then click OK.
6. In the Renumber Activity IDs dialog box, select how to create activity IDs for copied activities, then click OK. If you selected the Replace Beginning Characters option on the previous dialog box, the Duplicates dialog box may appear after clicking OK. If it appears, enter a new activity ID and click OK.

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Note

- If you select Do Not Show This Window Again in the Copy WBS Options or Copy Activity Options dialog box, the dialog box settings are retained until you reopen the module.
- When connected to a P6 EPPM database: When you copy and paste a WBS within the same project, the WBS, activities, and associated risks from P6 are copied; risks are not copied if you copy and paste the WBS to a different project.

Cut and paste a work breakdown structure element

1. Choose Project, WBS.
2. Select the WBS element you want to cut and paste, then choose Edit, Cut.
3. Select the WBS element to which you want to add the cut element, then choose Edit, Paste.

Note

- When you cut and paste a WBS element, the element's activity assignments are also pasted.
- When connected to a P6 EPPM database: When you cut and paste a WBS within the same project, the WBS, activities, and associated risks from P6 are moved; risks are not moved if you cut and paste the WBS to a different project.

Define earned value settings for a specific work breakdown structure element

1. Choose Project, WBS.
2. Select the WBS element whose earned value settings you want to define, then click the Earned Value tab.
3. In the Technique for Computing Performance Percent Complete area, choose the completion percentage method you want to use when calculating an activity's earned value.
4. In the Technique for Computing ETC (Estimate-to-Complete) area, choose the method you want to use when calculating an activity's Estimate to Complete (ETC) value.

Delete a work breakdown structure element

1. Choose Project, WBS.
2. Select the WBS element you want to delete, then choose Edit, Delete. If the WBS element you want to delete is assigned to activities, you are prompted to delete the WBS element

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and all activities assigned to it or reassign all of its activity assignments to the element's parent WBS element.

3. Click OK, then click Yes.

> **Note**
>
> If you delete a parent WBS element, all elements contained in the parent element are also deleted.

Working with and defining the OBS

Organizational breakdown structure (OBS) overview

The organizational breakdown structure (OBS) is a global hierarchy that represents the managers responsible for the projects in your enterprise. The OBS usually reflects the management structure of your organization, from top-level personnel down through the various levels constituting your business. You can associate the responsible managers with their areas of the EPS (Enterprise Project Structure) — either nodes or individual projects. When you associate a responsible manager with an EPS node, any projects you add to that branch of the EPS are assigned that manager element by default.

The OBS hierarchy is also used to grant users specific access privileges to projects and the WBS (work breakdown structure) levels within projects.

Setting up the OBS

Because the OBS is maintained as a separate, global hierarchy, you have flexibility in making your OBS assignments as responsibilities change throughout a project life cycle.

You might choose to create your OBS to match each EPS node and project set up in the EPS. You could initially match OBS names to the EPS node and project names. You could then assign users, by their login names, to the OBS elements to grant access to the corresponding EPS nodes or projects.

The type of access granted to a user is determined by the project security profile assigned to the user.

View the OBS

You can view an organizational breakdown structure (OBS) in two ways. You can use the OBS chart to view a graphical display of information, and you can use the OBS table to view information in a column format.

1. Choose Enterprise, OBS.
2. If the Organizational Breakdown Structure dialog box currently displays the Chart View, click the Display Options bar and choose Table View.
   - To view the OBS hierarchy, click the OBS Name column label.
   - To list and sort OBS elements, click the OBS Name column label again.

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OBS security

Project profiles define a user's access to each project according to a specified OBS element. The specified OBS element determines which work breakdown structure (WBS) elements, activities, issues, and thresholds the user can edit in a project.

The OBS is a global hierarchy that represents the management responsible for the projects in your enterprise. The OBS hierarchy is used primarily to grant users specific access privileges to projects and to the WBS levels within projects. To access a project, a user must have access permissions for an OBS element within the project. This provides user access to WBS information for which the specified OBS element is responsible, as well as limits user access to WBS information that may lie beyond the user's scope.

When P6 Professional is connected to a P6 Professional database, profiles and corresponding privileges are defined using the Security Profiles dialog box and are associated with the login name of the user. Given a user's set of OBS assignments, the user has access to all EPS nodes and projects assigned these OBS elements and their child OBS elements. The user will also inherit access to all child EPS nodes and projects as defined by the EPS hierarchy.

When P6 Professional is connected to a P6 EPPM database Profiles and corresponding privileges are defined using P6. Given a user's set of OBS assignments, the user has access to all EPS nodes and projects assigned these OBS elements. The user will also inherit access to all child EPS nodes and projects as defined by the EPS hierarchy.

When you assign users to OBS elements using their login names, the security profile is automatically associated.

> **Note**
>
> You can assign a user a security profile for any number of enterprise OBS nodes.

Add an OBS element

1. Choose Enterprise, OBS. A root OBS element is automatically assigned to the root EPS node so that a default OBS element can be assigned to each project you add to the EPS root.
2. Click the OBS Name column label to display the OBS hierarchy. The outline symbol

   in the OBS Name column label indicates a hierarchy display.
3. Select the OBS element immediately above and at the same hierarchy level as the element you want to add, then click Add.
4. Click the General tab, type the OBS Name, then click Modify to type a description of the OBS element in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.

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5. Click the Users tab to view the users and corresponding security profiles associated with an OBS element. You can also assign users from this tab, if you have appropriate access rights.
6. Click the Responsibility tab to quickly see where responsible managers (OBS elements) are assigned across the enterprise. Select the OBS name for whom you want to see assignments.

> **Tip**
>
> To change the element's position in the OBS hierarchy, click the appropriate arrow buttons.

Assign an OBS element to a WBS element

1. Choose Project, WBS.
2. Select the WBS element to which you want to assign an OBS element.
3. Click the General tab, then click ... in the Responsible Manager field.
4. Select the OBS element you want to assign, then click the Select button.

Edit an OBS element

1. Choose Enterprise, OBS.
2. Click the OBS Name column label to display the OBS hierarchy.
   The outline symbol in the OBS Name column label indicates a hierarchy display.
3. Select the OBS element you want to edit.
4. To change the element's information, click the General tab and enter new information.
5. To change the element's position in the OBS, click the appropriate arrow buttons.

Copy and paste an OBS element

1. Choose Enterprise, OBS.
2. Click the OBS Name column label to display the OBS hierarchy.
3. Select the OBS element you want to copy, then click Copy.
4. Select the OBS element to which you want to add the copied OBS element, then click Paste.

Cut and paste an OBS element

1. Choose Enterprise, OBS.
2. Click the OBS Name column label to display the OBS hierarchy.
3. Select the OBS element you want to cut and paste, then click Cut.
4. Select the OBS element to which you want to add the cut OBS element, then click Paste.

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Delete an OBS element

1. Choose Enterprise, OBS.
2. Click the OBS Name column label to display the OBS hierarchy.
3. Select the OBS element you want to delete, then click Del/Merge. If the OBS element you want to delete has work breakdown structure (WBS), issue or threshold assignments, you are prompted to merge the element with its parent OBS.
4. Click Yes.

> **Note**
>
> If you delete a parent OBS element, all of the elements contained in the parent element are deleted.

View the OBS chart display

Use the OBS chart to view a graphical display of OBS information.

- Choose Enterprise, OBS, then click the Display Options bar and choose Chart View.

> **Tip**
>
> To view the OBS table display again, click the Display Options bar, then choose Table View.

Change the OBS chart display

1. Choose Enterprise, OBS, then click the Display Options bar and choose Chart Font and Colors.
2. To change the appearance of the display's text, click Font, then select a new font.
3. To change the display's background color, click Back Color, then select a new color.
4. To change the display's OBS box color, click Box Color, then select a new color.

> **Tip**
>
> To change the displayed information, click the Display Options bar, choose Chart Box Template, then select Customize.

Move around the OBS chart

You can change the level of detail that appears on-screen.

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- Click the Display Options bar and choose Zoom. You can zoom in, zoom out, or zoom to best fit.

> **Tip**
>
> You can also use your mouse to control the level of detail that appears on-screen:

- To zoom in, hold down the Alt key, click the background, and then drag the pointer down while holding down the mouse button.
- To zoom out, hold down the Alt key, click the background, and then drag the pointer up while holding down the mouse button.

Change the OBS chart information

1. Choose Enterprise, OBS, then click the Display Options bar and choose Chart Box Template, Customize.
2. Click Add.
3. In the Field Name field, select a template element.
4. Specify a width and height for the template element.
5. Click the up and down arrows to place the element within the OBS box.

> **Tip**
>
> - To remove an element from the OBS box, select the element, then click Delete.
> - To revert to the default OBS box fields, click Default.

Assign responsibility for an issue

1. Choose Project, Issues, then select the issue.
2. Display Issue Details, then click the General tab.
3. In the Responsible Manager field, click ....
4. Select the name of the responsible OBS member, then click the Select button.

Assign responsibility for threshold-generated issues

1. Choose Project, Thresholds.
2. Select the threshold, then click the General tab.
3. In the Responsible Manager field, click ....
4. Select the name of the OBS element, then click the Select button.

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Defining Project, Resource, and Activity Codes

Project Codes

Project codes and values

You can organize the projects in your EPS (Enterprise Project Structure) in groups according to specific categories, such as location and manager, using project codes.

You can define unlimited hierarchical project codes to fulfill the filtering, sorting, and reporting requirements for your projects, and arrange them hierarchically for easier management and assignment.

The Project Codes dictionary is global to the entire enterprise.

You can assign a project code value to projects for each project code you create.

Use project codes to group projects, consolidate large amounts of information, and to distinguish one project from another. All projects assigned a value for a code are grouped by their corresponding values when you group and sort by project code. Any projects not assigned a value for the project codes are placed at the bottom of the view under a No Code grouping band.

Tip

- You can group by project code in the Open Project dialog box and in the Projects window by right-clicking anywhere in the dialog box or view, choosing Group and Sort By, then selecting the project code name. All predefined project codes are available in the Group and Sort By menu.
- View Project Codes as columns in the Activities and WBS column views. The project code value associated with the currently open projects appears in the row for each activity.

Create project codes

1. Choose Enterprise, Project Codes.
2. Click Modify.
3. Click Add, then type the name of the project code.
4. In the Max Length field, specify the maximum number of characters for the project code's values.
5. Click Close.

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> **Note**
>
> If you intend to use reporting software, avoid using commas when creating data other than Project names. The way that data is passed to some reporting software can cause a comma to be interpreted as a delimiter between data items.

> **Tip**
>
> To change the order in which project codes are listed, select the project code you want to move in the Project Code Definitions dialog box, then click Shift Up or Shift Down.

Create project code values

1. Choose Enterprise, Project Codes.
2. Select the project code for which you want to create a value.
3. Click Add.
4. Type the value's name.
5. Type the value's description.

Assign project codes and values

1. Choose Enterprise, Projects, then select the project to which you want to assign a code and value.
2. Click the Codes tab.
3. Click Assign.
4. Select the project code value you want to assign. You can only assign one value per code.
5. Click the Assign button, then click the Close button.

> **Tip**
>
> - To change a code value assignment, double-click the code value you want to change and select a new code value.
> - To remove a project code, select the code and value you want to remove in the Codes tab, then click Remove.
> - You can view the assigned project codes in a column in the Activities and Work Breakdown Structure windows.

Edit project codes

1. Choose Enterprise, Project Codes.
2. Click Modify.

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3. Select the project code you want to edit. To change the project code's name, type a new name. To change the maximum number of characters the code's values may have, specify a new number. To change the placement of the code in the list, click Shift Up or Shift Down.
4. Click Close.

> **Tip**
>
> If you change a project code, your changes apply to all project assignments.

Edit project code values

1. Choose Enterprise, Project Codes.
2. Select the project code whose value you want to change.
3. To change a value or description, double-click the item you want to change, then type the new text.

> **Tip**
>
> If you change a project code value, your changes apply to all project assignments.

Delete project codes

1. Choose Enterprise, Project Codes.
2. Click Modify.
3. Select the code you want to delete, then click Delete.
4. Click Yes.

Delete project code values

1. Choose Enterprise, Project Codes.
2. Select the code whose value you want to delete.
3. Select the value you want to delete.
4. Click Delete.
5. Click Yes.

Resource Codes

Resource codes

You can categorize resources using codes. With potentially hundreds of resources being used across an enterprise of projects, codes provide another method for filtering the resources you

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need to access quickly, or for grouping resources for analysis and summarization in layouts. You can also use resource codes to group, sort, and filter resources in profiles and spreadsheets.

Create resource codes

1. Choose Enterprise, Resource Codes.
2. Click Modify.
3. Click Add, then type the name of the resource code.
4. In the Max Length field, specify the maximum number of characters for the resource code's values.
5. Click Close.

> **Note**
>
> If you intend to use reporting software, avoid using commas when creating data other than Project names. The way that data is passed to some reporting software can cause a comma to be interpreted as a delimiter between data items.

> **Tip**
>
> To change the order in which resource codes are listed, select the resource code you want to move in the Resource Code Definitions dialog box, then click Shift Up or Shift Down.

Create resource code values

1. Choose Enterprise, Resource Codes.
2. Select the resource code for which you want to create a value.
3. Click Add.
4. Type the value's name and description.

Assign resource codes and values

1. Choose Enterprise, Resources, then select the resource to which you want to assign a code and value.
2. Click the Codes tab.
3. Click Assign.
4. Select the resource code value you want to assign. You can only assign one value per code.
5. Click Assign, then click Close.

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Tip

- To change a code value assignment, double-click the code value you want to change and select a new code value.
- To remove a resource code, select the code and value you want to remove in the Codes tab, then click Remove.

Edit resource codes

1. Choose Enterprise, Resource Codes.
2. Click Modify.
3. Select the resource code you want to edit. To change the resource code's name, type a new name. To change the maximum number of characters the code's values may have, specify a new number. To change the placement of the code in the list, click Shift Up or Shift Down.
4. Click Close.

Tip

If you change a resource code, your changes apply to all resource assignments.

Edit resource code values

1. Choose Enterprise, Resource Codes.
2. Select the resource code whose value you want to change.
3. To change a value or description, double-click the item you want to change, then type the new text.

Tip

If you change a resource code value, your changes apply to all resource assignments.

Delete resource codes

1. Choose Enterprise, Resource Codes.
2. Click Modify.
3. Select the code you want to delete, then click Delete.
4. Click Yes.

Delete resource code values

1. Choose Enterprise, Resource Codes.

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2. Select the code whose value you want to delete.
3. Select the value you want to delete.
4. Click Delete.
5. Click Yes.

Role Codes

Role codes

You can categorize roles using codes. With potentially hundreds of roles being used across an enterprise of projects, codes provide another method for filtering the roles you need to access quickly, or for grouping roles for analysis and summarization in layouts. You can also use role codes to group, sort, and filter roles in profiles and spreadsheets.

Create role codes

1. Choose Enterprise, Role Codes.
2. Click Modify.
3. Click Add, then type the name of the role code.
4. In the Max Length field, specify the maximum number of characters for the role code's values.
5. Click Close.

> **Note**
>
> If you intend to use reporting software, avoid using commas when creating data other than Project names. The way that data is passed to some reporting software can cause a comma to be interpreted as a delimiter between data items.

> **Tip**
>
> To change the order in which role codes are listed, select the role code you want to move in the Role Code Definitions dialog box, then click Shift Up or Shift Down.

Create role code values

1. Choose Enterprise, Role Codes.
2. Select the role code for which you want to create a value.
3. Click Add.
4. Type the value's name and description.

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Assign role codes and values

1. Choose Enterprise, Roles, then select the role to which you want to assign a code and value.
2. Click the Codes tab.
3. Click Assign.
4. Select the role code value you want to assign. You can only assign one value per code.
5. Click Assign, then click Close.

Tip

- To change a code value assignment, double-click the code value you want to change and select a new code value.
- To remove a role code, select the code and value you want to remove in the Codes tab, then click Remove.

Edit role codes

1. Choose Enterprise, Role Codes.
2. Click Modify.
3. Select the role code you want to edit. To change the role code's name, type a new name. To change the maximum number of characters the code's values may have, specify a new number. To change the placement of the code in the list, click Shift Up or Shift Down.
4. Click Close.

Tip

If you change a role code, your changes apply to all role assignments.

Edit role code values

1. Choose Enterprise, Role Codes.
2. Select the role code whose value you want to change.
3. To change a value or description, double-click the item you want to change, then type the new text.

Tip

If you change a role code value, your changes apply to all role assignments.

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Delete role codes

1. Choose Enterprise, Role Codes.
2. Click Modify.
3. Select the code you want to delete, then click Delete.
4. Click Yes.

Activity Codes

Activity codes and values

Activity codes and values enable you to filter, group, sort, and report activity information according to your organization's unique requirements. For example, if your organization has more than one location, you can create a Location code with values such as New York, Los Angeles, and Chicago. You can then associate activities with a specific location, such as New York.

You can define three types of activity codes, global activity codes, EPS-level activity codes, and project-level activity codes. You can assign global activity codes and values to activities in all projects. You can assign EPS-level activity codes and values to the EPS.EPS-level activity codes are useful when you don't want certain codes to be accessible to all users, or project-specific. You can assign project-level activity codes and values to activities only in the project for which the codes were created. Each activity code can have an unlimited number of values.

You can also assign a color to an activity code value for use in Visualizer. Assign colors to activity code values when you want the option from within the Visualizer application to color bars using the colors assigned in P6 Professional. You can also update colors directly in Visualizer. These updates will be saved to the database.

Tip

If possible, you should create EPS-level activity codes at the highest level of the EPS so all projects that belong to a lower level EPS will have access to these codes.

Assign activity codes and values to activities

1. Choose Project, Activities, then select the activity to which you want to assign a code and value.
2. Display Activity Details, then click the Codes tab.
3. Click Assign.
4. If an applicable activity code value does not exist, then proceed as follows to create one. Otherwise, go to the next step. Click the New icon



, type the new value and its description, and click OK. Then go to the next step to select and assign it to the selected activity.

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5. Select the activity code value you want to assign. You can only assign one value per code.
6. Click Assign, then click Close.

> **Note**
>
> - If you intend to use reporting software, avoid using commas when creating data other than Project names. The way that data is passed to some reporting software can cause a comma to be interpreted as a delimiter between data items.
> - You can assign global activity codes to any activity. You can only assign project level activity codes to activities in the project where the codes were created.
> - You can only assign EPS-level activity codes that have been assigned to the selected activity's project.
> - Any EPS-level activity code associated with an inaccessible EPS node will appear under the "No EPS ID" node in the Assign Activity Codes dialog box.
> - The New icon is disabled if no code band is selected or if you do not have security to edit the selected type of activity code (global, EPS, or project).

Change activity code value assignments

1. Choose Project, Activities, then select the activity whose assigned code value you want to change.
2. Display Activity Details, then click the Codes tab.
3. Double-click the code value you want to change.
4. Select a new code value, then click Select.

Remove activity codes and values from activities

1. Choose Project, Activities, then select the activity from which you want to remove a code and value.
2. Display Activity Details, then click the Codes tab.
3. Select the activity code and value you want to remove, then click Remove.
4. Click Yes.

Defining Global Activity Codes and Values and Values Colors

Create global activity codes

1. Choose Enterprise, Activity Codes.
2. Choose Global.
3. In the Select Activity Code section, click Modify.
4. Click Add, then type the name of the global activity code.

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5. In the Max Length field, specify the maximum number of characters for the activity code's values.
6. Click Close.

> **Tip**
>
> To change the order in which global activity codes are listed, select the activity code you want to move in the Activity Code Definitions dialog box, then click Shift Up or Shift Down.

Create global activity code values

1. Choose Enterprise, Activity Codes.
2. Choose Global.
3. Select the activity code for which you want to create a value, then click Add.
4. Type the value's name.
5. Type the value's description.

> **Tip**
>
> - You can arrange activity code values hierarchically using the arrow buttons on the Activity Codes dialog box.
> - You can define the maximum number of levels in an activity code hierarchy on the Data Limits tab of the Admin Preferences dialog box when P6 Professional is connected to a P6 Professional database and from the P6, Application Settings when connected to a P6 EPPM database.
> - You can also create a new activity code value when assigning an activity code value to an activity.

Assign color to global activity code value

Colors assigned to activity code values are used only in Visualizer drawings.

This procedure assumes you have already created an activity code value for which you want to assign a color.

1. Choose Enterprise, Activity Codes.
2. Choose Global.
3. Select the activity code with the activity code value for which you want to assign a color.
4. Double-click the cell under the Color column for the applicable activity code value. This launches the Color dialog box. When you complete that dialog box, click OK.
5. Click Close.

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> **Note**
>
> - The color for each new activity code value defaults to blue.
> - The Color column is disabled for Global activity Codes if you do not have the "Edit Global Activity Codes" global privilege.
> - The Color column is disabled for secure codes if you do not have the "Edit Secure Codes" global privilege.
> - To remove color from an activity code value, launch the Color dialog box and assign the color white.

Edit global activity codes

1. Choose Enterprise, Activity Codes.
2. Choose Global, then click Modify.
3. Select the activity code you want to edit. To change the activity code's name, type a new name. To change the maximum number of characters the code's values may have, specify a new number. To change the placement of the code in the list, click the appropriate arrow.
4. Click Close.

> **Tip**
>
> If you change an activity code, your changes apply to all activity assignments.

Edit global activity code values

1. Choose Enterprise, Activity Codes.
2. Choose Global.
3. Select the activity code whose value you want to change. To change a value name or description, double-click the item you want to change, then type the new text. To change the placement of the code in the list, click Shift Up or Shift Down.
4. Click Close.

> **Tip**
>
> If you change an activity code value, your changes apply to all activity assignments.

Edit color of global activity code value

Colors assigned to activity code values are used only in Visualizer drawings.

This procedure assumes you have already created an activity code value for which you want to edit a color.

1. Choose Enterprise, Activity Codes.

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2. Choose Global.
3. Double-click the cell under the Color column for the applicable activity code value. This launches the Color dialog box. When you complete that dialog box, click OK.
4. Click Close.

> **Note**
>
> - The Color column is disabled for Global activity Codes if you do not have "Edit Global Activity Codes" global privilege.
> - The Color column is disabled for secure codes if you do not have "Edit Secure Codes" global privilege.
> - To remove color from an activity code value, launch the Color dialog box and assign the color white.

Delete global activity codes

1. Choose Enterprise, Activity Codes.
2. Choose Global, then click Modify.
3. Select the code you want to delete, then click Delete.
4. Click Yes.

> **Note**
>
> When you delete a global activity code, all code values associated with the deleted activity code and all activity assignments to those activity code values are automatically deleted.

Delete global activity code values

1. Choose Enterprise, Activity Codes.
2. Choose Global.
3. Select the code whose value you want to delete.
4. Select the value you want to delete, then click Delete.
5. Click Yes.

> **Note**
>
> When you delete a global activity code value, all activity assignments made to that activity code value are automatically deleted.

Defining Project Activity Codes and Values and Values Colors

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Create project-level activity codes

1. Choose Enterprise, Activity Codes.
2. Choose Project, then click Modify.
3. Select the project to which you want to add the activity code and click Add.
4. Type the name of the project activity code.
5. In the Max Length field, specify the maximum number of characters for the activity code's values.
6. Click Close.

> **Tip**
>
> To change the order in which project activity codes are listed, select the activity code you want to move in the Activity Code Definitions dialog box, then click Shift Up or Shift Down.

Create project-level activity code values

1. Choose Enterprise, Activity Codes.
2. Choose Project.
3. Select the activity code for which you want to create a value, then click Add.
4. Type the value's name.
5. Type the value's description.

> **Tip**
>
> - You can arrange activity code values hierarchically using the arrow buttons on the Activity Codes dialog box.
> - You can define the maximum number of levels in an activity code hierarchy on the Data Limits tab of the Admin Preferences dialog box when P6 Professional is connected to a P6 Professional database and from the P6, Application Settings when connected to a P6 EPPM database.
> - You can also create a new activity code value when assigning an activity code value to an activity.

Assign color to project-level activity code value

Colors assigned to activity code values are used only in Visualizer drawings.

This procedure assumes you have already created an activity code value for which you want to assign a color.

1. Choose Enterprise, Activity Codes.
2. Choose Project.

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3. Select the activity code with the activity code value for which you want to assign a color.
4. Double-click the cell under the Color column for the applicable activity code value. This launches the Color dialog box. When you complete that dialog box, click OK.
5. Click Close.

> **Note**
>
> - The color of each new activity code value defaults to blue.
> - The Color column is disabled for Project activity Codes if you do not have the "Edit Project Activity Codes" project privilege.
> - The Color column is disabled for secure codes if you do not have the "Edit Secure Codes" global privilege.
> - To remove color from an activity code value, launch the Color dialog box and assign the color white.

Edit project-level activity codes

1. Choose Enterprise, Activity Codes.
2. Choose Project, then click Modify.
3. Select the activity code you want to edit. To change the code's name, type a new name. To change the maximum number of characters the code's values may have, specify a new number. To change the placement of the code in the list, click Shift Up or Shift Down.
4. Click Close.

> **Tip**
>
> If you change an activity code, your changes apply to all activity assignments.

Edit project-level activity code values

1. Choose Enterprise, Activity Codes.
2. Choose Project.
3. Select the code whose value you want to change.
4. To change a value or description, double-click the item you want to change, then type the new text. To change the placement of the code in the list, click the appropriate arrow.
5. Click Close.

> **Tip**
>
> If you change an activity code value, your changes apply to all activity assignments.

Edit color of project-level activity code value

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Colors assigned to activity code values are used only in Visualizer drawings.

This procedure assumes you have already created an activity code value for which you want to edit a color.

1. Choose Enterprise, Activity Codes.
2. Choose Project.
3. Double-click the cell under the Color column for the applicable activity code value. This launches the Color dialog box. When you complete that dialog box, click OK.
4. Click Close.

> **Note**
>
> - The Color column is disabled for Project activity Codes if you do not have "Edit Project Activity Codes" project privilege.
> - The Color column is disabled for secure codes if you do not have "Edit Secure Codes" global privilege.
> - To remove color from an activity code value, launch the Color dialog box and assign the color white.

Delete project activity codes

1. Choose Enterprise, Activity Codes.
2. Choose Project, then click Modify.
3. Select the code you want to delete, then click Delete.
4. Click Yes.

> **Note**
>
> When you delete a project activity code, all code values associated with the deleted activity code and all activity assignments to those activity code values are automatically deleted.

Delete project-level activity code values

1. Choose Enterprise, Activity Codes.
2. Choose Project.
3. Select the code whose value you want to delete.
4. Select the value you want to delete, then click Delete.
5. Click Yes.

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> **Note**
>
> When you delete a project-level activity code value, all activity assignments made to that activity code value are automatically deleted.

Promote project-level activity codes and values

You can promote, or change, a project-level activity code and its values to a global or EPS-level activity code with global or EPS-level values.

1. Choose Enterprise, Activity Codes.
2. Choose Project, then click Modify.
3. Select the code you want to promote, then click Make Global or Make EPS.
4. Click Yes, then click Close.

> **Tip**
>
> If you promote a project-level activity code and its values, your change applies to all activity assignments.

Defining EPS-level Activity Codes and Values and Values Colors

Create EPS-level activity codes

1. Choose Enterprise, Activity Codes.
2. Choose EPS, then click Modify.
3. Click Add to select the EPS to which you want to add the activity code.
4. In the Activity Code Name field, type the name of the EPS-level activity code.
5. In the Max Length field, specify the maximum number of characters for the activity code's values.
6. Click Close.

> **Tip**
>
> To change the order in which EPS-level activity codes are listed, select the activity code you want to move in the Activity Code Definitions dialog box, then click Shift Up or Shift Down.

Create EPS-level activity code values

1. Choose Enterprise, Activity Codes.
2. Choose EPS.

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3. Select the activity code for which you want to create a value, then click Add.
4. Type the value's name.
5. Type the value's description.

Tip

- You can arrange activity code values hierarchically using the arrow buttons on the Activity Codes dialog box.
- You can define the maximum number of levels in an activity code hierarchy on the Data Limits tab of the Admin Preferences dialog box when P6 Professional is connected to a P6 Professional database and from the P6, Application Settings when connected to a P6 EPPM database.
- You can also create a new activity code value when assigning an activity code value to an activity.

Assign color to EPS-level activity code value

Colors assigned to activity code values are used only in Visualizer drawings.

This procedure assumes you have already created an activity code value for which you want to assign a color.

1. Choose Enterprise, Activity Codes.
2. Choose EPS.
3. Select the activity code with the activity code value for which you want to assign a color.
4. Double-click the cell under the Color column for the applicable activity code value. This launches the Color dialog box. When you complete that dialog box, click OK.
5. Click Close.

Note

- The color of each new activity code value defaults to blue.
- The Color column is disabled for EPS activity Codes if you do not have the "Edit EPS Activity Codes" project privilege.
- The Color column is disabled for secure codes if you do not have the "Edit Secure Codes" global privilege.
- To remove color from an activity code value, launch the Color dialog box and assign the color white.

Edit EPS-level activity codes

1. Choose Enterprise, Activity Codes.
2. Choose EPS, then click Modify.

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3. Select the activity code you want to edit. To change the code's name, type a new name. To change the maximum number of characters the code's values may have, specify a new number. To change the placement of the code in the list, click Shift Up or Shift Down.
4. Click Close.

Tip

- If you change an activity code, your changes apply to all activity assignments.
- Any code associated with an EPS-level you do not have access to, will appear under "No EPS ID". You can not modify or delete EPS-level activity codes listed under "No EPS ID".

Edit EPS-level activity code values

1. Choose Enterprise, Activity Codes.
2. Choose EPS.
3. Select the code whose value you want to change.
4. To change a value or description, double-click the item you want to change, then type the new text. To change the placement of the code in the list, click the appropriate arrow.
5. Click Close.

Tip

If you change an activity code value, your changes apply to all activity assignments.

Edit color of EPS-level activity code value

Colors assigned to activity code values are used only in Visualizer drawings.

This procedure assumes you have already created an activity code value for which you want to edit a color.

1. Choose Enterprise, Activity Codes.
2. Choose EPS.
3. Double-click the cell under the Color column for the applicable activity code value. This launches the Color dialog box. When you complete that dialog box, click OK.
4. Click Close.

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> **Note**
>
> - The Color column is disabled for EPS activity Codes if you do not have "Edit EPS Activity Codes" project privilege.
> - The Color column is disabled for secure codes if you do not have "Edit Secure Codes" global privilege.
> - To remove color from an activity code value, launch the Color dialog box and assign the color white.

Delete EPS level activity codes

1. Choose Enterprise, Activity Codes.
2. Choose EPS, then click Modify.
3. Select the code you want to delete, then click Delete.
4. Click Yes.

> **Note**
>
> When you delete an EPS-level activity code, all code values associated with the deleted activity code and all activity assignments to those activity code values are automatically deleted.

Delete EPS level activity code values

1. Choose Enterprise, Activity Codes.
2. Choose EPS.
3. Select the code whose value you want to delete.
4. Select the value you want to delete, then click Delete.
5. Click Yes.

> **Note**
>
> When you delete an EPS-level activity code value, all activity assignments made to that activity code value are automatically deleted.

Promote EPS-level activity codes and values

You can promote, or change, an EPS-level activity code and its values to a global activity code with global values.

1. Choose Enterprise, Activity Codes.
2. Choose EPS, then click Modify.
3. Select the code you want to promote, then click Make Global.

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4. Click Yes, then click Close.

> **Tip**
>
> If you promote an EPS-level activity code and its values, your change applies to all activity assignments.

Defining Custom Fields

User-defined fields

User-defined fields enable you to add your own custom fields and values to the project database. For example, you can track additional activity data, such as delivery dates and purchase order numbers, or resource and cost-related data, such as profit, variances, and revised budgets.

To create user-defined fields, choose Enterprise, User Defined Fields. Once you create user-defined fields, you can perform all of the following tasks:

- Display user-defined fields in columns of table views, then enter or select data in the columns. For example, if you add a user-defined field in the Activities subject area, you can display that user-defined field as a column in the Activity Table (Activities window).

  > **Note**
  >
  > You can only create columns for a UDF in the layout of the subject area in which you created the UDF. For example, if you create a UDF called Purchase Order Number in the Project Expenses subject area, the Purchase Order Number UDF can only be viewed in the Expenses layout.

- View user-defined fields on a detail tab.
- Group, sort, and filter data by user-defined fields. To group and sort based on UDFs, click View, Group and Sort. To filter data based on a UDF, select View, Filters.
- Add user-defined fields to reports you create or modify existing reports to include user-defined fields.
- Use Global Change to assign values to Activity, Activity Resource Assignments, and Expenses user-defined fields. To assign a global change click Tools, Global Change.

  > **Note**
  >
  > You must create UDFs in the User Defined Fields dialog before you can assign and populate UDFs using Global Change. There are no pre-existing UDFs available in the database.

- Create bars for user-defined date fields and view them in the Gantt chart. Click View, Bars. In the Bars dialog, click Add. Enter a name in the Name field. In the Timescale field, select User Dates (the User Start Date and User Finish Date fields will become enabled. Select

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the user-defined start and finish date values in the User Start Date and User Finish Date fields.

> **Note**
>
> You must create user-defined start date and finish date fields in the User Defined Fields dialog before you can create bars for these fields in the Gantt chart. Also, the User Finish Date and User Start Date columns are only editable when you select User Dates in the Timescale column.
>
> If you select a User Finish Date that is earlier than the User Start Date, or if there is no value associated with those fields, the bar will not be displayed.

Define custom user fields

1. Choose Enterprise, User Defined Fields.
2. Select the subject area of the product where you would like to add the new field, such as Activities, Activity Steps, Activity Resource Assignments, Projects, Resources, WBS, Expenses, Issues, and Work Products & Documents.
3. Click Add.
4. Enter a user-defined title for the new field and select a data type. For example, you could enter Purchase Order Number as the title and select Integer as the data type.

To assign values to custom user fields

1. In the appropriate window, add a column for the custom user field code. For example, if you created a UDF in the Activities subject area named Work Order Number, you can display a Work Order Number column in the Activity Table of the Activities window.
2. In the custom field column you added, type a value.

> **Note**
>
> - If you intend to use reporting software, avoid using commas when creating data other than Project names. The way that data is passed to some reporting software can cause a comma to be interpreted as a delimiter between data items.
> - You can also create new user-defined fields in the UDFs detail tab of your chosen subject area.
> - If the Data Type is an Indicator, in the custom field column you must select a value of red, yellow, green, or blue. You cannot enter any other value.
> - Only users with global security privileges to edit user-defined fields (UDFs) can add, modify, or delete UDFs. Users that do not have access rights to edit UDFs can still view them in the User Defined Fields dialog box.
> - Only users with project security privileges to view project cost data can view UDF values with a Data Type of Cost.

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Choosing data types for user-defined fields

A user-defined field's data type determines the kind of data you can enter in the field, such as text, numbers, or dates. The following table summarizes the data types available for user-defined fields.

Data type	Use for
Text	Text or combinations of text and numbers
Start Date	Start date
Finish Date	Finish date
Cost	Currency values
Indicator	An indicator field that you can use to enter color-coded values in columns and display them in reports
Number	Numeric with two decimal places
Integer	Numeric data, except money

Indicator user-defined fields

Indicators are a special type of user-defined field (UDF) that enable you to select color-coded icons as values for display in columns and reports.

Indicator UDFs can be used to highlight Activities, Activity Steps, Activity Resource Assignments, Projects, Resources, WBS, Expenses, Issues and Work Products & Documents. For example, you could group activities based on priority or status using Indicator UDFs.

Like all other UDFs, you can perform the following functions using Indicator UDFs:

- Display in columns
- View on detail tabs
- Group and sort data based on indicators
- Filter data based on indicators
- Perform global changes
- Display timescale bars
- View indicator data in reports using columns, group and sort, and filters.

To assign values to indicator fields:

You are required to create a column for the UDF, click in the field, and select an icon from the list. An indicator UDF can have one of four values: red, yellow, green, or blue. You must select one of these values whenever you enter a value for an Indicator UDF, whether in columns, group and sort, filters, reports, global change or bars.

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> **Note**
>
> In columns, filters, global change, and group and sort, indicator UDF values appear as icons. In reports, indicator UDF columns show the text value of the icon (that is, rather than displaying the icon, the value is red, yellow, green, or blue).

Defining Calendars

Calendars

You can create and assign calendars to each resource, each project, and each activity. For each calendar, you can define the following:

- available workhours in each calendar day
- default hours per time period settings that are used as conversion factors when entering or displaying units in time increments other than hours
- national holidays
- your organization's holidays
- project-specific work/ nonworkdays
- resource vacation days.

Calendar assignments are used for activity scheduling, tracking, and resource leveling. Whether an activity uses its assigned calendar or the calendar of an assigned resource depends on the activity type you specify (task-dependent versus resource-dependent).

Three calendar pools are defined: global, resource, and project. The global calendar pool contains calendars that apply to all projects. The project calendar pool is a separate pool of calendars for each project. The resource calendar pool can be a separate pool of calendars for each resource. You can assign either resource or global calendars to resources, and you can assign either global or project calendars to activities.

You can link resource and project calendars to global calendars. Then, if you make changes to a global calendar, your changes apply to all resource and project calendars that are linked to the modified global calendar.

Shared and Personal Resource Calendars

Resource calendars consist of two types:

- Shared Resource Calendar
  When connected to a P6 EPPM database: Shared resource calendars can be assigned to multiple resources, and only users with Add/Edit/Delete Resource Calendars privilege (as defined using P6) can edit a shared resource calendar.

  When connected to a P6 Professional database: Shared resource calendars can be assigned to multiple resources, and only users with Add/Edit/Delete Resource Calendars privilege can edit a shared resource calendar.
- Personal Resource Calendar
  Personal resource calendars are similar to shared resource calendars except a personal resource calendar is assigned to only one user, and that user can can edit their standard workweek, their default work hours per time period, and exceptions in their personal

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resource calendar without needing any privileges. A user assigned a personal resource calendar can edit it by choosing Enterprise, Calendars, and then selecting their calendar.

When connected to a P6 EPPM database: To edit a personal resource calendar, the user must be defined (using P6), a resource representing the user must be defined (using P6 or P6 Professional), the user must be associated with the corresponding resource (using P6), and a personal resource calendar must be created for that user (using P6 or P6 Professional).

When connected to a P6 Professional database: To edit a personal resource calendar, the user must be defined, a resource representing the user must be defined, the user must be associated with the corresponding resource, and a personal resource calendar must be created for that user.

You can convert shared resource calendars to personal resource calendars only if zero or one resource is assigned to the shared calendar, and you can convert a personal resource calendar to a shared resource calendar. Also, to convert calendars between shared and personal you must have the Add/Edit/Delete Resource Calendars privilege. When P6 Professional is connected to a P6 EPPM database, this is defined in P6 .

Note

- You can create a personal resource calendar using the Calendars dictionary, the Resource Details, Details tab, or the New Resource Wizard.
- To create a personal resource calendar, you must have the Add/Edit/Delete Resource Calendars privilege.

Defining default hours per time period in calendars

P6 Professional calculates and stores time unit values in hourly increments, but you can set preferences to display time units in other increments, such as days or weeks. The values specified for Hours per Time Period 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.

When P6 Professional is connected to a P6 Professional database:

Administrators can define Hours per Time Period settings globally on the Admin Preferences, Time Periods tab, or they can specify that the Hours per Time Period settings should be defined per calendar.

When Hours per Time Period settings are defined per calendar, units and durations are displayed more accurately. When Hours per Time Period settings are defined globally and you set your user preferences to display units and durations in time increments other than hours, units and durations will display unexpected values when the Admin settings for Hours per Time Period do not match the work hours specified in calendars assigned to activities and resources. This occurs because the display reflects the conversion factor of the Admin Preference Hours per Time Period settings, not the hours per day defined by the activity's or resource's assigned calendar.

For example,

User Preferences, Time Units = day

Admin Preferences, Hours per Time Period = 8h/d

Activity calendar, Work hours per day = 10h/d

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User-entered activity duration = 30h

Actual duration display = 3d6h (30h duration/8h per day, based on the conversion factor set in Admin Preferences)

Expected duration display = 3d (30h duration/10h per day, based on the conversion factor set in the activity calendar)

To avoid unexpected display results, an administrator should mark the 'Use assigned calendar to specify the number of work hours for each time period' checkbox on the Admin Preferences, Time Periods tab. Then, you can specify the Hours per Time Period settings for each defined calendar, and assign these calendars to the appropriate activities and resources.

When P6 Professional is connected to a P6 EPPM database:

Administrators can define Hours per Time Period settings globally from the P6, Application Settings, or they can specify that the Hours per Time Period settings should be defined per calendar.

When Hours per Time Period settings are defined per calendar, units and durations are displayed more accurately. When Hours per Time Period settings are defined globally and you set your user preferences to display units and durations in time increments other than hours, units and durations will display unexpected values when the P6 Application Settings settings for Hours per Time Period do not match the work hours specified in calendars assigned to activities and resources. This occurs because the display reflects the conversion factor of the Application Settings Hours per Time Period settings, not the hours per day defined by the activity's or resource's assigned calendar.

For example,

User Preferences, Time Units = day

P6, Application Settings, Hours per Time Period = 8h/d

Activity calendar, Work hours per day = 10h/d

User-entered activity duration = 30h

Actual duration display = 3d6h (30h duration/8h per day, based on the conversion factor set in P6, Application Settings)

Expected duration display = 3d (30h duration/10h per day, based on the conversion factor set in the activity calendar)

To avoid unexpected display results, an administrator should mark the 'Use assigned calendar to specify the number of work hours for each time period' checkbox from the Application Settings in P6. Then, you can specify the Hours per Time Period settings for each defined calendar, and assign these calendars to the appropriate activities and resources.

Project Calendars

Create a project calendar

1. Choose Enterprise, Calendars, then choose Project.
2. If more than one project is open, select the projects to which you want to add a calendar, then click Add.

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3. Select the calendar you want to copy for the new project calendar, then click the Select button.
4. Type the new calendar's name.
5. Click Modify and edit the new calendar.

Edit a project calendar

1. Choose Enterprise, Calendars, then choose Project.
2. Select the calendar you want to edit and click Modify.
3. To base the calendar on another calendar, select a new global calendar in the Inherit Holidays and Exceptions from Global Calendar field.
4. Choose the month you want to modify by clicking the appropriate arrow button next to the month-year title.
5. To add a nonworkday, click the date you want to make a nonworkday, then click Nonwork.
6. To change the number of hours in a specific workday, click the date you want to change. Choose Total work hours/day to define the total working hours in each day. In the Work hours/day section, set the amount of hours available to work for a specific day. Choose Detailed work hours/day to define which hours of the day are work or nonwork hours. In the Work hours section, select the hours you want to change and click Work or Nonwork. If the date's display color changes to white, the number of hours you entered does not equal the default number of working hours for that weekday.
7. To make an exception into a workday and apply the default number of working hours to that day, click the exception you want to change, then click Standard.
8. To define the calendar's default hours per timeperiod, click Time Periods. For each timeperiod, enter the default number of hours. For activities to which the calendar is assigned, these values are used as conversion factors when users enter or display units and durations in time increments other than hours.

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Tip

- To apply the same change to all instances of a specific weekday in the displayed month, click the weekday's column label.
- To view a calendar's assignments, in the Calendars Dialog Box, select the calendar, then click Used By.
- When an assignment to an activity has manual future period values, editing the project calendar for the associated activity may cause the manual values to change.
- The program calculates and stores time unit values in hourly increments, but users can set preferences to display time units in other increments, such as days or weeks. When you define the Hours per Time Period for a calendar, these values are used to accurately convert units and durations to the selected display format for activities to which the calendar is assigned.
- When connected to a P6 Professional database: Fields in this dialog box are disabled if the "Use assigned calendar to specify the number of work hours for each time period" checkbox on the Admin Preferences, Time Periods tab, is not marked. If this checkbox is not marked, default hours per time period settings are defined on the Admin Preferences, Time Periods tab.
- When connected to a P6 EPPM database: Fields in this dialog box are disabled if the "Use assigned calendar to specify the number of work hours for each time period" checkbox, accessed from the P6 Application Settings, is not marked. If this checkbox is not marked, default hours per time period settings are defined from the P6 Application Settings.

Note

Working hours defined with decimal values other than .0 or .5 will round up or down to .0 or .5.

Delete a project calendar

1. Choose Enterprise, Calendars.
2. Choose Project.
3. Select the calendar you want to delete, then click Delete.
4. If the calendar has assignments, the Calendars in Use dialog box is displayed. To delete the calendar and move its assignments to a calendar you select, choose Select Replacement Calendar, click OK, then select a replacement calendar. To delete the calendar and move its assignments to the default global calendar, choose Link to Default Global Calendar, then click OK.

View project calendar assignments

1. Choose Enterprise, Calendars.
2. Choose Project.

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3. Select the calendar whose assignments you want to view, then click Used By.

Global Calendars

Create a global calendar

1. Choose Enterprise, Calendars.
2. Choose Global, then click Add.
3. Select the calendar you want to copy for the new global calendar, then click the Select button.
4. Type the new calendar's name.
5. Mark the Default checkbox to make the new calendar the default global calendar for activities and resources.
6. Click Modify and edit the new calendar.

Edit a global calendar

1. Choose Enterprise, Calendars, then choose Global.
2. Select the calendar you want to edit and click Modify.
3. Choose the month you want to modify by clicking the appropriate arrow button next to the month-year title.
4. To add a nonworkday, click the date you want to make a nonworkday, then click Nonwork.
5. To change the number of hours in a specific workday, click the date you want to change. Choose Total work hours/day to define the total working hours in each day. In the Work hours/day section, set the amount of hours available to work for a specific day. Choose Detailed work hours/day to define which hours of the day are work or nonwork hours. In the Work hours section, select the hours you want to change and click Work or Nonwork. If the date's display color changes to white, the number of hours you entered does not equal the default number of working hours for that weekday.
6. To make an exception into a workday and apply the default number of working hours to that day, click the exception you want to change, then click Standard.
7. To define the calendar's default hours per timeperiod, click Time Periods. For each timeperiod, enter the default number of hours. For activities and resources to which the calendar is assigned, these values are used as conversion factors when users enter or display units and durations in time increments other than hours.

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Tip

- To apply the same change to all instances of a specific weekday in the displayed month, click the weekday's column label.
- To view a calendar's assignments, in the Calendars Dialog Box, select the calendar, then click Used By.
- When an activity's resource assignment has manual future period values, editing the global calendar for the associated activity or resource may cause the manual values to change.
- The program calculates and stores time unit values in hourly increments, but users can set preferences to display time units in other increments, such as days or weeks. When you define the Hours per Time Period for a calendar, these values are used to accurately convert units and durations to the selected display format for activities and resources to which the calendar is assigned.
- When connected to a P6 Professional database: Fields in this dialog box are disabled if the "Use assigned calendar to specify the number of work hours for each time period" checkbox on the Admin Preferences, Time Periods tab, is not marked. If this checkbox is not marked, default hours per time period settings are defined on the Admin Preferences, Time Periods tab.
- When connected to a P6 EPPM database: Fields in this dialog box are disabled if the "Use assigned calendar to specify the number of work hours for each time period" checkbox, accessed from the P6 Application Settings, is not marked. If this checkbox is not marked, default hours per time period settings are defined from the P6 Application Settings.

Note

Working hours defined with decimal values other than .0 or .5 will round up or down to .0 or .5.

Delete a global calendar

1. Choose Enterprise, Calendars.
2. Choose Global.
3. Select the calendar you want to delete, then click Delete.
4. If the calendar has assignments, the Calendars in Use dialog box is displayed. To delete the calendar and move its assignments to a calendar you select, choose Select Replacement Calendar, click OK, then select a replacement calendar. To delete the calendar and move its assignments to the default global calendar, choose Link to Default Global Calendar, then click OK.

Specify a default global calendar

1. Choose Enterprise, Calendars.
2. Choose Global.

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3. Mark the Default checkbox next to the calendar you want to designate as the default global calendar.

View global calendar assignments

1. Choose Enterprise, Calendars.
2. Choose Global.
3. Select the calendar whose assignments you want to view, then click Used By.

Resource Calendars

Create a shared resource calendar

Use this task to create a shared resource calendar.

1. Choose Enterprise, Calendars.
2. Choose Resource, then click Add.
3. Select the calendar you want to copy for the new resource calendar, then click the Select icon.
4. Type the new calendar's name.
5. Click Modify and edit the new calendar.

Create a personal resource calendar

Use this task to create and assign a personal resource calendar.

> **Note**
>
> When P6 Professional is connected to a P6 EPPM database:
>
> - You must have the Add/Edit/Delete Resource Calendars privilege, as defined in P6, to create personal resource calendars.
> - Before you create a personal resource calendar for a user, the user must be defined (using P6), a resource representing the user must be defined (using P6 or P6 Professional), and the user must be associated with the corresponding resource (using P6).
> - You must have the Add/Edit/Delete Resource Calendars privilege to create personal resource calendars.
> - Before you create a personal resource calendar for a user, the user must be defined, a resource representing the user must be defined, and the user must be associated with the corresponding resource.
>
> When P6 Professional is connected to a P6 Professional database:

1. Choose Enterprise, Calendars.
2. Choose Resource.

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3. Select any row in the Personal Resource Calendars group, or click the Display Options bar, then click Filter By, Personal Resource Calendars and select any row.
4. Click Add.
5. In the Select Resources dialog box, select the resource for which you want to create a personal resource calendar.

> **Note**
>
> The list of resources does not include resources already assigned to a personal resource calendar unless you filter the list of resources by All Resources.

6. Click the Select icon.
7. In the Calendars dialog box, click Modify and edit the new calendar.

Edit a resource calendar

This topic is intended for the administrator who defines resource calendars.

1. Choose Enterprise, Calendars, then choose Resource.
2. Select the calendar you want to edit and click Modify.
3. To base the calendar on another calendar, select a new global calendar in the Inherit Holidays and Exceptions from Global Calendar field.
4. Choose the month you want to modify by clicking the appropriate arrow button next to the month-year title.
5. To add a nonworkday, click the date you want to make a nonworkday, then click Nonwork.
6. To change the number of hours in a specific workday, click the date you want to change. Choose Total work hours/day to define the total working hours in each day. In the Work hours/day section, set the amount of hours available to work for a specific day. Choose Detailed work hours/day to define which hours of the day are work or nonwork hours. In the Work hours section, select the hours you want to change and click Work or Nonwork. If the date's display color changes to white, the number of hours you entered does not equal the default number of working hours for that weekday.
7. To make an exception into a workday and apply the default number of working hours to that day, click the exception you want to change, then click Standard.
8. To define the calendar's default hours per timeperiod, click Time Periods.or each timeperiod, enter the default number of hours. For activities and resources to which the calendar is assigned, these values are used as conversion factors when users enter or display units and durations in time increments other than hours.

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Tip

- To apply the same change to all insta
- nces of a specific weekday in the displayed month, click the weekday's column label.
- To view a calendar's assignments, in the Calendars dialog box, select the calendar, then click Used By.
- When a resource assignment has manual future period values, editing the resource's associated resource calendar may cause the manual values to change.
- When connected to a P6 EPPM database: P6 and P6 Professional calculates and stores time unit values in hourly increments, but users can set preferences to display time units in other increments, such as days or weeks.
- When connected to a P6 Professional database: P6 Professional calculates and stores time unit values in hourly increments, but users can set preferences to display time units in other increments, such as days or weeks.
- When you define the Hours per Time Period for a calendar, these values are used to accurately convert units and durations to the selected display format for activities to which the calendar is assigned.
- When connected to a P6 EPPM database: The Time Periods button is always enabled, but if the Application Settings in P6 is not marked, the fields in the Hours per Time Period dialog are disabled.
- When connected to a P6 Professional database: The Time Periods button is enabled when the 'Use assigned calendar to specify the number of work hours for each time period' checkbox on the Admin Preferences, Time Periods tab is marked.

Note

Working hours defined with decimal values other than .0 or .5 will round up or down to .0 or .5.

Edit your personal resource calendar

Use this task to edit your standard workweek and exception time in your personal resource calendar.

This task is intended for users who have been assigned a personal resource calendar; it assumes you do not have the Add/Edit/Delete Resource Calendars privilege.

1. Choose Enterprise, Calendars, then choose Resource.
2. Select your personal resource calendar and click Modify.
3. Choose the month you want to modify by clicking the appropriate arrow button next to the month-year title.
4. To add a nonworkday, click the date you want to make a nonworkday, then click Nonwork.
5. To change the number of hours in a specific workday, click the date you want to change. Choose Total work hours/day to define the total working hours in each day. In the Work

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hours/day section, set the amount of hours available to work for a specific day. Choose Detailed work hours/day to define which hours of the day are work or nonwork hours. In the Work hours section, select the hours you want to change and click Work or Nonwork. If the date's display color changes to white, the number of hours you entered does not equal the default number of working hours for that weekday.

6. To make an exception into a workday and apply the default number of working hours to that day, click the exception you want to change, then click Standard.
7. If you want to edit your standard workweek, proceed as follows:
   a. Click Workweek.
   b. In the Calendar Weekly Hours dialog box, select the day of the week for which you want to change the default working hours for the open calendar.
      - To reduce the default working hours, select the work hours to change and click Nonwork. To increase the default working hours, select the nonwork hours to change, and click Work.
      - Repeat this substep for each applicable day of the week.
   c. Click OK.
8. If you want to edit the calendar's default hours per timeperiod, click Time Periods. For each timeperiod, enter the default number of hours.
   For activities and resources to which this calendar is assigned, these values are used as conversion factors when you enter or display units and durations in time increments other than hours.

Tip

- To apply the same change to all instances of a specific weekday in the displayed month, click the weekday's column label.
- When your assignments to activities have have manual future period values, editing your resource calendar may cause the manual values to change.

Delete a resource calendar

1. Choose Enterprise, Calendars.
2. Choose Resource.
3. Select the calendar you want to delete, then click Delete.
4. If the calendar has resource assignments, the Calendars in Use dialog box appears. To delete the calendar and move its assignments to a calendar you select, choose Select Replacement Calendar, click OK, then select a replacement calendar. To delete the calendar and move its assignments to the default global calendar, choose Link to Default Global Calendar, then click OK.

View resource calendar assignments

1. Choose Enterprise, Calendars.
2. Choose Resource.
3. Select the calendar whose assignments you want to view, then click Used By.

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Convert a shared resource calendar to a personal resource calendar

1. Choose Enterprise, Calendars.
2. Choose Resource.
3. Select the shared resource calendar you want to convert to a personal resource calendar.
4. Click To Personal.
5. Proceed as follows:
   - If a single resource is assigned to the calendar, a confirmation message appears. Click Yes.
   - If no resources are assigned to the calendar, the Select Resource dialog box appears. Select a resource to assign to the calendar. A confirmation message appears. Click Yes.

> **Note**
>
> – You cannot convert a shared resource calendar to a personal resource calendar when multiple resources are assigned to calendar.
>
> – The calendar is not renamed when it is converted from a shared resource calendar to a personal resource calendar.

Convert a personal resource calendar to a shared resource calendar

1. Choose Enterprise, Calendars.
2. Choose Resource.
3. Select the personal resource calendar you want to convert to a shared resource calendar.
4. Click To Shared.
5. A confirmation message appears. Click Yes.

Defining Resources and Roles

Resources

Resources

Resources include the personnel and equipment that perform work on activities across all projects. Resources are generally reused between activities and/or projects. In P6 Professional you can create a resource pool that reflects your organization's resource structure and supports the assignment of resources to activities. P6 Professional also enables you to distinguish between labor, material, and nonlabor resources. Labor and nonlabor resources are always time-based, and material resources, such as consumable items, use a unit of measure you can specify. You can create and assign resource calendars and define a resource's roles, contact information, and time-varying prices.

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Define a master list of resources consisting of the resources necessary to complete the projects in your organization. Then, group resources to create an easily accessible pool from which you can draw when assigning resources to a project. For each resource, set availability limits, unit prices, and a calendar to define its standard worktime and nonworktime, then allocate resources to the activities that require them. To enable grouping and rollups of your resources across the organization, set up resource codes and assign code values.

Resources are different from expenses. While resources can be time-based and generally extend across multiple activities and/or projects, expenses are one-time expenditures for nonreusable items required by activities. P6 Professional does not include expenses when leveling resources.

Primary Resources

P6 Professional allows you to assign primary resources to activities. An activity's primary resource is typically the resource who is responsible for coordinating an activity's work.

Resource Security

Resource security allows the administrator to restrict your resource access by assigning you to a node in the resource hierarchy. That node is your root node. Once assigned to a resource node, you have access only to your root node and all of its children. In the Resource Assignments window you still have access to current project resources even if they are outside your root node.

Add a resource

1. Choose Enterprise, Resources.
2. If necessary, click the Display options bar, then choose Filter By, All Resources, to display the resource hierarchy. If resource security is enabled, you can only view resources you have access to. Therefore, you can add a new resource only to the hierarchy you have access to.
3. Select the resource to which you want to add a new child resource. You can use the arrow icons on the Move toolbar to position the new resource after you add it. You can also display the resource hierarchy as a list rather than a hierarchy; when you display a resource list, the new resource is added at the root level of the hierarchy. To switch between list and hierarchy views in the Resources window, click the column label furthest to the left in the Resources window.
4. Click

   on the Edit toolbar or choose Edit, Add. Depending on your user preferences, the New Resource wizard may start. Follow the prompts on each dialog box to create the resource.
5. Click each tab in Resource Details and enter the resource's information.

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Tip

- If resource security is enabled you can add a resource only under your root node. Under your root node, you can select any resource node and click the Add button. The new resource is added as a child to the selected node.
- You can indent or outdent any resources you have access to, except your root node. Since your root node is the highest level of resource you have access to, you cannot outdent any other resources to the same level. By changing the position of a resource in the resource hierarchy, you change the resource's accessibility for all users that are assigned to that resource.
- You can enter the default units/time as a numeric valued followed by a forward slash (/) and the appropriate time duration, depending on your user preference setting for time units, or as a percentage for labor and nonlabor units.
- You can use limits to delay the start of a resource in the project schedule until the resource is available. For example, if a resource is hired in August but does not start until September, you can add their activities and assignments to the project and then set the resource limits as follows:

Effective Date	Max Units/Time
10AUG01	0h/h
10SEP01	1h/h

Note

If you intend to use reporting software, avoid using commas when creating data other than Project names. The way that data is passed to some reporting software can cause a comma to be interpreted as a delimiter between data items.

When connected to a P6 Professional database: The email address and office phone number you type in the Resources window General tab overwrites the email address and office phone number recorded in the Users dialog box, if that information is different. Likewise, email and phone information you enter for a resource in the Users dialog box overwrites the information in the Resources window.

When connected to a P6 EPPM database: The email address and office phone number you type in the Resources window General tab overwrites the email address and office phone number recorded using P6, if that information is different. Likewise, email and phone information you enter for a resource in P6 overwrites the information in the Resources window.

Adding resources using a wizard

Resources include the personnel and equipment that perform work on activities across all projects. You can create a resource pool that reflects your organization's resource structure and supports the assignment of resources to activities.

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If the Use New Resource Wizard checkbox is marked in the User Preferences dialog box, the New Resource Wizard displays each time you add a resource to guide you through the process.

View resources

1. Choose Enterprise, Resources.

> **Note**
>
> If you cannot see all resources, resource security may be enabled. In that case, you can only see resources you have access to.

Define resource shifts

You can globally define shifts that span specific workhours over a period of time. You can also apply one or more shifts directly to specific resources.

1. Choose Enterprise, Resource Shifts.
2. Click Add, then type the new shift's name.
3. Click Modify to define the workhours for the new shift.
4. Click Add, then enter the start hour for each shift segment. The total shift hours must add up to 24 hours and each shift segment must have a duration of at least one hour. The start hour must begin and end on the hour, for example, 8:00, rather than 8:30 A.M.

> **Note**
>
> This note applies only when P6 Professional is connected to a P6 Professional database because leveling in P6 does not consider shifts.
>
> Shift hours are considered when calculating units and prices during leveling. The resource calendar is used to determine when the resource can work; the limits for that period are determined from the shift definition for that resource. The minimum resource availability for every shift must satisfy the minimum demand for the resource so that the resource can be leveled properly. Limits defined outside the boundaries of the shift definition are ignored. Since shifts are defined at the resource level, all projects are leveled using that resource according to the shift definition.

Assign shared resource calendars to resources

Use this topic to assign a shared resource calendar to a resource. See Create and assign a personal resource calendar to create and assign a personal resource calendar.

1. Choose Enterprise, Resources.
2. Select the resource to which you want to assign a calendar.
3. Click the Details tab, then click

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in the Calendar field. To change the calendars display, click the Display Options bar.

4. Select the calendar you want to assign, then click the Select button.

Create and assign a personal resource calendar

Use this topic to create and assign a personal resource calendar.

> **Note**
>
> - When connected to a P6 EPPM database: The following must be done for the user to edit their personal resource calendar: The user must be defined (using P6), a resource representing the user must be defined (using P6 or P6 Professional), and the user must be associated with the corresponding resource (using P6).
> - When connected to a P6 Professional database: The following must be done for the user to edit their personal resource calendar: The user must be defined, a resource representing the user must be defined, and the user must be associated with the corresponding resource.

1. Choose Enterprise, Resources.
2. Select the resource to which you want to assign a personal resource calendar. In Resource Details, click the Details tab.
3. Click Create Personal Calendar.
4. From the Calendar dialog box, edit the new calendar as discussed in Edit a resource calendar.
5. Click OK when you finish editing the calendar. The calendar name defaults to <Resource ID> - <Resource Name>.

Copy and paste a resource

1. Choose Enterprise, Resources.
2. If necessary, choose View, Filter By, All Resources, to display all resources. If resource security is enabled you can only view resources you have access to. Therefore, you can copy and paste a resource only to the hierarchy you have access to.
3. Choose View, Group and Sort By, Default.
4. Select the resource you want to copy, then choose Edit, Copy.
5. Select the resource to which you want to add the copy, then choose Edit, Paste. Choose Sub-Resources to copy all resources contained in the resource you want to copy. Choose Role Assignments to copy the resource's role assignments. Choose Prices to copy the resource's price information.

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Tip

- Copying a resource that has a personal resource calendar assigns the copied resource to the global default calendar.
- You can copy and paste any resources you have access to based on resource security settings. If you copy and paste a resource node that previously had been assigned to users to provide resource security, those users remain assigned to the original resource node. Since resource security information is not copied, you can copy and paste your root node as well.
- If you mark Do not show this window again, the Copy Resource Options dialog box will not display again until you restart the application.

Cut and paste a resource

1. Choose Enterprise, Resources.
2. If necessary, choose View, Filter By, All Resources, to display all resources.
3. Choose View, Group and Sort By, Default, to display the resource hierarchy. If resource security is enabled you can only view resources you have access to. Therefore, you can cut and paste a resource only to the hierarchy you have access to.
4. Select the resource you want to cut and paste, then choose Edit, Cut.
5. Select the resource to which you want to add the cut resource, then choose Edit, Paste.

Note

- When you cut and paste a resource, the resource's activity assignments are also cut and pasted.
- You can cut and paste any resources you have access to, except your root node. However, keep in mind that changing the resource hierarchy changes the resource's accessibility for users previously assigned to those nodes.

Display resource details

1. Choose Enterprise, Resources, then choose View, Show on Bottom, Details.

Note

If resource security is enabled, you can only see resources you have access to.

Edit resource information

1. Choose Enterprise, Resources.
2. If necessary, choose View, Filter By, All Resources, to display all resources.
3. Choose View, Group and Sort By, Default.

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4. Select the resource you want to edit. To change the resource's position in the hierarchy, click the appropriate arrow buttons.
5. Click each tab in Resource Details to enter new information.

> **Note**
>
> - When connected to a P6 Professional database: The email address and office phone number you type in the Resources window General tab overwrites the email address and office phone number recorded in the Users dialog box, if that information is different. Likewise, email and phone information you enter for a resource in the Users dialog box overwrites the information in the Resources window.
> - When connected to a P6 EPPM database: The email address and office phone number you type in the Resources window General tab overwrites the email address and office phone number recorded using P6, if that information is different. Likewise, email and phone information you enter for a resource in P6 overwrites the information in the Resources window.
> - If resource security is enabled you can only see resources you have access to.

Delete a resource

> **Note**
>
> In most circumstances you should not delete resources. Instead, clear the Active checkbox.

1. Choose Enterprise, Resources.
2. Select the resource you want to delete, then choose Edit, Delete.
3. If the resource you want to delete has activity assignments or other associated data, the Delete Resource dialog box appears. To delete the resource and reassign, or merge, the resource's associated data to its parent resource, choose Select Replacement Resource. See Parent Resource. To delete the resource without reassigning its associated data, choose Delete Selected Resource.

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Tip

- If your organization manually plans future period resource and role distribution in the Resource Usage Spreadsheet, you should determine if the resource you are deleting has manual future period values. If so, you should choose to merge the resource's associated data with another resource; otherwise, the manual future period values will be lost. See Manual future period buckets. To determine if the resource has manual future period assignment data, in the Resource Assignments window, display the Curve column and group the layout by resource. The module displays a 'Manual' value in the Curve column for all assignments that have been manually planned.
- You can delete any resources that you have access to based on resource security settings. See Introduction to Resource Security. Deleting a resource also removes all of its children from the hierarchy. If the deleted resources or any of its children were previously assigned to users to provide resource security, those users automatically get 'No Resources' access. Then, the administrator can re-assign the users to another resource. If you delete your own root node, you also get 'No Resources' access, which means you cannot view any resources next time you log in.

Note

If you delete a parent resource, all of the resources contained in the parent resource, and all of their assignments, are deleted.

For resources with personal calendars, deleting a resource automatically deletes the resource's personal calendar even if the user performing the deletion does not have rights to add/edit/delete resource calendars.

Enter comments about resources

1. Choose Enterprise, Resources.
2. Select the resource about which you want to view or enter comments.
3. Click the Notes tab.
4. Click Modify, they type your comments.

Specify the resource type for resources

1. Choose Enterprise, Resources.
2. Select the resource whose resource type you want to enter.
3. Click the Details tab.
4. To indicate that the selected resource performs labor, which is measured in units of time, choose Labor.
5. To indicate that the selected resource does not perform labor, for example, if the resource is equipment, choose Nonlabor. The nonlabor resource is measured in units of time.

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6. To indicate that the selected resource is measured in units other than time, choose Material. If you selected Material as the resource type, select a unit of measure for the resource.

> **Note**
>
> - When connected to a P6 EPPM database: You can define a unit of measure for material resources using P6.
> - When connected to a P6 Professional database: You can define a unit of measure for material resources in the Units of Measure tab of Admin Categories, in the Admin menu.

Specify the unit of measure for material resources

A unit of measure describes the quantity of a particular resource. Labor resources are often measured in units of time, such as hours or days; materials can be measured in cubic or linear feet, or perhaps in tons or kilos; items used one-by-one can be measured individually (EA) or as shipped: a box, a case, a pallet. Money is generally measured in monetary units, such as dollars, euros, or yen.

1. Choose Enterprise, Resources.
2. In the Details tab, choose Material as the resource type for the selected resource.
3. Select a value in the Units of Measure field.

> **Note**
>
> - When connected to a P6 EPPM database: You can define a unit of measure for material resources using P6.
> - When connected to a P6 Professional database: You can define a unit of measure for material resources in the Units of Measure tab of Admin Categories, in the Admin menu.
> - If a unit of measure is not assigned, the unit of measure for the material resource will be Unit.

Change Resources tab columns

1. Choose Project, Activities.
2. Display Activity Details, then click the Resources tab. See Display window details.
3. Right-click anywhere in the tab, then choose Customize Resource Columns. To add a column to the Resources tab, in the Available Options section, click the column you want to add, then click



.To remove a column from the Resources tab, in the Selected Options section, click the column you want to remove, then click

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. To return to the default columns settings, click Default. To change the title, width, and alignment of a column, select column and click Edit Column. To apply your changes without closing this dialog box, click Apply.

4. Click OK.

Specify how resources report hours

For any resource, you can use the auto-compute actuals feature to automatically calculate actual progress according to the project plan or you can manually record progress data collected from resources via other means.

1. Choose Enterprise, Resources and display the Details tabs.
2. Select the resource whose reporting method you want to specify.
3. Click the Details tab, then mark the Auto Compute Actuals checkbox. Based on the assignment planned units and the activity's percent complete, resource actual units and remaining units are automatically calculated when Apply Actuals is run.

Collaborate with resources and enter activity feedback

Using Activity Details, you can collaborate on activities by entering activity-specific messages or feedback for other users to view; all users who can access the activity can view your feedback and provide their own feedback that you can view.

> **Note**
>
> Although available to any user, the following procedure is intended for use by project managers, project planners, or people in similar roles, and resources assigned to the activity.

1. In the Activities window, select the activity you want to send notes about.
2. Display Activity Details, then click the Feedback tab. See Display window details.
3. The New checkbox is marked when new feedback appears in the Feedback from Resources field. Clear the checkbox when you finish reading the new feedback so you will be aware of subsequent new feedback.
4. If you want to enter feedback, enter it in the Notes to Resources text box. Then click Add to move your feedback from the text box to the Notes to Resources field.
When P6 Professional is connected to a P6 EPPM database, all P6 Progress Reporter-enabled resources assigned to the activity can view your notes on the Activity Details General tab in P6 Progress Reporter, and the resource can respond.

Having a discussion with team members

1. Choose Project, Activities.
2. Select the activity to which you want to post a message.

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3. Display Activity Details, then click the Discussion tab. To display the Discussion tab, click the Layout Options bar and choose Bottom Layout Options. In the Available Tabs section, select Discussion, click



, then click OK.

4. To add a message or respond to a message, enter your message in the text box. Only users with the Add/Edit Activities Except Relationships privilege can post a comment.
5. Click Post. Your message will appear in the Comments field.

> **Tip**
>
> Use the Unread Comments column to view the number of unread comments on an activity. You can sort and filter on Unread Comments. This column serves as a notification for new comments. Project Managers use this column to see how many unread comments are in a given project.
>
> To display this column, click Columns on the Layout toolbar. In the Columns dialog box, select Unread Comments from the General group.
>
> - You can choose to show all messages, only received messages, or only sent messages.
> - You can sort how messages are displayed by newest to oldest or oldest to newest.

Enter multiple resource prices over time

1. Choose Enterprise, Resources.
2. Select the resource whose prices you want to enter.
3. Click the Units & Prices tab.
4. Repeat the following to assign dates with different price/units to the resource:
   a. Click Add.
   b. To change the price's effective date, double-click the Effective Date field, click , then select a new date.
   c. Type the maximum number of time units the resource can perform, followed by a forward slash (/) and the appropriate time duration. For example, if the selected resource is one person, a reasonable value may be 8 hours (units) per day (duration). In this case, the Max Units/Time would be 8.00h/ d, or 8 hours of work per day. Similarly, if the selected resource is a department with 5 people, then the Max Units/ Time may be 40.00h/ d. This means that 5 people can perform 40 hours of work per day, rather than 1 person performing 8 hours of work per day.
   d. Double-click the Price/Unit field, then type the resource's monetary price. For labor resources, indicate the time unit with a forward slash (/) and the appropriate time unit abbreviation, such as $50.00/h (for 50 dollars per hour). Right-click in the Units & Prices table and select Customize Resource Rate Columns to add or remove additional price/unit fields.

When P6 Professional is connected to a P6 Professional database, these fields display the name defined for the rate types in the Rate Types tab in the Admin Preferences dialog box.

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When P6 Professional is connected to a P6 EPPM database, these fields display the name defined for the rate types from the Application Settings in P6.

Tip

- You can display the Max Units/Time data as a numeric value (8h/ d) or as a percentage of the resource's limits (100 percent). For example, if Robert is assigned a limit of eight hours/day and you assign him to a task at a maximum limit of two hours/day, you can display this information one of two ways: as 2h/ d or as 25 percent of his resource limit (since he is only assigned to this task for two of his allotted eight hours per day). Select either Show as a Percentage (50 percent) or Show as Units/Duration (4h/ d) in the Time Units tab of the User Preferences dialog box.
- To allow the selected resource to log overtime hours, click the Details tab and mark the Allow Overtime checkbox, then, in the Overtime Factor field, type the number by which the resource's standard price should be multiplied to determine the resource's overtime price (standard price * overtime factor = overtime price).

Note

The available time units are minutes, hours, days, weeks, months, and years. Your system administrator sets the abbreviation for each time unit in the Admin Preferences dialog box when P6 Professional is connected to a P6 Professional database and from the P6, Application Settings when connected to a P6 EPPM database.

Calculating cost when using multiple resource rates

The total cost for a resource assignment takes into consideration any changes in the price/unit over the course of the activity.

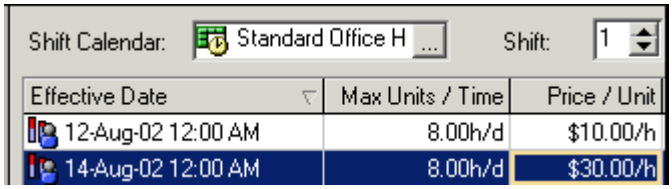
When connected to a P6 Professional database: Enter a price/unit for each rate type (defined in Admin Preferences, Rate Types) in the Units & Prices tab in the Resources window.

When connected to a P6 EPPM database: An application level setting determines whether cost spreads account for changes in resource and role rates over time. Enter a price/unit for each rate type (defined in P6, Application Settings) in the Units & Prices tab in the Resources window.

Select the rate type you want this assignment to use in the Resources tab in the Activities window. The cost of the resource assignment is based on the Rate Type assigned to the resource assignment.

For example, a 3-day activity has a resource that works 8 hours per day. The activity begins on Monday, 12-Aug-02 8:00 AM and ends on Wednesday, 14-Aug-02 5:00 PM. Price/unit for the resource is defined as:

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The cost of the first 16 hours of the resource assignment is $160 (16 hours x $10.00/ hr). The cost for the last 8 hours of the resource assignment is $240 (8 hours x $30.00/ hr). The total cost for the resource is $400.00 ($160.00 + $240.00).

Note

- If you have resources with shifts that use timesheets, costs calculate using the price of the first shift for the resource.
- When activity dates change, run Recalculate Assignment Costs to update resource costs based on the new dates.
- Multiple resource rates are not reflected in the Activity Usage Spreadsheet or Resource Usage Spreadsheet.

Roles

Roles

Roles are project personnel job titles or skills, such as mechanical engineer, inspector, or carpenter. They represent a type of resource with a certain level of proficiency rather than a specific individual. Roles can also be assigned to specific resources to further identify that resource's skills. For example, a resource may have a role of a engineer and manager.

You can create a set of roles to assign to resources and activities in all projects in the enterprise. You can establish an unlimited number of roles and organize them in a hierarchy for easier management and assignment. The set of roles you assign to an activity defines the activity's skill requirements. You can also define unique price per unit rates for each role for accurate cost planning.

You can temporarily assign roles during the planning stages of the project to see how certain resources affect the schedule. Once you finalize your plans, you can replace the roles with resources that fulfill the role skill levels. Five proficiency levels can be assigned to roles: Master, Expert, Skilled, Proficient and Inexperienced.

Roles can be assigned in the Resource Details window or from the Roles dialog box.

Add a role

1. Choose Enterprise, Roles.
2. Click ✚ on the Edit toolbar or choose Edit, Add.
3. Click the General tab, then type a unique ID for the role.
4. Type the role's name.

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5. Click Modify to type a description of the role's responsibilities in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.

Change the proficiency of a role

Roles and the proficiency levels help to further identify each resource's skills. For example, one individual may be an expert in Web development tools, and proficient in Web design. Specifying proficiency levels for roles can help you decide which resource is the best fit for a particular task.

1. Choose Enterprise, Roles.
2. Select the role you want to change.
3. Click the Resources tab.
4. Double click in the Proficiency field and select a skill level for that role, such as Master, Expert, Skilled, Proficient, or Inexperienced.

> **Note**
>
> Proficiencies are pre-defined.

Define price/unit rates for roles over time

You can add up to five price per unit rates for each role in the roles dictionary. When you assign a role to an activity during project planning, you can choose which rate you want to use to calculate cost. Defining rates for specific roles yields more accurate project cost planning results. You can define an unlimited number of changes to prices for each role; however, the effective date must be unique.

1. Choose Enterprise, Roles.
2. Select the role you want to assign rates to, then click the Units and Prices tab. If tabs are not displayed in the Roles dialog box, click the Display Options bar and choose Roles Details.
3. Click Add at the bottom of the Roles dialog box.
4. Double-click in the Effective Date column, then click the Browse button to select the date the prices takes effect.
5. Enter up to five Price/Unit rates for the selected role. For example, if the price per unit is $25 per hour, enter 25h; if the price per unit is $50000 per year, enter 50000y. You can only enter unit values in minutes, hours, days, weeks, months, and years. Your system administrator defines the abbreviations for these units in the Admin Preferences, Time Periods tab when P6 Professional is connected to a P6 Professional databasein P6, Application Settings when connected to a P6 EPPM database.

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Note

- When connected to a P6 EPPM database: An application level setting determines whether cost spreads account for changes in resource and role rates over time.
- The Calculate Costs from Units checkbox is marked by default when you add a new role. When this option is selected, any new assignments for the role will have its costs recalculated whenever any quantity changes occur.
- The default unit value is hours. If you type a price but no unit, the module defaults the unit to hours.

Define role limits over time

Use the Limits tab to specify available quantities (limits) for a role. Setting limits helps you quickly identify areas of role overload in Resource/Role Usage Profiles, using different colors to represent limits and overallocated units in charts and histograms. You can define an unlimited number of role limits for each role; however, the effective date must be unique. To define role limits:

1. Choose Enterprise, Roles.
2. Select the role you want to define limits for, then click the Units and Prices tab. If tabs are not displayed in the Roles dialog box, click the Display Options bar and choose Roles Details.
3. Click Add at the bottom of the Roles dialog box.
4. Double-click in the Effective Date column, then click the Browse button to select the date the limit takes effect.
5. In the Max Units/Time column, enter the allocation limit for the role as a unit value or as a percentage, depending on your user preference settings for resource units/time (User Preferences, Time Units tab). You can enter values in any time and duration unit; however, the module automatically converts the value to the default units/duration format specified in the User Preferences, Time Units tab.

Tip

By default, role limits are calculated based on the limit defined for each role's primary resource, which may not accurately reflect a role's planned allocation. In P6 Professional on the User Preferences, Resource Analysis tab, you can choose to consider only active resources when calculating role limits or display role limits based on the custom role limits you define.

Assign roles to activities

1. Choose Project, Activities.
2. Select the activity to which you want to assign a role.
3. Display Activity Details, then click the Resources tab.
4. Click Add Role.

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5. Select the role you want to assign. You can assign multiple roles to an activity. To select more than one item, hold down the Ctrl key, then click each role you want to assign.
6. Click Assign, then click Close.

> **Tip**
>
> If price/unit rates are defined for a role you assign to an activity, you can choose the price/unit rate you want the module to use to calculate cost. Choosing a defined price/unit rate yields more accurate cost planning results. If you do not specify a rate, the module uses the default rate defined in the Project Details, Calculations tab.

Assign roles to resources from the Resources window

1. Choose Enterprise, Resources, then select the resource to which you want to assign a role.
2. Click the Roles tab, then click Assign.
3. Select the role you want to assign.
4. Click the Assign button, then click the Close button.
5. In the Roles tab, double-click the Proficiency column and select a skill level.
6. If this is the resource's primary role, mark the Primary Role checkbox.

Assign roles to resources from the Roles dialog box

1. Choose Enterprise, Roles, then select the role you want to assign.
2. Click the Resources tab, then click Assign.
3. Select the resource to which you want to assign the selected role.
4. Click the Assign button, then click the Close button.
5. In the Resources tab, double-click the Proficiency column and select a skill level.
6. If this is the resource's primary role, mark the Primary Role checkbox.

Delete a role

1. Choose Enterprise, Roles.
2. Select the role you want to delete, then click Del/Merge. If the role is currently assigned, select to replace the role or delete it.

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Tip

- If the role you want to delete does not appear in the display, click the Display Options bar, then choose Filter By, All Roles.
- If your organization manually plans future period resource and role distribution in the Resource Usage Spreadsheet, you should determine if the role you are deleting has manual future period values. If so, you should choose to merge the role's associated data with another role; otherwise, the manual future period assignment values will be deleted. To determine if the role has manual future period assignment data, in the Resource Assignments window, display the Curve column and group the layout by role. The module displays a 'Manual' value in the Curve column for all assignments that have been manually planned.

Remove roles from activities

1. Choose Project, Activities.
2. Select the activity from which you want to remove a role.
3. Display Activity Details, then click the Resources tab.
4. Select the role you want to remove, then click Remove.
5. Click Yes.

Remove roles from resources in the Resources window

1. Choose Enterprise, Resources.
2. Select the resource from which you want to remove a role.
3. Click the Roles tab. Select the role you want to remove, then click Remove.
4. Click Yes.

Remove roles from resources in the Roles dialog box

You can remove a role from a resource in the Resources window, or you can remove a role from a resource in the Roles dialog box.

1. Choose Enterprise, Roles.
2. Select the role you want to remove, then click the Resources tab.
3. Select the resource from which you want to remove the role, then click Remove.
4. Click Yes.

View roles

To view all roles

1. Choose Enterprise, Roles.

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2. Click the Display Options bar. To view only those roles that have assignments in the open project, choose Filter By, Current Projects' Roles. To view all roles, choose Filter By, All Roles.

To view roles for a specific activity

1. Choose Project, Activities.
2. Select the activity whose roles you want to view.
3. Click the Resources tab.

Defining Resource Curves

Resource curves

Resource/cost distribution curves enable you to specify how you want resource units or costs spread over the duration of an activity. Resource units and costs are distributed evenly from the assignment start to the assignment finish unless you specify a nonlinear distribution by assigning a curve.

You can assign a resource distribution curve to any resource or role assignment on activities with a duration type of Fixed Duration and Units/Time or Fixed Duration & Units. Assign the appropriate curve to a resource or role assignment by selecting a curve in the Curve column in the Resource Assignments window. You can also assign a resource curve in the Resources tab in the Activity Details.

If timesheet data exists for the actuals, curves are ignored for the actuals and are spread using the timesheet data. Activities with timesheet data continue to spread the remaining units using the curve.

In order to use curves to calculate the Actual Units/Cost and EV Units/Costs, the new project setting that uses duration percent complete to calculate actuals should be marked.

Tip

- Using pre-defined or custom resource curves, you can define 21 points on the curve to spread units or costs over the duration of an activity. While this is suitable for most activities, some of your activities may require a more granular resource distribution. For example, for long duration activities with varying levels of effort, a resource curve may not fully reflect when work is planned to be performed on the activity. To accurately capture future period resource distribution for these activities, you can manually enter future period budgeted or planned and remaining unit assignment values in the Resource Usage Spreadsheet of the Activities and Resource Assignments windows.
- You can paste data directly into the resource curve definitions from Excel using Range Paste. See: Copy and paste data from Microsoft Excel into P6 Professional

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Note

- Resource curves do not support expenses. The Accrual Type will continue to spread the expenses.
- Resource lag is taken into consideration. The curve should begin on the "lagged start date."
- Resource curves are reflected in the Resource Usage Profile and Resource Usage Spreadsheet.
- When connected to a P6 EPPM database: An application level setting determines whether cost spreads account for changes in resource and role rates over time.

Add a resource curve

1. Choose Enterprise, Resource Curves.
2. Click Add.
3. Select an existing curve from which to copy the curve value percentages, then click Select.
4. Type a name for the new resource curve. You can type up to 60 alphanumeric characters. You must enter a resource curve name.
5. Click Modify to define the curve's distribution. Edit the curve value percentages to create a curve that indicates how your costs/units should distribute over time. Curves are defined by 21 points (5% intervals from 0 to 100).
6. Click Prorate to make the total of the distribution values equal to 100% while maintaining the shape you specified.
7. Click OK, then click Close.

Note

You can define an unlimited number of global resource curves.

Delete a resource curve

1. Choose Enterprise, Resource Curves.
2. Select the global curve you want to delete. You cannot delete the default curves.
3. Click Delete.
4. Click Yes.

Note

If you delete a resource curve assigned to a resource or role assignment, the curve is removed from the assignment and the actual values and earned value for those assignments are recalculated.

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4

Working with the EPS

Managing projects using the EPS

The enterprise project structure (EPS) organizes and summarizes all projects within the enterprise hierarchically for top-down budgeting, resource and cost analysis, and global control of data. An enterprise structure enables you to manage multiple projects from the highest levels of the organization to the individuals that perform specific project tasks. You can also use the EPS to define project properties, including dates, budgets, codes, resources, and project defaults.

Defining project details

Use the Project Details tabs in the bottom portion of the Projects window to define project properties and defaults used throughout a project. You can also assign some general properties to the EPS nodes in your hierarchy. Display Details by clicking the Display Options bar and selecting Show on Bottom, Project Details, so that the checkmark appears.

Open each tab to view and edit the selected project's information. The details include schedule information, project codes, summarization information, default settings such as duration type for new activities, and activity numbering increments.

Enter project dates

1. Choose Enterprise, Projects and display Project Details.
2. Click the Dates tab.
3. Enter planned, anticipated, or actual dates for the project.

Specify a fiscal start month

1. Choose Enterprise, Projects and display Project Details.
2. Click the Settings tab.
3. Select the month on which the first day of the fiscal year begins.

Set project resource options

- Choose Enterprise, Projects and display Project Details, then click the Resources tab.

Change a project name

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1. Choose Enterprise, Projects and display Project Details.
2. Select the project whose name you want to change.
3. Click the General tab, then type a new project name.

Change a project ID

1. Choose Enterprise, Projects and display Project Details.
2. Select the project whose ID you want to change.
3. Click the General tab, then type a new project ID.

Change the project leveling priority

1. Choose Enterprise, Projects and display Project Details.
2. Click the General tab, then select a leveling priority from 1 (highest priority) to 100 (lowest priority). During leveling, this number determines which assignments from other projects to consider within the leveling run. For example, if you specify 5 in the Consider Assignments in Other Projects With Priority Equal/Higher Than field of the Level Resources dialog box, all projects with a project leveling priority of 1, 2, 3, 4, and 5 are considered.

> **Note**
>
> If you are selecting a priority level for an EPS node or project, your selection may affect the order in which the project's activities are leveled. If you level a project according to project priority, all activities in the higher priority project are leveled, and then activities in the lower priority project are leveled.

> **Tip**
>
> - You can include assignments from closed projects during leveling by marking the Consider Assignments in Other Projects With Priority Equal/Higher Than checkbox of the Level Resources dialog box. Indicate a Project Leveling Priority for those projects on the General tab in the Projects window.
> - To use the priority level as a tie breaker during leveling, include Project Leveling Priority under Leveling Priorities in the Level Resources dialog box.

Change a project's status

1. Choose Enterprise, Projects and display Project Details.
2. Select the project whose status you want to change, then select the project status you want to use for the current project. This selection affects data access as follows:

Status	Impact
Planned	Sets all project WBSs to Planned.
Active	Sets all project WBSs to Active.

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Inactive	Sets all project WBSs to Inactive.
What-If	Sets all project WBSs to What-If. Project is included when summarizing. Project is ignored by resource profile/spreadsheet and leveling.

> **Note**
>
> The Status field applies to projects only, not EPS nodes.

Set activity ID options

Specify how you want to assign IDs to activities in the open project, including the increment by which activity IDs are added, a prefix, and a suffix for activity IDs.

1. Choose Enterprise, Projects and display Project Details.
2. Click the Defaults tab.
3. In the Auto-Numbering Defaults section, type the prefix for new activity IDs.
4. Type the suffix for new activity IDs.
5. Type the increment by which to add new activity IDs.
6. Mark Increment Activity ID Based on Selected Activity if you want new activities to increment the activity ID based off the currently selected activity.

> **Note**
>
> - Your activity ID settings apply to new activities only.
> - When a new activity is created, the activity ID is automatically generated using auto-numbering. Activity ID auto-numbering concatenates the prefix and the suffix, with the suffix incremented to make the ID unique. For example, "A" (prefix), "1000" (suffix), and "10" (increment) yields activity IDs of "A1010," "A1020," "A1030," and so on. If you change the activity ID prefix, suffix, or increment, the change applies to new activities only.

Set the default price for activities

You can specify a project's default price of work for activities. This default price is used to calculate the cost of activities that do not have assigned resources, and activities whose resources do not have defined prices. When calculating an activity's total cost, this price is multiplied by the activity's labor and nonlabor units and then any associated activity expenses are added.

1. Choose Enterprise, Projects and display Project Details.
2. Click the Calculations tab.

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3. In the Activities section, type the default price for activities without resources, followed by a forward slash (/) and the appropriate time unit abbreviation, such as $50.00/h (for 50 dollars per hour). The available time units include minutes, hours, days, weeks, months, and years.

When connected to a P6 Professional database: Your system administrator sets the abbreviation for each time unit in the Admin Preferences dialog box.

When connected to a P6 EPPM database: Your system administrator sets the abbreviation for each time unit in the Application Settings in P6.

Set the default rate type for resource assignments

You can specify a project's default rate type for resource and assignments. The default rate type determines which price/unit is set on the resource/role assignment.

1. Choose Enterprise, Projects and display Project Details.
2. Click the Resources tab.
3. In the Assignment Defaults section, click  to select the default rate type for new resource/role assignments in the project. The list corresponds to the rate types defined in the Rate Types tab in the Admin Preferences dialog box when P6 Professional is connected to a P6 Professional database and in P6 when connected to a P6 EPPM database.

> **Note**
>
> This setting does not affect existing resource assignments.

Set the project default activity type

1. Choose Enterprise, Projects and display Project Details.
2. Click the Defaults tab.
3. In the Defaults for New Activities section, select the default activity type.

> **Note**
>
> The default duration type is only used for new activities. Changing this setting does not affect existing activities.

Set the project default activity duration type

1. Choose Enterprise, Projects and display Project Details.
2. Click the Defaults tab.
3. In the Defaults for New Activities section, select the default duration type.

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> **Note**
>
> The default duration type is only used for new activities. Changing this setting does not affect existing activities.

Set the project default activity percent complete type

1. Choose Enterprise, Projects and display Project Details.
2. Click the Defaults tab.
3. In the Defaults for New Activities section, select the default percent complete type.

> **Note**
>
> The default percent complete type is only used for new activities. Changing this setting does not affect existing activities.

Set the project default activity calendar

1. Choose Enterprise, Projects and display Project Details.
2. Click the Defaults tab.
3. In the Defaults for New Activities section, select a default calendar.

> **Tip**
>
> Click the Options bar in the Select Default Project Calendar dialog box to display global or project calendars.

> **Note**
>
> The default calendar is only used for new activities. Changing this setting does not affect existing activities.

Set the project default cost account

You can specify a project's default cost account. This cost account will be used for resource assignments to activities and project expenses in the open project.

1. Choose Enterprise, Projects and display Project Details.
2. Select the project to which you want to assign a default cost account.
3. Click the Defaults tab.

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4. In the Defaults for New Activities section, click  in the Cost Account field.
5. Select the cost account you want to assign as the default, then click the Select button.

> **Note**
>
> The default cost account is only used for new resource assignments to activities and new project expenses. Changing this setting does not affect existing resource assignments to activities or existing project expenses.

Set the float time for identifying critical activities

You can specify a maximum activity float time for identifying critical activities. If an activity's float time is less than or equal to the time period you specify, the activity is automatically marked as critical.

1. Choose Enterprise, Projects and display Project Details.
2. Click the Settings tab.
3. Choose Total Float less than or equal to in the Critical Activities section. Type the value for which critical activities should have float less than or equal to, followed by the corresponding time unit abbreviation. The available time units are minutes, hours, days, weeks, months, and years.

(Your system administrator sets the abbreviation for each time unit in the Admin Preferences dialog box when P6 Professionalis connected to a P6 Professional database and in the Application Settings in P6 when P6 Professional is connected to a P6 EPPM database.)

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5

Developing Projects

Adding Activities to a Project

Activities

Activities are the fundamental work elements of a project. They are the lowest level of a work breakdown structure (WBS) and, as such, are the smallest subdivision of a project that directly concerns the project manager. Although you can divide activities into steps, an activity's primary resource is typically responsible for managing and tracking the progress of an activity's steps, while the project manager is typically responsible for managing and tracking the progress of the overall activity.

You can define the following information for an activity:

- Activity ID and name, which enables you to uniquely identify and describe the activity
- Activity start and finish dates
- Activity calendar
- Activity type, duration type, and percent complete type, which are used to specify which calendar applies to an activity; whether an activity is a milestone; how to keep an activity's unit values, duration values, and resource units/time values synchronized; and how to calculate an activity's percent complete
- Activity codes and values, which enable you to classify and categorize activities
- Constraints on the activity's scheduled start and finish dates
- Expenses
- Predecessor and successor relationships, which are used to define relationships with other activities
- Work products and documents and deliverables
- Resources
- Notes, which are used to communicate with the resources working on an activity
- When connected to a P6 Professional database: Feedback, which is used to communicate with the resources working on an activity
- Roles, which enable you to identify skill requirements for staffing the activity
- Steps, which divide the activity into smaller units
- Work breakdown structure element

Activity types

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Activity types control how an activity's duration and dates are calculated. Choose from six activity types:

- Task dependent activity
- Resource dependent activity
- Level of effort activity
- Start milestone activity
- Finish milestone activity
- WBS summary activity

Each activity must be assigned an activity type.

Activity dates

The following table defines the types of activity dates available in the module and how they are used to plan and schedule your project.

Date Field	Definition
Start	For started activities, the Actual Start date. For not started activities, set to the Project Planned Start date until the project is scheduled. When scheduled, set to the Remaining Early Start date.
Finish	For completed activities, the Actual Finish date. For not started and in progress activities, set to the Planned Finish date if the project has not been scheduled. When scheduled, set to the Remaining Early Finish date.
Actual Start	The date on which the activity is actually started.
Actual Finish	The date on which the activity is actually finished.
Early Start	The earliest possible date the remaining work for the activity can begin. This date is calculated by the project scheduler based on activity relationships, schedule constraints, and resource availability. The Early Start equals the Remaining Start unless you preserve the scheduled early dates during leveling. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.
Early Finish	The earliest possible date the activity can finish. This date is calculated by the project scheduler based on activity relationships, schedule constraints, and resource availability. The Early Finish equals the Remaining Finish unless you preserve the scheduled early dates during leveling. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.
Late Start	The latest possible date the remaining work for the activity must begin without delaying the project finish date. This date is calculated by the project scheduler based on activity relationships, schedule constraints, and resource availability. The Late Start equals the Remaining Late Start unless you preserve the scheduled late dates during leveling. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.

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Date Field	Definition
Late Finish	The latest possible date the activity must finish without delaying the project finish date. This date is calculated by the project scheduler based on activity relationships, schedule constraints, and resource availability. The Late Finish equals the Remaining Late Finish unless you preserve the scheduled late dates during leveling. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.
Project Planned Start	For an activity that has not started, the date the activity is scheduled to begin. This date is set equal to the early start date by the project scheduler but can be updated manually by the project manager. This date is not changed by the project scheduler once you apply an Actual Start date.
Planned Finish	For an activity that has not started, the date the activity is scheduled to finish. This date is set equal to the early finish date by the project scheduler but can be updated manually by the user. This date is not changed by the project scheduler once you apply an Actual Finish date.
Anticipated Start	The expected start date of the project, EPS node, or WBS level, used during the planning phase. This date is manually entered and is not affected by scheduling. An anticipated start date cannot be entered at the activity level.
Anticipated Finish	The expected finish date of the project, EPS node, or WBS level, used during the planning phase. This date is manually entered and is not affected by scheduling. An anticipated finish date cannot be entered at the activity level.
Remaining Start	The earliest possible date the remaining work for the activity is scheduled to begin. This date is calculated by the project scheduler but can be updated manually by the user. Before the activity is started, the Remaining Start is the same as the Project Planned Start. Once the activity has started, the Remaining Start is equal to the Data Date. When the activity is complete, the Remaining Start is blank.
Remaining Finish	The earliest possible date the remaining work for the activity is scheduled to finish. This date is calculated by the project scheduler but can be updated manually by the user. Before the activity is started, the Remaining Finish is the same as the Planned Finish. When the activity is complete, the Remaining Finish is blank.
Remaining Late Start	The latest possible date the remaining work for the activity must begin without delaying the project finish date. This date is calculated by the project scheduler based on activity relationships, schedule constraints, and resource availability. When the activity is complete, the Remaining Late Start is blank.
Remaining Late Finish	The latest possible date the activity must finish without delaying the project finish date. This date is calculated by the project scheduler based on activity relationships, schedule constraints, and resource availability. When the activity is complete, the Remaining Late Finish is blank.

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Date Field	Definition
Expected Finish	The date the activity is expected to finish, according to the primary resource. Typically, the primary resource enters this date. When scheduling your projects, you can choose to use the Expected Finish dates or not.
Constraint Date	The constraint date for the activity is the date for which the activity's constraint applies. You can enter a primary and secondary constraint. Depending on the constraint type, this date could be a start date or a finish date. For example, if the constraint is a Finish On constraint, the constraint date is the date on which the activity must finish. If the activity does not have a constraint, this field will be empty.
Suspend Date	The date on which an activity's progress was, or is planned to be, suspended. The activity must have an actual start date before you can enter a suspend date. The amount of time an activity's progress is suspended is considered nonworktime based on activity and resource calendar definitions. You can only enter a suspend date on Task Dependent and Resource Dependent activities. When you enter a suspend date, the activity is suspended at the beginning of the specified day.
Resume Date	The date on which an activity's progress was, or is planned to be, resumed. When you enter a resume date, the activity is resumed at the beginning of the specified day.

Note

- An A appearing after the Start or Finish value indicates that the value is the Actual Start or Actual Finish. An * appearing after the Start or Finish value indicates that there is a Start or Finish constraint on this activity.
- When P6 Professional is connected a P6 EPPM database and integrated with Primavera Unifier, the Actual Start and Actual Finish dates might have been imported from Primavera Unifier rather than calculated by P6.

Synchronizing activity duration, units, and resource units/time

P6 Professional automatically synchronizes the duration, labor/ nonlabor units, and resource units/time for activities so that the following equation is always true for each activity:

Duration = Units ¸ (Resource Units ¸ Time)

However, since three variables are involved (duration, units, and resource units/time), when you change the value of one variable, P6 Professional must alter the value of a second to balance the equation. The Duration Type setting for an activity allows you to control how P6 Professional synchronizes these variables when any one of the equation's variables is changed.

The following table lists the value that is automatically changed by P6 Professional to synchronize the variables whenever the value of one of the duration type variables is changed.

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Activity duration type	When you change units, this value changes...	When you change duration, this value changes...	When you change units/ time, this value changes...	When you add a resource and there are no budgeted or planned units, this value changes...	When you add additional resources, this value changes...
Fixed units/time	Duration	Units	Duration	Units	Duration
Fixed Duration & units/time	Units/Time	Units	Units	Units	Units
Fixed units	Duration	Units/Time	Duration	Units	Duration
Fixed Duration & units	Units/Time	Units/Time	Units	Units	Units/Time of each resource

Define general activity information

1. Choose Project, Activities, then select the activity whose general information you want to define.
2. Display Activity Details, then click each tab in Activity Details and enter the corresponding information.

> **Tip**
>
> To specify which Activity Details you want to display and their order, click the Layout Options bar, then choose Bottom Layout Options.

Add activities in the Activity Table

- Select an activity within the group to which you want to add a new activity. Click

  on the Edit toolbar or choose Edit. The new activity is placed according to the sorting options selected for the layout. Depending on your user preferences, the New Activity wizard might start and help you add an activity.

Add activities in the Activity Network

- In the Activity Network, select the group band or another activity box within the group band into which you want to add the new activity, then click

  on the Edit toolbar or choose Edit, Add. Depending on your user preferences, the New Activity wizard might start and help you add an activity.

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> **Note**
>
> If activities are not grouped in the Activity Network, the activity is added to the bottom of the Activity Network.

Adding activities using a wizard

Activities are the fundamental work elements of a project. They are the lowest level of a work breakdown structure (WBS) and, as such, are the smallest subdivision of a project that directly concerns the project manager.

If the Use New Activity Wizard checkbox is marked in the User Preferences dialog box, the New Activity wizard displays each time you add an activity to guide you through the process.

Define activity types

1. Choose Project, Activities.
2. Select the activity whose activity type you want to define.
3. Display Activity Details, then click the General tab.
4. Select an activity type: To indicate that the activity's resources are scheduled according to the activity calendar, select Task Dependent. To indicate that each of the activity's resources are scheduled according to his/her own calendar, select Resource Dependent. To indicate that the activity's duration is dependent on its predecessor and/or successor activities, select Level of Effort. To indicate that the activity marks the beginning of a major stage in the project, select Start Milestone. To indicate that the activity marks the end of a major stage in the project, select Finish Milestone. To indicate that the activity's duration is dependent on the activities assigned to the same WBS level, select WBS Summary.

> **Note**
>
> - You cannot apply constraints to Level of Effort and WBS Summary activities.
> - Start and Finish Milestones do not have time-based costs, resource assignments, or durations.
> - You cannot assign resources that drive activity dates to WBS summary activities.

Define activity duration types

1. Choose Project, Activities.
2. Select the activity whose duration type you want to define.
3. Display Activity Details, then click the General tab.
4. Select the duration type: Choose Fixed Units/Time if you want the resource units per time to remain constant when the activity duration or units change. This type is used when an activity has fixed resources with fixed productivity output per time period. You most often choose this duration type when you are using resource dependent activities. Choose Fixed

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Duration & Units/Time if you want the activity duration to remain constant and the remaining units to change. This type is used when the activity is to be completed within a fixed time period regardless of the resources assigned. You most often choose this duration type when you are using task dependent activities. Choose Fixed Units if you want the activity units to remain constant when the duration or resource units per time change. This type is used when the total amount of work is fixed, and increasing the resources can decrease the activity duration. You most often choose this duration type when you are using resource dependent activities. Choose Fixed Duration & Units if you want the activity duration to remain constant and the units/time to change. This type is used when the activity is to be completed within a fixed time period and the total amount of work is fixed. You most often choose this duration type when you are using task dependent activities.

> **Note**
>
> The Duration Type field is disabled if the Activity Type is Start Milestone or Finish Milestone.

Define activity percent complete types

You can calculate percent complete according to activity duration, activity units, or according to a physical percent complete that you enter manually for each activity.

1. Choose Project, Activities.
2. Select the activity whose percent complete type you want to define.
3. Display Activity Details, then click the General tab.
4. Select the percent complete type: To indicate that the activity's percent complete will be entered by the user for this activity, select Physical. In this case, Activity % Complete = Physical % Complete. To specify that the activity's percent complete be calculated from the original or planned and remaining durations, select Duration. In this case, Activity % Complete = Duration % Complete = (Original or Planned Duration – Remaining Duration) ¸ Original or Planned Duration. To specify that the activity's percent complete be calculated from the actual and remaining units, select Units. In this case, Activity % Complete = Units % Complete = (Actual Labor Units + Actual Nonlabor Units) ¸ (Actual Labor Units + Actual Nonlabor Units +Remaining Labor Units + Remaining Nonlabor Units).

Assign a calendar to an activity

1. Choose Project, Activities.
2. Select the activity whose calendar you want to define.
3. Display Activity Details, then click the General tab.
4. In the Activity Calendar field, click .
5. Choose the calendar that you want to assign to the selected activity, then click the Select button.

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> **Tip**
>
> To choose whether to display global or project calendars in the Select Activity Calendar dialog box, click the Display Options bar.

Change an activity's cost breakdown structure assignment (P6 EPPM Only)

1. Choose Projects, Activities.
2. Select the activity whose CBS assignment you want to define or change.
3. In the Activity Table, double-click in the CBS column, then click ....
4. Select the CBS code to which you want to assign the selected activity. CBS codes are created in Primavera Unifier for the linked project's cost sheet.
5. Click the Select button.

Change an activity's work breakdown structure assignment

1. Choose Project, Activities.
2. Select the activity whose WBS assignment you want to define or change.
3. Display Activity Details, then click the General tab.
4. In the WBS field, click ..., then select the WBS element to which you want to assign the selected activity.
5. Click the Select button.

Enter activity durations

1. Choose Project, Activities.
2. Select the activity whose duration you want to enter.
3. Display Activity Details, then click the Status tab. To enter original or planned duration for the activity, in the original or planned field, type the amount of time followed by the time period. To enter the actual duration for the activity, in the Actual field, type the amount of time followed by the time period. You can only enter actual duration for activities that are completed. To enter the remaining duration for the activity, in the Remaining field, type the amount of time followed by the time period. You can only enter remaining duration for activities that are in progress. To enter at completion duration for the activity, in the At Complete field, type the amount of time followed by the time period. You can only enter at completion duration for activities that are not started or in progress.

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Note

- A time period does not display if the Show Duration Label checkbox is not marked in the User Preferences, Time Units tab.
- The following limitation applies to dates: Do not enter a date equal to or later than December 31, 2049 or a duration that causes the date to be equal to or later than December 31, 2049.

Tip

- P6 Professional automatically recalculates the time value and period you enter according to the project's calendar and the standard time period defined by your system administrator.
- To view the available time period abbreviations, choose Admin, Admin Preferences, then click the Time Periods tab when P6 Professional is connected to a P6 Professional database and choose the Application Settings in P6 when connected to a P6 EPPM database.

Enter activity start and finish dates

1. Choose Project, Activities.
2. Select the activity whose start and finish dates you want to enter.
3. Display Activity Details, then click the Status tab. To enter the activity's start date, in the Started field, click



, then select a date.To enter the activity's actual start date, mark the Started checkbox, then type the actual start date in the Started field or click



to select a date.To enter the activity's finish date, in the Finished field, click



, then select a date.To enter the activity's actual finish date, mark the Finished checkbox, then type the actual finish date in the Finished field or click



to select a date.

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> **Note**
>
> - Entering a start or finish date for an activity can push the activity out-of-sequence. If you want to be warned if the change you make could result in out-of-sequence progress, in the User Preferences dialog box, on the Assistance tab, mark the Warn about out-of-sequence activities option.
> - When you enter a start or finish date, depending on your application settings, a dialog box may prompt you to enter a constraint. To accept the constraint, click Yes in the Confirmation dialog box. If you specify start and/or finish dates without applying Must Start On or Must Finish On constraints, the dates you enter may be changed when the project is scheduled.

Enter a physical percent complete for activities

A percent complete that is entered manually by the user instead of being calculated by the module is known as a "physical" percent complete.

The default method is to calculate percent complete according to activity duration.

1. Choose Project, Activities.
2. Select the activity whose physical percent complete you want to enter.
3. Display Activity Details, then click the General tab.
4. Select Physical as the percent complete type.
5. Click the Status tab.
6. In the Physical % field, type a physical percent complete.

> **Note**
>
> You may enter a percent complete value for in progress activities only. If the activity has not started yet or has already finished, you will not be able to specify a percent complete value.

Enter unit information for resource assignments

1. Choose Project, Activities.
2. Select the activity whose unit values you want to record.
3. Display Activity Details, then click the Resources tab.
4. To enter the budgeted or planned units for the activity, type the value in the budgeted or planned Units column. To enter the actual units for the activity, type the value in the Actual Units column. You can only enter actual units for activities that are in progress or completed. To enter the remaining units for the activity, type the value in the Remaining Units column. You can only enter remaining units for activities that are in progress.

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> **Note**
>
> A time period does not display if the Show Unit Label checkbox is not marked in the User Preferences, Time Units tab.

> **Tip**
>
> - P6 Professional automatically recalculates the time value and period you enter according to the standard time period defined by your system administrator.
> - To view the available time period abbreviations, choose Admin, Admin Preferences, then click the Time Periods tab when P6 Professional is connected to a P6 Professional database and choose the Application Settings in P6 when connected to a P6 EPPM database.

Enter cost information for resource assignments

1. Choose Project, Activities.
2. Select the activity whose costs you want to enter.
3. Display Activity Details, then click the Resources tab.
4. To enter the budgeted or planned cost for the activity, type the value in the Budgeted or Planned Cost column. To enter the actual cost for the activity, type the value in the Actual Cost column. To enter the remaining cost for the activity, type the value in the Remaining Cost column. You can only enter remaining cost for activities that are in progress.

> **Note**
>
> When you enter an actual cost on an activity that is not in progress, and the Cost Units Linked checkbox is not marked on the assignment, the budgeted or planned cost and remaining cost will not be linked. The budgeted or planned cost will remain untouched and the remaining cost will change. To maintain the same value for the at completion cost, set the When Updating Actual Units or Cost option (found on the Calculations tab in the Project details) to Subtract Actual from At Completion.

Designating an activity owner (P6 EPPM Only)

You can designate users as activity owners. An Activity Owner who has Projects module access to P6 (assigned using P6) and has the required privileges can update the activity's status and other details. Follow this procedure to designate a user as an activity owner.

Display the Owner Column

1. With the Activities window active, choose View, Columns.
2. In the Available Options list, expand the General category.

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3. Locate the Owner field, highlight it and then click  to move it to the Selected Options field.
4. Click OK.

Designate an Activity Owner

1. In the Activity Table of the Activities view, double click the appropriate activity under the Owner column.
2. Highlight the appropriate user and click Select.

Delete an activity

1. Choose Project, Activities.
2. Select the activity you want to delete, then choose Edit, Delete.
3. Click Yes to confirm that you want to delete the selected activity.

> **Tip**
>
> To remove an activity, but maintain the relationship between its predecessor and successor activities, dissolve the activity instead of deleting it.

Dissolve an activity

To dissolve an activity, you select the activity and then choose Edit, Dissolve.

Dissolving an activity removes the dissolved activity and joins the dissolved activity's predecessor and successor activities as well as possible to maintain the project's network logic, as explained here. You cannot dissolve an activity unless it has a predecessor and successor.

When an activity is dissolved, relationships are made as follows:

- The first half of the relationship between the immediate predecessor of the dissolved activity and the dissolved activity is used as the first half of the relationship between the predecessor (of the dissolved activity) and all successors that had a relationship with the dissolved activity.
  For example, say that Activity A is the immediate predecessor of Activity B, that Activity A has a Start to Finish relationship with Activity B, and that Activity B is to be dissolved. When Activity B is dissolved, all of A's relationships with B's successors (with which B had a relationship) must begin with Start.
- The second half of the relationship between the predecessor (of the dissolved activity) and each successor that had a relationship with the dissolved activity remains the same for each successor as when each was linked to the dissolved activity.
  To continue the previous example, say that Activity C is the immediate successor of Activity B, and that Activity C has a Finish to Finish relationship with Activity B. As Activity B is dissolved, the second half of its relationship to C (C's end of it) is used and combined with A's first half of its relationship with B, giving a Start (from A's side of the A to B relationship) to Finish (from C's side of the B to C relationship) relationship.

The same principle applies to any other successor activities to B.

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So, for example, the following activities have the following relationships:

Activity A is linked to Activity B using SF

Activity B is linked to Activity C using FF

Activity B is linked to Activity D using a FS

Activity B is linked to Activity E using SF

Activity B is linked to Activity F using SS

When you dissolve Activity B, the following occurs:

Activity A is linked to Activity C using SF

Activity A is linked to Activity D using SS

Activity A is linked to Activity E using SF

Activity A is linked to Activity F using SS

By default, any lag applied to relationships with the dissolved activity is removed and the new relationships created have zero lag. However, you can select Retain lag on the Calculations tab of User Preferences if you would prefer to keep the lag applied to predecessor and successor relationships when you dissolve an activity. If you choose to retain lag, the lag from the predecessor relationship is added to the lag from the successor relationship and applied to the new relationship.

Define milestones

1. Choose Project, Activities.
2. Select the activity you want to define as a start or finish milestone.
3. Display Activity Details, then click the General tab.
4. In the Activity Type field, select Start Milestone or Finish Milestone.

> **Note**
>
> Milestones cannot have durations, time-based costs, or resource assignments.

View activity float values

1. Choose Project, Activities.
2. Select the activity whose float values you want to view.
3. Display Activity Details, then click the Status tab. The Free Float field displays the amount of time the selected activity can be delayed without delaying the activities that immediately follow (successor activities). The Total Float field displays the amount of time the selected activity can be delayed without delaying the project's finish date.

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Tip

You can also display Total Float and Free Float columns in the Activity Table.

Note

An activity's free and total float is automatically calculated each time you schedule the project. You cannot edit an activity's float values directly.

View activity summaries

1. Choose Project, Activities.
2. Select the activity whose summary information you want to view.
3. Display Activity Details, then click the Summary tab. To view summary information about the activity's units, choose Display Units. To view summary information about the activity's costs, choose Display Cost. To view all of the activity's start and finish dates, choose Display Dates.

Copy and paste activities in the Activity Table

1. Select the activity you want to copy. To select multiple activities, use Ctrl+click.
2. Click Edit, Copy.
3. Select the WBS band where you want to insert the copied activities, then click Edit, Paste.
4. In the Copy Activity Options dialog box, mark the checkbox next to each type of information you want to copy, then click OK.
5. In the Renumber Activity IDs dialog box, select how to create activity IDs for copied activities. Click OK. If you selected the Replace Beginning Characters option on the previous dialog box, the Duplicates dialog box may appear after clicking OK. If it appears, enter a new activity ID and click OK.

Note

- When connected to a P6 EPPM database: When you copy and paste activities within the same project, any associated risks from P6 are also copied; risks are not copied when you copy and paste activities to a different project.
- When connected to a P6 Professional database: When you copy and paste activities within the same project, any associated risks are also copied; risks are not copied when you copy and paste activities to a different project.

Copy and paste activities in the Activity Network

1. Select the activity you want to copy. To select multiple activities, use Ctrl+click.

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2. Click Edit, Copy.
3. Select the group band or another activity within the group band where you want to insert the copied activities, then click Edit, Paste. If activities are not grouped in the Activity Network, you do not need to select a group band.
4. In the Copy Activity Options dialog box, mark the checkbox next to each type of information you want to copy, then click OK.
5. In the Renumber Activity IDs dialog box, select how to create activity IDs for copied activities. Click OK. If you selected the Replace Beginning Characters option on the previous dialog box, the Duplicates dialog box may appear after clicking OK. If it appears, enter a new activity ID and click OK.

> **Note**
>
> - When connected to a P6 EPPM database: When you copy and paste activities within the same project, any associated risks from P6 are also copied; risks are not copied when you copy and paste activities to a different project.
> - When connected to a P6 Professional database: When you copy and paste activities within the same project, any associated risks are also copied; risks are not copied when you copy and paste activities to a different project.

Cut and paste activities in the Activity Table

1. Select the activities you want to cut and paste.
2. Choose Edit, Cut.
3. Select the WBS band where you want to insert the cut activities, then choose Edit, Paste.

> **Note**
>
> - When connected to a P6 EPPM database: When you cut and paste activities within the same project, any associated risks from P6 are also moved; risks from P6 are not moved when you cut and paste activities to a different project.
> - When connected to a P6 Professional database: When you cut and paste activities within the same project, any associated risks are also moved; risks are not moved when you cut and paste activities to a different project.

Cut and paste activities in the Activity Network

1. Select the activities you want to cut and paste.
2. Choose Edit, Cut.
3. Select the group band (or another activity box within the group band) where you want to insert the cut activities, then choose Edit, Paste.

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> **Note**
>
> - When connected to a P6 EPPM database: When you cut and paste activities within the same project, any associated risks from P6 are also moved; risks are not moved when you cut and paste activities to a different project.
> - When connected to a P6 Professional database: When you cut and paste activities within the same project, any associated risks are also moved; risks are not moved when you cut and paste activities to a different project.

Renumber activity IDs in the Activity Table

This task renumbers activity IDs for the current project and, if applicable, renumbers the same activity IDs in baselines for this project.

1. Select the activity you want to renumber. To select multiple activities, use Ctrl+click or Shift+click.
2. Choose Edit, Renumber Activity IDs.
3. Proceed as follows from the Renumber Activity IDs dialog box: Specify how you want to renumber the activity IDs. The Renumber Selected Activities in Baselines checkbox is marked by default if baselines exist for the project. Be aware that if you clear this checkbox, all renumbered activities are disconnected from the baselines and are treated as new activities. Click OK.
4. The Duplicates dialog box may appear after clicking OK. If it appears, type new activity IDs, as applicable, and click OK.

   > **Note**
   >
   > If you click Cancel in the Duplicates dialog box, no activity IDs are renumbered, including activity IDs that are not duplicates.

5. If you marked the Renumber Selected Activities in Baselines checkbox on the Renumber Activity IDs dialog box, P6 Professional searches for baselines where duplicate activity IDs would be created. If it finds none, then the current project and its associated baselines are renumbered, and the baseline renumbering is committed to the database with no chance for you to undo the renumbering. If P6 Professional finds any baselines where duplicate activity IDs would be created, the Baseline Duplicates dialog box appears and lists the names of those baselines; P6 Professional does not renumber activity IDs in a baseline if it detects that doing so would create duplicate activity IDs. From the Baseline Duplicates dialog box, click one of the following:
   - Yes Click Yes to apply renumbering to baselines that can be renumbered. When you click Yes, you have no further chance to undo the renumbering, which is committed to the database. Also, be aware that when you click Yes, the baselines listed in the Baseline Duplicates dialog box will not synchronize with the current project, which impacts the accuracy of comparison data and earned value if these baselines are subsequently used against the current project.
   - No Click No to cancel the renumbering process for baselines and to undo the renumbering for the current project.

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> **Note**
>
> – You must have the Edit Activity ID project security privilege to renumber activity IDs.
>
> – When connected to a P6 Professional database: If the current project has baselines, you must have the Maintain Project Baselines project privilege to access the Renumber Activity IDs dialog box.

When connected to a P6 EPPM database: If the current project has baselines, you must have the appropriate project privilege assigned using P6 to access the Renumber Activity IDs dialog box.

- You can renumber activity IDs in a single project only.
- You can renumber activity IDs when multiple projects are open; however, you can not renumber activity IDs when you select activities in multiple projects.

Linking Activities with Relationships

Relationships

A relationship defines how an activity relates to the start or finish of another activity or assignment. Add relationships between activities to create a path through your schedule from the first activity to the last activity. These relationships, which form the logic of the project network, are used together with activity durations to determine schedule dates. An activity can have as many relationships as necessary to model the work that must be done. You can enter comments about a relationship, for example to explain the need for the relationship or how it is configured. You can also identify relationships between activities that are in different projects; this type of relationship is referred to as an external relationship.

Choose from the following types of relationships:

Finish to start relationship

Finish to finish relationship

Start to start relationship

Start to finish relationship

Tip

The default relationship type for all activities (including start milestones) is finish to start.

Adding relationships between activities

Add relationships between activities to create a path through your schedule from the first activity (or activities) to the last. If you display relationship lines you can add relationships by drawing the relationship on the Gantt Chart from predecessor to successor. You can also add relationships using the Predecessors, Successors, and Relationships tabs in Activity Details, or using the Assign Toolbar.

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Relationship lines

Relationship lines graphically illustrate the links between activities in the bars area. You can display relationships lines in both the Gantt Chart and the Activity Network.

Add predecessor relationships

1. Choose Project, Activities.
2. Select the activity to which you want to add a predecessor relationship.
3. Display Activity Details, then click the Predecessors or Relationships tab.
4. Click Assign in the Predecessors tab or in the Predecessors area of the Relationships tab.
5. Assign relationships to activities within the same project and/or assign relationships to activities outside of the current project (external relationships): To assign relationships within the same project, in the Assign Predecessors dialog box select the predecessor activity you want to assign. Click the Assign button, then click the Close button. To assign a relationship to an activity outside of the current project, in the Assign Predecessors dialog box click the Display Options bar and choose Select Project. Select the external project, then select the predecessor activity you want to assign. Click the Assign button then click the Close button.
6. To specify a predecessor activity's relationship type, double-click the Relationship Type field, then select a type.
7. To specify a predecessor activity's lag time, double-click the Lag field, then type the lag time value.
8. To add comments about a predecessor activity's relationship, double-click the Comments field, then type your comments.

> **Tip**
>
> You can add the Predecessor Details column to the Activity Table to see a list of all predecessors, the relationship type, and the lag applied to the relationship.

> **Note**
>
> To display the Relationships tab in Activity Details, click the Layout Options bar, then choose Bottom Layout Options and add the Relationships tab to the Display Tabs column list.

Add successor relationships

1. Choose Project, Activities.
2. Select the activity to which you want to add a successor relationship.
3. Display Activity Details, then click the Successors or Relationships tab.
4. Click Assign in the Successors tab or in the Successors area of the Relationships tab.

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5. Assign relationships to activities within the same project and/or assign relationships to activities outside of the current project (external relationships): To assign relationships within the same project, in the Assign Successors dialog box select the successor activity you want to assign, click the Assign button, then click the Close button. To assign a relationship to an activity outside of the current project, in the Assign Successors dialog box click the Display Options bar and choose Select Project. Select the external project, then select the successor activity you want to assign. Click the Assign button, then click the Close button.
6. To specify a successor activity's relationship type, double-click the Relationship Type field, then select a type.
7. To specify a successor activity's lag time, double-click the Lag field, then type the lag time value.
8. To add comments about a successor activity's relationship, double-click the Comments field, then type your comments.

Tip

You can add the Successor Details column to the Activity Table to see a list of all successors, the relationship type, and the lag applied to the relationship.

Note

To display the Relationships tab in Activity Details, click the Layout Options bar, then choose Bottom Layout Options and add the Relationships tab to the Display Tabs column list.

Create relationships in the Gantt Chart

1. Move the mouse pointer to the edge of the predecessor activity bar until it turns into a relationship pointer (a vertical single-ended arrow).
2. Click and hold the mouse button while dragging to the successor activity. Release the mouse button. If you draw from the right edge of the predecessor to the left edge of the successor, you create a finish to start relationship. If you draw from the right edge of the predecessor to the right edge of the successor, you create a finish to finish relationship. If you draw from the left edge of the predecessor to the right edge of the successor, you create a start to finish relationship. If you draw from the left edge of the predecessor to the left edge of the successor, you create a start to start relationship.

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Tip

- If no relationship lines are displayed for activity dependencies you have defined, change the Gantt Chart bar options to show relationship lines or click  on the Top Layout toolbar.
- A hint window is displayed while you are dragging the relationship line between two activities to tell you what kind of relationship will be created when you release the mouse button.
- You can add comments about the relationship in the Relationships, Predecessors, or Successors tabs in Activity Details.

Create relationships in the Activity Network

1. Move the mouse pointer to the edge of the predecessor activity box until it turns into a relationship pointer (a vertical single-ended arrow).
2. Click and hold the mouse button while dragging to the successor activity box. Release the mouse button. If you draw from the right edge of the predecessor to the left edge of the successor, you create a finish to start relationship. If you draw from the right edge of the predecessor to the right edge of the successor, you create a finish to finish relationship. If you draw from the left edge of the predecessor to the right edge of the successor, you create a start to finish relationship. If you draw from the left edge of the predecessor to the left edge of the successor, you create a start to start relationship.

Tip

- A hint help window appears while you are dragging the relationship line between two activities to tell you what kind of relationship will be created when you release the mouse.
- You can add comments about the relationship in the Relationships, Predecessors, or Successors tabs in Activity Details.

Change predecessor relationships

1. Choose Project, Activities.
2. Select the activity whose predecessor relationship you want to change.
3. Display Activity Details, then click the Predecessors or Relationships tab. To add a predecessor, click Assign in the Predecessors tab or in the Predecessors area of the Relationships tab. Select the predecessor activity you want to add. To change a relationship type, double-click the appropriate Relationship Type field, then select a new relationship type. To change a lag time value, double-click the appropriate Lag field, then enter a new time value. To remove a predecessor, select the predecessor you want to remove, then click Remove.

Change successor relationships

1. Choose Project, Activities.

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2. Select the activity whose successor relationship you want to change.
3. Display Activity Details, then click the Successors or Relationships tab.
4. To add a successor, click Assign in the Successor tab or in the Successors area of the Relationships tab. Select the successor activity you want to add. To change a relationship type, double-click the appropriate Relationship Type field, then select a new relationship type. To change a lag time value, double-click the appropriate Lag field, then enter a new time value. To remove a successor, in the Successor Activity column select the successor you want to remove, then click Remove.

Edit relationships in the Gantt Chart

1. Double-click the line representing the relationship you want to edit.
2. Select a different relationship type.
3. Specify a new number of lag days.
4. Click OK.

Edit relationships in the Activity Network

1. Double-click the line representing the relationship you want to edit.
2. Select a new relationship type.
3. Specify a new number of lag days.
4. Click OK.

Change Predecessors tab columns

1. Display Activity Details, then click the Predecessors or Relationships tab.
2. Right-click anywhere in the Predecessors tab or the Predecessor area of the Relationships tab, then choose Customize Predecessor Columns.
3. To add a column to the Predecessors tab, in the Available Options area, click the column you want to add, then click



. To remove a column from the Predecessors tab, in the Selected Options area, click the column you want to remove, then click



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Tip

- To move all available columns to the Available Options or Selected Options area, click  .
- To reset the Predecessors tab so that it contains only the default columns, click Default.
- To edit a column's title, width, and alignment, click Edit Column.

Change Successors tab columns

1. Display Activity Details, then click the Successors or Relationships tab.
2. Right-click anywhere in the Successors tab or the Successor area of the Relationships tab, then choose Customize Successor Columns.
3. To add a column to the Successors tab, in the Available Options column, click the column you want to add, then click .
4. To remove a column from the Successors tab, in the Selected Options column, click the column you want to remove, then click .

Tip

- To move all available columns to the Available Options or Selected Options area, click .
- To reset the Successors tab so that it contains only the default columns, click Default.
- To edit a column's title, width, and alignment, select column and click Edit Column.

Delete relationships in the Gantt Chart

1. Double-click the line representing the relationship you want to delete.
2. Click Delete.
3. Click Yes.

Delete relationships in the Activity Network

1. Double-click the line representing the relationship you want to delete.
2. Click Delete.
3. Click Yes.

Remove predecessor relationships

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1. Choose Project, Activities.
2. Select the activity from which you want to remove a predecessor relationship.
3. Display Activity Details, then click the Predecessors or Relationships tab.
4. Select the predecessor you want to remove. To view the predecessor's activity information before removing the relationship, click Go To.
5. Click Remove, then click Yes.

Remove successor relationships

1. Choose Project, Activities.
2. Select the activity from which you want to remove a successor relationship.
3. Display Activity Details, then click the Successors or Relationships tab.
4. Select the successor you want to remove. To view the successor's activity information before removing the relationship, click Go To.
5. Click Remove, then click Yes.

Viewing activity relationships

View activity relationships in the Activity Table

The Activity Table enables you to view the open project's activity information in table format.

1. Choose View, Columns. You can also click the Layout Options bar and choose Columns.
2. To view information about predecessors, select Predecessor Details in the Available Columns section, then click  .
3. To view information about successors, select Successor Details in the Available Columns section, then click  .

View activity relationships in Activity Details

Activity Details list the selected activity's relationships and details, such as activity type, in different tabs.

1. Select the activity whose relationships you want to view.
2. Click the Layout Options bar, then choose Show on Bottom, Activity Details.
3. To view the selected activity's predecessors, click the Predecessors or Relationships tab.
4. To view the selected activity's successors, click the Successors or Relationships tab.

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Tip

- If the Predecessors, Successors, or Relationships tab is not displayed, click the Layout Options bar, then choose Bottom Layout Options and add the missing tab to the Display Tabs column list.
- To change the displayed columns within each tab, right-click anywhere in the tab, then choose Customize Predecessor Columns or Customize Successor Columns.

View activity relationships in the Gantt Chart

The Gantt Chart displays a graphical view of all activity relationships for a specific activity filter.

- Click the Layout Options bar, then choose Show on Top, Gantt Chart. If no relationship lines are displayed for activity dependencies you have defined, change the Gantt Chart bar options to show relationship lines or click on the Top Layout toolbar.
- A line connecting two activity bars indicates an activity relationship. The point at which the line begins on the predecessor bar and the point at which the line ends on the successor bar indicates the type of activity relationship the line represents.
- A finish to start relationship line begins on the right side of the predecessor activity's bar and ends on the left side of the successor activity's bar.
- A finish to finish relationship line begins on the right side of the predecessor activity's bar and ends on the right side of the successor activity's bar.
- A start to finish relationship line begins on the left side of the predecessor activity's bar and ends on the right side of the successor activity's bar.
- A start to start relationship line begins on the left side of the predecessor activity's bar and ends on the left side of the successor activity's bar.

View activity relationships in the Activity Network

The Activity Network displays a graphical view of all activity relationships for a specific activity filter.

- In the hierarchy table on the left side of the Activity Network, select the hierarchy element whose activity relationships you want to view. The Activity Network table displays the selected hierarchy element's activities. A line connecting two activity boxes indicates an activity relationship. The point at which the line begins on the predecessor box and the point at which the line ends on the successor box indicates the type of the activity relationship. A finish to start relationship line begins on the right side of the predecessor's box and ends on the left side of the successor's box. A finish to finish relationship line begins on the right side of the predecessor's box and ends on the right side of the successor's box. A start to finish relationship line begins on the left side of the predecessor's box and ends on the right side of the successor's box. A start to start relationship line begins on the left side of the predecessor's box and ends on the left side of the successor's box.

View activity relationships in Trace logic

Trace Logic displays a graphical view of only the selected activity's relationships.

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1. Select the activity whose relationships you want to view.
2. Click the Layout Options bar, then choose Show on Bottom, Trace Logic. The selected activity appears with a blue border. Activity boxes to the left of the selected activity are predecessors. Activity boxes to the right of the selected activity are successors.

Assigning Resources and Roles to Activities

Assign resources to activities

1. Choose Project, Activities.
2. Select the activity to which you want to assign a resource.
3. Display Activity Details, then click the Resources tab.
4. Click Add Resource.
5. Select the resource you want to assign. If resource security is enabled you can only select resources you have access to.
6. Click the Assign button, then click the Close button.

Assign resources to activities by role

Assigning resources to activities by role facilitates resource staffing for activities because you can use roles with specific skill sets as resource assignments until specific resources can be assigned.

1. Choose Project, Activities.
2. Select the activity for which you want to assign a resource.
3. Display Activity Details, then click the Resources tab.
4. Click Assign by Role. The Assign Resources by Role dialog box lists the roles assigned to the selected activities. Under each role is a list of resources who can fulfill the role.
5. Select the resource you want to assign. To assign multiple resources, hold down the Ctrl key, then click each resource you want to assign.

Click the Assign button, then click the Close button.

Tip

When a resource and role share an activity assignment (e.g., when assigning a resource to an activity by role), you can choose to use the rate of the resource or role to calculate costs on the activity.

Associate a primary resource with an activity

1. Choose Project, Activities.
2. Select the activity to which you want to associate a primary resource.
3. Display Activity Details, then click the General tab.

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4. In the Primary Resource field, click .
5. Choose a resource, then click Select.

Remove resources from activities

1. Choose Project, Activities.
2. Select the activity from which you want to remove a resource.
3. Display Activity Details, then click the Resources tab.
4. Select the resource you want to remove, then click Remove.
5. Click Yes.

> **Note**
>
> - When you remove all resources from the activity, you are prompted to choose whether or not to reset the labor/ nonlabor units to zero on the activity. Click Yes to set the Budgeted or Planned and Remaining Labor/ Nonlabor Units to zero.
> - If you manually plan future period resource allocation, when you remove a resource assignment that has manual future period values from an activity, all manual future period values are deleted. If you want to preserve the manual values, you should replace the resource assigned to the activity.

Replace resources assigned to activities

1. Choose Project, Activities.
2. Select the activity for which you want to replace a resource.
3. Display Activity Details, then click the Resources tab. If resource security is enabled you can only view resources you have access to.
4. Select the resource you want to replace.
5. Click Add Resource.
6. Click the Replace button in the Assign Resources dialog box.
7. Select the new resource with which you want to replace the existing resource, then click the Assign button.
8. Click the Close button.

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Note

- You cannot replace a resource that has actual dates assigned to it.
- In the User Preferences, Calculations tab, you can choose to always use the units/time and overtime factor of the current assignment or of the new resource replacing the existing assignment; or, you can choose to be prompted to select which units/time and overtime factor you want to use each time you replace a resource on an existing activity assignment.
- When you replace a resource on an assignment that has manual future period values, the manual values are preserved with the new assignment.

Assign a rate type to a resource assignment

You can choose the price/unit rate you want to use to calculate costs for a resource or role assignment on an activity.

1. Choose Project, Activities.
2. Select the activity that contains the assignment to which you want to assign a rate type.
3. Display Activity Details, then click the Resources tab.
4. Click in the Rate Type column and select the rate type you want to use for the assignment. The rate type determines the price/unit used to calculate costs for the assignment. The names for each rate type are defined by your system administrator in the Rate Types tab of Admin Preferences when P6 Professional is connected to a P6 Professional database and in P6 when connected to a P6 EPPM database. When you select a rate type, the monetary value is updated automatically in the Price/Unit column (if displayed).

Tip

A ^ value in the Price/Unit column indicates that the module is using the default value defined in the 'Default Price/Unit for activities without resource/role Price/Units' on the Project Details, Calculations tab. An asterisk symbol (*) beside the value indicates that multiple, time-varying, resource rates or shift calendars will be applied during the duration of the activity. An asterisk and caret symbol (*^) beside the price/unit value indicate that the project default price/unit is in effect at the start of the activity and a time-varying rate is also in effect within the activity assignment duration.

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Note

- If there is no defined rate for the selected price/unit in the Rate Type column, the module calculates cost using the default rate specified in the Default Price/Unit for activities without resource or role Price/Units field in the Project Details, Calculations tab.
- When the rate type is changed, the new price/unit is used to recalculate the costs for the assignment (assuming the units and costs are linked).
- The Recalculate Assignment Costs utility ignores any assignment with a Rate Source set to Override. The customized, manually entered price is not overwritten when you recalculate assignment prices.
- If the activity's duration type is Fixed Units or Fixed Units/Time, and a rate type is selected for the assignment, units are not updated when costs change.
- In the General tab of the Schedule Options dialog box (Tools, Schedule, Options), mark the Recalculate assignment costs after scheduling option to recalculate assignment costs whenever the rate type is changed.
- In the Level Resources dialog box (Tools, Level Resources), mark the Recalculate assignment costs after leveling option to recalculate assignment costs after leveling.

Choose the rate source for an assignment

When a resource and role share an assignment on the same activity (e.g., when you assign a resource that has an assigned role to an activity), you can choose to use the rate of the resource or role to calculate costs, or enter a custom rate.

1. Choose Project, Activities.
2. Select the activity that contains the assignment.
3. Display Activity Details, then click the Resources tab.
4. In the Resources tab, double-click the Rate Source column and choose Resource, Role, or Override. Choose Resource to calculate cost based on the resource's price/unit value selected in the Rate Type column. Choose Role to calculate cost based on the role's price/unit value selected in the Rate Type column. Choose Override if you want to enter a custom rate in the Price/Unit column.

Tip

If you seldom combine different rate sources in the same project (e.g., you almost always use Resource as the Rate Source), you can choose to always use the rate of the resource or role when a resource and role share an assignment on the same activity. Choose Edit, User Preferences. In the Calculations tab, Assignment Staffing section, choose to always use the resource's price/unit or the role's price/unit; or, choose to be asked which price/unit you want to use each time a resource is assigned to an activity that already has a role assignment (and vice versa).

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> **Note**
>
> If only a resource is assigned to an activity, the rate source must be Resource or Override. If only a role is assigned to an activity, the rate source must be Role or Override.

Change the resource's role assignments for an activity

1. Choose Project, Activities.
2. Select the activity for which you want to change a resource's role.
3. Display Activity Details, then click the Resources tab.
4. For the appropriate resource listing, double-click in the Role column.
5. Select the role you want to assign, then click the Select button.

> **Tip**
>
> If the Role column is not displayed in the Resources tab, right-click anywhere in the tab, then choose Customize Resource Columns. In the Available Options area, click Role, click the right arrow button, then click OK.

Recalculate resource and role assignment costs

1. Choose Tools, Recalculate Assignment Costs to recalculate prices for all resources and roles on the project.
2. Mark the Synchronize Overtime Factor while recalculating cost checkbox to synchronize the overtime factor defined for each resource when recalculating costs.
3. Click Recalculate.

> **Note**
>
> - Choosing this command recalculates activity costs in all open projects.
> - When connected to a P6 Professional database: Recalculate Assignment Costs is disabled if you do not have the View Resource and Role Costs/ Financials global privilege.

When connected to a P6 EPPM database: Recalculate Assignment Costs is disabled if you do not have the appropriate global privilege as defined in P6.

- The recalculate utility ignores any assignment with a Rate Source set to Override. The customized, manually entered price is not overwritten when you synchronize resource prices. To view the Rate Source for an assignment, display the Rate Source column in the Activity Details, Resources tab.
- You must mark the setting to Link actual to date and actual this period units and costs in the Project Details, Calculations tab to recalculate assignment costs.

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Assign roles to activities

1. Choose Project, Activities.
2. Select the activity to which you want to assign a role.
3. Display Activity Details, then click the Resources tab.
4. Click Add Role.
5. Select the role you want to assign. You can assign multiple roles to an activity. To select more than one item, hold down the Ctrl key, then click each role you want to assign.
6. Click Assign, then click Close.

> **Tip**
>
> If price/unit rates are defined for a role you assign to an activity, you can choose the price/unit rate you want the module to use to calculate cost. Choosing a defined price/unit rate yields more accurate cost planning results. If you do not specify a rate, the module uses the default rate defined in the Project Details, Calculations tab.

Assigning Resource Curves

Assign a curve to a resource or role assignment

You can assign a resource distribution curve to any resource or role assignment on activities with a duration type of Fixed Duration and Units/Time or Fixed Duration & Units. Resource usage and costs are distributed evenly during an activity unless you specify nonlinear distribution using curves.

1. Choose Project, Resource Assignments.
2. Select the resource/role assignment to which you want to assign a resource curve.
3. Double-click in the Curve column and select the curve you want to assign to the resource/role assignment, then click Select. To display the Curve column, click the Display Options bar, then choose Columns, Customize. Select Curve from the General group and click

   to add the column to the Selected Options.

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Tip

- Using pre-defined or custom resource curves, you can define 21 points on the curve to spread units or costs over the duration of an activity. While this is suitable for most activities, some of your activities might require a more granular resource distribution. For example, for long duration activities with varying levels of effort, a resource curve might not fully reflect when work is planned to be performed on the activity. To accurately capture future period resource distribution for these activities, you can manually enter future period budgeted or planned and remaining unit assignment values in the Resource Usage Spreadsheet of the Activities and Resource Assignments windows.
- For activities whose assignments you want to manually plan, you can assign a resource curve to a resource or role assignment, then manually modify the future period values to more accurately capture the planned resource or role distribution. When you assign a resource curve and manually modify future period values, the assigned resource curve is removed from the resource or role assignment.

Note

- Curves are defined by 21 points (5% intervals from 0 to 100).
- You can also assign resource curves in the Resources tab of Activity Details.
- Curves cannot be assigned to an activity with a duration type of Fixed Units or Fixed Units/Time.

Remove a curve from a resource or role assignment

1. Choose Project, Resource Assignments.
2. Select the resource/role assignment from which you want to remove the resource curve.
3. Click in the Curve column, then click Clear in the Select Curve dialog box. To display the Curve column, click the Display Options bar, then choose Columns, Customize. Select Curve from the General group and click

   to add the column to the Selected Options.

   Note

   You can also remove curves from the Resources tab in the Activity Details.

Manually Planning Future Period Assignments

Future period bucket planning

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When you specify an activity's total budgeted or planned units, the budgeted or planned units for an assignment to that activity are spread evenly across the duration of the activity, in the timescale increment you choose. For example, a four-week activity with 80 budgeted or planned units is spread as follows, assuming a weekly timescale:

Week 1	Week 2	Week 3	Week 4
20h	20h	20h	20h

However, your projects may contain activities for which you know work will be performed sporadically and at varying levels of effort. For these activities, you can do either of the following to more accurately capture when you plan for work to be performed on an activity:

- Assign a curve to a resource or role assignment.
- Manually enter future period assignment values.

While assigning a resource curve to the resource/role assignment will yield more accurate results than spreading units evenly across the duration of an activity, the work you plan to perform per period on an activity may not be fully reflected by the curve. As a result, performance against the project plan cannot be accurately measured.

To achieve the most precise resource/role distribution plan, you can manually enter the budgeted or planned resource/role allocation per assignment in the timescale unit you choose (days, weeks, months, quarters, years, or financial periods). For example, assume an activity has an original or planned duration of 28 days and budgeted or planned units of 80 hours. For this activity, you know that the actual work will not be spread evenly across the duration of the activity; rather, the budgeted or planned units will be spread as follows:

Week 1	Week 2	Week 3	Week 4
10h	30h	15h	25h

By manually entering the planned resource/role distribution in future period assignment buckets, you can create an accurate baseline plan to measure against current project progress. As the current project schedule progresses and you apply actuals, you can track how the project is performing against plan by comparing the project's budgeted or planned future periods to the current project's actuals.

If work on an activity is not proceeding according to plan, you can manually update the remaining units for an assignment's future periods, enabling you to measure the remaining work for an assignment without changing the original plan. Alternatively, if you choose to re-estimate future work based on changes to the project schedule, you can edit an assignment's future period budgeted or planned units while the activity is in progress; if many assignments require re-estimation, you can establish a new baseline plan based on your changes.

Tip

- You can compare the planned future period resource distribution to actual units and costs in the Resource Usage Profile, Resource Usage Spreadsheet, Activity Usage Profile, Activity Usage Spreadsheet, time-distributed reports, and the Tracking window. If you plan your project work in defined financial periods, after you store period performance, you can compare the resource distribution you planned to the project's past period actuals.
- Activity costs, including earned value and planned value, are calculated using the planned future period resource distribution you define for activity assignments.

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> **Note**
>
> You must have the 'Edit Future Periods' project privilege to manually enter future period data.

Future period bucket planning FAQ

Refer to the following question and answer topics for important information to consider when manually planning future period resource allocation. Questions and answers are divided into the following categories:

- General questions - Future period bucket planning FAQ
- Troubleshooting - Future period bucket planning FAQ
- Getting Started - Future period bucket planning FAQ
- Application settings - Future period bucket planning FAQ
- Entering and editing data in future period buckets - Future period bucket planning FAQ
- Deleting, copying, and pasting future period bucket data - Future period bucket planning FAQ
- Updating projects - Future period bucket planning FAQ
- Adding, deleting, or replacing assignments - Future period bucket planning FAQ
- Importing and exporting data - Future period bucket planning FAQ
- Miscellaneous - Future period bucket planning FAQ

General questions - Future period bucket planning FAQ

What is a bucket?

The term "bucket" refers to the timeperiod (or timescale interval) in which you enter data in a spreadsheet. For example, if the Resource Usage Spreadsheet is configured to display a Week/Day timescale, the daily timescale intervals in which you can enter data are referred to as "daily buckets."

In the Help related to future period bucket planning, buckets are also referred to as timeperiods or timescale intervals, where appropriate.

What is the difference between a future period bucket and a manual future period value?

A "future period bucket" refers to the future timeperiod (or timescale interval) displayed in a spreadsheet. For example, "Enter values in the assignment's future period buckets."

The phrase "manual future period values" refers to the values that exist within future period buckets. For example, "Changing an activity's start or finish dates may change an assignment's manual future period values."

How do I know that an assignment has manual future period values?

When an assignment has manual future period values, the module automatically identifies the future period values as a Manual resource curve. To determine the assignments that have a manual resource curve, display the Curve column in the Resource Assignments window. The Curve column displays a value of 'Manual' for manually-planned resource/role assignments.

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Are manual future period values stored in the baseline?

Yes, manual future period values are always stored in the baseline when you save a copy of the current project as a new baseline. When you restore a baseline, manual future period values are also restored. Additionally, baselines that contain assignments with manually-created future period buckets are updated automatically.

Can all users manually enter future period values?

No. You must have the 'Edit Future Periods' project privilege to manually enter or edit data in future period buckets.

Troubleshooting - Future period bucket planning FAQ

Why are some future period buckets gray/uneditable?

When a future period bucket is not eligible for editing, the spreadsheet cell is gray.

Spreadsheet cells are gray/uneditable when any of the following are true:

- The activity associated with the assignment has a duration type of Fixed Units or Fixed Units/Time. You can only manually enter future period values for activities with a duration type of Fixed Duration & Units and Fixed Duration & Units/Time.
- The resource or role assigned to the activity does not have any valid worktime for the time period. For resource assignments to task-dependent activities, and for all role assignments to activities, the module determines if there is valid worktime based on the activity calendar. For resource assignments to resource-dependent activities, the module determines if there is valid worktime based on the resource calendar.
- The displayed timescale intervals in the spreadsheet are smaller than the minimum timescale interval used for time-distributed resource calculations. You can change this setting in the 'Interval for time-distributed resource calculations' field (User Preferences, Resource Analysis tab). For example, if this option is set to Week, you can only enter or edit data in weekly, monthly, quarterly, or yearly future period buckets.
- For activities that have not started yet, the date of the timescale interval is prior to the Project Planned Start date (for the Budgeted or Planned Units field) or the Remaining Early Start date (for the Remaining Units field) of the activity.
- The activity associated with the assignment has an Actual Finish date (for Remaining Early Unit buckets only).
- For activities that are in progress, the date of the timescale interval is prior to the Data Date (for Remaining Early Unit buckets only).
- The activity associated with the assignment is a milestone activity.
- The timescale is set to Day/Shift or Day/Hour.
- The timescale is set to display only ordinal dates. You must display primary dates (with or without ordinal dates) to edit data in future period buckets.
- When the timescale is set to display financial period intervals, no financial period is defined for the timeperiod or the first timeperiod is not within the range of defined financial period dates.
- You choose to display time-distributed Remaining Early units and costs according to forecast dates rather than remaining early dates in the User Preferences, Resource Analysis tab. This only applies to the Remaining Units field.
- You choose to calculate average values for the spreadsheet in the Spreadsheet Options dialog box.

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- You have not been assigned the Edit Future Periods project privilege.
- In the Resource Usage Spreadsheet of the Activities window, you display assignment data for all projects rather than for open projects. If you display data for all projects, the title of the Display Options bar in the Resource Usage Spreadsheet is "Display: All Projects." To display data for open projects only, click the Display Options bar, then choose Show All Projects to remove the checkmark; the title of the Display Options bar changes to "Display: Open Projects Only."

Why can't I enter different values for the Budgeted or Planned and Remaining Units fields?

For activities that have not started, if the project-level setting 'Link Budgeted or Planned and At Completion for not started activities' is marked (Project Details, Calculations tab), the total planned values of the Budgeted or Planned Units and Remaining (Early) Units for the assignment will always be equal. For example, when you enter a value for a future period in the Budgeted or Planned Units field, the Remaining (Early) Units field is automatically populated with the same value; the reverse is also true. If this setting is not marked, you can enter different values for the same future period in the Budgeted or Planned Units and Remaining (Early) Units fields; in this case, the total values for each field are calculated independently for the assignment.

For activities that are in progress, you can always enter different future period values in the Budgeted or Planned Units and Remaining (Early) Units fields.

Why did the manual future period values I entered change?

There are many reasons why the future period values you entered for an assignment might change to different values or be placed in a different timeperiod. For example, remaining unit data for an assignment might change when you apply actuals, or if you entered values in daily increments and changed the timescale to a larger increment (for example, days to weeks), the data you see is a roll-up of the daily values you entered.

More specifically, changes to some activity or assignment data can cause the manual future period values to be respread and, in some cases, recalculated. When you manually enter data in future period buckets, the bucket values are stored in the database. When you modify activity or assignment information that causes the values to respread across future period buckets, the values stored in the database do not change; only the spread of those values across future period buckets changes. When you modify activity or assignment data that causes the values to be recalculated, the values you originally entered are recalculated according to the manual distribution and stored in the database; the original values are lost.

The sections below detail the activity and assignment fields that may cause manual future period values to be respread or recalculated.

Changing values in the following ASSIGNMENT-related fields may respread manual future period values across buckets:

- Project Planned Start or Finish (Fixed Duration & Units activities only)
- Remaining Early Start or Finish (Fixed Duration & Units activities only)
- Original or Planned Remaining Duration (Fixed Duration & Units activities only)
- Actual, Budgeted or Planned, or Remaining Units
- Budgeted or Planned Units/Time
- Planned or Remaining Lag
- Budgeted or Planned Remaining Cost (see note below)

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- Drive Activity Dates - You change the driving resource on the assignment.
- Rate Source (see note below)
- Rate Type (see note below)
- Price/Unit (see note below)
- Curve - You assign a resource curve to an assignment with manual future period values.

> **Note**
>
> When you modify the budgeted or planned and Remaining Cost, Rate Source, Rate Type, and Price/Unit fields, costs will be recalculated. Manual future period unit values may be respread only if the 'Calculate costs from units' resource/role option (or the equivalent 'Calculate costs from units' assignment option) and the project setting 'Update units when costs change on resource assignments' (Project Details, Calculations tab) are both selected. For more information, see the next question below.

Do application settings for linking costs and units affect manual future period values?.

- Yes. At the project level, the 'Update units when costs change on resource assignments' setting (Project Details, Calculations tab) determines if the application updates units when costs change on assignments to activities throughout the project. At the assignment level, the 'Calculate costs from units' field (Activity Details, Resources tab) determines if costs are updated when you change units for that particular assignment. The 'Update units when costs change on resource assignments' project-level setting only applies when the 'Calculate costs from units' assignment-level option is selected.

> **Note**
>
> When you add a resource or add a role, you can choose the option to 'Calculate costs from units' for that resource's (Resource Details, Details tab) or role's (Roles dictionary, Prices tab) assignments. The 'Calculate costs from units' assignment-level option is automatically turned on or off based on this resource/role setting when you assign a resource/role to an activity. You can change this setting per assignment by displaying the Calculate Costs From Units column on the Resources tab of Activity Details, then marking or clearing the checkbox.
>
> When you manually edit future period units and costs for an assignment (for example, you change the Remaining Cost of the assignment), the following will occur depending on the values of these settings:
>
> – When 'Calculate costs from units' is selected for an assignment, costs are recalculated when you change the planned or budgeted or remaining units, regardless of the 'Update units when costs change on resource assignments' project-level setting. If the project-level setting is also selected, the planned or budgeted or remaining units are respread when the planned or budgeted or remaining costs change for the assignment.
>
> – When the 'Calculate costs from units' setting is not selected for an assignment, costs and units are handled independently, regardless of the 'Update units when costs change on resource assignments' project-level setting.

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Changing values in the following activity-related fields may respread manual future period values across buckets:

- Actual, Budgeted or Planned, or Remaining Units
- Start Date
- Planned or Remaining Lag
- Suspend and Resume Date
- Activity Type - Manual future period values will only be respread if the activity Finish Date changes when you change the activity type from Task Dependent to Resource Dependent, or from Resource Dependent to Task Dependent.
- Activity Calendar (editing or changing)
- Duration % (Fixed Duration & Units activities only. For more information on the impact of modifying the Duration % field, refer below to How are actuals applied when I manually update progress for assignments with manual future period values?)
- 'Update units when costs change on resource assignments' setting (Project Details, Calculations tab. For more information on the impact of modifying this setting, refer below to Do application settings for linking costs and units affect manual future period values?)
- Adding a new assignment - When you add a new assignment to an activity that already has a resource assignment with manual future period values, the module may change values for the existing assignment based on your user preference setting for assignment staffing (User Preferences, Calculations tab). For more information, refer to below to Can I assign a new resource to an activity that already has a resource assignment with manual future period values?.
- How are actuals applied when I manually update progress for assignments with manual future period values?) Actuals are applied to manually-planned assignments according to the following rules, depending on the way you manually update activity progress:
- If you use Progress Spotlight to update activity progress, actuals are applied using the specified manual planned or budgeted unit distribution; the manual remaining unit distribution is not considered, even if no manual planned or budgeted unit data exists for an assignment. When the planned or budgeted and remaining unit values are different for an assignment, the planned or budgeted unit values overwrite the existing remaining unit values when you apply actuals.
- If you update activity progress by modifying Duration % Complete or Remaining Duration on the activity, the activity's actual units are updated when you apply actuals using the manual remaining unit distribution, as long as the project option 'Recalculate Actual Units and Cost when duration percent complete changes' (Project Details, Calculations tab) is marked.
- If you update activity progress by modifying the Remaining Units or Remaining Early Finish on the assignment, the activity's actual units are updated when you apply actuals using the manual planned or budgeted unit distribution as long as the project option 'Recalculate Actual Units and Cost when duration percent complete changes' (Project Details, Calculations tab) is marked.
- If you update activity progress by modifying the Actual Units on the activity or assignment, manual future period planned or budgeted and remaining unit values are not updated when you apply actuals.
- Do application settings for linking costs and units affect manual future period values?) Yes. At the project level, the 'Update units when costs change on resource assignments' setting (Project Details, Calculations tab) determines if the application updates units when

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costs change on assignments to activities throughout the project. At the assignment level, the 'Calculate costs from units' field (Activity Details, Resources tab) determines if costs are updated when you change units for that particular assignment. The 'Update units when costs change on resource assignments' project-level setting only applies when the 'Calculate costs from units' assignment-level option is selected.

> **Note**
>
> When you add a resource or add a role, you can choose the option to 'Calculate costs from units' for that resource's (Resource Details, Details tab) or role's (Roles dictionary, Prices tab) assignments.The 'Calculate costs from units' assignment-level option is automatically turned on or off based on this resource/role setting when you assign a resource/role to an activity. You can change this setting per assignment by displaying the Calculate Costs From Units column on the Resources tab of Activity Details, then marking or clearing the checkbox.

- When you manually edit future period units and costs for an assignment (for example, you change the Remaining Cost of the assignment), the following will occur depending on the values of these settings:
- When 'Calculate costs from units' is selected for an assignment, costs are recalculated when you change the planned or budgeted or remaining units, regardless of the 'Update units when costs change on resource assignments' project-level setting. If the project-level setting is also selected, the planned or budgeted or remaining units are respread when the planned or budgeted or remaining costs change for the assignment.
- When the 'Calculate costs from units' setting is not selected for an assignment, costs and units are handled independently, regardless of the 'Update units when costs change on resource assignments' project-level setting.
- Can I assign a new resource to an activity that already has a resource assignment with manual future period values?. Yes. When you add an assignment to an activity that already has an existing assignment, the module adheres to your User Preference settings for assignment staffing, as described below.

Adding a resource assignment to an activity that has an existing resource assignment

- When you add a resource assignment to an activity that already has an existing resource assignment with manual future period values, the module adheres to your setting in the 'When assigning a resource to an existing activity assignment' field (User Preferences, Calculations tab, Assignment Staffing section). If you choose to 'Always use the new resource's Units/Time and Overtime factor,' the manual future period values of the existing resource assignment may be respread across future period buckets based on the new resource's values. If you choose to 'Always use current assignment's Units/Time and Overtime factor,' unit values for the new resource are spread evenly over future period buckets and the manual future period values for the existing resource assignment are not changed.

Adding a resource assignment to an activity that has an existing role assignment, or vice versa

- When you add a resource assignment to an activity that already has an existing role assignment with manual future period values (or vice versa), the module adheres to your setting in the 'When a resource and role share an activity assignment' field (User Preferences, Calculations tab, Assignment Staffing section). If you choose to 'Always use

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resource's Price per Unit,' the manual future period values for the existing role assignment may be respread across future period buckets based on the new resource's values. Likewise, if you choose to 'Always use role's Price per Unit,' the manual future period values for the existing resource assignment may be respread across future period buckets based on the new role's values.

Changing values in the following ASSIGNMENT-related fields may RECALCULATE manual future period values:

- Budgeted or Planned or Remaining Finish (Fixed Duration & Units/Time activities only)
- Original or Planned or Remaining Duration (Fixed Duration & Units/Time activities only)

Changing values in the following ACTIVITY-related fields may RECALCULATE manual future period values:

- Budgeted or Planned or Remaining Finish (Fixed Duration & Units/Time activities only)
- Original or Planned or Remaining Duration (Fixed Duration & Units/Time activities only)
- Activity Status
- Duration Type
- Duration % (Fixed Duration & Units/Time activities only. For more information on the impact of modifying the Duration % field, refer below to How are actuals applied when I manually update progress for assignments with manual future period values?) How are actuals applied when I manually update progress for assignments with manual future period values?) Actuals are applied to manually-planned assignments according to the following rules, depending on the way you manually update activity progress:
- If you use Progress Spotlight to update activity progress, actuals are applied using the specified manual planned or budgeted unit distribution; the manual remaining unit distribution is not considered, even if no manual planned or budgeted unit data exists for an assignment. When the planned or budgeted and remaining unit values are different for an assignment, the planned or budgeted unit values overwrite the existing remaining unit values when you apply actuals.
- If you update activity progress by modifying Duration % Complete or Remaining Duration on the activity, the activity's actual units are updated when you apply actuals using the manual remaining unit distribution, as long as the project option 'Recalculate Actual Units and Cost when duration percent complete changes' (Project Details, Calculations tab) is marked.
- If you update activity progress by modifying the Remaining Units or Remaining Early Finish on the assignment, the activity's actual units are updated when you apply actuals using the manual planned or budgeted unit distribution as long as the project option 'Recalculate Actual Units and Cost when duration percent complete changes' (Project Details, Calculations tab) is marked.
- If you update activity progress by modifying the Actual Units on the activity or assignment, manual future period planned or budgeted and remaining unit values are not updated when you apply actuals.
- Removing an assignment (For more information, refer to below to Can I remove or replace a resource assignment with manual future period values? Can I remove or replace a resource assignment with manual future period values? Yes. When you replace the resource or role assigned to an activity, any manual future period values entered for that assignment are preserved with the new assignment.
- When you remove a resource or role assignment that has manual future period values, the manual future period values are deleted. If other assignments with manual future period

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values exist on the same activity, those assignments' manual future period values may change based on the activity type and your user preference settings for assignment staffing (User Preferences, Calculations tab).

Getting Started - Future period bucket planning FAQ

Where can I manually enter future period values?

You can manually enter future period values for an assignment in the Budgeted Units or Planned Units and Remaining (Early) Units fields in the Resource Usage Spreadsheet in the Resource Assignments and Activities windows.

> **Note**
>
> To manually enter future period values in the Resource Usage Spreadsheet in the Activities window, you must choose to display resource assignment data for open projects only. If you are displaying data for all projects, the title of the Display Options bar in the Resource Usage Spreadsheet is "Display: All Projects." To display data for open projects only, click the Display Options bar, then choose Show All Projects to remove the checkmark; the title of the Display Options bar changes to "Display: Open Projects Only."

Can I enter future period values for all assignments to activities?

No. You can manually enter future period values for assignments when:

- The activity associated with the assignment has a duration type of Fixed Duration & Units or Fixed Duration and Units/Time. You cannot enter future period values for assignments to activities with a duration type of Fixed Units or Fixed Units/Time.
- The activity associated with the assignment is not a milestone activity.

For more information on these and other future period bucket planning restrictions, see the next question below.

Why are some future period buckets gray/uneditable?

When a future period bucket is not eligible for manual future period bucket planning, the spreadsheet cell is gray.

Spreadsheet cells are gray/uneditable when:

- The activity associated with the assignment has a duration type of Fixed Units or Fixed Units/Time (you can only enter manual future period values for activities with a duration type of Fixed Duration & Units and Fixed Duration & Units/Time).
- The resource or role assigned to the activity does not have any valid worktime for the timeperiod. For resource assignments to task-dependent activities, and for all role assignments to activities, the module determines if there is valid worktime based on the activity calendar. For resource assignments to resource-dependent activities, the module determines if there is valid worktime based on the resource calendar.
- The displayed timescale unit in the spreadsheet is smaller than the minimum timescale unit used for time-distributed resource calculations. You can change this setting in the 'Interval for time-distributed resource calculations' field (User Preferences, Resource Analysis tab). For example, if this option is set to Week, you can only enter or edit data in weekly, monthly, or quarterly timescale buckets.

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Can I enter values in any time unit?

The values you enter in the Budgeted or Planned Units and Remaining (Early) Units fields are converted to the Unit/Time specified in the User Preferences, Time Units tab. For example, if the Unit/Time user preference is set to Hour and you enter 1d, the value is converted to 8h. To avoid planning mistakes, you should set the Unit/Time user preference to the same time unit you use to plan your work. For example, if you plan your work in hours, set the Unit/Time to Hours.

Can I manually enter or edit values for Remaining Late Units?

No, you can only enter or edit values for budgeted or planned Units and Remaining (Early) Units.

Application settings - Future period bucket planning FAQ

Can I enter future period values in any timescale interval?

No. You can enter values in future period buckets of all timescale intervals except Day/Hour and Day/Shift.

Your user preference setting for 'Interval for time-distributed resource calculations' (User Preferences, Resource Analysis tab) determines the minimum timescale interval in which you can enter or edit data. For example, if this option is set to Week, you can only enter or edit data in weekly, monthly, quarterly, yearly, or financial period buckets. When you display timescale intervals smaller than the interval specified as your user preference, the buckets are not editable. Using this case as an example, if you display daily timescale intervals, the buckets are not editable.

Does it matter which date format I choose, primary dates or ordinal dates?

Yes. You can enter future period values if you choose to display primary dates or a combination of primary and ordinal dates. You cannot enter future period values when you choose to display only ordinal dates.

To select timescale settings, click the Display Options bar in the Resource Usage Spreadsheet, then choose Timescale.

Can I change timescale settings after I enter values in future period buckets?

Yes. When you select a smaller timescale interval, the values you originally entered in the larger buckets are spread linearly over the smaller buckets. When you enlarge the timescale interval, the values you originally entered in the smaller buckets are rolled up into the larger buckets.

If you subsequently change the timescale back to the setting you used when you manually entered values in future period buckets, the values appear as you originally entered them.

Do application settings for linking costs and units affect manual future period values?

Yes. At the project level, the 'Update units when costs change on resource assignments' setting (Project Details, Calculations tab) determines if the application updates units when costs change on assignments to activities throughout the project. At the assignment level, the 'Calculate costs from units' field (Activity Details, Resources tab) determines if costs are updated when you change units for that particular assignment. The 'Update units when costs change on resource assignments' project-level setting only applies when the 'Calculate costs from units' assignment-level option is selected.

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Note

- When you add a resource or add a role, you can choose the option to 'Calculate costs from units' for that resource's (Resource Details, Details tab) or role's (Roles dictionary, Prices tab) assignments. The 'Calculate costs from units' assignment-level option is automatically turned on or off based on this resource/role setting when you assign a resource/role to an activity. You can change this setting per assignment by displaying the Calculate Costs From Units column on the Resources tab of Activity Details, then marking or clearing the checkbox. When you manually edit future period units and costs for an assignment (for example, you change the Remaining Cost of the assignment), the following will occur depending on the values of these settings:
- When 'Calculate costs from units' is selected for an assignment, costs are recalculated when you change the planned or budgeted or remaining units, regardless of the 'Update units when costs change on resource assignments' project-level setting. If the project-level setting is also selected, the planned or budgeted or remaining units are respread when the planned or budgeted or remaining costs change for the assignment.
- When the 'Calculate costs from units' setting is not selected for an assignment, costs and units are handled independently, regardless of the 'Update units when costs change on resource assignments' project-level setting.

Entering and editing data in future period buckets - Future period bucket planning FAQ

Can I enter different values for Budgeted or Planned Units and Remaining (Early) Units?

Yes. **For not started activities**, if the project-level setting 'Link Budgeted or Planned and At Completion for not started activities' is marked (Project Details, Calculations tab), the total planned values of the Budgeted or Planned Units and Remaining (Early) Units for the assignment will always be equal. For example, when you enter a value for a future period in the Budgeted or Planned Units field, the Remaining (Early) Units field is automatically populated with the same value; the reverse is also true. If this setting is not marked, you can enter different values for the same future period in the Budgeted or Planned Units and Remaining (Early) Units fields; in this case, the total values for each field are calculated independently for the assignment.

For activities that are in progress, you can always enter different future period values in the Budgeted or Planned Units and Remaining (Early) Units fields

Can I enter data in financial period buckets?

Yes, you can enter data in financial period buckets for the range of financial period dates defined in the Financial Period Calendar. For example, if you are working in a project which uses a financial period calendar with weekly financial periods from January 1st, 2007, through December 31st, 2007, you can enter data in weekly financial period buckets beginning on or after January 1st, 2007, and ending on or before December 31st, 2007.

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> **Note**
>
> The setting for 'Interval for time-distributed resource calculations' (User Preferences, Resource Analysis tab) should not be larger than your defined financial periods. For example, if you are working in a project which uses a financial period calendar with weekly financial periods, the setting for 'Interval for time-distributed resource calculations' should be Hour, Day, or Week, but not Month. If this setting is larger than the financial period calendar's defined financial periods, you will not be able to edit most financial period buckets. For example, if the user preference is set to Month but you are working in a project which uses a financial period calendar with weekly financial periods, you will only be able to edit data for financial period buckets that contain the first day of the month.

Can I overallocate a resource or role when I manually enter future period values?

Yes. If the resource or role on the assignment has valid worktime for a timeperiod, you can enter an unlimited number of units for the timeperiod, even if the value you enter overallocates the resource or role.

If no work is planned to be performed on an activity for a timeperiod, do I have to enter a value?

No. Assume, for example, that you plan your work in weekly planning periods. You have a four-week task in which work is planned to be performed during weeks 1, 2, and 4, but no work will be performed during week 3. Given this example, when you enter future period values, simply do not enter a value for the period in which work will not be performed, such as:

Week 1	Week 2	Week 3	Week 4
20	15		30

The module treats a blank value the same as a zero value; therefore, you could also enter a 0 (zero) as the Week 3 value.

Can I manually enter future period values for an assignment that already has an assigned resource curve?

Yes. In fact, to simplify the process of manually planning future period assignments, you can apply a resource curve to the assignment that has a similar resource distribution to the distribution you intend to manually plan, then manually make any necessary modifications to the future period values.

> **Note**
>
> When you apply a resource curve to an assignment and then manually modify future period values for that assignment, the resource curve is removed from the assignment and the assignment is designated as a 'Manual' curve.

Can I enter a zero in a future period bucket?

Yes; however, the module considers the zero value differently depending on where the value lies in the planned resource distribution.

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When you replace an assignment's first future period bucket value with a zero:

When an assignment's first future period bucket contains a non-zero value and you replace it with a zero (or you delete the value), the duration of the assignment is shortened and the zero value is converted to start date lag.

For example, assume you've manually planned a five-day assignment with the following daily bucket values: 8|4|2|6|2. If you change the 8 to a zero (or delete the value), the planned duration of the assignment is changed to four days with a start date lag of one day.

> **Note**
>
> - When you enter a leading zero for an assignment and then refresh the window, the leading zero disappears.
> - For assignments to not started activities, if the 'Link Budgeted or Planned and At Completion for not started activities' project option (Project Details, Calculations tab) is NOT selected and you enter a leading zero for an assignment, one day of lag is added to both the Project Planned Start and Remaining Start dates. This occurs regardless of the field in which you enter the leading zero (budgeted or planned Units or Remaining Units) because the Project Planned Start and Remaining Start dates must be the same for activities that are not started.

When you enter a zero value in between non-zero values:

If you enter a zero value in between non-zero values for an assignment, the module considers the zero bucket part of the planned resource distribution. In the following examples of five-day tasks, the zeros are included in the resource distribution:

2|8|0|4|4

2|0|8|0|4

8|0|0|8|4

When you enter a zero as the last future period bucket value for an assignment:

When you enter a zero after an assignment's last future period bucket value (that is, there are no subsequent non-zero values), the module ignores the zero. In the following example, the zero is ignored:

2|8|4|8|0

> **Note**
>
> When you enter a trailing zero for an assignment and then refresh the window, the trailing zero disappears.

Can I enter a negative value in a future period bucket?

Yes, if the total units (budgeted or planned or remaining, exclusive) value for the assignment is negative. For example, if the total Budgeted or Planned Units for an assignment is negative, you can enter a negative value in a Budgeted or Planned Units future period bucket for that assignment.

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If the total units (budgeted or planned or remaining) value for an assignment is negative and you enter a positive value, the value is automatically converted to a negative value. Likewise, if the total units (budgeted or planned or remaining) value for an assignment is positive and you enter a negative value, the value is automatically converted to a positive value.

If an activity's progress is planned to be suspended, can I enter or edit values for the activity's assignments in future periods during which progress on the activity will be suspended?

Yes, you can enter or edit values in future period buckets that are planned to be suspended, as long as the suspend time has not been scheduled (in other words, the project has not been scheduled since the suspend and resume dates were added to the activity).

When the project is scheduled, the suspend and resume dates for the activity are scheduled accordingly and you can no longer enter or edit data in buckets which are scheduled to be suspended.

If you enter future period data in a bucket that is planned to be suspended, when you schedule the project, any work that is planned to occur during the suspend time is pushed out to the resume date.

Deleting, copying, and pasting future period bucket data - Future period bucket planning FAQ

When I copy/paste a project, WBS, or activity, are manual future period values included?

Yes, manual future period values are copied when you copy a project, WBS, or activity, provided that, when prompted, you choose to copy Resource and Role Assignments in the Copy Activity Options dialog box.

What happens when I delete a manual future period value?

When you delete a manual future period value, the module considers the value to be a zero. Depending on where the zero lies during the duration of the assignment (first bucket, middle bucket, last bucket), the zero may or may not be considered part of the future period resource distribution.

Refer below to Can I enter a zero in a future period bucket? to learn more about how the module considers zero values.

Can I enter a zero in a future period bucket?

Yes; however, the module considers the zero value differently depending on where the value lies in the planned resource distribution.

When you replace an assignment's first future period bucket value with a zero:

When the first future period assignment bucket contains a non-zero value and you replace it with a zero (or you delete the value), the duration of the assignment is shortened and the zero value is converted to start date lag.

For example, assume you've manually planned a five-day assignment with the following daily bucket values: 8|4|2|6|2. If you change the 8 to a zero (or delete the value), the planned duration of the assignment is changed to four days with a start date lag of one day.

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> **Note**
>
> - When you enter a leading zero for an assignment and then refresh the window, the leading zero disappears.
> - For assignments to not started activities, if the 'Link Budget or Planned and At Completion for not started activities' project option (Project Details, Calculations tab) is NOT selected and you enter a leading zero for an assignment, one day of lag is added to both the Project Planned Start and Remaining Start dates. This occurs regardless of the field in which you enter the leading zero (Budgeted or Planned Units or Remaining Units) because the Project Planned Start and Remaining Start dates must be the same for not started activities.

When you enter a zero value in between non-zero values:

If you enter a zero value in between non-zero values for an assignment, the module considers the zero bucket part of the planned resource distribution. In the following examples of five-day tasks, the zeros are included in the resource distribution:

2|8|0|4|4

2|0|8|0|4

8|0|0|8|4

When you enter a zero as the last future period bucket value for an assignment:

When you enter a zero at the end of an assignment (that is, there are no subsequent non-zero values), the module ignores the zero. In the following example, the zero is ignored:

2|8|4|8|0

> **Note**
>
> When you enter a trailing zero for an assignment and then refresh the window, the trailing zero disappears.

Are manual future period values deleted when I delete a project, WBS, activity, or assignment?

Yes, manual future period values are automatically deleted when you delete a project, WBS, activity, or assignment.

If I delete a resource or role with manual future period values, can I merge the assignment data with another existing resource or role?

Yes. When you delete a resource or role, you can choose to preserve the associated assignment data by merging the data with another resource.

Updating projects - Future period bucket planning FAQ

If work on an activity is in progress or complete, can I edit the previously defined manual assignment values?

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For Budgeted or Planned units, you can edit manual values for an assignment at any time (before or after the data date), even if the activity associated with the assignment is in progress or has an Actual Finish date.

For Remaining (Early) Units, you can edit manual values for an assignment's future period buckets only (buckets after the data date); you cannot edit an assignment's past period buckets (buckets before the data date) when an activity is in progress, even if you manually entered the values before work began on the activity. Once an activity has an Actual Finish date, you can not edit remaining unit values.

> **Tip**
>
> When work on an activity is not proceeding according to plan, you can re-estimate the remaining work on the assignment and update the assignment's remaining without changing the original plan, enabling you to compare the original baseline plan to when the work actually occurred. If the project schedule has deviated significantly from the original plan and several activities require re-estimation, you might choose to update the budgeted or planned units for those assignments and re-baseline the project.

Can I automatically apply actuals for assignments with manual future period values?

Yes. The Auto Compute Actuals option must be selected on the activity or the resource assigned to the activity for the module to consider manual future period values when applying actuals.

To set Auto Compute Actuals at the activity level, display the Auto Compute Actuals column in the Activity Table (Activities window), then mark the checkbox for the appropriate activities.

You can set Auto Compute Actuals per resource on the Details tab of Resource Details. Choose Enterprise, Resources, then display resource details.

How are actuals applied when I manually update progress for assignments with manual future period values?

Actuals are applied to manually-planned assignments according to the following rules, depending on the way you manually update activity progress:

If you use Progress Spotlight to update activity progress, actuals are applied using the specified manual planned or budgeted unit distribution; the manual remaining unit distribution is not considered, even if no manual planned or budgeted unit data exists for an assignment. When the planned or budgeted and remaining unit values are different for an assignment, the planned or budgeted unit values overwrite the existing remaining unit values when you apply actuals.

If you update activity progress by modifying Duration % Complete or Remaining Duration on the activity, the activity's actual units are updated using the manual remaining unit distribution when you apply actuals, as long as the project option 'Recalculate Actual Units and Cost when duration percent complete changes' (Project Details, Calculations tab) is marked.

If you update activity progress by modifying the Remaining Units or Remaining Early Finish on the assignment, the activity's actual units are updated using the manual planned or budgeted unit distribution when you apply actuals, as long as the project option 'Recalculate Actual Units and Cost when duration percent complete changes' (Project Details, Calculations tab) is marked.

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If you update activity progress by modifying the Actual Units on the activity or assignment, manual future period planned or budgeted and remaining unit values are not updated when you apply actuals.

How does removing progress from an activity affect manual future period values?

When you remove progress from an activity that has manual future period values on its associated assignment, the module adheres to the setting for removing progress from activities on the Project Details, Calculations tab.

If you choose to 'Reset Planned or Original Duration and Units to Remaining,' the assignment's manual future period planned or budgeted unit values are respread to match the manual remaining unit values.

If you choose to 'Reset Remaining Duration and Units to Planned or Original,' the assignment's manual future period remaining unit values are respread to match the manual planned or budgeted unit values.

Does the module use manual future period values when calculating earned value?

Yes.

Can I update a baseline with revised manual future period values?

Yes.

Adding, deleting, or replacing assignments - Future period bucket planning FAQ

Can I assign a new resource to an activity that already has a resource assignment with manual future period values?

Yes. When you add an assignment to an activity that already has an existing assignment, the module adheres to your User Preference settings for assignment staffing, as described below.

Adding a resource assignment to an activity that has an existing resource assignment

When you add a resource assignment to an activity that already has an existing resource assignment with manual future period values, the module adheres to your setting in the 'When assigning a resource to an existing activity assignment' field (User Preferences, Calculations tab, Assignment Staffing section). If you choose to 'Always use the new resource's Units/Time and Overtime factor,' the manual future period values of the existing resource assignment might be respread across future period buckets based on the new resource's values. If you choose 'Always use current assignment's Units/Time and Overtime factor,' unit values for the new resource are spread evenly over future period buckets, and the manual future period values for the existing resource assignment are not changed.

Adding a resource assignment to an activity that has an existing role assignment, or vice versa

When you add a resource assignment to an activity that already has an existing role assignment with manual future period values (or vice versa), the module adheres to your setting in the 'When a resource and role share an activity assignment' field (User Preferences, Calculations tab, Assignment Staffing section). If you choose 'Always use resource's Price per Unit,' the manual future period values for the existing role assignment might be respread across future period buckets based on the values of the new resource. Likewise, if you choose 'Always use role's Price per Unit,' the manual future period values for the existing resource assignment might be respread across future period buckets based on the new role's values.

Can I remove or replace a resource assignment with manual future period values?

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Yes. When you replace the resource or role assigned to an activity, any manual future period values entered for that assignment are preserved with the new assignment.

When you remove a resource or role assignment that has manual future period values, the manual future period values are deleted. If other assignments with manual future period values exist on the same activity, those assignments' manual future period values may change based on the activity type and your user preference settings for assignment staffing (User Preferences, Calculations tab).

Importing and exporting data - Future period bucket planning FAQ

Can I exchange manual bucket data with other P6 Professional users using P6 Professional XER files?

Yes, you can import and export manual future period buckets using P6 Professional XER files.

Import considerations

You will lose manual future period buckets in a project you are updating with imported data when all of the following are true:

- The XER file you are importing was created using P6 Professional.
- The XER file you are importing does not contain manual future period buckets.
- You choose the Update Existing import action.
- You choose to update activity resource assignments.
- The project you are updating does contain manual future period buckets.

In all other cases, manual future period buckets remain intact when you import an XER file.

Can I exchange manual bucket data with other P6 Professional users using P6 Professional XML files?

Yes. When you export a project to a P6 Professional XML file, manual future period buckets are exported to the file.

When you import a P6 Professional XML file to a project, all manual future period buckets that exist in the project are retained as long as the periods defined in the financial period calendar assigned to the project match the periods in the import file.

Can I exchange manual bucket data with Oracle Contractor?

Oracle Contractor 6.1 and later users can exchange manual bucket data with P6 Professional using Contractor 6.1 XER files; however, manual future period buckets are not supported in Oracle Contractor 5.0 and earlier versions.

When you export a project with manual bucket data to a Contractor 5.0 XER, manual future period buckets are included in the XER file but are not imported to Contractor (version 5.0 or earlier). When you import a Contractor 5.0 XER to a P6 Professional project containing manual future period buckets, the manual future period buckets remain intact.

Can I exchange manual bucket data with Microsoft Project?

Yes. You can import and export manual future period buckets to 2003, 2007, and 2010 using MSP XML format. Due to changes in Microsoft's supported import and export file formats, P6 Professional no longer supports MPD, MPT, MPX, and MDB files. P6 Professional does not support import and export using MSP 98 due to the manner in which time-phased data is stored in that version. You will achieve the most accurate import/export results using MSP 2003 or later.

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Export considerations

When you export a project to MSP:

- Manual future period buckets are imported to MSP as a contoured curve.
- If the Timescale Units setting in MSP is smaller than the setting in the P6 Professional export file (as specified in the 'Interval for time-distributed resource calculations' field in User Preferences), the manual future period buckets are spread linearly across the smaller timescale in MSP. If you change the MSP timescale setting to match the P6 Professional timescale setting, the buckets will display the proper values.
- Since MSP does not use forecast dates, if the P6 Professional export file displays time-distributed data using forecast dates (as specified in User Preferences, Resource Analysis tab), assignments with manual future period buckets are spread linearly in MSP.
- For manually-planned assignments to activities with suspend and resume dates, MSP honors the suspend and resume dates and spreads the budgeted or planned unit values accordingly in the Baseline Work field; however, because P6 Professional's Actual Units and Remaining (Early) Units are combined into MSP's Actual Work field, MSP only honors actual and remaining values up to the Suspend Date or the Data Date, depending on when the activity's suspend and resume dates fall. If the suspend and resume dates are both before the Data Date, MSP spreads the Actual Work up to the Data Date; if only the Suspend Date is before the Data Date, MSP spreads the Actual Work up to the Suspend Date.
- WBS Summary activities with manual future period assignment values are exported to MSP; however, the manual future period values are not exported. In MSP, the total budgeted or planned and remaining unit values for assignments to WBS Summary activities are spread linearly across the duration of the assignment.

Import considerations

When you import a project from MSP:

- Suspend and resume dates in MSP are not honored when imported to P6 Professional. When you import an MSP project that has an activity with suspend and resume dates, the suspend time is imported as a 0 (zero) bucket value for the assignment.
- The MPX file format does not support time-phased data and therefore does not support manual future period buckets. When you import an MPX file, if you choose the Replace Existing import action and the project you are replacing contains manual future period buckets, all manual buckets will be deleted.

Miscellaneous - Future period bucket planning FAQ

Can I update data globally for projects that have assignments with manual future period values?

Yes. However, changing some values globally may cause manual future period values to change or, in some cases, be deleted.

For activity resource assignments, globally changing the Planned Finish, Remaining Finish, and Actual Start may cause manual future period values to change. Manual future period values are deleted when you globally change the assigned Curve, specify an Actual Finish date, or set the budgeted or planned and Remaining Units or Units/Time (Labor, Non-Labor, or Material) to zero.

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For activities, globally changing the Actual Start, Planned Finish, Planned or Original Duration, Remaining Finish, or Remaining Duration may cause manual future period values to change. Manual future period values are deleted when you globally change the Duration Type to Fixed Units or Fixed Units/Time, specify an Actual Finish date, or set the budgeted or planned Units/Time to zero.

Are manual future period values considered when I level resources?

Yes. When a project with manual future period buckets is leveled, assignments with manual future period values are leveled in the same manner as assignments without manual future period values.

Create a future period bucket planning layout

You can budget or plan future period resource/role assignments in any type of layout in the Resource Assignments and Activities windows. This topic contains some steps you might choose to follow when you create a layout to use for future period bucket planning. When you create a future period bucket planning layout, you should save the layout for future use.

1. Display editable future period bucket planning fields

You can enter future period budgeted or planned and remaining values in the Budgeted or Planned Units and Remaining (Early) Units fields in the Resource Usage Spreadsheet. To display these fields, click the Display Options bar and choose Spreadsheet Fields, Customize. Move the Budgeted or Planned Units and Remaining Early Units fields to the Selected Options list; you can also remove all other fields from the Selected Options list. Click Apply, OK.

Tip

- You can display the Actual Units field as well to compare the work that was planned to be performed (Budgeted or Planned Units) for an assignment versus the work that has actually occurred (Actual Units). Once an assignment is in progress, if work is not being performed according to plan, you can adjust the Remaining (Early) Units as necessary; or, if you choose to re-estimate an assignment's remaining work, you can adjust the assignment's Budgeted or Planned Units instead.
- To see costs related to the assignments you are manually planning, display the Budgeted or Planned Cost and Actual Cost fields.

2. Display the Curve, Budgeted or Planned Units, and Remaining (Early) Units columns

When you manually enter a value in a future period bucket for an assignment, the module automatically enters a value of Manual in the assignment's associated Curve column. By displaying the Curve column, you can determine which assignments already have an assigned resource curve, or a defined manual curve.

For assignments that do not have a defined total Budgeted or Planned Units or Remaining (Early) Units value, it is useful to display the Budgeted or Planned Units and Remaining (Early) Units columns. When you display these columns, you can enter or edit an assignment's total Budgeted or Planned or remaining units to spread the units evenly over the original or planned duration of the assignment, then manually modify the future period distribution as necessary.

To display these columns, click the Layout Options bar and choose Columns, Customize. Move the Curve, Budgeted or Planned Units, and Remaining (Early) Units columns to the Selected Options list, then modify the remaining columns. Click Apply, OK.

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3. Adjust the timescale to reflect your planning periods

Adjust the timescale in the Resource Usage Spreadsheet to reflect the planning periods in which you typically plan future resource distribution. For example, if you plan your work in daily buckets, adjust the timescale to Week/Day and enter hourly planning unit values.

> **Note**
>
> - If you track past period actuals per financial period and plan to report performance against manual budgeted or planned future period values, you should enter future period planning values in financial period timescale units. You can adjust the timescale to reflect your predefined financial periods. For example, if your project is assigned a financial period calendar which uses weekly financial periods, set the timescale to Week/Financial Period.
> - You cannot copy and paste data between Excel and P6 Professional using the Range Copy and Range Paste functionality if your layout uses a timescale comprising financial periods.

4. Logically group and sort data

Group and sort data in a way that enables you to easily identify resources/roles, the activities to which they are assigned, and the activities' associated projects (because the same activity name may appear in different projects). For example, you can group and sort the Resource Usage Spreadsheet by project and by resource.

5. Filter out activities you don't want to plan manually

If you are planning future period resource distribution for a project that has already started, you might choose to apply a filter to display only the activities you want to plan, such as activities that don't have an actual duration or that have a project planned start after the current date or data date.

Alternatively, if a project has already started and you want to update the remaining units for activities that are in progress, you could apply a filter to display only activities that have an Actual Start date and do not have an Actual Finish date.

Manually enter future period assignment values

You can enter or edit future period assignment values manually per bucket for labor, non-labor, and material resource assignments, as well as for role assignments.

1. In the Resource Assignments or Activities window, display the Resource Usage Spreadsheet.
2. Create a future period bucket planning layout. In the Activities window, you are required to display resource assignment data for open projects only. Showing data for all projects, causes the title of the Display Options bar in the Resource Usage Spreadsheet to change to "Display: All Projects." To display data for open projects only, click the Display Options bar, then choose Show All Projects to remove the checkmark; the title of the Display Options bar changes to "Display: Open Projects Only."
3. For each resource assignment you want to plan manually, enter or edit the Planned or Budgeted Units and/or the Remaining (Early) Units for each assignment bucket for the original or planned duration of the activity.

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Note

If the project option 'Link Budgeted or Planned and At Completion for not started activities' is selected (Project Details, Calculations tab) and you enter a value in the Planned or Budgeted Units field for a not started activity, the module automatically populates the Remaining Units field with the same value; the reverse is also true. If this setting is not marked, you can enter different values for the same future period in the Planned or Budgeted Units and Remaining Units fields; in this case, the total values for each field are calculated independently for the assignment. The examples below assume that this project option is selected and the activities have not started.

You must have the 'Edit Future Periods' project privilege to enter or edit future period data manually.

Tip

- If the total budgeted or planned units or remaining units have not been defined for an assignment, you can display the Budgeted or Planned Units and Remaining (Early) Units columns, then enter the total budgeted or planned or remaining units for the assignment. When you enter the total budgeted or planned or remaining units for an assignment, the values are spread evenly over the budgeted or planned duration of the activity. Then, you can modify the values manually to define the planned resource distribution. If the total budgeted or planned or remaining units have already been defined for an assignment, you can edit the future period distribution as necessary.
- You can apply a resource curve to an assignment before you enter/edit future period values for the assignment. For example, if the assignment you want to plan has a planned resource distribution that is similar to a defined resource curve's distribution, you can apply the resource curve to the assignment. When you apply the resource curve, future period values are spread across the planned duration of the activity according to the resource curve distribution; you can then modify the future period values as necessary. Once you modify a resource curve's distribution, the curve is removed from the assignment.
- Assignment buckets that are available for editing display with a white background; buckets you can not edit display with a gray background.
- You can paste data directly into future periods from Excel using Range Paste. See: Copy and paste data from Microsoft Excel into P6 Professional
- The values you should enter in the future period buckets are dependent on the duration of your planning periods (buckets), the timescale you choose, and user preference settings. See below for examples of manually-planned future period assignments.

Example 1: Daily planning periods, Week/Day timescale, and Unit/Time set to Hour

		Week 1						
		Sun	**Mon**	**Tue**	**Wed**	**Thu**	**Fri**	**Sat**
Paul Kim's assignment	Planned or Budgeted Units	0h	8h	4h	0h	2h	6h	0h

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	Remaining Units	0h	8h	4h	0h	2h	6h	0h

Example 2: Weekly planning periods, Month/Week timescale, and Unit/Time set to Hour

		January 2007			
		Week 1	**Week 2**	**Week 3**	**Week 4**
Paul Kim's assignment	Planned or Budgeted Units	10h	30h	15h	25h
	Remaining Units	10h	30h	15h	25h

Example 3: Weekly planning periods, Month/Week timescale, and Unit/Time set to Day

		January 2007			
		Week 1	**Week 2**	**Week 3**	**Week 4**
Paul Kim's assignment	Planned or Budgeted Units	2d	3d	1d	4d
	Remaining Units	2d	3d	1d	4d

Example 4: Monthly planning periods, Quarter/Month timescale, and Unit/Time set to Day

		Q1 2007		
		Jan	**Feb**	**Mar**
Paul Kim's assignment	Planned or Budgeted Units	15d	20d	10d
	Remaining Units	15d	20d	10d

Example 5: Monthly planning periods, Quarter/Month timescale, and Unit/Time set to Week

		Q1 2007		
		Jan	**Feb**	**Mar**
Paul Kim's assignment	Planned or Budgeted Units	2w	3w	1w
	Remaining Units	2w	3w	1w

How do user preference settings affect manual future period planning?

The values you enter in the Budgeted or Planned Units and Remaining (Early) Units fields are converted to the Unit/Time specified in the User Preferences, Time Units tab. For example, if the Unit/Time user preference is set to Hour and you enter 1d, the value is converted to 8h. To avoid planning mistakes, you should set the Unit/Time user preference to the same time unit you use to plan your work. For example, if you plan your work in hours, set the Unit/Time to Hours.

Additionally, your user preference setting for 'Interval for time-distributed resource calculations' (User Preferences, Resource Analysis tab) determines the minimum timescale interval in which you can enter or edit data. For example, if this option is set to Week, you can only enter or edit data in weekly, monthly, quarterly, or financial period timescale buckets. When you

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display timescale intervals smaller than the interval specified as your user preference, the buckets are not editable. Using this case as an example, if you display daily timescale intervals, the buckets are not editable.

Here are some other considerations - Export projects to a Microsoft Project file

When you export a project that contains manual future period assignment values to MSP:

- Manual future period buckets are imported to MSP as a Contoured curve.
- If the Timescale Units setting in MSP is smaller than the setting in the P6 export file (as specified in the 'Interval for time-distributed resource calculations' field in User Preferences), the manual future period buckets are spread linearly across the smaller timescale in MSP. If you change the MSP timescale setting to match the P6 Professional timescale setting, the buckets will display the proper values.
- Since MSP does not use forecast dates, if the P6 export file displays time-distributed data using forecast dates (as specified in User Preferences, Resource Analysis tab), assignments with manual future period buckets are spread linearly in MSP.
- For manually-planned assignments to activities with suspend and resume dates, MSP honors the suspend and resume dates and spreads the budgeted or planned unit values accordingly in the Baseline Work field; however, because P6's Actual Units and Remaining (Early) Units are combined into MSP's Actual Work field, MSP only honors actual and remaining values up to the Suspend Date or the Data Date, depending on when the activity's suspend and resume dates fall. If the suspend and resume dates are both before the Data Date, MSP spreads the Actual Work up to the Data Date; if only the Suspend Date is before the Data Date, MSP spreads the Actual Work up to the Suspend Date.

How - Select calculation options for resource and role assignments topic

When you add or replace an assignment to an activity that already has an existing assignment with manual future period values, the module adheres to your User Preference settings for assignment staffing, as described below.

Replacing a resource assignment

When you replace the resource or role assigned to an activity, any manual future period values entered for that assignment are preserved with the new assignment.

Adding a resource assignment to an activity that has an existing resource assignment

When you add a resource assignment to an activity that already has an existing resource assignment with manual future period values, the module adheres to your setting in the 'When assigning a resource to an existing activity assignment' field. If you choose to 'Always use the new resource's Units/Time and Overtime factor,' the manual future period values of the existing resource assignment may be respread across future period buckets based on the new resource's values. If you choose to 'Always use current assignment's Units/Time and Overtime factor,' unit values for the new resource are spread evenly over future period buckets and the manual future period values for the existing resource assignment are not changed.

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Adding a resource assignment to an activity that has an existing role assignment, or vice versa

When you add a resource assignment to an activity that already has an existing role assignment with manual future period values (or vice versa), the module adheres to your setting in the 'When a resource and role share an activity assignment' field. If you choose to 'Always use resource's Price per Unit,' the manual future period values for the existing role assignment may be respread across future period buckets based on the new resource's values. Likewise, if you choose to 'Always use role's Price per Unit,' the manual future period values for the existing resource assignment may be respread across future period buckets based on the new role's values.

Adding Expenses and Entering Cost Information for Activities

Expenses

Expenses

Expenses are nonresource costs associated with a project and assigned to a project's activities. They are typically one-time expenditures for nonreusable items. Examples of expenses include materials, facilities, travel, overhead, and training. You can categorize expenses, indicate a unit of measure for expenses, and specify whether an expense accrues at the start or end of an activity or uniformly over its duration. Each expense has a budgeted or planned cost, actual cost, and estimated remaining cost. Expenses are not the same as resources. Resources generally extend across multiple activities and/or multiple projects. Examples of resources are personnel and equipment. Unlike resources, expenses are project-specific. P6 Professional does not include expenses when leveling resources. Resource curves are not supported for expenses.

Add expenses

1. Choose Project, Expenses.
2. Click  on the Edit toolbar or choose Edit, Add.
3. Select the activity to which you want to assign the expense, then click the Select button.
4. Click the General, Activity, Costs, and Description tabs, and enter details for the expense.

Add expenses from the Activities window

1. Choose Project, Activities.
2. Select the activity that incurs the expense.
3. Display Activity Details, then click the Expenses tab. To display the Expenses tab, click the Layout Options bar and choose Bottom Layout Options. In the Available Tabs section, select Expenses, click



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, then click OK.

4. Click Add, then type a name for the expense item.
5. Double-click in the Cost Account column, then click . Select the cost account you want to assign, then click the Select button.
6. Double-click in the Expense Category column, then click . Select the category you want to assign, then click the Select button.
7. Double-click the Accrual Type column, then select the expense's accrual type.
8. Type the number of budgeted or planned units you expect the selected activity to use.
9. Type the price of each unit. The module calculates and displays the expense's budgeted or planned cost (budgeted or planned units * price/unit) in the Budgeted or Planned Cost field.
10. To enter actual expense costs already incurred by the activity, type the cost in the Actual Cost field. To automatically calculate an expense's actual cost based on the activity's planned completion percentage, mark the Auto Compute Actuals checkbox.
11. Type the name of the vendor business or organization to which the expense is payable.

> **Tip**
>
> To change the columns displayed on the Expenses tab, right-click anywhere in the Expenses tab, then choose Customize Expense Columns.

Change expenses tab columns

1. Click the Expenses tab.
2. Right-click anywhere in the Expenses tab, then choose Customize Expense Columns. To add a specific column to the Expenses tab, select it in the Available Options area, then click

   .To remove a specific column from the Expenses tab, select it in the Selected Options list, then click

   . To apply your changes without closing this dialog box, click Apply.
3. Click OK.

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Tip

- To move all available columns to either Available Options or Selected Options, click  or .
- To reset the Expenses tab so that it contains only the default columns, click Default.
- Double-click an item in the Available Options or Selected Options area to move it to the opposite column.
- To edit a column's title, width, and alignment, click Edit Column.

Assign an expense category

1. Choose Project, Expenses.
2. Select the Expense Item, then click the General tab.
3. In the Expense Category field, click .
4. Select the category to which you want to assign the expense, then click the Select button.

Assign expense categories from the Activities window

1. Choose Project, Activities.
2. Select the activity associated with the expense.
3. Display Activity Details, then click the Expenses tab. To display the Expenses tab, click the Layout Options bar and choose Bottom Layout Options. In the Available Tabs section, select Expenses, click

   , then click OK.
4. Select the expense to which you want to assign a category. Double-click in the Expense Category column, then click .
5. Select the category you want to assign, then click the Select button.

Specify an accrual type for an expense

1. Choose Project, Expenses.
2. Select the expense, then click the Activity tab.
3. In the Accrual Type field, select one of the following: Start of Activity, to accrue the entire expense on the date the activity begins End of Activity, to accrue the entire expense on the date the activity ends Uniform Over Activity, to evenly distribute the expense over the course of the activity's duration

Enter cost information for expenses

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1. Choose Project, Expenses.
2. Select the expense, then click the Costs tab.
3. In the Budgeted or Planned Units field, type the number of units you expect the expense's assigned activity to use.
4. In the Price/Unit field, type the price for each unit. The module calculates and displays the budgeted or planned cost of the selected expense (budgeted or planned units * price ¸ unit) in the Budgeted or Planned Cost field.
5. To enter actual expense costs already incurred by the activity, type the cost in the Actual Cost field. To automatically calculate an expense's actual cost based on the activity's planned completion percentage, mark the Auto Compute Actuals checkbox.

Change an expense's activity assignment

1. Choose Project, Expenses.
2. Select the expense item you want to reassign, then click the Activity tab.
3. In the Activity Name field, click .
4. Select the activity to which you want to reassign the expense, then click the Select button.

Copy and paste expenses

1. Choose Project, Expenses.
2. Select the expense you want to copy, then choose Edit, Copy.
3. When connected to a P6 Professional database: To add the copied expense to a specific project expense category, WBS, cost account, or vendor, click the Display Options bar, choose Group and Sort By, then choose the grouping option.

When connected to a P6 EPPM database: To add the copied expense to a specific project expense category, WBS, or vendor, click the Display Options bar, choose Group and Sort By, then choose the grouping option.

Select the grouping band to which you want to add the copied expense, then choose Edit, Paste.

Cut and paste expenses

1. Choose Project, Expenses.
2. Select the expense you want to cut, then choose Edit, Cut.
3. When connected to a P6 Professional database: To add the cut expense to a specific project expense category, WBS, cost account, or vendor, click the Display Options bar, choose Group and Sort By, then choose the grouping option.

When connected to a P6 EPPM database: To add the cut expense to a specific project expense category, WBS, or vendor, click the Display Options bar, choose Group and Sort By, then choose the grouping option.

Select the grouping band to which you want to paste the cut expense, then choose Edit, Paste.

Delete expenses

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1. Choose Project, Expenses.
2. Select the expense you want to delete, then choose Edit, Delete.
3. Click Yes.

Delete expenses from the Activities window

1. Choose Project, Activities.
2. Select the activity from which you want to delete an expense.
3. Display Activity Details, then click the Expenses tab.
4. Select the expense, then click Delete.
5. Click Yes.

Change the expense categories display

When P6 Professional is connected to a P6 EPPM database, you can use P6 to control the order in which your expense categories are listed in the Select Expense Category dialog box.

When P6 Professional is connected to a P6 Professional database, you can control the order in which your expense categories are listed in the Select Expense Category dialog box.

This dialog box is displayed when you assign expense categories in the General tab of the Project Expenses window or the Activity Details Expenses tab.

Cost Accounts

Cost accounts

You can create cost accounts and associate them with activity resource assignments or expenses in a project.

Cost accounts are hierarchical, and they enable you to track activity costs and earned value according to your organization's specific cost account codes.

You can specify a project's default cost account. This cost account is used for resource assignments to activities and project expenses in the open project.

If you receive the message, "Too Many Cost Account Items To Display," when opening the Cost Account Library, switch to Table View. If you must use the Chart View, apply a filter to show less data.

Create a cost account hierarchy

1. Choose Enterprise, Cost Accounts. Click the Cost Account ID column label to display the cost accounts hierarchy. An outline symbol in the Cost Account ID column label indicates a hierarchy display.
2. In the Cost Accounts list, select a cost account immediately above and of the same hierarchy level as the cost account you want to add, then click Add.
3. Type the cost account's ID.

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4. Type the cost account's name.
5. Click Modify to type a description of the cost account in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.

Edit a cost account

1. Choose Enterprise, Cost Accounts. Click the Cost Account ID column label to display the cost accounts hierarchy. An outline symbol in the Cost Account ID column label indicates a hierarchy display.
2. Select the cost account you want to edit.
3. To change the cost account's position in the hierarchy, click the appropriate arrow buttons.
4. Type a new cost account ID.
5. Type a new cost account name.

> **Note**
>
> If you change a cost account's ID or name, your change applies to all activity assignments.

Delete a cost account

1. Choose Enterprise, Cost Accounts.
2. Select the cost account you want to delete, then click Del./Merge. If activities or projects are assigned to the cost account, the Cost Account in Use dialog box is displayed. To delete the cost account and specify a replacement cost account, choose Select Replacement Account, click OK, then select a replacement account. To delete the cost account without specifying a replacement cost account, choose Delete Account(s), then click OK.

Copy and paste cost accounts

1. Choose Enterprise, Cost Accounts. Click the Cost Account ID column label to display the cost accounts hierarchy. An outline symbol in the Cost Account ID column label indicates a hierarchy display.
2. Select the cost account you want to copy, then click Copy.
3. Select the cost account to which you want to add the copy, then click Paste.

> **Note**
>
> When you copy and paste a cost account, the cost account's activity and project assignments are not copied.

Cut and paste cost accounts

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1. Choose Enterprise, Cost Accounts. Click the Cost Account ID column label to display the cost accounts hierarchy. An outline symbol in the Cost Account ID column label indicates a hierarchy display.
2. Select the cost account you want to cut and paste, then click Cut.
3. Select the cost account to which you want to add the cut account, then click Paste.

> **Note**
>
> When you cut and paste a cost account, the account's activity and project assignments are also pasted.

Set the project default cost account

You can specify a project's default cost account. This cost account will be used for resource assignments to activities and project expenses in the open project.

1. Choose Enterprise, Projects and display Project Details.
2. Select the project to which you want to assign a default cost account.
3. Click the Defaults tab.
4. In the Defaults for New Activities section, click ... in the Cost Account field.
5. Select the cost account you want to assign as the default, then click the Select button.

> **Note**
>
> The default cost account is only used for new resource assignments to activities and new project expenses. Changing this setting does not affect existing resource assignments to activities or existing project expenses.

Adding Activity Steps

Activity steps

Activity steps provide a way to break activities down into smaller units and track the completion of those units. For example, the activity Prepare for System Integration and Testing might contain the following steps:

Step 1

Step 2

Step 3

You can add as many steps to an activity as you need: some activities will require more steps to complete than others and some activities might require no additional steps at all. If progress occurs on the step, enter a percent complete in the Step % Complete column, or mark the Completed checkbox to indicate the step is 100% complete.

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You can assign additional information to steps, such as cost, start and finish dates, and text. Define user-defined fields for activity steps in the User Defined Fields dialog box (choose Enterprise, User Defined Fields), then add fields as columns in the Steps tab of Activity Details.

You can also create activity step templates (using P6 when P6 Professional is connected to a P6 EPPM database) that capture a group of steps common to multiple activities, then assign the step group to activities.

Weighted steps

Weighted steps enable you to track the progress of an activity based on the number of steps completed. When you mark the Activity Percent Complete Based on Activity Steps checkbox in the Calculations tab in the Projects window, and choose Physical as the activity's percent complete type in the General tab in the Activities window, activity percent complete is updated based on the weight you assign to each activity step.

For example, in the activity Prepare for System Integration and Testing mentioned above, the steps are assigned weights of 3.0, 2.0, and 1.0 respectively. When you mark the Completed checkbox or enter 100% in the Step % Complete column for the step Establish Test Cases and Test Procedures, the activity's physical percent complete is updated to 50 percent (because the total weight for the steps in this activity is 6.0 and the weight for this step is 3.0; therefore, half the work on this activity, according to the weight of the steps, has been completed).

Add steps to activities

For unique, activity-specific steps, you can add steps to activities as described below.

When connected to a P6 EPPM database: For general, repeatable groups of steps, you can assign templates (including steps, weights, and descriptions) created using P6 to activities.

When connected to a P6 Professional database: For general, repeatable groups of steps, you can convert existing steps to a template, create activity step templates, and assign templates.

1. Choose Project, Activities.
2. Select the activity to which you want to add a step.
3. Display Activity Details, then click the Steps tab. To display the Steps tab, click the Layout Options bar and choose Bottom Layout Options. In the Available Tabs section, select Steps, click

   , then click OK.
4. Click Add.
5. Type the name of the new step.
6. Click Modify to type a description of the step in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.
7. Position the step within the listed steps for the activity.To move the step to an earlier stage of the activity, click

   .To move the step to a later stage of the activity, click

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.

> **Tip**
>
> Use activity step user-defined fields (Enterprise, User Defined Fields) to enter start and finish dates, cost, or text you would like to display for the step. To add step UDF columns to the Steps tab, right-click in the step area and choose Customize Steps Columns.

Update activity steps

The Physical percent complete for the activity calculates each time you mark or clear a Completed checkbox, edit the Step % Complete, change the weight of a step, or add or remove steps from the activity. To calculate the percent complete, select Physical as the percent complete type.

- Mark the Completed checkbox beside the steps you want to update. Or
- Display the Step % Complete column, and enter a percent complete value for the steps you want to update.

> **Note**
>
> When the Step % Complete is set to 100%, the checkbox is marked as Completed. If you mark the Completed checkbox, the Step % Complete becomes 100%.

> **Tip**
>
> - To display additional step columns for updating, right-click in the Steps tab and click Customize Steps Columns. Select the columns to display in the Steps tab.
> - Add user-defined columns to the Steps tab to update additional information, such as the finish date, start date, cost, and the number of hours worked for a step.

Add weights to steps

Weighted steps enable you to track the progress of an activity based on the number of steps completed. To calculate weighted steps you must first mark the Activity Percent Complete Based on Activity Steps checkbox for the project you want to use (this checkbox is located on the Calculations tab in the Project details view). Then, for each activity containing weighted steps, set the percent complete type to Physical.

When you add a step to an activity that already has steps defined, the default weight for the new step is 1, providing no steps have been marked Completed, and no steps have a Step %

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Complete of 100%. If some of the steps for the activity have already been completed, the default weight for the new step is 0.

1. Choose Project, Activities.
2. Select the activity to which you want to add a step weight.
3. Display Activity Details, then click the Steps tab.
4. Double-click the Step Weight column of the step you want to modify.
5. Type a value for the weight of the step. The higher the value you enter, the greater the importance of the step in the activity. Based on the total weight for all steps in the activity, the percent for each step is calculated and displayed in the Step Weight Percent column.

> **Note**
>
> - To change the weight of a step, double-click the Step Weight column and type the new weight for the step.
> - Select Physical as the percent complete type on the General tab of Activity Details to calculate the percent for each weighted step.

Remove steps from activities

1. Choose Project, Activities.
2. Select the activity from which you want to remove a step.
3. Display Activity Details, then click the Steps tab.
4. Select the step you want to remove, then click Delete.

Creating and Assigning Activity Step Templates

Activity step templates

Activity step templates enable you to define a group of steps common to multiple activities, then assign the template to activities.

Your organization might have several activities that repeat within a project or across projects. For example, every time you start a project, several specifications must be written and approved. Developing a specification is a multi-step process that never changes.

As an example, the “Write Specifications” activity could have the following steps:

1. Submit initial spec
2. Review initial spec
3. Revise initial spec
4. Final review
5. Final revision

These steps might apply to many or all “Write Specifications” activities in a project or across all projects.

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Rather than manually inputting these steps into each “Write Specifications” activity, you can create an activity step template containing these steps and assign the template to each applicable activity at once.

If a commonly used step or set of steps have already been defined for an activity, you can convert the steps to a template.

Create activity step templates manually

1. Choose Enterprise, Activity Step Templates.
2. In the upper grid, click Add.
3. In the Step Template Name field, enter a descriptive name for the template.
4. In the lower grid, click Add. The Step Count field in the upper grid automatically updates the number of steps in the template.
5. In the Step Name field, enter the name of the step.
6. In the Step Weight field, enter a step weight (at least 1.0). The higher the value you enter, the greater the importance of the step in the activity.

> **Note**
>
> - You can add an unlimited number of templates. There is no limit on the number of steps per template.
> - You can customize the bottom grid to display user-defined field columns in which you can add step data such as dates and costs. Any user-defined field data you enter in an activity step template is saved as part of the template.

Convert steps into an activity step template

You can convert existing step(s) into an activity step template rather than creating the template manually.

1. In the Activity Table, select the activity that contains the step(s) you want to convert to a template.
2. Display Activity Details.
3. In the Steps tab of Activity Details, ctrl-click to select the steps.
4. Right-click on the selected steps and choose Create Template.
5. In the Create Template dialog, enter a unique name for the template. You can also add UDFs assigned to the selected steps to the activity step template. The steps and their associated name, description, weight, and UDFs (if selected) are added to the new template.

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> **Note**
>
> - The Activity Step Templates dialog box does not open after you convert the steps to a template. To view the template choose Enterprise, Activity Step Templates.
> - The module automatically updates step UDF information in activity step templates when a step UDF is added, deleted, or modified in the User Defined Fields dialog box.

Assign activity step templates to activities

You can assign one or more activity step templates to one or more activities.

1. In the Activities window, select the activity to which you want to assign an activity step template. To select multiple activities, use Ctrl-Click or Shift-Click.
2. Click  on the Assign toolbar.
3. In the Assign Activity Step Templates dialog box, select the template you want to assign to the selected activities. You can Ctrl-Click to assign more than one template.
4. Click Assign

   . The steps, weights, descriptions, and UDFs contained in the template are loaded into the Steps tab of Activity Details.

> **Tip**
>
> After assigning a step template to an activity, if necessary, you can modify the steps on the Steps tab of Activity Details.

Assigning Notebooks to Activities

Assign notebooks to activities

1. Choose Project, Activities.
2. Select the activity to which you want to assign a note.
3. Display Activity Details, then click the Notebook tab. To display the Notebook tab, click the Layout Options bar and choose Bottom Layout Options. In the Available Tabs section, select Notebook, click

   , then click OK.
4. Click Add.

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5. Select the notebook you want to assign. To assign multiple notebooks, hold down the Ctrl key, then click each notebook you want to assign.
6. Click the Assign button, then click the Close button.
7. Click Modify to type a description of the activity notebook in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.

Remove notebooks from activities

1. Choose Project, Activities.
2. Select the activity from which you want to remove a note.
3. Display Activity Details, then click the Notebook tab.
4. Select the notebook you want to remove, then click Delete.
5. Click Yes.

> **Note**
>
> Deleting a notebook topic also deletes the topic description associated with the notebook for the selected activity.

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6

Managing Projects

Budgeting

Establishing budgets

You can create budget estimates for each EPS node, project, or WBS level, and then refine them as needed.

Use the Budget Log tab on the Projects window to enter the original budget—the total amount you require for the EPS node or project.

The Budget Change Log helps you keep track of budget changes as they occur. The Current Budget (original budget plus approved budget changes) and Proposed Budget fields (original budget plus approved and pending budget amounts) incorporate these changes so you have up-to-date and accurate budget information for each project or EPS node.

You can record monthly spending of budgeted funds, track the current and undistributed variance amounts, and roll up the monthly spending plan of each project to any level of the EPS.

When P6 Professional is connected to a P6 EPPM database: If your projects use funding to support budgets, you can also use P6 to set up a dictionary containing any nonprofit, government-allocated, or other funding sources for easy assignment to projects or EPS nodes.

When P6 Professional is connected to a P6 Professional database: If your projects use funding to support budgets, you can also set up a dictionary containing any nonprofit, government-allocated, or other funding sources for easy assignment to projects or EPS nodes.

Tracking and analyzing budgets

The resource spreadsheet enables you to see an overall picture of unit and cost budget distributions, and the variance amounts resulting from current use versus original estimates at the activity level.

For high-level budgeting information, display the Projects Window (choose Enterprise, Projects) and then select Original Budget and Current Variance as columns.

You can also use the preformatted reports to track budget amounts at the project and activity level.

Establish budgets

1. Choose Enterprise, Projects, then select the EPS node/project for which you want to enter budgets.
2. Display Project Details, then click the Budget Log tab.

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3. In the Original Budget field, type an estimate of the total amount you require for this project, including all funding contributions.

Enter budget changes

1. Choose Enterprise, Projects, then select the EPS node/project for which you want to enter budget changes.
2. Display Project Details, then click the Budget Log tab.
3. Click Add.
4. In the Budget Change Log section, specify the date, amount, person responsible for the change, status (pending, approved, or not approved), and reason for the change. The Current Budget field is the sum of the original budget plus approved budget changes; the Proposed Budget contains the original budget plus approved and pending budget amounts.

Define funding sources

When P6 Professional is connected to a P6 EPPM database, you use P6 to set up a Funding Sources Dictionary containing any nonprofit, government-allocated, or other funding sources.

When P6 Professional is connected to a P6 Professional database, follow these steps to set up a Funding Sources Dictionary containing any nonprofit, government-allocated, or other funding sources. You can assign funding sources to budgets as you develop projects.

1. Choose Enterprise, Funding Sources.
2. Select the funding source immediately above and at the same hierarchy level as the fund you want to add, then click Add. Use the hierarchical structure of the Funding Sources Dictionary to categorize and group similar funds, such as those affiliated with a particular agency.
3. Click Modify to type any additional information about the fund in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.
4. Click Close.

Tip

- You can apply unlimited Funding assignments to each EPS and project level.
- To see a graphical display of your funding hierarchy, click the Display Options bar in the Funding Sources dialog box and choose Chart View.

Assign funding sources

Once you define funding sources, you can assign them to EPS nodes or projects as follows:

1. Choose Enterprise, Projects, then select the EPS node/project to which you want to assign a funding source.
2. Display Project Details, then click the Funding tab.

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3. Click Add.
4. Select a funding source from the Funding Sources Dictionary.
5. Click , then click .
6. Type the amount of funding to be allocated to this project.
7. Type a percentage or share of the total fund to be allocated to the selected element. You can assign the same funding source multiple times with varying amount and share contributions for different levels of the EPS. Both the amount and share values for the fund are user-defined. Funds do not roll up; you edit them per EPS level to allow for top-down planning.

> **Tip**
>
> In the Projects window you can include a column called Total Funding, which contains the sum of the funding for each project and EPS node.

Enter monthly spending amounts

1. Choose Enterprise, Projects, then select the EPS node/project for which you want to enter monthly spending amounts.
2. Display Project Details, then click the Spending Plan tab.
3. Type total expenditures for each month in the Spending Plan column. The Spending Plan Tally column shows any amounts previously recorded for lower-level project spending plans. The current variance is the difference between the monthly spending of the EPS node and its projects' tallies. You can type the benefit amount or profit portion of the monthly amounts; the benefit plan is also tallied.

View budget and spending plan totals

1. Choose Enterprise, Projects, then select the EPS node/project for which you want to view budget information.
2. Display Project Details, then click the Budget Summary tab to view calculated budget data from the Budget Log and Spending Plan tabs.

Compare budgets and variances

1. Choose Enterprise, Projects, then click the Display Options bar and choose Columns, Customize.
2. Select any budget-related columns you want to display in the Projects window. For example, select the Project ID, Project Name, Original Budget, and Current Variance columns to compare the original budget amounts assigned to the projects, and the current variance resulting from budget spending on those projects to date.

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> **Note**
>
> When current spending differs from original budget estimates, a variance results. A variance amount shown in parentheses indicates a negative variance amount for the project.

Print budget reports

You can print preformatted reports or create new reports to track budget amounts at the project and activity level.

1. Choose Tools, Reports, Reports.
2. Select the report you want to run, such as expense reports EX-01 through EX-05, which contain budget information.
3. Click  on the Reports toolbar, or right-click on the report and choose Run, Report.

Creating Baselines

Baselines

Before you update a schedule for the first time, you should create a baseline plan. A baseline is a complete copy of a project plan that you can compare to the current schedule to evaluate progress. Within layouts, you can display baseline data in graphical and column data format to perform cost and schedule analysis.

The simplest baseline plan is a complete copy, or snapshot, of the original schedule. This snapshot provides a target against which you can track a project's cost, schedule, and performance. When you create a baseline, you can save a copy of the current project to use as the baseline or you can choose to convert another project in the EPS hierarchy to a baseline for the current project.

You can save an unlimited number of baselines per project; however, the number of baselines you can actually save per project is determined by administrative preference settings, which are typically controlled by the administrator. Regardless of the number of baselines you save for a project, at any given time you can select only up to three baselines for comparison purposes.

The Baselines feature includes an option for you to specify which baselines you want to use for comparison. The project-level baseline is used for project/activity usage spreadsheets and profiles, as well as earned value calculations.

When P6 Professional is connected to a P6 Professional database, you must have the Edit Project Details Except Costs/Financials project privilege to set the project baseline.

When P6 Professional is connected to a P6 EPPM database, you must have the appropriate project privilege as defined in P6 to set the project baseline.

You can assign primary, secondary, and tertiary baselines. If you do not select a baseline to use, the current project is used by default. Using the administrative preference setting, you can choose which values to use for earned value calculations, either budgeted or planned or at completion.

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To help categorize, or track, multiple baselines for a single project, you can assign each baseline a type that reflects its purpose, for example, initial planning baseline, what-if project baseline, or midproject baseline. The administrator defines the available baseline types.

You can restore or update an original or copied baseline.

Baselines do not exist as separate projects that you can access. To modify a baseline project, you must first unlink it from its current project by restoring it as a separate project. You can then work with this restored baseline project as you would any other project in the EPS.

You can also automatically add new data from the current project to the baseline and modify existing baseline data that has changed in the current project using the Update Baseline feature.

Create a baseline

1. Open the projects for which you want to create a baseline.
2. Choose Project, Maintain Baselines, then, if more than one project is open, select the projects for which you want to create a baseline. If you want to copy the current project as a new baseline or assign other projects as a baseline to the current project, you can select multiple projects.
3. Click Add.
4. Choose to save a copy of the current project as a new baseline or convert other projects into baselines of the current project, then click OK. If you choose to convert other projects, select the projects in the Select Project dialog box, then click the Select button.

Tip

Before converting a project to a baseline, if you still want to have access to the original project, you should make a copy of it. Once you convert a project to a baseline, it is no longer available in the project hierarchy. You can restore a baseline, making it available again as a separate project in the project hierarchy. You can also update a baseline with new/modified data from the current project.

Note

- When you save a copy of the current project as a new baseline, the baseline title uses the project name and a suffix of - Bx, where x equals 1 for the first baseline you save for a project, 2 for the second, and so on. You can change the baseline name.
- When you choose to convert another project to a baseline, the project you want to convert cannot be open or have baselines assigned to it. The converted project's name is used as the baseline name.
- When connected to a P6 EPPM database: P6 Professional uses a job service to create the baseline. This means that you can carry on working while the baseline is created in the background. To see the progress of the job, choose Tools, Job Status.

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Create a baseline type

When P6 Professional is connected to a P6 EPPM database, you can use P6 to create baseline types that you can assign to baselines in any project. You can use baseline types to standardize baselines for all projects.

When P6 Professional is connected to a P6 Professional database, you can create baseline types that you can assign to baselines in any project. You can use baseline types to standardize baselines for all projects.

1. Choose Admin, Admin Categories.
2. Click the Baseline Types tab, then click Add.
3. Type the name of the new baseline type.

Assign a baseline type

1. Choose Project, Maintain Baselines.
2. Select the baseline.
3. In the Baseline Type field, select a type. Baseline types are typically defined by the administrator.

Assign baselines to projects

You can assign a project baseline to use for summarization purposes and up to three baselines to use for comparison purposes.

1. Choose Project, Assign Baselines.
2. In the Project field, select the project to which you want to assign baselines.
3. To set an existing baseline as the project, primary, secondary, or tertiary baseline, select a baseline from the menu in the appropriate field. To use the current state of the project as the project, primary, secondary, or tertiary baseline, select the current project from the menu in the appropriate field.

> **Note**
>
> - You can only assign one project, primary, secondary, and tertiary baseline to a project.
> - Secondary and tertiary baselines are not required.
> - When connected to a P6 Professional database: You must have the Edit Project Details Except Costs/Financials project privilege to set the project baseline.
> - When connected to a P6 EPPM database: You must have the appropriate project privilege as defined in P6 to set the project baseline.

Copy a baseline

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As a project progresses, you might choose to update the project's baseline, or restore the project's baseline and modify it to capture changes to the original schedule. When you update or restore a baseline, the baseline's original state is not preserved. To preserve the baseline's original state, you can copy the baseline, then update or restore the baseline copy, rather than updating or restoring the original baseline. When you copy a baseline, a new copy of the original baseline is copied under the same project.

1. Choose Project, Maintain Baselines.
2. In the Maintain Baselines dialog box, select the baseline you want to copy.
3. Click Copy.

Tip

- When you copy a baseline, the Last Update Date field of the Maintain Baselines dialog box displays the same date and time as the original (copied) baseline.
- Baselines can not be copied between projects. When you copy a baseline, the copied baseline is placed under the same project as the original baseline.
- When you copy a baseline, the copied baseline exists as a separate baseline, subject to the same rules as original baselines. For example, after you copy a baseline, you can delete, update, restore, or assign it as the project, primary, secondary, or tertiary baseline.

Note

- When connected to a P6 Professional database: You must have the project privilege Maintain Project Baselines to copy a baseline.
- When connected to a P6 EPPM database: You must have the appropriate project privilege assigned using P6 to copy a baseline.
- When you copy a baseline, the copied baseline title uses the project name and a suffix of - Bx, where x equals 1 for the first baseline you save for a project, 2 for the second, and so on. You can change the baseline name.

Update a baseline

As a project progresses, you might choose to update baseline data without restoring the baseline or creating a new baseline. When a project is in progress, creating a new baseline may not yield accurate comparison results. When you update a baseline, only the data types you select will be updated.

1. Choose Project, Maintain Baselines.
2. In the Maintain Baselines dialog box, select the baseline you want to update.
3. Click Update.
4. In the Update Baseline dialog box, select the types of data you want to update.
   For project-level data, you can choose to update project details, work products and documents, and risks, issues, and thresholds. You do not have to select any of these options.

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> **Note**
>
> If you choose to update project details, the following items are NOT updated: all data in the Default, Settings, and Resources tabs; the Risk Level and the Project Leveling Priority fields in the General tab; and, the Default Price/Unit for Activities Without Resource or Role Price/Units field in the Calculations tab.

For activity-level data, you can choose to update all activities or activities that meet filter criteria. If you choose to update activities based on filters, select whether to apply to activities that match all selected filters or any selected filter, then select the filters you want to use. If you choose to update all activities, the module overwrites all activities in the baseline.

You can also choose to add new activities to the baseline, delete activities from the baseline that are no longer in the project, and update existing activities with new activity data. If you only want to update project-level data (and not activity-level data), clear all of the activity-level data options.

5. Enter or select a filename to log errors during the update process (when connected to a P6 Professional database only).
6. If you are updating existing activity data, click Update Options.
7. In the Activity tab of Update Options, select the types of activity data you want to update.

> **Note**
>
> If you choose to update 'Dates, durations, and data date' in the Update Baseline Options dialog box, the following date fields are NOT updated because they are calculated by the scheduler: Early Start, Early Finish, Late Start, and Late Finish. To ensure that these fields are updated, after you run the baseline update, you should restore the baseline project, then schedule and re-baseline the project.

8. In the Resource Assignment tab of Update Options, select the types of resource and role assignment data you want to update.
9. Click Preview.
10. In the Preview Changes dialog box, click nodes in the tree to view the changes that would be made to the baseline according to the options you selected. You can print the change preview list. Click Close to return to the Update Baseline dialog box.
11. Optionally adjust any settings required to ensure the updates to the baseline are as you would expect.
12. Click Update.

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Tip

- If you encounter errors during the Update Baseline process, schedule the project to the current data date, then run Update Baseline again. This may resolve some errors that can occur when updating a baseline.
- When you update a baseline, the module stores the date on which the baseline was last updated. You can view this date in the Last Update Date field of the Maintain Baselines dialog box. The module does not consider the last update date when you choose the Ignore Last Update Date option in the Update Baseline dialog box. We recommend that you select the Ignore Last Update Date option if you plan to update different data types at different times (that is, you will not simply be updating all baseline data each time). If you do not select this option, some data types may not be updated from the correct date when you run the baseline update. For example: - On June 1st, you run a baseline update that includes activity steps. - On June 8th, you run a baseline update that does NOT include activity steps. - On June 15th, you run a baseline update that includes activity steps. You do not select the Ignore Last Update Date option. Given this scenario, when you run the baseline update on June 15th, activity steps are only updated from June 8th because the baseline is updated from the last update date. If you select the Ignore Last Update Date option, all changes to activity steps are updated regardless of the date the baseline was last updated.
- To overwrite all activity data, choose All Activities and all of the activity data options.
- If you only want to update project-level data, select the project data options and clear the add new, delete, and update activity options. If you clear these activity data options, it does not matter if All Activities or Activities Within the Following Filter is selected - no activity data will be updated.
- To optimize baseline update performance, select the Run Optimized option in the Update Baseline dialog box. If errors occur when updating a baseline in optimized mode, you will not be able to determine the data item that is causing the update to fail. To determine the data item causing the failure, turn off the Run Optimized option and rerun the baseline update. After the update is complete, refer to the log file to determine which data item is causing the update to fail.
- Baseline update performance is further optimized when you log in as an Admin Superuser.

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Note

- When connected to a P6 Professional database: You must have the project privilege Maintain Project Baselines to update a baseline. Additionally, We recommend that you have all project and global view, create, edit, and delete privileges (for example, View Project Costs/ Financials, Add/Edit/Delete Work Products and Documents, etc.) before running a baseline update. If you do not have these privileges, you may receive an error message when you attempt to update the baseline.
- When connected to a P6 EPPM database: You must have the appropriate global and project privileges as defined in P6 to update a baseline.
- When connected to a P6 EPPM database this process runs as a job service. To see the progress of the job, choose Tools, Job Status.
- A project's baselines cannot be updated if the project has been opened in Exclusive mode or if the project is currently checked out by another user.
- Baselines that contain future period buckets on resource or role assignments are updated automatically.
- When connected to a P6 Professional database: If errors occur while the project is updating, the module logs the errors in the specified log file (if the Run Optimized option is not selected) and continues updating the project.
- When connected to a P6 EPPM database: If errors occur while the project is updating, the module logs the errors in the corresponding job service log file (if the Run Optimized option is not selected) and continues updating the project. You can view the log file by clicking Tools, Job Status.
- New or modified Primary Resource assignments are always updated for an activity if you choose to update 'General activity information' in the Update Baseline Options dialog, even if you do not choose the 'Update existing resource and role assignments' and 'Add new resource and role assignments' options in the Update Options dialog.
- If you choose to update activity relationships, only relationships between activities within the project are updated; relationships to activities in external projects are not updated.
- Project calendars, activity codes, and the WBS are always updated.
- If you choose to update issues or work products and documents but not activities, the new issues or work products and documents are added without activity assignments.
- If you choose to update activities that fall within a filter and choose to add new activities, only activities that meet that filter's criteria will be added.

Modify a baseline manually

As a project progresses and changes occur, you might choose to modify one, or more, of the baselines associated with it. You cannot access and modify a baseline as you would a project. To modify a baseline manually, you must restore it to the project hierarchy, which makes it available again as a separate project in which you can update data.

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To restore a baseline for the open project

1. Choose Project, Maintain Baselines.
2. Select the baseline you want to restore, click Restore, then click Yes. The restored project is placed in the same node as the project to which it was linked as a baseline.

Tip

- After you modify the restored baseline project, you can recreate it as a baseline for comparison against the current project.
- You can also automatically update a baseline with new and/or modified data from the current project without restoring the baseline. You should use this option when you want to globally update a type of project, activity, or resource/role assignment data, such as activity steps or project issues, and thresholds.

Note

When a baseline contains relationships to non-baseline projects, these relationships are maintained and copied when a baseline is restored. This could result in duplicate relationships if both projects in the original relationship are non-baseline projects. If one side of the relationship is from a baseline, no copy can take place.

Delete a baseline

1. Choose Project, Maintain Baselines. Select the baseline you want to delete, click Delete, then click Yes.

Note

You cannot delete an active baseline. An active baseline is any baseline marked as the primary, secondary, or tertiary baseline in the Assign Baselines dialog box.

Updating Projects

Updating the schedule

Choose from a couple of ways of updating your schedule. You can update activity progress manually, or you can have P6 Professional automatically calculate progress according to the project plan.

- If your project is progressing exactly as planned, or if you only need to estimate progress, simply specify the data date or "as-of" date and allow the module to automatically update activities that should have progressed, calculate the remaining durations of activities that have started, and set the remaining durations of activities that have completed to zero.

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- If your project is not progressing as planned—many activities are starting out-of-sequence, activities are taking more or less time to complete than originally planned, actual resource use is exceeding planned use—update activities and resources individually. This will help you forecast the effects of unforeseen circumstances, so that you can take appropriate corrective action.
- When connected to a P6 EPPM database: To collect progress data using P6 Progress Reporter, someone in your organization, typically the Oracle administrator, must use P6 to create timesheets, specify the timesheet approval rules and permissions to be used, and set up the necessary resource/user accounts and related privileges. Then, project team members can use P6 Progress Reporter to record progress on their assignments and submit the timesheets for review and approval. Progress from approved timesheets is used to update the project when actuals are applied.
- Most projects contain some activities that progress as planned and some which do not. In this case, combine the two updating methods. Calculate your project as if it is progressing exactly as planned, then individually update those activities and resources that have deviated from the plan.

Once you update a project, choose File, Commit Changes, to save your changes and update the database immediately. Closing also automatically commits data changes.

Update progress for all activities

1. Choose Tools, Apply Actuals.
2. Make sure the projects you want to update appear in the Project(s) to be Updated list. A project must be open to update progress for its activities.
3. Specify whether to use the data date for each project or assign a new data date to all the projects you are updating.
4. In the New Data Date field, click  and select the new data date or click the arrows to select a new data date based on timesheet end dates.
5. When actuals are applied from timesheets, choose to recalculate the remaining duration based on the activity duration type or to always recalculate it. If you choose to always recalculate, all activities are treated as Fixed Units and Fixed Units/Time.
6. Click Apply, then click Yes.

When P6 Professional is connected to a P6 EPPM database, an ASAP job will be added to the job queue on the application server and you will be notified when it is complete. (You can also look at Job Status dialog box to view the status of the job.)

Update progress for individual activities

1. Choose Project, Activities, then select the activity you want to update.
2. Display Activity Details, then click the Status tab. To update actual dates, mark the Started checkbox, then specify the actual start date in the Started field. If the activity is complete, mark the Finished checkbox, then specify the actual finish date in the Finished field. -Or- To update activities with Duration percent complete type, click the Remaining field and type the remaining number of workperiods needed to complete the selected activity. When you schedule or apply actuals, the actual duration is calculated as the total working time from the actual start date to the current data date (for in-progress activities) or to the actual finish date (for completed activities), using the activity's calendar. -Or- To update activities with Physical percent complete type, type the physical percent complete and the remaining

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duration for the activity. If resources are assigned, you must also update each resource's actual regular units.

3. Repeat the previous steps for each activity you want to update.

Tip

- To automatically update actual units and costs when Duration percent complete is updated, you must mark the checkbox to Recalculate Actual Units and Cost when Duration % Complete Changes in the Calculations tab of Project Details.
- If you manually plan future period resource/role distribution in the Resource Usage Spreadsheet, the module updates progress for individual activities based on the manual values you enter for assignments. How?
- If you update activity progress by modifying Duration % Complete or Remaining Duration on the activity, the activity's actual units are updated using the manual remaining unit distribution when you apply actuals, as long as the project option 'Recalculate Actual Units and Cost when duration percent complete changes' (Project Details, Calculations tab) is marked.
- If you update activity progress by modifying the Remaining Units or Remaining Early Finish on the assignment, the activity's actual units are updated using the manual planned or budgeted unit distribution when you apply actuals, as long as the project option 'Recalculate Actual Units and Cost when duration percent complete changes' (Project Details, Calculations tab) is marked.
- If you update activity progress by modifying the Actual Units on the activity or assignment, manual future period planned or budgeted and remaining unit values are not updated when you apply actuals.

Progress Spotlight

The Progress Spotlight feature highlights the activities that should have started or finished during a specified timeperiod. To access this feature, choose View, Progress Spotlight, or click  on the Tools toolbar. You can also drag the data date line until you reach the new date you want. P6 Professional highlights the activities that fall between the last data date and the new data date. If you have multiple projects open, P6 Professional uses the data date of the default project (Project, Set Default Project) as the start of the highlighted timeperiod. P6 Professional automatically uses the date interval you are showing for the timescale to select the new data date. For example, if the minimum date interval for the timescale is set to Day, the new data date will be the next day. Once you spotlight activities, you can automatically status them or manually update them.

To make it easier to use Progress Spotlight, set up your timescale so that the smallest increment is equal to your update periods. That way, when you turn this feature on, the highlighted curtain will indicate the update period immediately and eliminate the necessity of adjusting the data date. For example, if you update weekly, set the timescale to weekly increments; right-click on the Gantt Chart and select Timescale, and select a weekly Date Interval.

When you spotlight activities by dragging the data date line or by using the Progress Spotlight feature, P6 Professional turns off automatic scheduling. Choose Tools, Schedule, or press F9 to reschedule after you finish updating; P6 Professional recalculates the schedule and turns automatic scheduling back on.

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Update progress for spotlighted activities

Use the Progress Spotlight feature (View, Progress Spotlight) to highlight activities in the layout that have started, progressed, or finished between the previous data date and the new data date. If you have the project privileges required to schedule projects, level resources, and apply actuals, you can status the activities that have been highlighted. To update the progress of these activities:

1. Choose Tools, Update Progress.
2. If you do not want to use the current data date to update progress, select a new data date.
3. Choose to update all highlighted activities in the Gantt Chart, or to update the activities that have been selected.
4. When actuals are applied from timesheets, choose to recalculate the remaining duration based on the activity duration type or to always recalculate it. If you choose to always recalculate, all activities are treated as Fixed Units and Fixed Units/Time.
5. Click Apply.

> **Note**
>
> If you manually plan future period resource/role distribution, updating progress for spotlighted activities can affect remaining unit values in manual future period buckets. How? If you use Progress Spotlight to update activity progress, actuals are applied using the specified manual planned or budgeted unit distribution; the manual remaining unit distribution is not considered, even if no manual. planned or budgeted unit data exists for an assignment. When the planned or budgeted and remaining unit values are different for an assignment, the planned or budgeted unit values overwrite the existing remaining unit values when you apply actuals.

Highlight activities for updating

You can highlight activities in the layout that are scheduled to occur during a specific timeperiod. Then, you can choose to manually or automatically update the activities.

1. With the Activities window active, choose View, Progress Spotlight, or click

   on the Tools toolbar to add a timeperiod equal to the smallest increment of the displayed timescale from the previous data date. P6 Professional spotlights activities that should have started, progressed, or finished between the previous data date and the new data date in the Gantt Chart. To increase/decrease the area between the previous data date and the new date by one or more timescale increments, drag the data date line in the Gantt Chart.
2. Automatically or manually update the highlighted activities, or immediately reschedule the project according to the new data date by pressing F9.

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> **Note**
>
> - If multiple projects are open, P6 Professional will highlight activities from the data date of the default project (Project, Set Default Project).
> - Unlike selected activities, when Progress Spotlight is active, activities remain spotlighted even when you click in another area of the layout.

Update progress for the project

1. Choose Tools, Apply Actuals.
2. Make sure the projects you want to update appear in the Project(s) to be Updated list.
3. Specify whether to use the data date for each project, or assign a new data date to all the projects you are updating.
4. In the New Data Date field, specify a new data date for the projects, then click Apply.
5. Choose Project, Activities, then select the activity you want to update.
6. Display Activity Details, then click the Status tab.
7. Mark the Started checkbox to indicate that the activity started early or mark the Finished checkbox to indicate that the activity completed early. If the activity was supposed to start during the update period but did not, clear the Started checkbox. If the activity was supposed to finish during the update period but did not, clear the Finished checkbox.
8. In Activity Details, adjust any activity information, such as Expected Finish or Remaining Duration, that did not progress according to plan. When you add an Expected Finish date, the calendar defaults to the date and time of the activity's Early Finish date. When you edit an Expected Finish date, the calendar defaults to the date and time that is currently in the Exp Finish field.

Remove progress from an activity

1. Choose Project, Activities, then select the activity.
2. Display Activity Details, then click the Status tab.
3. Clear the Started and/or Finished checkboxes.

> **Note**
>
> - P6 Professional will calculate the durations and remaining units based on the Link Budget and At Completion for Not Started Activities setting in the Project Details, Calculations tab.
> - If you remove progress from an activity by clearing the Started checkbox, all past period actual data stored for that activity is deleted (except earned value units and cost and planned value units and cost).
> - In the Activities window, you can also display the Activity Status column in which you can edit activity status.

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Suspend or resume an activity's progress

At some point in the project, you may need to stop work on an activity for a period of time. Indicate this interruption by specifying suspend and resume dates in the Status tab of Activity Details.

1. Display Activity Details.
2. Click the Status tab.
3. In the Activities window, select the activity you want to suspend.
4. In the Status tab, enter a Suspend date. When the activity resumes, enter a Resume date.

Note

The activity must have an actual start date before you can record a suspend date.

- You can only enter suspend and resume dates on Task Dependent and Resource Dependent activities.
- When you enter a suspend or resume date, the activity is suspended or resumed at the beginning of the specified day.
- The module calculates an actual duration for all activities based on the amount of time actually worked. The amount of time an activity's progress is suspended is considered nonworktime based on activity and resource calendar definitions. Units and costs are not spread during the suspend period.

Tip

- You can use bar necking to graphically display the suspended activity's nonworktime. In the Bars dialog, Bar Settings tab, under Bar Necking Settings, select the Activity nonwork intervals option to neck bars between suspend and resume dates. You can also select the Calendar nonwork time option to neck bars according to the nonwork time set in the activity's calendar.
- You can show suspend and resume dates as columns.

Apply actuals

1. Choose Tools, Apply Actuals. The Project(s) To Be Updated section lists all the projects you can update, along with the current data date and the project planned start for each project.
2. Specify whether to use the same data date for all projects or whether each project uses its own data date.
3. In the New Data Date field, click ... and select the new data date or click the arrows to select a new data date based on timesheet end dates.

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4. Specify whether to recalculate the remaining duration based on the activity duration type or to always recalculate. If you choose to always recalculate, all activities are treated as Fixed Units and Fixed Units/Time.
5. Click Apply.
When connected to a P6 EPPM database: The job is now sent to a queue and run as an ASAP service. Because the job is not run locally from P6 Professional, there might be a time lag before it is processed. The status of your job, such as pending, failed, running, or completed, appears in the Last Job Request field in the status bar of your screen. You can also click Tools, Job Status to display the Job Status dialog box for details about the status of jobs. Finally, a message appears in the taskbar, along with the Oracle icon, when the job completes successfully or if it fails to complete successfully. The message appears for ten seconds and displays the internal job name of the job. After ten seconds only the Oracle icon continues to appear, and you can click it to view the message.
6. When connected to a P6 EPPM database: When the job completes successfully, press F5 to refresh open windows with the latest data.

Tip

- To calculate activity, resource, and expense actuals according to the project plan, rather than hours, units, and completion percentages reported by resources, mark the Auto Compute Actuals checkbox for each resource (in the Details tab of Resource Details) or nonresource cost (in the Expenses tab of Activity Details).
- To use resource curves or manual future period values when applying actuals, mark the Auto Compute Actuals checkbox for each resource (on the Details tab of Resource Details). See the Updating projects section of the Future period bucket planning FAQ for detailed information to consider when applying actuals for assignments with manual future period values.
- When connected to a P6 Professional database: You can set up a job service to apply actuals to your projects at a specified time.
- When connected to a P6 EPPM database: You can use P6 to apply actuals to your projects as a recurring job that runs at a specified time.
- If submitted or resubmitted timesheets exist that have not been approved when you apply actuals for a project, you are prompted to review the timesheets. Click Yes if you want to review the timesheets; click No if you want to skip the unapproved timesheets and apply actuals.
- When connected to a P6 EPPM database: The Last Job Request field in the status bar of your screen displays the status of the last job request that you submitted during this work session. So if you submit two jobs, only the status of the last request appears.

Earned Value

Earned value is a technique for measuring project performance according to both project cost and schedule. This technique compares budgeted or planned cost of the work to the actual cost. While earned value analysis are typically performed for WBS elements, you can also perform an earned value analysis for activities and groups of activities.

In order to perform an earned value analysis, you must specify two calculation techniques. These techniques apply to activities that are currently in progress. The first technique is used to calculate an activity's percent complete. The second technique is used to calculate an

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activity's Estimate to Complete (ETC). A set of options is provided for both of these techniques, and you can set these options for each WBS element.

The fundamental earned value parameters used to calculate an activity's Estimate to Complete are: Earned Value Cost; Budget At Completion (BAC); Planned Value Cost; and, Actual Cost. You can derive an activity's Estimate to Complete and other earned value indexes from these parameters.

If you are the administrator for your organization, you can specify default earned value techniques for WBS elements.

Calculating earned value using resource curves or manual future period buckets

Curves and manual future period buckets are used when calculating Earned Value if the following conditions apply:

- The activity's % Complete Type is Units and the Technique for Computing Performance Percent Complete (on the Earned Value tab in the Work Breakdown Structure window) is Activity Percent Complete.

OR

- The Technique for Computing Performance Percent Complete (on the Earned Value tab in the Work Breakdown Structure window) is Activity Percent Complete and the 'Use resource curves \ future period buckets' checkbox is marked (also on the Earned Value tab).

> **Note**
>
> To spread the Estimate To Complete using a curve, mark ETC = Remaining Cost for Activity (on the Earned Value tab in the Work Breakdown Structure window).

Updating progress

If activities are progressing on schedule, you might choose P6 Professional to estimate progress for all activities as of the new data date you specify. P6 Professional can quickly apply actuals to activity dates, and calculate actual duration and units when you use the Update Progress dialog box to update activities.

Estimating activity progress is a quick and convenient way to update your project. P6 Professional estimates progress only for those activities that were supposed to take place. Since progress can occur on activities out of sequence, you may need to update additional activities—especially if you selected activities by dragging the data-date line or by using the Progress Spotlight feature (View, Progress Spotlight). Once you spotlight activities, you can quickly update the project automatically as "on time."

When you use Update Progress to progress activities, P6 Professional will apply actual dates to the activities that should have started and finished, update the actual and remaining durations, and update the remaining units according to the new data date.

You can update progress automatically once you set the appropriate Auto Computer Actuals options. Choose Tools, Apply Actuals.

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Creating and Using Reflections

What is a reflection

A reflection is a copy of a project that has the following characteristics:

1. Has the same name as the original source project with reflection appended to it.
2. Internally, contains a link to the source project that allows the application to merge changes to the reflection into the source project.
3. Has a what-if status.

After creating a reflection, you can make changes to it. You can then merge selected changes back into the source project keeping active data in the source project intact. Creating a reflection facilitates the following work flows and processes:

- Creating a sandbox area to test different project scenarios.
- Reviewing changes made in collaboration with other users of a reflection. Using the reflection as an intermediary project lets you review and accept changes before merging the reflection back into the source project.
- Reviewing changes to a project by exporting a reflection as an .XER file. You can send the .XER file to outside users who can import the file into their database. After making changes to the project, the outside users can export the file and send the resulting .XER file back to you. By importing the .XER file back into your reflection, you can decide which changes to keep when you merge the reflection back into the source project.

Creating and using reflections

Follow this procedure to create and use reflections.

1. Create a reflection.
2. Make changes to the reflection.
3. Preview the changes to the project.
4. Optionally, print a report of the changes to the project.
5. Merge selected changes into the source project.

Create a Reflection

Follow this procedure to create a reflection of a source project. The reflection you create will have the same name as the source project with an incremental number appended to it.

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> **Note**
>
> - The Create Reflection context menu will only be available when selecting a project under an EPS node in which you have the privilege to create projects. Generally this means that the Responsible Manager assigned to the EPS node in which the project resides must be assigned to your user name with a profile that includes the "Add Projects" project privilege when P6 Professional is connected to a P6 Professional database and to your user name with a profile that includes the appropriate project privilege as defined in P6 when connected to a P6 EPPM database.
> - When connected to a P6 EPPM database: Project Managers can use the Reflection project and Activity Owner features together to collect and review activity status information reported by users with Contributor module access assigned in P6.
> - When connected to a P6 EPPM database: P6 Professional uses a job service to create the reflection. This means that you can carry on working while the reflection is created in the background. To see the progress of the job, choose Tools, Job Status.

Create a reflection

1. In the Projects view, right click on the project for which you want to create a reflection.
2. In the context menu, click Create Reflection. If the project does not contain any baselines, the system responds by creating a reflection. Otherwise, the system responds by displaying the Copy Baselines dialog box. For any baselines you want to copy, mark checkbox(s) in the Copy column of the Copy Baselines dialog box and click OK. The system responds by creating a reflection.

Make changes in the reflection

Once a reflection has been created, you can make changes to the reflection as needed to explore alternative project scenarios.

Printing a reflection difference report

The Preview Changes to Project dialog box provides a print function that allows you to print a report that lists the differences between the reflection and the source project.

1. In the Projects view, right click on the reflection that you want to print a difference report.
2. In the context menu, click Merge Reflection into Source Project. If there are any changes to merge, the system responds by displaying the Preview changes to project dialog box.
3. In the Group Changes By, choose how you would like group the changes.
4. Expand or collapse the nodes as you would like the information to be displayed in the printout.
5. Right click anywhere inside the grid and choose Print Preview from the context menu.
6. To set the default printer, paper size, and page orientation, click 
7. Click  to print the difference report.

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Merging a Reflection with the Source project

Creating a reflection allows you to make a copy of a project known as a reflection. Once a reflection has been created, you can make changes to the reflection as needed to explore alternative project scenarios. Then, you can merge these updates to the original project, allowing you to keep active project data intact. This topic assumes that you have already created a reflection, you have made changes to the reflection and are ready to either preview and/or merge selected changes into the source project.

> **Note**
>
> - The Merge Reflection into Source Project context menu will only be available when selecting a reflection to which you have superuser access. You will also need superuser access to the source project associated with the reflection. Additionally, the source project cannot be opened in Exclusive mode by another user nor can it be checked out.
> - Changes you make to the following fields in a reflection project will result in new entries being added to the source project when you merge a reflection into the source project: Project ID, Activity ID, Resource ID, Role ID, Cost Account, and Price/Unit. For example, assume that the source project contains an activity with an Activity ID of A1000. After creating a reflection, you change the Activity ID from A1000 to A1005 in the reflection project. Then, when you merge the reflection project into the source project, the source project now contains two activities, A1000 and A1005, which are identical except for the Activity ID.

Preview changes to be merged

Begin by previewing the changes.

1. In the Projects view, right click on the reflection that you want to merge with the source project.
2. In the context menu, click Merge Reflection into Source Project. If there are any changes to merge, the system responds by displaying the Preview Changes to Project dialog box.

Choose changes to merge

Next, choose changes from the reflection to merge into the source project. There are two ways the changes can be viewed, or grouped, in the Preview Changes to Project dialog box: by subject area or by activity. The default is by activity. When you view the changes by activity, check boxes appear in the Merge column for activity rows. This allows you to select which activities to merge into the source project.

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> **Note**
>
> - By default, if there are any activities with changes, all activity check boxes will be marked.
> - Marking or clearing an activity check box in the Activity grouping has a corresponding affect in the Subject Area grouping even though the check boxes are not available. Ensure the Activity radio button is marked if you need to understand or change which activities are to be merged.

1. In the Group Changes By, choose how you would like group the changes.
2. If you choose Activity in step 1, select activities to be merged by marking the appropriate Merge checkbox in the Merge column.

> **Tip**
>
> If the application has detected activities that have changed, two buttons will be enabled: Select All and Clear All. You can use these buttons to save time if you have a lot of activities to consider. For example, suppose you knew that there were only two activities that should be merged out of a large number of changed activities. In this example, you could save time by clicking the Clear All and then marking only the two that should be merged.

Determine actions the application should take prior to merging

Under Prior to merging, mark the appropriate check box.

1. Mark the Create a copy of the source project as a baseline if you would like to create a baseline in the source project with the name of the project with - Bx appended to it, where x is an incremented number.
2. Mark the Create a backup file of source project if you would like export the project to an .xer file. You could use this file to rollback the source project after the merge.

Determine actions the application should take after merging

Under After merging, mark the appropriate check box.

1. Mark the Keep reflection check box if you would like the application to keep the reflection in the EPS after the reflection is successfully merged.
2. Mark the Delete reflection check box if you would like the application to delete the reflection from the EPS after the reflection is successfully merged.
3. Mark the Replace reflection checkbox if you would like to replace the reflection with an updated reflection based on the current data in the source project after the merge.

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> **Note**
>
> - If you choose the Replace reflection option, the new reflection will be created with the same baselines that were in the original reflection.
> - When connected to a P6 EPPM database: Mark the Keep reflection checkbox if you want to keep a record of Risk data. Otherwise, Risk data for the Reflection project will be lost since Risks data is not merged (the source project's Risk data remains unchanged).

Merge the changes

If for whatever reason, you decide not to merge the changes in the Reflection into the Source project, click Cancel and no changes will be made to the source project.

Otherwise, click Merge Changes to merge the changes into the source project.

> **Note**
>
> - We suggest opening and scheduling the source project after merging changes into it.
> - When you export resource assignments to an XLSX file, only the lowest level of cost accounts associated with resource assignments is exported to the XLSX file. For example, assume your cost account hierarchy has a cost account named CA, with a subordinate level named CA.A. If you assign the cost account CA.A to a resource assignment, when you export resource assignments to an XLSX file, the XLSX file displays "A" as the cost account, not "CA.A." If you then import this XLSX file to the same project in P6 Professional, in some cases, a duplicate resource assignment will be created that lists "A" as the assigned cost account for the duplicate resource assignment.

Using Reflection projects and Activity Owner features to collect and review activity status (P6 EPPM Only)

The Reflection project and Activity Owner features can be used together to collect and review activity progress information from project team members who are not assigned as activity resources.

A Reflection project is a copy of an active project that can be used for what-if analysis. However, unlike a standard what-if project, a Reflection offers the capability to review all changes and specify which, if any, should be merged into the active source project.

An Activity Owner who has Contributor module access (defined in P6) and the required security privileges can update the activity's status and other details in P6. By offering an Activity Owner OBS access to a Reflection project, rather than its associated active source project, Project Managers can collect the data they require and have the ability, through a review process, to ensure data integrity for the active project.

To implement these activity status reporting and review capabilities, do the following:

- For the appropriate users, grant the required Contributor module access (assigned using P6), OBS access, and security privileges. Ensure that these users have access only to the

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OBS associated with the Reflection project. If an activity owner is granted OBS access to the source project, their changes will be incorporated into the active project without the review opportunity that a Reflection project provides. So that they can edit activities for which they are designated as Owner, team members must be granted the required project privileges.

- Designate owners for activities.
- Create the Reflection project, assigning it to the appropriate OBS.
- Review and merge changes from the Reflection project to the source project.

> **Note**
>
> Regardless of security privilege settings, users with Contributor module access (assigned using P6) can not add, delete, or edit WBS elements and they can not add or delete activities or delete resource assignments.

Frequently asked questions about reflections

Q. Can I view the link in the reflection to the source project?

A. Yes. Use the following procedure to view the link

1. From the Enterprise menu, select Projects.
2. From the View menu, select Columns, then select Customize.
3. In the General section of the Available Options column, select Source Project and click  to move the Source Project field into the Selected Options column.
4. Use the  and  buttons to move the field's position.
5. Click OK. The system responds by displaying the name of the Project ID in the Source Project field of reflection projects. Note that this field is read-only.

Q. Can I have multiple reflections pointing to the same source project?

A. Yes.

Q. What happens to the reflection when I delete the source project?

A. The link is deleted from the source project field in the reflection.

Q. Why don't I see the Create Reflection menu option when I right click on a project?

A. The right click option is hidden when any of the following is true:

- A group band node is selected
- More than one project is selected

Q. Why is the Create Reflection menu option disabled when I right click on a project?

A. The Create Reflection menu option is disabled when you do not have access to create projects within the EPS node.

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Q. Why don't I see the Merge Reflection into Source Project menu option when I right click on a reflection project?

A. The right click option is hidden when any of the following is true:

- A group band node is selected
- More than one project is selected
- A non-reflection project is selected (that is the project does not contain a source project field value)
- The selected project contains a source project field value, but it does not have a what-if status
- The selected project has a what-if status but it does not contain a source project field value

Q. Why is the Merge Reflection into Source Project disabled?

A. The right click option is disabled when any of the following is true:

- The source project has been checked out
- The source project and/or the reflection has been opened in Exclusive mode by another user
- You do not have super user privileges to both the source project and the reflection

Q. What happens when there are duplicate records for resources?

A. The resources will not be updated. You will have to update the resources in the source project manually.

Q. What happens if the merge fails?

A. The system responds with a message that the merge process failed, creating the prmReflectionMerge.log file in the temporary directory, and notifying of log file's location.

Q. How are changes to dates handled?

A. Scheduling related date fields are not shown in the preview but may be updated upon merging changes.

Q. How are baselines handled when the "Replace reflection" option is used?

A. The new reflection will be created with the same baselines that were in the original reflection.

Scheduling Projects

Scheduling projects

Your project schedule can be calculated one of two ways: when you choose the Schedule command or each time you make a change that affects schedule dates.

The Critical Path Method (CPM) scheduling technique is used to calculate project schedules. CPM uses activity durations and relationships between activities to calculate the project schedule.

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Calculating a schedule

When you choose to calculate a schedule, all activities in the network are examined, beginning with the first and ending with the last, to calculate the earliest start and finish dates for each activity.

The activities are then reexamined in a backward pass, beginning with the latest early finish of the last activity in the network and ending with the first activity, to calculate the latest start and finish dates for each activity.

Float values are calculated using the duration and calendar definitions for the activity.

In addition to scheduling a project, you can also level resources.

Automatic scheduling

You can calculate the schedule each time activity data change, rescheduling activities that have changed significantly and or that were affected by a change to the first activity. If automatic scheduling is turned on, the schedule recalculates each time a significant change is made to an activity, relationship, or resource. If you turn off automatic scheduling, changes to activities are not reflected in the schedule until you calculate the schedule again.

You can also level resources during automatic scheduling.

Scheduling "nondriving" resource assignments

Resources that do not drive the dates of the activity to which they are assigned are considered to be nondriving. You can define resources as driving or nondriving by default in the Projects Window, Project Details, Resources tab. When scheduling nondriving resources, P6 Professional applies the following rules:

- When scheduling on the forward pass, if the activity has any driving resource assignments, P6 Professional calculates the early start date of the activity as the earliest Early Start date of all driving resource assignments. Once the Early Start of the activity is calculated from the driving assignments and relationships, all nondriving resources are scheduled on or after this date using its assignment duration. The Early Finish dates of the nondriving assignments can fall earlier or later than the Early Finish of the activity.
- When scheduling on the backward pass, the Late Start date of the activity and all nondriving resources are calculated as the earliest Late Start date of all driving resource assignments. Once the Late Start date of the activity is calculated from the driving assignments and relationships, all nondriving resources are scheduled on or after this date using its assignment duration. This means the Late Finish date of the nondriving assignments can fall later than the Late Finish date of the activity to which they are assigned.
- The finish dates of the nondriving resource assignments can fall later than the latest calculated Early Finish date of the project, which is driven by the activity dates.
- If no driving resources exist on the activity, the activity dates are used as the calculated dates for the nondriving resources.

Types of constraints

Network logic alone cannot reflect all project situations. Sometimes activities must be accomplished according to specific dates rather than on dates determined by other activities in

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the project. To model dependence on specific dates, assign primary and secondary constraints to activities.

P6 Professional provides both hard and soft constraints. A hard constraint type prevents activities from being moved. In P6 Professional, the hard constraints available are Mandatory Start and Mandatory Finish. A soft constraint type does not prevent activities from being moved, but it can distort float. In P6 Professional, the soft constraints available are Start on, Start on or before, Start on or after, Finish on, Finish on or before, and Finish on or after.

> **Note**
>
> The expected finish date, typically applied to an activity by a primary resource, can also be taken into account when scheduling a project.

Select a constraint type below to view its description.

Start constraints

Start on constraint

Start on or after constraint

Start on or before constraint

Finish constraints

Finish on constraint

Finish on or after constraint

Finish on or before constraint

Mandatory constraints

Mandatory start constraint

Mandatory finish constraint

Late constraint

As late as possible constraint

Using the data date

The data date is the last date you recorded progress in the form of actual dates, percent of work completed, revised remaining duration, or actual quantities or costs.

Activities are scheduled from the project data date, using the project start date as the initial data date.

Be sure to change the data date and reschedule a project each time you record progress for activities. For example, suppose you update the schedule every Friday and the current data date is Friday, November 5. When one week elapses and it is November 12, update progress through the end of the day November 11, then advance the data date to November 12. The schedule revises based on the actual dates, delays, and other changes you recorded during the past week.

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Always assume that the data date starts the workperiod; the data date can be the beginning of the hour, day, week, or month. Work accomplished on the data date is not included because it is the beginning of the period.

During the project, the data date moves forward toward the project completion date. The actual dates can serve as historical data for planning another project.

Define critical activities

When you schedule your project, you can decide how you want to identify the critical activities.

1. Choose Tools, Schedule.
2. Click Options.
3. In the General tab, select an option to determine the method for defining critical activities. If you choose Total Float less than or equal to, specify the maximum float time for activities before they are marked critical. You can type a new number and time unit. If you choose Longest Path, the activities on the longest path in the network are considered critical. In a multicalendar project, the longest path is calculated by identifying the activities that have an early finish equal to the latest calculated early finish for the project and tracing all driving relationships for those activities back to the project start date.

> **Note**
>
> - When you run the scheduler, activities are flagged as critical based on the option you select as described above. If you also choose to calculate multiple critical float paths (on the Advanced tab of Schedule Options), the float paths are calculated after the project has been scheduled. Critical activities that are not part of a critical float path remain tagged as critical.
> - If multiple projects are open when you schedule, you must select which project's settings to use when scheduling.

Shortening the critical path

The critical path is a series of activities that determines a project's completion time. The duration of the activities on the critical path controls the duration of the entire project; a delay to any of these activities will delay the finish date of the entire project. Critical activities are defined by either the total float or the longest path in the project network.

To shorten the duration of a project, focus on the critical path. Filter the critical activities and make any of the following adjustments:

- Enter shorter original or planned and remaining durations (work faster).
- If resources are assigned to an activity, reduce the durations of those resources or increase the number of units assigned to reduce the duration of the activity itself (use more people or equipment).
- Change the appropriate calendar, changing some nonworkdays to workdays (more worktime).
- Use start to start relationships to overlap activities (work on more activities at once).
- Divide long activities into several shorter-duration activities, so that portions of the activity can be overlapped (work on several portions of an activity simultaneously).

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Activities can appear critical without being on the critical path, if they are part of an open-ended chain. To make these activities appear noncritical, so that you can focus on the critical path, choose Tools, Schedule. On the General tab, clear the Make Open-Ended Activities Critical checkbox.

Tip

You can calculate the most critical path, along with sub-critical paths, by choosing the Calculate multiple float paths option in the Advanced tab of the Schedule Options dialog box.

Analyzing the schedule using multiple critical float paths

When you schedule a project, you can choose to calculate multiple critical float paths (sequences of activities) that affect the project schedule. By calculating multiple critical float paths, you can determine the most critical path in the project schedule, along with sub-critical paths that affect the completion of the most critical path.

While you can determine the critical path of activities based on total float or longest path, these methods do not offer insight into sub-critical paths that can also affect the project schedule. For example, if you choose to identify critical activities based on a maximum total float threshold, the module will identify all activities beyond the threshold as critical even if the activities have no relationships or do not affect the project end date. Likewise, if you choose to identify critical activities based on longest path, the module will identify the critical path of activities but will not identify sub-critical paths that affect the critical path.

In the Advanced tab of the Schedule Options dialog, you can choose to calculate a specific number of critical float paths based on total float or free float. You can also choose the activity you want the float paths to end on. By choosing an activity, you can calculate multiple float paths that affect the entire project schedule, a specific part of the schedule, or a milestone in the schedule.

When you schedule the project, the module identifies the most critical float path in the schedule and assigns those activities a Float Path value of 1. Then, depending on the number of paths you choose to calculate, the module identifies other float paths (sub-critical float paths) that affect the most critical float path and numbers the paths in ascending order (beginning with 2) based on the criticality of the path.

After you schedule a project, you can display the Float Path and Float Path Order columns in the Activity Table. Group by Float Path to view the activities in each critical float path, then sort by Float Path Order to view the order in which the activities were processed.

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> **Note**
>
> - Calculating multiple critical float paths does not affect how you define critical activities. When you schedule a project, you must choose to define critical activities by a maximum float time or by longest path in the General tab of the Schedule Options dialog box. When you run the scheduler, activities are flagged as critical based on this setting. If you also choose to calculate multiple critical float paths, the float paths are calculated after the project has been scheduled. Critical activities that are not part of a critical float path remain tagged as critical.
> - Calculating multiple float paths using retained logic requires early and late dates to be visible on all activities, including completed activities. Scheduling a project with retained logic always calculates early and late dates for completed activities, even if you do not select the option to calculate multiple float paths.

Calculate multiple float paths

When you schedule a project, you can choose to calculate multiple critical float paths.

1. Choose Tools, Schedule.
2. Click Options, then click the Advanced tab.
3. Mark the Calculate multiple float paths option.
4. Choose to calculate multiple paths using Total Float or Free Float.
5. In the Display multiple float paths ending with activity field, click the Browse button to choose the activity on which you want the float paths to end. You can choose any activity; however, typically this activity is a milestone or some other major activity in the project schedule.
6. Specify the number of float paths you want the module to calculate. Enter a low number (10 or less) to optimize performance.
7. Click Close.

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Note

- If you choose to calculate multiple paths using Total Float, to calculate the most critical path, the module first determines which relationship has the most critical total float. Using this relationship as the starting point, the module determines which predecessor and successor activities have the most critical relationship total float, among all possible paths, until an activity is reached that does not have any relationships. The path that contains these activities is the most critical path. These activities are assigned a Float Path value of 1 (the most critical float path) and the process begins again until the specified number of paths are calculated.
- If you choose to calculate multiple paths using Free Float, the most critical path will be identical to the critical path that is derived when you choose to define critical activities as Longest Path in the General tab of the Schedule Options dialog box. In a multicalendar project, the longest path is calculated by identifying the activities that have an early finish equal to the latest calculated early finish for the project and tracing all driving relationships for those activities back to the project start date.

Showing activity critical paths

You can filter your view to show only the activities on a critical path to a selected activity. You can choose to view the activity-driven backward critical path, forward critical path, or backward and forward critical paths, or the resource-driven backward critical path. You must have scheduled your project to view the critical paths, however it is not necessary to have calculated multiple float paths during scheduling. You will see more realistic critical paths if the projects you have open have also been leveled together.

Completed activities, WBS Summary activities, and activities that are not on a critical path associated with the selected activity are filtered out of your view when you select to show activity critical paths.

1. Choose View, Toolbars, Activity Critical Path.
2. Select a not started or in-progress activity for which you want to view critical paths. Click 'Show Backward Activity Critical Paths' to show the most critical path behind the selected activity. Click 'Show Resource Critical Paths' to show the most critical path behind to the selected activity, and any activities whose resource assignments are contributing to the criticality of the selected activity (even if those activities are not on the activity-driven critical path to the selected activity). Click 'Show Forward Activity Critical Paths' to show the most critical path forward of the selected activity. Click 'Show Activity Critical Paths' to show the entirety of the most critical path of the selected activity. At any time you can click 'Show More Paths' to add further critical paths to the view up to a maximum of 30 paths or click 'Show Fewer Paths' to remove from view activities on less critical paths one path at a time. Alternatively, choose 'Select Paths to Show' to specify the exact number of critical paths to show. To apply your view's configured grouping and sorting, choose 'Enable Group and Sort'.
3. To return to seeing all activities visible in your view, toggle off the applied critical paths button.

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> **Note**
>
> - Add the Critical Path Number column to the activity grid to see which critical path each activity is on.
> - The criticality of each path is determined according to the latest early finish date of activities (or the latest early start date for start milestones) and then according to the lowest total float. If multiple activities on a path have the same early finish date and equal total float, Activity ID is used as a tie-breaker (in ascending order).
> - The criticality of resource assignments to activities on the critical path is determined according to the latest resource assignment early finish date. If multiple activities have the same resource assigned with the same assignment early finish date, again the Activity ID is used as a tie-breaker (in ascending order).

Schedule a project

1. Open the projects you want to schedule.

> **Tip**
>
> **Tip** If you want to schedule multiple projects simultaneously, you should set the data date for each project individually before scheduling. To set the data date for each project, choose Enterprise, Projects. For each project you want to schedule, select the project in the project table, then modify the Data Date field on the Project Details, Dates tab.

1. Choose Tools, Schedule.
2. To set scheduling options, click Options. To display and/or use the default scheduling settings, click Default in the Schedule Options dialog box.
3. If only one project is open, click



in the Current Data Date field if you want to change the data date before scheduling the project. If multiple projects are open, select All projects use their own data date if you want to schedule all projects according to their current data date or select Apply selected data date to all open projects and click



to select a data date. You can change the data date for individual projects on the Project Details, Dates tab and when you apply actuals (Tools, Apply Actuals).

4. If enabled, mark the 'Set Data Date and Project Planned Start to Project Forecast Start during scheduling' checkbox if you want to schedule using forecast dates rather than the data date. When you mark this checkbox and schedule the projects, each project's data date is changed to match each project's forecast start date during scheduling.

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> **Tip**
>
> **Tip** A forecast start date is shown if the start date of a project was manually changed by dragging the project bar to a new timeframe in Tracking layouts.

1. To record your scheduling results in a log file, mark the Log to File checkbox, then click … to specify a filename and location.
2. Click Schedule.
3. If you're scheduling multiple projects and the projects have different data dates, a message appears indicating that each open project will be scheduled using its own data date (as specified on the Project Details, Dates tab). Click Yes to continue scheduling, or click No to cancel.
4. If, in the Schedule Options dialog box, you chose to calculate float based on the latest finish date of all open projects, you may be prompted with an additional warning message. Read the contents of the message, then click Yes to continue scheduling, or click No to cancel.

> **Note**
>
> - When scheduling, to recalculate actual units for resource assignments that use curves, mark Recalculate Actual Units and Cost When Duration % Complete Changes (in the Calculations tab in the Projects window).
> - Relationships to and from WBS Summary activities are ignored when you schedule a project, even if you choose to maintain activity relationships between projects.

Schedule a project automatically

Follow these steps to turn on "automatic scheduling" so that the schedule calculates each time you add or delete an activity or relationship, change an activity duration or relationship type, or change anything that affects schedule dates.

1. Choose Tools, Schedule.
2. Click Options.
3. In the General tab, mark the Schedule Automatically When a Change Affects Dates checkbox.
4. If you want to level resources automatically after it schedules, mark the Level Resources During Scheduling checkbox.
5. Click Close, then click Schedule.

Enter activity constraints

1. Choose Project, Activities, then select the activity whose constraint you want to define.
2. Display Activity Details, then click the Status tab.
3. In the Primary field, select a constraint type.

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4. Click … in the Date field, then select the date to which the constraint applies.
5. In the Secondary field, select a constraint type (if necessary).
6. Click … in the Date field, then select the date to which the constraint applies.

> **Note**
>
> - The Secondary constraint list is filtered based on the value you select in the Primary constraint field.
> - You cannot apply constraints to Level of Effort or WBS Summary activity types.

Change the data date

1. Choose Enterprise, Projects, then select the project whose data date you want to change.
2. Display Project Details, then click the Dates tab.
3. In the Data Date field, type the new data date or click … to select a date.

Choose a calendar for relationship lag

1. Choose Tools, Schedule.
2. Click Options.
3. On the General tab, select a calendar in the Calendar for Scheduling Relationship Lag field.

> **Note**
>
> Lag entered in a unit other than hours is converted to hours based on the predecessor activity's calendar.

Checking Schedules

Checking schedules

The Check Schedule Report analyzes the schedules of open projects allowing you assess project heath metrics. You can specify your own target percentages for each report parameter.

The Check Schedule Report looks for warning signs of potential issues:

Inflexibility and Inefficiency

Inflexibility and inefficiency in a schedule can cause unnecessary project overruns.

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Inflexibility occurs when too many activities are constrained or activities are not linked by schedule logic to reasonable predecessors or successors.

A schedule might be inefficient if some activities have very long durations, lags, or float. For example, if an activity has a very long duration its successors might be unnecessarily prevented from starting work, whereas breaking the activity down into several shorter activities might provide for more parallel working. When a relationship has a long lag or a large amount of float, it might be that the schedule would be more efficient if the activities were joined with different activities.

The following checks can help you to identify inflexibility and inefficiency in a schedule:

- Logic - Activities missing predecessors or successors
- Negative Lags - Relationships with a lag duration of less than 0
- Positive Lags - Relationships with a positive lag duration
- Long Lags - Relationships with a lag duration greater than 352 hours
- Relationship Types - The majority of relationships should be Finish to Start
- Hard Constraints - Constraints that prevent activities being moved
- Soft Constraints - Constraints that do not prevent activities being moved
- Large Float - Activities with total float greater than x
- Negative Float - Activities with a total float less than 0
- Large Durations - Activities that have a remaining duration greater than x
- Invalid Progress Before Data Date - Incomplete activities before the data date
- Invalid Progress After Data Date - Activities with actual dates after the data date
- Resources/Cost - Activities that do not have an expense or a resource assigned
- Late Activities - Activities scheduled to finish later than the project baseline
- Baseline - Activities missing assigned baseline
- Links to Closed Projects - Activities with links to closed projects
- Out of Sequence - Activities which are completed or in-progress before their predecessors
- Dangling Start Activities - Activities with start dates that are not driven by predecessors
- Dangling Finish Activities - Activities with finish dates that do not drive successors

Inaccuracy

Accuracy in a schedule relies on progress being reported accurately and costs being assigned appropriately.

The following checks can help you identify potential inaccuracy in a schedule:

- Negative Lags - Relationships with a lag duration of less than 0
- Invalid Progress Dates - Activities with invalid progress dates
- Resource / Cost - Activities that do not have an expense or a resource assigned

Lateness

If work is running late, it might be possible to take corrective action by adjusting the schedule. Alternatively it might be necessary to manage expectations of stakeholders.

The following checks can help you identify lateness in the schedule:

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- Late Activities - Activities scheduled to finish later than the project baseline
- BEI - Baseline Execution Index
- Negative Float - Activities with a total float less than 0

Check a schedule

1. Open the projects you want to check.
2. Choose Tools, Check Schedule Report....
3. If multiple projects are open, select the project whose check schedule parameters you want to use.
4. Select the checks to run. Optionally adjust the target and any durations for the selected checks.
5. Specify a location and file name for the report. Optionally select to overwrite the existing file if a file with the name you specify already exists in the location. If you choose not to overwrite the existing file, the report name will be appended with a time stamp if an existing file is found with the same name.
6. Click Check Schedule.

> **Note**
>
> You can filter the view to the activities that fail specific tests in the check schedule report either by using the Check Schedule toolbar, or selecting View, Check Schedule and then selecting the check to view. The Check Schedule Thresholds option allows you to modify the thresholds for Long Lags, Large Float, and Large Durations.
>
> The report also provides the following information:
>
> - The ID, name, data date, total number of activities, number of completed activities, number of internal relationships, and number of external relationships for each of the projects checked.
> - The ID, name, data date, and number of links to and from other linked projects that were closed when the report was run.
> - The project ID, activity ID, and activity name for any activities missing from the assigned baseline of the checked projects.
> - The predecessor project ID, predecessor activity ID, predecessor activity name, relationship type, lag duration, successor project ID, successor activity ID, and successor activity name for any links to projects that were closed when the report was run.

Leveling Resources

Leveling resources

Resource leveling is a process that helps you ensure that sufficient resources are available to perform the activities in your project according to the plan. During resource leveling, an activity

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is only scheduled to occur when its resource demands can be met. To accomplish this, tasks may be delayed to resolve resource availability conflicts.

Typically, you level during the forward pass through a project. This determines the earliest dates to schedule an activity when sufficient resources will be available to perform the task.

If forward leveling delays the project's early finish date, late dates remain unchanged unless you clear the checkbox to preserve scheduled early and late dates in the Level Resources dialog box. In this case, a backward pass recalculates late dates.

After a project is leveled, you can also calculate multiple resource-driven critical paths to identify the resource assignments affecting the critical path. This calculation starts with an activity you select and works backwards through the critical paths to determine resource-driven criticality.

Tip

While resource leveling provides one way to resolve resource conflicts, you may also want to consider alternative solutions, such as changing activity relationships or reallocating resources.

Note

- The maximum amount of work that a resource is capable of doing for a given timeperiod is defined by the resource's Max Units/Time value in the Units & Prices tab of Resource Details.
- Leveling is disabled when no projects are open.
- Resource curves are not used when leveling; however, manual future period values are considered when leveling.
- If multiple projects are open when you level resources, you must select which project's settings to use when leveling.

Leveling priority definitions

Projects typically contain more than one chain of activities. If two activities from different chains are ready for leveling, P6 Professional chooses one using the priorities you specify in the Leveling Priorities area of the Level Resources dialog box. Then, it sorts numbers first, then alphabetic characters, followed by blank values. If you specify no prioritization codes, P6 Professional sorts by activity ID.

The following table defines your priority and order options for leveling resources.

Priority	Ascending	Descending
Activity ID	Levels activities with lower IDs first.	Levels activities with higher IDs first.
Activity Priority	Levels lower priority activities first.	Levels higher priority activities first.
Early Finish	Levels activities with earlier, early finish dates first.	Levels activities with later, early finish dates first.
Early Start	Levels activities with earlier, early start dates first.	Levels activities with later, early start dates first.

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Free Float	Levels activities with less free float, or more critical activities, first.	Levels activities with more free float, or less critical activities, first.
Late Finish	Levels activities with earlier, late finish dates first.	Levels activities with later, late finish dates first.
Late Start	Levels activities with earlier, late start dates first.	Levels activities with later, late start dates first.
Original or Planned Duration	Levels activities with shorter original or planned durations first.	Levels activities with longer original or planned durations first.
Planned Finish	Levels activities with earlier planned finish dates first.	Levels activities with later planned finish dates first.
Project Planned Start	Levels activities with earlier project planned start dates first.	Levels activities with later project planned start dates first.
Project Priority	Levels lower priority projects first.	Levels higher priority projects first.
Remaining Duration	Levels activities with shorter remaining durations first.	Levels activities with longer remaining durations first.
Total Float	Levels activities with less total float, or more critical activities, first.	Levels activities with more total float, or less critical activities, first.

Specify leveling priorities

1. Choose Tools, Level Resources.
2. In the Leveling Priorities area, click Add.
3. Select a new leveling priority. A priority within the table takes precedence over any priorities below it.
4. Specify a sort order.
5. Click Level.

> **Note**
>
> - To remove a priority from the list, select the priority, then click Remove.
> - To edit a priority, click the field name, then select a new field name and/or double-click the Sort Order column and select Ascending or Descending.
> - If multiple projects are open when you level resources, you must select which project's settings to use when leveling.

Level resources

1. Choose Tools, Level Resources.
2. Mark the Consider Assignments in Other Projects With Priority Equal/Higher Than checkbox and specify a priority number if you want to consider other project assignments when determining whether a resource is overallocated.
3. Mark the Preserve Scheduled Early and Late Dates checkbox to preserve the early and late dates that were calculated during project scheduling.

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4. Mark the Level All Resources checkbox to level all the resources within the project. To level specific resources, clear the Level All Resources checkbox and click Select Resources to choose the resources that you want to include in the leveling run.
5. Specify leveling priorities.
6. Mark the Log to File checkbox to record your leveling results in a log file, then click ... to specify a filename and location.
7. Click Level.

> **Tip**
>
> To display and/or use the resource leveling defaults, click Default.

> **Note**
>
> - Resource curves are not used when leveling.
> - A Resource assigned to a suspended activity is considered available for assignment to other activities until the resume date of the suspended activity.

Level selected resources

1. Choose Tools, Level Resources.
2. Clear the Level All Resources checkbox to level only a subset of all the resources.
3. Click Select Resources.
4. Mark the checkbox in the Level column next to each resource you want to level, then click OK.
5. Click Level.

> **Note**
>
> If the Level All Resources checkbox is marked, all the resources will be leveled regardless of the resource selection defined under the Select Resources button.

Limit resource leveling

1. Choose Tools, Level Resources.
2. Mark the Level Resources Only Within Activity Total Float checkbox to delay activities with resource conflicts only up to their late dates (late finish when based on finish float, late start when based on start float).
3. In the Preserve Minimum Float When Leveling field, type the minimum amount of total float you want to maintain for each activity during the leveling.
4. In the Max Percent to Overallocate Resources field, specify the maximum percentage by which resource availability can be increased. This increased resource availability is used

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for leveling if resources assigned to an activity cannot be leveled after using the activity's float limit.

5. Click Level.

Level resources automatically

1. Choose Tools, Level Resources.
2. Mark the Automatically Level Resources When Scheduling checkbox to automatically level resources each time you schedule a project.

Leveling resources on Task, Resource Dependent, and WBS summary activities

The following rules apply to leveling resources:

- If you level a Task dependent activity with driving and nondriving resource assignments, P6 Professional requires that all resources be available in order to place the activity.
- If you level a Resource dependent activity with driving and nondriving resource assignments, P6 Professional requires that all driving resources assigned to the activity be available in order to place the activity. All nondriving resources will be leveled on or after the activity dates, which are driven by the driving resources.
- If you level a Resource Dependent type activity with nondriving resource assignments, P6 Professional will place the resources on or after the earliest possible start date of the activity. These resources can be placed any time in the future after this candidate date.
- If you level a Resource Dependent type activity with a combination of driving and nondriving resources, and the driving resource succeeds in finding availability, while the nondriving resource fails, the nondriving assignment dates will be delayed based on where the driving resources are placed.
- WBS Summary activities are ignored during the leveling process.

If any resource assignment fails leveling, it is noted in the leveling report, even in cases where the driving resources succeed.

Adding and Assigning Issues

Issues

Issues are known problems within a project plan that require attention or corrective action. You can manually create issues and you can generate issues automatically by defining project thresholds. You can associate these issues with work breakdown structure (WBS) elements, activities, or resources.

When you add an issue, you can assign a priority level, tracking layout, and responsible manager to the issue. An issue's tracking layout assignment is helpful when you want to quickly open the tracking layout that best displays the problem area. An issue's responsible manager assignment identifies the person responsible for addressing the issue. You can record historical details for the issue and email issue details, along with your notes and the issue's history, to any member of the project's staff.

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In addition to these features, an Issue Navigator feature enables you to select a current issue and navigate to specific areas of the module to view different issue details quickly.

Add an issue

1. Choose Project, Issues.
2. Click ✚ on the Edit Toolbar or choose Edit, Add.
3. Display Issue Details, then click the General tab.
4. Type the issue's name.
5. In the Responsible Manager field, click ..., select the person to assign, then click the Select button.
6. In the Tracking Layout field, click ..., select the layout to associate with the issue, then click the Select button.
7. In the Date Identified field, click ... to select a date (if different than the current system date).
8. Select the issue's status.
9. Select the issue's priority level.
10. Click the Details tab. If applicable to the issue you are adding, type values in the Lower Threshold, Upper Threshold, and Actual Value fields. For issues that you add manually, these fields are informational only and are not used for calculations. For threshold-generated issues, these fields display the threshold values assigned to a threshold parameter and the actual value calculated for the threshold.
11. To associate the issue with a work breakdown structure (WBS) element other than the root WBS element, in the Applies to WBS field, click ..., select the WBS element, then click the Select button.
12. To associate the issue with a resource and/or a specific activity, click ... in the appropriate field, select the resource or activity, then click the Select button. If resource security is enabled, you can only view current project resources and resources you have access to.
13. To record a description of the issue, click the Notes tab, then click Modify to type a description of the issue in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.

Assign responsibility for an issue

1. Choose Project, Issues, then select the issue.
2. Display Issue Details, then click the General tab.
3. In the Responsible Manager field, click ....
4. Select the name of the responsible OBS member, then click the Select button.

Assign a tracking layout to an issue

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When you assign a default tracking layout to an issue, you can quickly view issue details through the Issue Navigator.

1. Choose Project, Issues, then select the issue.
2. Display Issue Details, then click the General tab.
3. In the Tracking Layout field, click , select the tracking layout you want to assign, then click the Select button.

Assign an issue to a resource

1. Choose Project, Issues, then select the issue.
2. Display Issue Details, then click the Details tab.
3. In the Applies to Resource field, click , select the resource to which you want to assign the issue, then click the Select button.

> **Note**
>
> If the threshold monitor generated the selected issue, you cannot assign the issue to a resource or change the issue's resource assignment.

Assign an issue to an activity

1. Choose Project, Issues, then select the issue.
2. Display Issue Details, then click the Details tab.
3. In the Applies to Activity field, click , select the activity to which you want to assign the issue, then click the Select button.

> **Note**
>
> If the threshold monitor generated the selected issue, you cannot assign the issue to an activity or change the issue's activity assignment.

Change an issue's status

1. Choose Project, Issues, then select the issue.
2. Display Issue Details, then click the General tab.
3. Select a status.

Track the duration of an issue

1. Choose Project, Issues, then select the issue.
2. Display Issue Details, then click the General tab.

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3. Compare the dates in the Date Identified and Resolution Date fields to determine how long an issue is open and how long it took to resolve the issue.

Delete an issue

1. Choose Project, Issues.
2. Select the issue, then choose Edit, Delete.

Send Email about an issue

You can send Email about an issue from the Project Issues window or the Issue Navigator dialog box.

1. From the Project Issues window, select the issue about which you want to send Email, then click

   on the Edit toolbar, or right-click on the issue and choose Notify. From the Issue Navigator dialog box, select the issue about which you want to send Email, then click Notify.
2. In the Subject and Contents area, type any corrections or additions about the issue.
3. To add a recipient, click Add. To select a recipient from a list of OBS members, resources, or users, choose Select Recipient from a Dialog, then click OK. Select a recipient from the displayed dialog box, then click the Assign button. To enter a recipient's Email address, choose Manually Add a New Recipient, then click OK. Type the recipient's information in the Notify Issue dialog box.
4. To remove a recipient from the recipient list, select the recipient, then click Remove.
5. To send the notification to all listed recipients, click Send All.

> **Tip**
>
> The recipients you choose to notify about an issue are not saved in the Recipients list in the Notify Issue dialog box. To keep a record of who you Emailed about an issue, you can add the information to the issue history.

View or add to an issue's history

1. Choose Project, Issues.
2. Select the issue whose history you want to view.
3. Click  on the Edit toolbar, or right-click on the issue and choose Issue History.
4. To add information, type in the Add to Notes area, then click Add.

Use the issue navigator

1. Choose Tools, Issue Navigator.

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2. Select the issue you want to review.
3. To view the issue's details with its assigned tracking layout, click Tracking. To view the issue's Activity Details in the Activities window, click Activities. To view the issue's work breakdown structure details in the Work Breakdown Structure window, click WBS. To view the issue's resource details in the Resources window, click Resources. To view the issue's details in the Project Issues window, click Issue Details.

> **Tip**
>
> You can automatically display the Issue Navigator at startup. Choose Edit, User Preferences. Click the Application tab, then mark the Show the Issue Navigator Dialog at Startup checkbox.

Adding and Assigning Thresholds

Thresholds

Use thresholds as a project management technique. You can create a threshold by selecting a parameter, such as start date variance; setting lower and upper values for the threshold; and applying the threshold to a specific work breakdown structure (WBS) element, or area, of your project plan.

When you define a threshold for a WBS element, you can specify the level of detail by which you want to monitor the WBS element. You can monitor the threshold at the activity level, and you can monitor the threshold at the WBS level. If you monitor a threshold at the activity level, issues are generated for each activity that violates the threshold. If you monitor a threshold at the WBS level, each activity contained in the specified WBS element is tested, and then all issues are summarized to the WBS element, rather than each activity.

After you define a threshold, you can monitor it to identify any issues associated with it. For example, you may set a threshold using the Total Float parameter. If the lower threshold value is 1d and the upper threshold value is 10d, an issue is generated for any activities that have a total float less than or equal to 1d or more than or equal to 10d. You can assign a person to be responsible for issues generated by the threshold. You can also specify threshold tracking layouts and assign priority levels to thresholds. A threshold's tracking layout assignment identifies the tracking layout that best displays the threshold problem area.

Threshold parameter definitions

A threshold parameter is a type of "test" that P6 Professional applies to activities or work breakdown structure (WBS) elements in a project to identify potential issues. You can specify a threshold parameter and a lower and/or upper threshold value against which project data can be evaluated to identify issues that you want to track.

An issue is automatically generated when a threshold parameter is equal to or less than the lower threshold value, or equal to or greater than the upper threshold value.

The following list defines the available threshold parameters:

Accounting Variance ($)

Cost % of Planned (%)

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Cost Performance Index (CPI) (ratio)

Cost Variance (CV) ($)

Cost Variance Index (CVI) (ratio)

Duration % of Original (%)

Finish Date Variance (days)

Free Float (days)

Schedule Performance Index (SPI) (ratio)

Schedule Variance (SV) ($)

Schedule Variance Index (SVI) (ratio)

Start Date Variance (days)

Total Float (days)

Variance at Completion (VAC) ($)

Add a threshold

1. Choose Project, Thresholds.
2. Click  on the Edit toolbar or choose Edit, Add.
3. To specify a threshold parameter, in the Threshold Parameter field on the General tab, click . Select the parameter, then click the Select button.
4. In the Lower Threshold and/or Upper Threshold fields, type a numeric value. To identify issues, project data is evaluated using a less than or equal to algorithm for the lower threshold value and a greater than or equal to algorithm for the upper threshold value. For example, to generate a Start Date Variance issue if an activity starts one or more days early or three or more days late, you would specify a lower threshold of –1 and an upper threshold of 3.
5. To select the work breakdown structure (WBS) element you want to monitor for the new threshold, in the WBS to Monitor field, click . Select the element, then click the Select button.
6. In the Detail to Monitor field, select the level at which you want to monitor the WBS element. When Detail to Monitor is set to Activity, the threshold monitor will review activities belonging to the WBS element you specified, as well as the activities for all of its child WBS elements.
7. To assign responsibility for the threshold's issues to a member of the OBS structure, in the Responsible Manager field, click . Select the name of the manager, then click the Select button.
8. To associate a tracking layout with the threshold's issues, in the Tracking Layout field, click . Select the layout, then click the Select button.
9. To assign a priority level to issues generated by the selected threshold, in the Issue Priority field, select a priority level.
10. Click the Details tab.

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11. To specify the timeperiod during which you want to monitor the threshold, in the Monitor Time Window area From Date and To Date fields, click



. To specify a custom date, click the date in the calendar window, then click the Select button. The From Date and To Date values define a window in time for this threshold. Any activities/WBS elements whose start dates exceed the To Date or whose finish dates precede the From Date will not be reviewed by the threshold monitor and, therefore, will not generate any issues.

Assign responsibility for threshold-generated issues

1. Choose Project, Thresholds.
2. Select the threshold, then click the General tab.
3. In the Responsible Manager field, click .
4. Select the name of the OBS element, then click the Select button.

Assign a tracking layout to a threshold

You can assign default tracking layouts to thresholds and their issues. This enables you to use the Issue Navigator to quickly open the tracking layout that best displays the threshold's issue details.

1. Choose Project, Thresholds.
2. Select the threshold, then click the General tab.
3. In the Tracking Layout field, click . Select the tracking layout you want to assign, then click the Select button.

Monitor a threshold

You can monitor a specific threshold or you can monitor all thresholds at once.

> **Tip**
>
> For start and finish date thresholds, it is best to monitor the threshold after applying actuals but before scheduling. This prevents numerous issues from being generated when only one activity causes the problem. Scheduling prior to monitoring would cause successor activities to be included in the monitor that are really not an issue.

To monitor all thresholds at once

1. Choose Tools, Monitor Thresholds.
2. To monitor the thresholds using their original monitor timeframe, choose Use Original Threshold Monitor Windows. To specify a new monitor timeframe, choose Use New Threshold Monitor Window, then, in the From Date and To Date fields, click

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to select new dates.

3. Click Monitor.

To monitor a specific threshold

1. Choose Project, Thresholds.
2. Select the threshold you want to monitor.
3. Click  on the Edit toolbar.

> **Note**
>
> If you monitor a threshold whose status is Disabled, no issues are generated.

Delete a threshold

1. Choose Project, Thresholds.
2. Select the threshold, then choose Edit, Delete.
3. Click Yes.

> **Note**
>
> If you delete a threshold, historical issue data are also deleted. If you disable a threshold, new issues are not generated for it, but historical issue data are maintained.

Disable or enable a threshold

1. Choose Project, Thresholds.
2. Select the threshold, then double-click in the Status column and select Disabled or Enabled.

> **Note**
>
> A disabled threshold does not generate new issues, but historical issue data are maintained. If you delete a threshold, historical issue data are also deleted.

View threshold issue details

1. Choose Project, Thresholds.
2. Select the threshold whose issue details you want to view, then click the Details tab.

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3. Select the issue, then click Go To.

Delete a threshold issue

1. Choose Project, Thresholds.
2. Select the threshold, then click the Details tab.
3. Select the issue, then click Delete.
4. Click Yes.

Adding and Assigning Risks (P6 Professional Only)

Risks (P6 Professional Only)

Risks are any uncertain events or conditions that, if they occur, have a positive or negative effect on project objectives.

Use the integrated risk management feature to identify, categorize, and prioritize risks, to assign an owner (a person responsible for managing the risk) to each potential risk, to assign risks to activities that could be effected by the risk, and to perform qualitative analysis on each project risk. You can respond to a risk and create an associated risk response.

Managing Risks

When a risk is identified, it is automatically assigned to the open project. If more than one project is open, the project it assigns the risk to depends on the current grouping. Then you can assign the risk to activities it may impact. Assigning a risk to an activity, or an activity to a risk, creates a risk assignment. A risk can be assigned to multiple activities; likewise an activity can be assigned to multiple risks.

Based on risk assignments and impact parameters that you can define for each risk, the application generates data, including an overall risk score, discussed below, that you can use to evaluate the significance of the risk. Other data include the potential start date of the risk, the potential end date of the risk, and the potential cost the risk may impose. A subsection below discusses the calculation used to determine potential cost.

Based on your qualitative analysis of the risk, you can respond to the risk and develop a response, also discussed below.

How the risk score is calculated

The application calculates an overall risk score. There are actually two overall risk score fields: The Score field that displays in the Pre-Response section of the Risks, Impact tab, and the Score field that displays in the Post-Response section of that tab if you respond to a risk and complete the Post-Response fields. The following discussion refers to both the Pre- and Post-Response Score fields generically as the Score fields because both are calculated using the same equation.

The Score field is calculated based on the values you select for three fields (located on that same tab): Probability, Cost, and Schedule. Two of these fields, Cost and Schedule, are known as the impact fields.

The Probability field and each impact field have these possible values: Very High, High, Medium, Low, Very Low, and Negligible. The application uses the highest value selected for the Cost and Schedule fields as the overall impact value. The application determines the Score

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by plotting the overall impact value with the value entered for Probability, as shown in the table below.

For example, if you enter the value Low for Cost and the value Medium for Schedule, the application uses Medium, the highest of the two, as the overall impact value. The application then uses the table below to determine the Score value by plotting the overall impact and Probability values. The columns in the table represent the overall impact values (Negligible through Very High), while the rows represent the Probability values (Very High through Negligible). The application determines the Score as the number that corresponds to the intersection of the applicable Impact column and Probability row. So, to continue our example, if you entered a value of High for Probability, the Score would display as 14, the number shown where the Impact Medium column intersects the Probability High row.

	Impact Negligible	Impact Very Low	Impact Low	Impact Medium	Impact High	Impact Very High
Probability Very High	0	5	9	18	36	72
Probability High	0	4	7	14	28	56
Probability Medium	0	3	5	10	20	40
Probability Low	0	2	3	6	12	24
Probability Very Low	0	1	1	2	4	8
Probability Negligible	0	0	0	0	0	0

How the potential cost is calculated

The application calculates the potential cost of a risk. The potential cost displays in the Pre-Response Exposure Cost and Post-Response Exposure Cost fields on the Risks, General tab. (The Post-Response Exposure Cost field displays only after a response is made to a risk using the Post-Response fields on the Impact tab.) The following discussion refers to both the Pre- and Post-Response Exposure Cost fields generically as Exposure Cost fields because both are calculated using the same equation.

The value for the Exposure Cost field is based on the values selected for the Probability and Cost fields, located on the Risks, Impact tab, and on cost figures associated with the activities assigned to the risk or to the project, if no activity assignments have been made.

The application calculates the Exposure Cost value using this equation: Exposure Cost = Planned/Budgeted Total Cost * (Probability Midpoint * Cost Midpoint).

The Planned/Budgeted Total Cost is the sum of the Planned/Budgeted Cost values for each activity assigned to the risk (or the planned project cost, if no activities are assigned to the risk).

The Probability Midpoint is the midpoint of the Probability field value for the selected risk. The Cost Midpoint is the midpoint of the Cost field value for the selected risk. The way each is calculated is discussed below.

The Cost and Probability midpoint for the value Negligible is always zero, so the value of Negligible is not relevant to the following discussion.

The equation for the calculation of Probability Midpoint and Cost Midpoint varies, depending on which values are selected for the Probability and Cost fields:

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- **When using a value between highest and lowest:**
  - When a value of High (50% to 70%), Medium (30% to 50%), or Low (10% to 30%) is selected for the Probability field, then the Probability Midpoint is calculated using this equation: Probability Midpoint = (lower range for selected value + higher range of selected value)/2. So if the Probability value is Medium (30% to 50%), then the Probability Midpoint is calculated as follows: (30+50)/2 = 40%.
  - When a value of High (20% to 40%), Medium (10% to 20%), or Low (1% to 10%) is selected for the Cost field, then the Cost Midpoint is calculated using the same equation as Probability Midpoint. So if the Cost value is Medium (10% to 20%), then the midpoint is calculated as follows: (10 + 20)/2 = 15%
- **For highest values:**
  - When the value Very High (70% or higher) is selected for the Probability field, then the Probability Midpoint is calculated as the midpoint between the lower value and 100%. So the Probability Midpoint for the value Very High (70% or higher) midpoint is calculated as follows: (70 + 100)/2 = 85%.
  - When the value Very High (40% or higher) is selected for the Cost field, then the Cost Midpoint is calculated using this equation: ((the lower range for the selected value * 2) + the high range for the selected value)/2. So the Cost Midpoint for the value Very High (40% or higher) is calculated as follows: ((40 * 2) + 100)/2 = 90%.
- **For lowest values:**
  - When the value Very Low (<=10%) is selected for the Probability field, then the Probability Midpoint is calculated as the midpoint between zero and the upper value. So the Probability Midpoint for the value Very Low is calculated as follows: (0 + 10)/2 = 5%.
  - When the value Very Low (Up to 1%) is selected for the Cost field, then the Cost Midpoint is calculated as the midpoint between zero and the upper value. So the Cost Midpoint for the value Very Low is calculated as follows: (0 + 1)/2 = .005%.

So if the Planned/Budgeted Total Cost is $700,689.00, and the Probability Midpoint is Medium (40%), and the Cost Midpoint is Very High (90%), then the Exposure Cost would be calculated as follows: $700,689.00 * (.4 * .9) = $252,248.00.

Responding to a Risk

If, based on your qualitative analysis of a risk, you determine that a risk is sufficient to warrant a response, then you can do so by selecting a response and by adding a response description. If the risk is a threat, you can select to accept, avoid, transfer, or reduce the risk. If the risk is an opportunity, you can select to enhance, exploit, facilitate, or reject the risk.

Response planning allows you to identify and document methods you might use to manage risks. Use a risk response to determine what actions could be taken to promote the most favorable outcome. You can enter a description of the risk and then select post-response values for Probability, Schedule, and Cost fields, which the application uses to calculate the score and the exposure cost.

Creating Risks (P6 Professional Only)

Add risks to capture potential threats or opportunities that might impact your project, and to perform qualitative analysis to reduce or eliminate negative impact on the project. After you add a risk, it can be assigned to activities.

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> **Note**
>
> You must have Add/Edit/Delete Risks privilege to add, edit, or remove risks.

To add a risk:

1. Choose Project, Risks.
2. Display Risk Details.
3. Click  on the Edit toolbar or choose Edit, Add.
4. Click the General tab.
5. On the General tab:
   a. In the ID field, edit the identifier if you want a different one. (It must be a unique identifier.)
   b. In the Name field, type the risk's name.
   c. In the Category field, click . Select the Risk Category then click the Select button.
   d. In the Type list, select the risk type.
   e. In the Owner field, click . Select the resource who owns this risk, then click the Select button. If resource security is enabled, you can only view current project resources and resources you have access to.
   f. In the Status list, select a status for the risk.
   g. Exposure Start displays the earliest date the risk may occur.
   h. Exposure Finish displays the potential end date of the risk.
   i. Pre-Response Exposure Cost displays the cost the risk may impose.
   j. Post-Response Exposure Cost displays the cost the risk may impose based on your response.
   k. In the Identified On field, type or select the date this risk was identified.
   l. In the Identified By field, click . Select the resource who identified this risk.
6. Click the Risk Details, Impact tab.
7. On the Impact tab, Pre-Response section:
   a. In the Probability list, select the likelihood range of the risk occurring.
   b. In the Schedule list, select the impact range on the schedule if the risk occurs.
   c. In the Cost list, select the monetary impact on the project if the risk occurs.
   d. Observe the Score field. It shows the risk calculation based on the values you selected for the Probability, Cost, and Schedule fields.

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> **Tip**
>
> You can copy existing risks to create new risks. If you copy an existing risk to the same project, all data, including response and associated activities is retained. If you copy an existing risk to a different project, activity associations and responses are removed.

Assigning a risk to an activity (P6 Professional Only)

Once a risk has been added, you can assign the risk to an activity to explicitly identify the activity impacted by the risk.

> **Note**
>
> You must have Add/Edit/Delete Risks and Add/Edit Activities Except Relationships privileges to assign or remove risks.

You can assign a risk to an activity while you are adding risks using the Risks view or while managing your activities using the Activities window.

To assign a risk to an activity from the Risks view:

1. If you haven't already done so, do the following to display the Risks details:
   a. Choose Project, Risks.
   b. Display Risk Details.
2. Select the risk to assign to activities.
3. Click the Activities tab.
4. On the Activities tab, click Assign.
5. On the Select Activity dialog box:
   a. Select the activity you want to assign to the risk.
      To assign multiple activities, hold down the Ctrl key, then click each activity to assign.
   b. Click the Assign icon.

To assign a risk to an activity from the Activities window:

1. If you haven't already done so, do the following to display the Activity Details:
   a. Choose Project, Activities.
   b. Display Activity Details.
2. Select the activity to assign to risks.
3. Click the Risks tab.
4. On the Risks tab, click Assign.
5. On the Assign Risks dialog box:
   a. Select the risk you want to assign to the activity.
      To assign multiple risks, hold down the Ctrl key, then click each risk to assign.

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b. Click the Select icon.

Responding to a risk (P6 Professional Only)

If you decide to respond to a risk, you can choose to select a response and to define new risk impacts based on the your response.

The Response section is disabled if you have not selected values in the Pre-Response section for the Probability, Schedule, and Cost fields.

To respond to a risk and develop a response:

1. If you haven't already done so, do the following to display the Risks details:
   a. Choose Project, Risks.
2. Display Risk Details.
3. If not already selected, select the risk for which you want to respond.
4. Click the Impact tab.
5. On the Impact tab, Response section:
   a. In the Response Type list, select the appropriate value.
   b. In the Response Description field, type a description of the response.
6. On the Impact tab, Post-Response section:
   a. In the Probability list, select the appropriate value.
   b. In the Schedule list, select the appropriate value.
   c. In the Cost list, select the appropriate value.
   d. Observe the Score field field. It shows the risk calculation based on the values you selected for the Probability, Cost, and Schedule fields.

Deleting a risk (P6 Professional Only)

1. Choose Project, Risks.
2. Select the risk you want to delete, then choose Edit, Delete.
3. Click Yes.

Modifying a risk (P6 Professional Only)

Modify a risk by selecting the risk from the Risks view and editing applicable fields. After you modify a risk, the modifications apply to all activities assigned to the risk.

To modify a risk:

1. Choose Project, Risks.
2. Select the risk to modify.
3. Display Risk Details.
4. Click the applicable Details tab and make the changes.

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> **Note**
>
> - If you select the value <None> for any Pre-Response field, all Response and Post-Response data is cleared.
> - If you select the value <None> for the Response Type field, all Post-Response values are cleared.

Removing risk assignments from activities (P6 Professional Only)

You can remove the assignment of a risk to an activity using the Risks view or while managing your activities using the Activities window.

To remove the assignment of a risk to activities from the Risks window:

1. If you haven't already done so, do the following to display the Risks details:
   a. Choose Project, Risks.
   b. Display Risk Details, then click the Activities tab.
2. Select the risk with the activity assignment to remove.
3. On the Activities tab:
   a. Select the activity to remove.
   To remove multiple activities, hold down the Ctrl key, then click each activity to remove.
   b. Click Remove.

To remove the assignment of a risk to activities from the Activities window:

1. If you haven't already done so, do the following to display the Activity Details:
   a. Choose Project, Activities.
2. Display Activity Details, then click the Risks tab.
3. Select the activity with the risk assignment to remove.
4. On the Risks tab:
   a. Select the risk to remove.
   To remove multiple risks, hold down the Ctrl key, then click each risk to remove.
   b. Click Remove.

Adding and Assigning Work Products and Documents

Work Products and Documents

The Work Products and Documents feature enables you to catalog and track all project-related documents and deliverables. This includes guidelines, procedures, standards, plans, design templates, worksheets, and all types of project deliverables. A work product or document can provide standards and guidelines for performing an activity's work, or it can be formally identified as a project standard. A work product or document can also be activity output, such as testing plans and blueprints. You can also use the Work Products and Documents feature to

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identify project deliverables, documents that will be delivered to the end user or customer at the end of the project.

With P6 Professional, you can assign work products and documents to activities and to work breakdown structure (WBS) elements. During a project's early planning stages, you can assign a work product or document to a WBS element. Later, you can assign the same work product or document to one or more activities as your project's activity details develop.

The Work Products and Documents feature enables you to maintain general information about project documents, such as revision date, location, and author. The actual document files can be stored on a network file server, configuration management system, or Web site, depending on project requirements. You can specify a public or private location for the document files. Specifying a public location enables any P6 Professional user to view the document.

View a project's document library

- Choose Project, Work Products and Documents.

> **Tip**
>
> To change the document display from outline to list view, click the Title column label. A triangle symbol in the Title column label indicates a list display.

Add a work product or document record

Before you can assign a work product or documents to a project, you need to add a record for it in the project database.

1. Choose Project, Work Products & Documents.
2. Click on the Edit toolbar or choose Edit, Add.
3. Type a title for the document.
4. To record general details for the document, such as title, reference number, and author, display WP & Doc Details, click the General tab, then type the information.

Assign a document status or category

Document status and category designations can help you track project work products and documents. For example, status designations can identify which documents are in review or completed, and category designations can identify documents that are project standards or project deliverables. You create document status and document category designations through the Administrative Categories feature and assign status and category designations in the Work Products & Documents window.

1. Choose Project, Work Products and Documents, then select the document.
2. Display WP & Doc Details, then click the General tab.
3. In the Document Category field, click , select a category, then click the Select button.
4. In the Status field, select a status.

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Specify work product and document location references

P6 Professional supports two types of document location references, private and public. Private location references can only be viewed by P6 Professional users. Public location references can be viewed by all project participants. For this reason, public location references typically refer to files stored in a widely accessible network location such as an intranet or the Internet.

1. Choose Project, Work Products and Documents, then select the work product or document.
2. Display WP & Doc Details, then click the Files tab.
3. In the appropriate location field, type the full path and filename of the document.

> **Tip**
>
> Click the Browse button to select a file.

Identify a document as a work product

You can identify a document as a work product if it is assigned to a WBS element or activity.

1. Choose Project, Work Products & Documents, then select the document.
2. Display WP & Doc Details, then click the Assignments tab.
3. If the document is already assigned to the WBS or activity for which it is a work product, mark the corresponding Work Product checkbox. If the document is not yet assigned to a WBS element or activity, click Assign, then select the WBS element or activity to which you want to assign the document. Click the Assign button and the Close button, then mark the Work Product checkbox.

Identify a work product or document as a deliverable

1. Choose Project, Work Products & Documents, then select the work product or document.
2. Display WP & Doc Details, then click the General tab.
3. Mark the Deliverable checkbox.

Display work product and document details in the WPs and Docs window

- Right-click and select WP & Doc Details.

Display work product and document details in the Work Breakdown Structure window

1. Choose Project, WBS.
2. Select a WBS element associated with the work product or document.

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3. Display WBS Details, then click the WPs & Docs tab. To display the WPs & Docs tab, right-click in the Details area and choose Customize WBS Details. In the Available Tabs section, select WPs & Docs, click



, then click OK.

4. Select the work product or document, then click Details. To view the work product or document, click Launch next to the appropriate Location field.

> **Note**
>
> Only P6 Professional users can open private location documents. Public location documents can be viewed by all project participants.

Assign work products and documents from the WPs and Docs window

1. Select the work product or document.
2. Display WP & Doc Details, then click the Assignments tab.
3. Click Assign.
4. Select the activity or WBS element to which you want to assign the selected document, then click the Assign button.
5. Click .

> **Note**
>
> You can select only WBS elements or activities that belong to the project for which the work product or document was created.

Assign work products and documents to an activity from the Activities window

1. Select the activity.
2. Display Activity Details, then click the WPs & Docs tab. To display the WPs & Docs tab, click the Layout Options bar and choose Bottom Layout Options. In the Available Tabs section, select WPs & Docs, click



, then click OK.

3. Click Assign.

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4. Select the work product or document you want to assign, then click the Assign button. You can select only work products or documents that were created for the project to which the activity belongs.
5. Click .

> **Tip**
>
> To view work product and document details, such as author or description, or to open and view a work product or document, select it in the WPs & Docs tab and click Details.

Assign work products and documents to a WBS element from the Work Breakdown Structure window

1. Select the WBS element.
2. Display WBS details, then click the WPs & Docs tab.
3. Click Assign. To display the WPs & Docs tab, right-click in the Details area and choose Customize WBS Details. In the Available Tabs section, select WPs & Docs, click , then click OK.
4. Select the work products and documents you want to assign, then click the Assign button. You can select only work products and documents that were created for the project to which the WBS element belongs.
5. Click .

Remove work product and document assignments from the WPs and Docs window

1. Select the work product or document.
2. Display WP & Doc Details, then click the Assignments tab.
3. Select one or more activity or WBS element assignments.
4. Click Remove, then click Yes.

Remove work product and document assignments from the Activities window

1. Select the activity.
2. Display Activity Details, then click the WPs & Docs tab.

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3. Select one or more work products or documents. To display the WPs & Docs tab, click the Layout Options bar and choose Bottom Layout Options. In the Available Tabs section, select WPs & Docs, click



, then click OK.

4. Click Remove, then click Yes.

Remove work product and document assignments in the Work Breakdown Structure window

1. Select the WBS element.
2. Display WBS details, then click the WPs & Docs tab.
3. Select one or more work products or documents. To display the WPs & Docs tab, right-click in the Details area and choose Customize WBS Details. In the Available Tabs section, select WPs & Docs, click



, then click OK.

4. Click Remove, then click Yes.

> **Tip**
>
> To view detailed information about or open the document before you remove it, select the document, then click Details.

Open a work product or document from the Work Products and Documents window

1. Select the work product or document.
2. Display WP & Doc Details, then click the Files tab.
3. Click Launch next to the appropriate Location field.

> **Note**
>
> - Only P6 Professional users can open private location documents. Public location documents can be viewed by all project participants.
> - If the selected work product or document has been added via a P6 installation with a configured content repository, the detail fields are read-only and the document cannot be opened from P6 Professional.

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Open a work product or document from the Activities window

1. Select an activity associated with the work product or document.
2. Display Activity Details, then click the WPs & Docs tab. To display the WPs & Docs tab, click the Layout Options bar and choose Bottom Layout Options. In the Available Tabs section, select WPs & Docs, click



, then click OK.
3. Select the work product or document and click Details.
4. Click Launch next to the appropriate Location field.

> **Note**
>
> - Only P6 Professional users can open private location documents. Public location documents can be viewed by all project participants.
> - If the selected work product or document has been added via a P6 installation with a configured content repository, the detail fields are read-only and the document cannot be opened from P6 Professional.

Open a work product or document from the Work Breakdown Structure window

1. Select a WBS element associated with the work product or document.
2. Display WBS details, then click the WPs & Docs tab. To display the WPs & Docs tab, right-click in the Details area and choose Customize WBS Details. In the Available Tabs section, select WPs & Docs, click



, then click OK.
3. Select the work product or document and click Details.
4. Click Launch next to the appropriate Location field.

> **Note**
>
> - Only P6 Professional users can open private location documents. Public location documents can be viewed by all project participants.
> - If the selected work product or document has been added via a P6 installation with a configured content repository, the detail fields are read-only and the document cannot be opened from P6 Professional.

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Delete work product or document records

1. Choose Project, Work Products and Documents, then select one or more work product or document records.
2. Choose Edit, Delete, then click Yes.

> **Note**
>
> Deleting a work product or document record deletes the work product or document record in the project. It does not delete the actual document file.

Display work product and document details in the Activities window

1. Choose Project, Activities.
2. Select an activity associated with the document.
3. Display Activity Details, then click the WPs & Docs tab. To display the WPs & Docs tab, click the Layout Options bar and choose Bottom Layout Options. In the Available Tabs section, select WPs & Docs, click

   , then click OK.
4. Select the work product or document, then click Details. To view the work product or document, click Launch next to the appropriate Location field.

> **Note**
>
> Only P6 Professional users can open private location documents. Public location documents can be viewed by all project participants.

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7

Customizing Activity Layouts

Overview

Open a layout

1. In the Project menu, choose Activities, or Resource Assignments, or WBS to open the respective layout. Or, choose Enterprise, Projects to open a project layout.
2. Choose View, Layout, Open. You can also click the Layout Options bar and choose Layout, Open. You are prompted to save the current layout.
3. Select the layout you want to open, then click Open. To preview the layout without closing this dialog box, click Apply.

Open two layouts side-by-side

1. In the Project menu, choose Additional Activities View.
2. Choose View, Layout, Open. You can also click the Layout Options bar and choose Layout, Open. You are prompted to save the current layout.
3. Select the layout you want to open, then click Open. To preview the layout without closing this dialog box, click Apply.

Create a new activity layout

To create a new activity or resource assignment layout, you save an existing layout with a new name, then modify it and save your changes. To create a new activity or resource assignment layout, you must have the appropriate security privileges.

1. Open an existing layout that most closely resembles the format of the new layout you want to create.
2. Choose View, Layout, Save As. You can also click the Layout Options bar and choose Layout, Save As.
3. Type a name for the new layout.
4. In the Available To field, select a user category, then click Save. To create a global layout, choose All Users. To create a layout only for your own use, choose Current User. To create a layout for another user, choose Another User. Then, in the User field, click

   to specify the user.
5. Modify the layout, if necessary, then choose View, Layout, Save.

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> **Note**
>
> If you save a layout for a specific user, the layout is listed in the Open Layout dialog box only for that user. You must log in under the specified user name to open the layout.

Save a layout in the Activities or Resource Assignments window

When P6 Professional is connected to a P6 Professional database:

To save changes to a layout in the Activities or Resource Assignment window, you must have the following privileges:

- Add/Edit/Delete Global Activity and Assignment Layouts and Filters
- Add/Edit Project Layout (to save a layout as a project layout)
- Choose View, Layout, Save, or click the Layout Options bar and choose Layout, Save.

When P6 Professional is connected to a P6 EPPM database:

To save changes to a layout in the Activities or Resource Assignment window, you must have the appropriate global and project privileges, as defined in P6. Choose View, Layout, Save, or click the Layout Options bar and choose Layout, Save.

Save a layout in the Projects or Work Breakdown Structure window

When P6 Professional is connected to a P6 Professional database:

To save changes to a layout in the Projects or Work Breakdown Structure window, you must have the appropriate security privilege: Add/Edit/Delete Global Project/WBS Layouts and Filters.

- Choose View, Layout, Save, or click the Layout Options bar and choose Layout, Save.

When P6 Professional is connected to a P6 EPPM database:

To save changes to a layout in the Projects or Work Breakdown Structure window, you must have the appropriate global security privilege as defined in P6.

- Choose View, Layout, Save, or click the Layout Options bar and choose Layout, Save.

Save a layout as a project layout

You can save layouts in the Activities, Resource Assignments and WBS views as project layouts. Layouts can be saved as project layouts in any project that you have opened and to which you have Add/Edit Project Level Layouts privilege. Consider saving a layout as a project layout if you want to do any of the following:

- Export the project with the layout
- Copy and paste the project and want the layout to be copied and pasted with the project
- Share the layout with other users of the project without unnecessarily adding layouts to the global layouts

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Saving the Layout as a Project Layout

Before you begin, you must have at least one project open.

1. Choose View, Layout, Save As. You can also click the Layout Options bar and choose Layout, Save As.
2. Type a new name for the current layout.
3. In the Available To field, select Project.
4. In the Project field, click  to specify a project. The Select Project dialog box displays.
5. Select a project from the list.

> **Note**
>
> Only currently opened projects will appear in the Select Project dialog box. To select a project that is not in the list, cancel out of the Select Project and the Save Layout As dialog boxes. Then use the Projects view to open both the project with the layout you are copying and the target project. Ensure the project with the layout is the default project. Then repeat the steps in this topic.

6. Click Save.

> **Note**
>
> - Only global or layout filters can be assigned to a project layout. When a layout is saved as a project, any previously applied user filter is automatically copied to the layout filters section.
> - Saving a layout as a project layout requires Add/Edit Project Level Layouts privileges to the target project.

Delete a layout

1. Choose View, Layout, Open in the Activities, Work Breakdown Structure, Resource Assignments, or Projects window. You can also click the Layout Options bar and choose Layout, Open.
2. Select the layout you want to delete, then click Delete.

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> **Note**
>
> - You cannot delete global activity and resource assignment layouts (layouts that are available to all users) unless you have the Add/Edit/Delete Global Activity and Assignment Layouts, Views and Filters privilege.
> - When connected to a P6 Professional database: You cannot delete global project and WBS layouts (layouts that are available to all users) unless you have the Add/Edit/Delete Global Project/WBS Layouts and Filters privilege.
> - When connected to a P6 EPPM database: You cannot delete global project and WBS layouts (layouts that are available to all users) unless you have the Add/Edit/Delete Global Project, WBS and Portfolio Layouts and Filters privilege.

Expand or contract the visible area of a timescaled layout

- To expand or contract a timescaled layout's visible area, move the mouse pointer over the minor time unit of the timescale, then click and hold the mouse button while dragging the timescale. To expand the timescale, drag it to the right. To contract the timescale, drag it to the left.

Zoom in and out of a timescaled layout

Zooming in on a timescaled layout (Gantt Chart, spreadsheet, or profile), displays a shorter range of time using smaller time intervals, for example, zooming from a quarterly to monthly to weekly display.

- To view a smaller timeperiod at a greater level of detail, click on the Display toolbar, or position the mouse pointer in the layout, then right-click and choose Zoom In.

Zooming out displays a longer range of time using larger time intervals, for example, zooming from a weekly to monthly to quarterly display.

- To view a larger timeperiod at a lesser level of detail, click on the Display toolbar, or position the mouse pointer in the layout, then right-click and choose Zoom Out.

> **Note**
>
> - When the Top and Bottom Layout windows both display a timescaled layout, zooming in or out changes the timescale in both windows.
> - The right-click zoom options are not available in the Gantt Chart.

Change the display timeperiod for a timescaled layout

- To change the timeperiod for which a timescaled layout is displaying information, move the mouse pointer over the major time unit of the timescale until the mouse pointer changes to a hand. Click and hold the mouse button while dragging it. To move backward in time, drag the timescale to the right. To move forward in time, drag the timescale to the left.

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Customize Activity Details

1. With Activity Details displayed in the Activities window, choose View, Bottom Layout Options.
2. To add a tab to the Activity Details, select it in the Available Tabs column, then click

   .To add all available tabs to the Activity Details, click

   .To remove a tab from the Activity Details, select it in the Display Tabs column, then click

   . To remove all display tabs from the Activity Details, click

   .
3. To position the tab in the Activity details, select it in the Display Tabs column. To shift the tab left in the Activity Details, click

   .To shift the tab right in the Activity Details, click

   .
4. Click OK. To view your changes without closing this dialog box, click Apply.

Add line numbers

Add line numbers to number each row in the Activities view. This option is enabled only when the Activities view displays an Activity Table, Gantt Chart, or Activity Usage Spreadsheet.

Line numbers appear to the far left of each row in a separate column. Numbering is sequential, starting with number one. Line numbers apply only to rows that are visible.

Rows are automatically renumbered during data manipulation, such as when rows are added, deleted or when group data is expanded or collapsed.

To add line numbers:

1. Open an Activities view that displays an Activity Table, Gantt Chart, or Activity Usage Spreadsheet.

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2. Choose View, Line Numbers. You can also right-click in the grid and then choose Line Numbers or click the

   icon in the Layout toolbar.

> **Note**
>
> - Enabling or disabling the Line Numbers option enables or disables line numbers on all applicable grids in the Activities view. For example, if you have the Activity Table displayed on top and the Activity Usage Spreadsheet displayed on the bottom, enabling the option applies line numbering to both top and bottom grids, starting with #1 in each grid.
> - The heading for the Line Numbers column is a hash/number sign (#). It cannot be customized.
> - The Line Numbers column is always the first column, and it cannot be moved.

Activity Table

The Activity Table

Use the Activity Table to view the open project's activity information in table format. You can customize Activity Table columns, fonts, and colors. You can also filter, sort, and group the Activity Table.

You can use the Activity Table to

- Create a list of activities and activity information quickly when you don't need to see the information graphically over time.
- Group activities in categories that share a common attribute. For example, focus on activities by resource, responsibility, or date. Once you organize activities into groups, you can summarize or "roll up" project data to simplify their presentation.
- Sort activities to arrange them in an order you specify. For example, to view activities chronologically, you might sort them by early start date.

To make the Activity Table fit your needs exactly, you can

- Change the information displayed in columns to show scheduling data, resource and cost data, user-defined fields, or any data item you select, including calculated data.
- Format specific information to call attention to it by using the filter, group and sort, and table display features.

Define Activity Table columns

1. Choose View, Columns. You can also click the Layout Options bar and choose Columns.

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2. To add a column to the Activity Table, select it in the Available Columns section, then click .
3. To add all available columns to the Activity Table, click .
4. To remove a column from the Activity Table, select it in the Selected Options section, then click .
5. To remove all current display columns from the Activity Table, click

   . You must select at least one column to display in the Activity Table.
6. To change the order in which columns display, in the Selected Options section, select a column you want to move: To move the column left, click

   .To move the column right, click

   .
7. To use a column display format from another activity layout, click Copy From, select a layout, then click Open.
8. To update columns in the Activity Table, click OK, or to view your changes without closing this dialog box, click Apply. To restore the default column settings for this layout, click Default.

> **Tip**
>
> To locate a specific column in the Columns dialog box, to group and sort the available columns in the Columns dialog box, or to collapse or expand all the groupings in the dialog box, click the Available Columns Options bar.

Customize activity column titles

1. Choose View, Columns. You can also click the Layout Options bar and choose Columns.
2. In the Available Columns or Selected Options section, select the column whose title you want to change.
3. Click Edit Column.
4. In the Edit Column dialog box, type a new title, then click OK. You can also specify a new width and alignment for the column.
5. To update columns in the Activity Table, click OK, or to view your changes without closing the Columns dialog box, click Apply.

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> **Note**
>
> - The default column title appears in parentheses after the new title in the Columns dialog box; however, only your revised title appears in the actual layout.
> - To restore the default column title, click Default in the Edit Column dialog box.

Change activity information in the Activity Table

- To change activity information, double-click the information you want to change.

> **Note**
>
> You may need the required security privileges to edit certain activity information.

Sort activity information in the Activity Table

- To sort the display, click a column label.
- An up arrow in the column title indicates that the Activity Table is sorted in ascending order (lowest to highest for a numerical column or A to Z for an alphabetical column). A down arrow in the column title indicates that the Activity Table is sorted in descending order.

Change group row fonts and colors

1. Choose View, Group and Sort. You can also click the Layout Options bar and choose Group and Sort.
2. Double-click the Font & Color cell you want to change. To change a font, click the Font button, then select a new font. To change a color, click the Color button, then select a new color.

Change Activity Table font, color, and row height

You can specify the font, background color, and row height for information displayed in a table.

1. Choose View, Table Font and Row.
2. To specify a general table font, click the Font button.
3. To select a background color, click the Color button.
4. In the Row Height area: To use the current row heights you set, mark the Keep Current Row Heights checkbox. To automatically size row heights based on the cell content, clear the Keep Current Row Heights checkbox and choose Optimize row heights by content. Mark the checkbox, Do not exceed X lines per row, to limit the amount of lines created by text wrapping and optimizing the row heights. To specify a row height for all rows in the current layout, clear the Keep Current Row Heights checkbox and choose Select height for all rows. Type a new row height in the field, or click the arrow buttons.
5. To display symbols, mark the Show Icons checkbox.

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6. Click OK.

Gantt Chart

The Gantt Chart

Use the Gantt Chart to view a graphical display of the open project's schedule information or the order in which activities occur over the course of the project. The Gantt Chart shows each activity's duration, using the timescale specified, as a horizontal bar. A line connecting activity bars indicates a relationship.

Use the Gantt Chart in combination with the Activity Table to

- View activities both graphically and in table format
- Establish relationships between activities, so you can see how changing activity duration affects the start and finish dates of other activities and the project finish date
- Track progress by comparing planned and actual start and finish dates and by checking the percentage of each activity that is complete

To use the Gantt Chart more effectively, you can

- Change the information displayed in columns to show scheduling data, resource and cost data, user-defined fields, or any data item you select
- Distinguish schedule dates by using different formats and colors for the bars and endpoints
- Change the timescale to show more or less detail
- Change background lines to enhance the readability or clarity of the Bar Chart

Display the Gantt Chart

With the Activities, Projects, or Work Breakdown Structure windows active, do one of the following:

- Choose View, Show on Top or Show on Bottom, Gantt Chart.
- Click the Layout Options bar and choose Show on Top or Show on Bottom, Gantt Chart.
- Click  on the Top Layout toolbar.

Tip

- In the Projects and Work Breakdown Structure windows, you can only display the Gantt Chart in the top layout.
- To hide the Activity Table and display only the Gantt Chart, drag the split bar that separates the Activity Table from the Gantt Chart all the way to the left.

Change a layout's timescale format

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You can change the timescale for a Gantt Chart, profile, or spreadsheet. When one of these layout components is displayed in both the Top and Bottom Layout windows, changing the timescale affects both windows.

1. Display the Gantt Chart, profile, or spreadsheet then click the Layout Options bar and choose Timescale.
2. Choose to display Two Lines or Three Lines for the timescale.
3. To indicate the beginning date from which you want to display data, in the Timescale Start field click , then select a standard date or a custom date.
4. Click the Font & Color button to format the font type, size, and color for the timescale and column headings. Click Default Font to change the timescale to its original font and color settings.
5. In the Date Format section, choose to show the primary dates to specify the date interval increments for the timescale, or ordinal dates to display the date intervals as sequential numbers, beginning from the ordinal start date specified. If you choose Show Primary Dates, in the Type field, select the format in which to display date intervals. In the Date Interval field, select an interval. If you choose Day/Shift, click the Shift Calendar field and select a shift. If you choose an interval which includes Financial Period. click the Financial Period Calendar field and select the calendar to use. If you choose Ordinal Dates, specify a start date for the ordinal dates in the Ordinal Start field. Then, select the ordinal date interval.
6. Click OK. To see the timescale settings without closing the Timescale dialog box, click Apply.

Note

- If you customize a profile or spreadsheet to display past period actual data (rather than actual to date values) and you want to display a financial period timescale, choose Calendar or Fiscal as the Type. Then, in the Date Interval field choose Year/Financial Period, Quarter/Financial Period, Month/Financial Period, or Week/Financial Period and in the Financial Period Calendar field select the calendar to use. You can display a financial period timescale at any time, even if you do not store past period actuals.
- When you customize a profile or spreadsheet to display a financial period timescale, activity and resource data must be summarized by financial period to accurately display actual to date values for closed projects.
- When connected to a P6 Professional database: If you have administrator rights, you can choose to summarize data in financial period intervals by choosing Admin, Preferences. Select the Options tab, then select the 'By financial period' checkbox.
- When connected to a P6 EPPM database: If you have administrator rights, you can choose to summarize data in financial period intervals from the P6 Application Settings.

Move around a Gantt Chart

- To change the timeperiod for which the Gantt Chart displays activities, move the mouse pointer over the major time unit of the timescale until the mouse pointer turns into a hand.

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Click and hold the mouse button while dragging it. To move backward in time, drag the mouse pointer to the right. To move forward in time, drag the mouse pointer to the left.

- To expand or contract the Gantt chart's visible area, move the mouse over the minor time unit of the timescale. Click the mouse button down and hold it. To expand the Gantt Chart, drag the mouse pointer to the right. To contract the Gantt Chart, drag the mouse pointer to the left.

> **Tip**
>
> You can also use the horizontal scroll bar at the bottom of the Gantt Chart to change the timeperiod for which the layout is displaying information.

Add a bar to the Gantt Chart

1. Choose View, Bars. You can also click the Layout Options bar and choose Bars.
2. Click Add.
3. Mark the Display checkbox next to the new bar.
4. Type a name for the new bar.
5. In the Timescale column, select the timescale you want the new Gantt Chart bar to represent.
6. In the Filter column, choose the filter you want to attach to the bar. Filters determine which activities the bar represents.
7. Click the Bar Style tab and configure the new bar's style. The Preview column shows you what the configured bar will look like in the Gantt Chart.
8. Click the Bar Settings tab and select grouping and necking options.
9. Click the Bar Labels tab and specify the new bar's label and position.
10. To preview your changes, click Apply.

> **Note**
>
> To restore the default bar settings, click Default.

Change a bar in the Gantt Chart

1. Choose View, Bars You can also click the Layout Options bar and choose Bars.
2. Select the bar you want to change and mark or clear the Display checkbox.
3. In the Name column, type a new name for the bar.
4. In the Timescale column, select the timescale you want the Gantt Chart bar to represent.
5. In the Filter column, choose the filter you want the Gantt Chart bar to represent.
6. Click the Bar Style tab and reconfigure the Gantt Chart bar's style.
7. Click the Bar Settings tab and select grouping and necking options.

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8. Click the Bar Labels tab and redefine the Gantt Chart bar's label and position.
9. Click OK. To view your changes without closing this dialog box, click Apply.

Apply Gantt Chart settings from another layout

1. Choose View, Bars. You can also click the Layout Options bar and choose Bars.
2. Click Copy From.
3. Select the layout with the Gantt Chart settings you want to apply. To view the Gantt Chart settings, click Apply. To apply the selected layout's Gantt Chart settings and close the dialog box, click Open.

Position a bar in the Gantt Chart

1. Choose View, Bars. You can also click the Layout Options bar and choose Bars.
2. Select the Gantt Chart bar for which you want to specify a position.
3. Click the Bar Style tab.
4. In the Options section, specify a row. Bars are drawn on the Gantt Chart according to their position in the Bars dialog box. Rows indicate where bars should be drawn: bars can be drawn stacked one above another, or occupying the same row so that only some of the bars are visible.
5. Click OK. To view your changes without closing this dialog box, click Apply.

> **Tip**
>
> When displaying the Gantt chart, you can increase the space between the bars by adjusting the height of rows in the Activity Table.

Change the background lines in the Gantt Chart

1. Choose View, Bars. You can also click the Layout Options bar and choose Bars.
2. Click Options.
3. Click the Sight Lines tab.
4. To show background horizontal lines before every Summary bar, mark the Show Major Lines checkbox in the Horizontal Lines section.
5. To show background horizontal lines at a specific interval of rows, mark the Show Minor Lines Every checkbox in the Horizontal Lines section, then type or select the row interval at which you want to the minor lines to be displayed.
6. To show background vertical lines based on a time interval you specify, mark the Show Major Lines Every checkbox in the Vertical Lines section. Select the line style and specify the number of time intervals to display the sight line, then select the time unit.
7. To show minor vertical lines, mark the Show Minor Lines Every checkbox and format the lines as described in Step 6. To view your changes without closing this dialog box, click Apply.

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Show or hide the Gantt Chart legend

1. Choose View, Barchart Options.
2. Click the General tab.
3. To display the Gantt Chart legend, mark the Show Legend checkbox. To hide the Gantt Chart legend, clear the Show Legend checkbox.
4. Click OK. To view your changes without closing this dialog box, click Apply.

> **Note**
>
> You can move the legend within the Gantt Chart. Move the mouse over the legend, click and hold the mouse button, and drag the legend.

Show or hide relationship lines in the Gantt Chart

1. Choose View, Barchart Options.
2. Click Options.
3. Click the General tab.
4. To display relationship lines in the Gantt Chart, mark the Show Relationships checkbox. To hide relationship lines, clear the Show Relationships checkbox. You can also click

   on the Top Layout toolbar to show or hide relationship lines.
5. Click OK. To view your changes without closing this dialog box, click Apply.

Customize the data date line

You can customize the data date line in the Activities and Tracking windows.

1. With the Activities window active, choose View, Bars. You can also click the Layout Options bar and choose Bars. With the Tracking window active, display the layout, then choose View, Bars. You can also click the Display Options bar (in the right pane) in the Top Layout window and choose Top Layout Options, Bars.
2. Click Options.
3. Click the Data Date tab.
4. To change the style for your data date line, select a style from the drop down list. The line can be solid, or contain dashes and dots. To change the thickness of your data date line, select a value between 1 and 10 pixels. This option is only available when the solid line is selected as the style. If your line style is something other than the solid line and you increase the size to a number greater than one, the bar style will switch to a solid line. To change the color of your data date line, choose a color from the color palette.
5. Click OK. To view your changes without closing this dialog box, click Apply.

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Change a Gantt Chart bar's filter - under Gantt Chart

1. Choose Project, Activities, then display the Gantt Chart.
2. Choose View, Bars. You can also click the Layout Options bar and choose Bars.
3. Select the Gantt Chart bar for which you want to change the filter.
4. Double-click the Filter column.
5. Mark the checkbox next to each filter you want to use. To view a filter's settings before applying it to your Gantt Chart bar, click Modify. You can only view and modify user-defined filters.
6. Click OK. To view your changes without closing this dialog box, click Apply.

Change a Gantt Chart bar's label - under Gantt Chart

1. Choose View, Bars. You can also click the Layout Options bar and choose Bars.
2. Select the Gantt Chart bar for which you want to change the label.
3. Click the Bar Labels tab.
4. To add a label to a bar, click the Add button at the bottom of the Bar Labels tab.
5. To remove a label from a bar, select the label you want to remove and click the Delete button at the bottom of the Bar Labels tab.
6. To change the position of a label, select the label for which you want to change the position, then double-click the Position column and select a position from the list.
7. To change the label's display value, select the label for which you want to change the display value, then double-click the Label column and select a display value from the list.
8. Click OK. To view your changes without closing this dialog box, click Apply.

Change a Gantt Chart bar's settings

1. Choose View, Bars. You can also click the Layout Options bar and choose Bars.
2. Select the Gantt Chart bar for which you want to change the label.
3. Click the Bar Settings tab.
4. To include the selected bar when you collapse the display to summary-level information, select Show bar when collapsed.
5. To display the selected bar as a summary bar only, select Show bar for grouping bands.
6. To show the selected bar's nonwork time as a neck based on the activity's calendar, select Calendar nonwork time.
7. To show the selected bar's nonwork intervals as a neck based on out-of-sequence progress and suspended/resumed activities, select Activity nonwork intervals.
8. Click OK. To view your changes without closing this dialog box, click Apply.

Change a Gantt Chart bar's style - under Gantt Chart

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1. Choose View, Bars. You can also click the Layout Options bar and choose Bars.
2. Select the Gantt Chart bar for which you want to change the display style.
3. Click the Bar Style tab.
4. To change the shape of the bar's Start Endpoint (first field), the height and position of the bar (second field), and Finish Endpoint (end field), click each corresponding field and select a shape.
5. To change the color of the bar's Start Endpoint (first field), body (second field), and the Finish Endpoint (end field), click each corresponding field and select a color.
6. To change the pattern of the bar's Start Endpoint (first field), body (second field), and Finish Endpoint (end field), click each corresponding field and select a pattern.
7. In the Options section, specify whether to show the bar when collapsed, as summary bars only, or both.
8. Specify a row. Rows indicate where the bars should be drawn on the Gantt Chart: bars can be drawn stacked one above another, or occupying the same row so that only some of the bars are visible.
9. Click OK. To view your changes without closing this dialog box, click Apply.

> **Note**
>
> Bars are drawn on the Gantt Chart according to their position in the Bars dialog box. When the bars are stacked, bars higher up the list are drawn overlapping bars that are lower in the list when these bars occupy the same row. If a bar low down on the list occupies the same row as a bar higher up the list and has the same dates, the lower bar might be obscured by the higher bar.

Change a Gantt Chart bar's timescale - under Gantt Chart

1. Choose View, Bars. You can also click the Layout Options bar and choose Bars.
2. Select the Gantt Chart bar for which you want to change the timescale.
3. In the Timescale column, select the timescale you want the Gantt Chart bar to represent.
4. Click OK. To view your changes without closing this dialog box, click Apply.

Move to a specific activity in the Gantt Chart

- To jump to a specific activity's bar, double-click in the Gantt Chart next to the activity.

Change an activity's start and finish dates in the Gantt Chart

1. Move the mouse pointer over the activity's Gantt Chart bar end until it displays a hand pointer.
2. Click and hold the mouse button. To move the activity's start date and finish date back in time, drag the bar to the left. To move the activity's start date and finish date forward in time, drag the bar to the right.

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Note

- You cannot move the activity if the activity has already started.
- Changing a bar's position in the Gantt Chart does not affect activity duration.
- When you change a start or finish date, depending on your application settings, a dialog box may display to prompt you to enter a constraint. To accept the constraint, click Yes in the Confirmation dialog box. If you specify start and/or finish dates without applying Must Start On or Must Finish On constraints, the dates you enter may be changed when the project is scheduled.
- If resources are assigned to the activity, and the resource assignment has manual future period values, the values may be affected when you change the activity start or finish dates.

Delete a bar from the Gantt Chart

1. Choose View, Bars. You can also click the Layout Options bar and choose Bars.
2. Select the Gantt Chart bar that you want to delete.
3. Click Delete.

Tip

To remove the Gantt Chart bar from the Gantt Chart display without deleting it, you can clear the Display checkbox.

Change an activity's duration in the Gantt Chart

1. Move your mouse over the right end of an activity's Gantt Chart bar until it displays a double-ended arrow.
2. Click and hold the mouse button. To increase the duration of the activity, drag the bar to the right. To decrease the duration of the activity, drag the bar to the left.

Note

- If resources are assigned to the activity, the activity's labor/ nonlabor units or the activity's resource assignment units per time are adjusted when you change the activity's duration in accordance with the activity's duration type.
- If resources are assigned to the activity, and the resource assignment has manual future period values, the values may be affected when you change the activity duration.

Add a curtain attachment in a Gantt Chart

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1. In the Activities window, click the Layout Options bar and choose Attachments, Curtain, Add Curtain.
2. Mark the 'Display curtain attachment' checkbox.
3. Click  to select the Start and Finish Dates.
4. Select the color to use for the curtain.
5. Select the fill pattern for the curtain date range.
6. Click OK.

Tip

When you add curtains, they are added to the open layout, not the open project. If you save the open layout after adding a curtain attachment, the attachment is saved as part of the layout. The curtain attachment is then displayed whenever you view the layout, unless you subsequently choose to delete or hide the curtain attachment.

Note

- The data range defaults to the longest date interval. For example, if the date interval is Month/Week, the default range will be one month.
- You can manually shift the entire curtain or change the start and finish dates of the curtain display. Move the mouse pointer over the curtain and click and drag the curtain to the new dates.
- Click Cancel to close the dialog box without saving any changes.

Hide a curtain attachment in a Gantt Chart

1. Double-click on the selected curtain in the Gantt Chart.
2. Clear the Display curtain attachment checkbox in the Curtain Attachment dialog box.
3. Click OK.

Tip

When you hide curtains from a saved layout, the attachments are not deleted from the layout. If you save the layout after hiding the attachments, the attachments are still available for display by all users who have access to the layout.

Add a text attachment to a Gantt Chart

1. In the Activities window, select the activity to which you want to add the attachment.
2. Click the Layout Options bar and choose Attachments, Text.
3. Click the Font button to select the attachment's font and font style.

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4. Click OK.

> **Note**
>
> - Click Cancel to close the dialog box without saving any changes.
> - The attachment text displays in the foreground of the Gantt Chart, wherever you click in the layout.
> - To modify an existing text attachment, double-click to select it, then modify it in the Text Attachment dialog box.

Remove a text attachment from a Gantt Chart

1. In the Gantt Chart, click to select the text attachment you want to remove.
2. Press the Delete key.

Attach notebook items to bars in a Gantt Chart

1. Click the Layout Options bar and choose Bars.
2. Click the Bar Labels tab.
3. Click Add to add a label, then select a position for the label.
4. Click in the Label field and select a notebook item from the list of available bar labels.
5. Click options to set the dimensions of the notebook item.

> **Note**
>
> - Only one notebook item can be attached to each bar.
> - Notebook items can be printed with the layout or published with the layout to the project Web site.

Hide all curtain attachments in the Gantt Chart

- In the Activities window, click the Layout Options bar and choose Attachments, Curtain, Hide All. The Hide All menu item is only available if at least one curtain attachment is currently displayed in the Gantt Chart.

> **Tip**
>
> When you hide a curtain attachment contained in a saved layout, the attachment is not deleted from the layout. If you save the layout after hiding the attachment, the attachment is still available for display by all users who have access to the layout.

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Delete a curtain attachment from a Gantt Chart

1. Double-click the curtain attachment in the Gantt Chart.
2. Click Delete.

> **Note**
>
> If the curtain attachment you delete is part of a saved layout, you must save your changes to the layout after deleting the attachment; otherwise, the attachment will not be deleted.

Display all curtain attachments in the Gantt Chart

- In the Activities window, click the Layout Options bar and choose Attachments, Curtain, Show All. The Show All menu item is only available if at least one curtain is currently hidden.

Apply a Progress Line to the Gantt Chart

Applying a progress line to the Gantt chart enables you to quickly view the progress of activities with regard to their scheduled deadlines.

- As a variance line, the progress line can represent a variance between the planned and actual start dates or finish dates of a task.
- As a progress point line, the progress line shows either the remaining duration of an activity or the percent of the activity that has been completed.

In the Progress Line tab of the Bar Chart Options dialog box, you have complete control over how the line is drawn, whether it will be a variance line based on start or finish dates, or a progress point line based on remaining duration or completion percentages.

> **Tip**
>
> - This feature applies to the Gantt Chart in the Activities window only.
> - The progress line will not be drawn if you do not display a baseline bar and you choose to base the line on activity % complete or remaining duration.

1. Select View, Bar Chart Options, and click the Progress Line tab.
2. Type or select the value between 1 and 10 points to set the thickness of your progress line.
3. Click the color button to choose a color for your Progress Line.
4. Select to use the Project baseline or Primary baseline when calculating the Progress Line.
5. Select one of the following:
   - If you want the progress line drawn based on the difference between activity start or finish dates in the current project and baseline project dates, select Based on Difference between Current and Baseline Activity's option. From the list, select Finish

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Date to calculate the progress line based on the variance between the baseline finish and the current finish, or select Start Date to calculate the progress line based on the variance between the baseline start and the current start.

- If you want the progress line drawn by connecting progress points based on each activity's remaining duration or percent complete, select By Connecting Progress Points Based on Activity's option. From the list, select % Complete to calculate the progress point based on each activity's percent complete (which is the same as viewing the % Complete bar), or select Remaining Duration to calculate the progress point based on each activity's remaining duration. For Remaining Duration, the progress line is drawn to activities that have started or that should have started (when the project baseline start is earlier than the current data date) relative to the baseline start dates.

6. Click OK.
7. Choose View, Progress line to display the line.

In the Gantt chart, the new progress line is displayed. When the progress line is drawn to the left of the data date, the activity is behind schedule. When the progress line is drawn to the data date, the activity is on schedule. When the progress line is drawn to the right of the data date, the activity is ahead of schedule.

Activity Network

Activity Network

The Activity Network displays your project as a diagram of activities and relationships according to the work breakdown structure (WBS). A red border around an activity box indicates a critical activity. A line connecting activity boxes indicates an activity relationship.

You can control nearly every aspect of the Activity Network, including the appearance of activities, the contents of activity boxes, and the spacing between activities.

The left pane of the Activity Network layout always displays the WBS hierarchy, regardless of the current grouping selection. The right pane displays the selected WBS element's assigned activities. If you specify a grouping option other than WBS, the right pane of the Activity Network layout groups and displays the selected WBS element's activities according to the activity data item you specify, for example, grouped by project status or budget at completion.

You can save the Activity Network layout on your computer to email to another project user or to retrieve later.

To display the Activity Network:

With the Activities window active, do one of the following:

- Click  on the Top Layout toolbar.
- Click the Layout bar, choose Show on Top, Activity Network.
- From the View menu, choose Show on Top, Activity Network.
- You can use an Activity Network layout to
- Easily view relationships among activities and the flow of work through a project
- Examine and edit an activity and its predecessors and successors
- Focus on the driving relationship path

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- Determine at a glance whether an activity has started or finished

To make the Activity Network layout more effective, you can

- Change the Activity Network template to view different activity information and levels of detail
- Right-click anywhere in the Activity Network to access commands that enable you to change the information displayed or format data
- Combine the Activity Network with a Trace Logic layout to focus on a specific sequence of activities

> **Tip**
>
> - To edit or remove an activity relationship, double-click the line that indicates the relationship you want to change, then enter new details in the dialog box that appears.
> - To display an activity's ID and name, place your pointer on the activity whose details you want to view.
> - To zoom in, hold down the Alt key, click anywhere in the Activity Network layout, then drag the pointer down while holding down the mouse button. To zoom out, hold down the Alt key, click anywhere in the Activity Network layout, then drag the pointer up while holding down the mouse button. Right-click anywhere in the Activity Network table to display a menu of additional options.

Display the Activity Network

With the Activities window active, do one of the following:

- Choose View, Show on Top, Activity Network.
- Click the Layout Options bar and choose Show on Top, Activity Network.
- Click  on the Top Layout toolbar.

> **Tip**
>
> To hide the left pane and display only the Activity Network, drag the split bar separating the right and left panes all the way to the left.

Apply Activity Network settings from another layout

1. Choose View, Activity Network, Activity Network Options. You can also click the Layout Options bar, then choose Activity Network, Activity Network Options.
2. Click Copy From.
3. Select the layout containing the Activity Network settings you want to apply, then click Open.

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Move around in the Activity Network

- To view activities for a particular WBS element, select the element in the WBS hierarchy in the left pane. The right pane displays the hierarchy element's activities.
- To select an activity in the Activity Network, click the activity.
- To zoom in and out of the Activity Network, use the following icons on the Display toolbar.
  -  Zoom In magnifies the view.
  -  Zoom Out reduces the size of elements in the view.
  -  Zoom to Best Fit adjusts information to fit in the window.

Customize the Activity Network layout

1. Choose View, Activity Network, Activity Network Options. You can also click the Layout Options bar, then choose Activity Network, Activity Network Options.
2. Click the Activity Network Layout tab.
3. In the Organization Options section, specify how to organize the Activity Network layout: To align activity boxes towards the top of the Activity Network window in relation to their predecessors/successors, choose Organize Along the Top. To center activity boxes in relation to their predecessors/successors, choose Organize Centered. When an activity's predecessor/successor is not immediately adjacent to the activity in the Activity Network, the relationship line, in some cases, cannot be seen because of other activity boxes. To reposition the activity boxes so that all relationship lines are visible, mark the Adjust to Show All Relationships checkbox. To automatically zoom in/out each time you reorganize the layout to find the best fit for showing activity boxes in Activity Network, mark the Always Zoom to Best Fit After Reorganize checkbox. To view whether an activity has started or finished, mark the Show Progress checkbox. To change the vertical space between activity boxes in Activity Network, specify a vertical spacing factor. To change the horizontal space between activity boxes in Activity Network, specify a horizontal spacing factor.
4. In the Network Order Options section, specify the order in which activity networks display: To display the activity networks with the longest path of linked activities on top, choose Longest on Top. To display the activity networks with the shortest path of linked activities on top, choose Shortest on Top.
5. To preview your changes, click Apply.

Tip

- To copy the Activity Network layout from another activity layout, click Copy From, select the layout whose Activity Network layout you want to copy, then click Open.
- To save the Activity Network layout, click the Layout Options bar, then choose Activity Network, Save Network Positions. Type a unique name to identify the layout and click Save.

Reorganize the Activity Network layout

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- To reorganize all activity boxes except those that you have positioned within the layout, right-click in the Activity Network layout and choose Reorganize.
- To reorganize all activity boxes including those that you have positioned within the layout, right-click in the Activity Network layout and choose Reorganize All.

View Activity Network Activity Details

- To display an activity's ID and name, place the mouse pointer on the activity whose details you want to view.

Customize the activity box layout

1. Display the Activity Network in the Activities window, then choose View, Activity Network, Activity Network Options. You can also click the Layout Options bar, then choose Activity Network, Activity Network Options.
2. Click the Activity Box Template tab.
3. Click Box Template.
4. To add a field to the activity boxes, click Add. Click the Field Name column, then select the field you want to display. Double-click the Width column, then specify the width of the field. Double-click the Height column, then specify the height of the field. See More Detail: Specifying activity box field widths for more information.
5. To position the field within the activity box, click  and .
6. To remove a field, select it, then click Delete.
7. Click OK.

Tip

- To copy the activity box layout from another activity layout, click Copy From, select the layout whose activity box layout you want to copy, then click Open.
- To change the width of the Activity Network activity boxes, specify a new box width in the Total Width field.

Change activity box fonts and colors

1. Choose View, Activity Network, Activity Network Options. You can also click the Layout Options bar, then choose Activity Network, Activity Network Options.
2. Click the Activity Box Template tab, then click Font & Colors.
3. To change the appearance of text, click Font, then select a new font.
4. To change the display's background color, click Back Color, then select a new color.
5. To change the activity box color, click Box Color, then select a new color.
6. To preview your changes, click Apply.

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Select the activity box layout

1. Choose View, Activity Network, Activity Network Options. You can also click the Layout Options bar, then choose Activity Network, Activity Network Options.
2. Click the Activity Box Template tab.
3. Select an activity box layout from the list of predefined activity box layouts. The example activity box uses the selected box layout.
4. To preview your changes, click Apply.

> **Tip**
>
> To copy the activity box layout from another activity layout, click Copy From, then select the layout whose activity box layout you want to copy, then click Open.

Save and Open an Activity Network Layout

- To save the Activity Network layout, click the Layout Options bar, then choose Activity Network, Save Network Positions. Type a unique name to identify the layout and click Save.
- To open a saved Activity Network layout, click the Layout Options bar, then choose Activity Network, Open Network Positions. Browse to the directory where the saved layout (ANP) file is located. Select this file and click Open.

Trace Logic

Trace Logic

Trace Logic enables you to step forward or backward through a sequence of activities to focus on predecessor/successor relationships.

Trace Logic, which is displayed in the lower layout, represents relationships for an activity you select in the Activity Table, Activity Network, Activity Usage spreadsheet, or Gantt Chart currently displayed in the upper layout. A red border around an activity box indicates a critical activity. A line connecting activity boxes indicates an activity relationship.

Use the Trace Logic layout to

- Examine an activity and its predecessors and successors
- Determine why an activity is scheduled at a particular time, answering questions such as: Were any of its predecessors delayed? Do any of its predecessors or successors have an obsolete constraint? Are two activities that should be linked start to start currently linked finish to start? Why is there negative float?

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Tip

- Zoom in or out without affecting the level of detail displayed in the upper layout.
- Choose View, Bottom Layout Options or click the Display Options bar and choose Bottom Layout Options to specify how many levels of predecessors and successors you want to view.

Display Trace Logic

With the Activities window active, do one of the following:

- Choose View, Show on Bottom, Trace Logic.
- Click the Layout Options bar and choose Show on Bottom, Trace Logic.
- Click  on the Bottom Layout toolbar.

Note

The activity boxes in Trace Logic display the same information as the boxes defined for the current Activity Network layout.

Move around in Trace Logic

- To view an activity's relationships in Trace Logic, click the activity in the Activity Table, Gantt Chart, Activity Usage Spreadsheet, Activity Network, or Trace Logic window.

Set Trace Logic preferences

You can specify the number of activity relationships you want to display in Trace Logic.

1. Choose View, Bottom Layout Options. You can also click the Layout Options bar, then choose Bottom Layout Options.
2. Specify the number of predecessors you want to display.
3. Specify the number of successors you want to display.
4. To preview your changes, click Apply.

Activity Usage and Resource Usage Profiles

Activity Usage Profile

The Activity Usage Profile

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- Use the Activity Usage Profile to view cost or unit values for activities in the open project over time according to a timescale you specify. The Activity Usage Profile displays resource allocations for all activities or for the activities you select in the Activity Table, Activity Usage Spreadsheet, Gantt Chart, or the Activity Network.

The Activity Usage Profile can display labor, nonlabor, material, and expense costs and labor and nonlabor units allocated to the activities in your project over time. Costs and units allocated to activities for each period in the timescale are represented as vertical bars. You can also display curves for charting cumulative costs or units over time.

You can customize the Activity Usage Profile to:

- Specify the type of information you want to display, including showing labels with the values of each bar.
- Change the timescale.
- Customize the bars and background.
- Display past period actual or actual to date values.
- Display unit and cost values by both remaining early and remaining late dates.
- Save any of these changes so that you can always access the same set of activity information, or share your Activity Usage Profile with someone else.

You can filter the Activity Usage Profile to include all activities displayed in the top layout, or to include only the activities you select in the top layout. You can also filter the top layout to display only those activities that correspond to the timeperiod you select in the bottom layout.

Tip

- If you apply activity filters to the Activity Table, Gantt Chart, Activity Usage Spreadsheet, or the Activity Network, these filters also apply to the Activity Usage Profile.
- When you display a financial period timescale and display data for all projects (rather than for open projects only), activity and resource data must be summarized by financial period to accurately display data for closed projects.
- When connected to a P6 Professional database: If you have administrator rights, to ensure that activity and resource data is summarized by financial period when you summarize projects, choose Admin, Admin Preferences, select the Options tab, then mark the 'By financial periods' checkbox.
- When connected to a P6 EPPM database: If you have administrator rights, to ensure that activity and resource data is summarized by financial period when you summarize projects, use the Application Settings, General link in P6, then mark the 'By financial periods' checkbox.
- The Planned Value Cost and Earned Value Cost curves may display different values in the profile, even if the total Planned Value Cost and Earned Value Cost values are the same in Activity Table columns. This occurs when an activity has an expense with an Accrual Type of Start of Activity or End of Activity (rather than Uniform over Activity). Since these are one-time expenses, and the planned value and earned value curves are cumulative (representing total values spread over time), the planned value spread is different than the earned value spread, even though the total values are the same.

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Display the Activity Usage Profile

With the Activities window active, do one of the following:

- Choose View, Show on Bottom, Activity Usage Profile.
- Click the Layout Options bar and choose Show on Bottom, Activity Usage Profile.
- Click  on the Bottom Layout toolbar.

> **Note**
>
> The numbers on the left side of the Activity Usage Profile correspond to the vertical bars. The numbers on the right side of the Activity Usage Profile correspond to the cumulative curves (these numbers appear only if you include cumulative curves in the profile).

Define the Activity Usage Profile

1. Display the Activity Usage Profile, then click the Display Options bar in the profile and choose Activity Usage Profile Options. You can also right-click in the profile and choose Activity Usage Profile Options.
2. Click the Data tab.
3. Choose the category of information to display: Cost or Units.
4. Mark the Display Actual and Earned Value using Financial Period data option if you want to display past period actual values. Do not mark the checkbox if you want to display actual to date values.

> **Note**
>
> If projects are summarized by financial period (which is controlled by an administrative setting), this option is ignored. When projects are summarized by financial period and you display a financial period timescale, the profile displays past period actual values if performance has been stored for a financial period; for financial periods that do not have stored performance, the profile displays actual to date values in financial period intervals.

5. To select the data included in the profile, mark the checkbox next to each filter type. Then, select the pattern to use to display each data type. If you choose to display cost data, you can select more than one filter to view a combination of cost values in the project profile. To display cost totals, mark the Total checkbox.
6. In the Show Bars/Curves area, mark the checkbox for each category of cost/units you want to display. To show these data by date, mark the By Date checkbox. To show these data as a curve representing cumulative value, mark the Cumulative checkbox. To select the color for each bar/curve, click the Color button.
7. In the Show Earned Value Curves area, mark the checkbox for each cumulative earned value curve you want to display. To select the color for each curve, click the Color button.
8. Click the Graph tab.

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9. To display a vertical background line for major and/or minor timescale increments, in the Vertical Lines area, mark the corresponding checkbox. For example, in a Year/Month format timescale, major lines would display between years; minor lines would display between months.
10. To display horizontal lines for each numerical increment listed along the side of the profile, choose the type of line you want to display, then select the line color. Choose None to hide background horizontal lines.
11. To specify additional profile display options, mark the corresponding checkboxes: Show Legend: Mark to display a legend for the profile's bars/curves. 3D Bars: Mark to display the profile's bars in 3D. Background Color: Click to change the profile's background color. Calculate Average: Mark to specify the values you want to use to divide the timescale interval totals. Divide Interval Totals By: To divide the timescale interval totals by an increment you specify, type it in this field. Base on Hours Per Timeperiod: To divide the timescale interval totals by automatic increments, based on the date interval selected, mark this checkbox. When you choose this option, the Divide Interval Totals By field displays the division increment based on the division increment specified in User Preferences for the corresponding date interval: 1h for Hour date interval, 2h for Shift date interval, 8h for Day date interval, 40h for week date interval, and so on. Unit of Measure: Specify the unit of measure for the timescale intervals.
12. To view your profile options without closing the dialog box, click Apply; to save your selections, click OK.

Show or hide the profile legend in the histogram

1. Display the profile, then click the Display Options bar in the profile and choose the Profile Options. You can also right-click in the profile to choose the Profile Options.
2. Click the Graph tab.
3. In the Additional Display Options section, mark or clear the Show Legend checkbox.

> **Note**
>
> - You can move the profile legend within the profile. Move the mouse over the legend, click and hold the mouse button, and drag the legend.
> - As well as a legend, you can select the Show Values option to display the value of each bar in the histogram.

Resource Usage Profile

The Resource Usage Profile

Use the Resource Usage Profile to analyze quantity or cost usage for resources or roles. You can view a resource's or role's cost and quantity data for a specific project or for all projects across the enterprise (total allocation).

Define the profile to specify whether you want to display cost or quantity information and set the timescale for displaying data values. Choose to display past period actual or actual to date values in bars and curves. Choose to display vertical bars to represent costs or units allocated

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to your resources for each timeperiod, and include cumulative curves to represent accumulated units and costs over time.

Use the Resource Usage Profile to

- Determine how many hours each resource is scheduled to work
- Identify overloaded resources
- Track expenditures per timeperiod
- Determine resource usage by late dates
- Display a "banana" curve to compare early and late dates
- Display different colors or patterns on the histogram bars when showing the stacked histogram

In addition to customizing data, you can customize the look of the profile by specifying display options, for example, bar color, background line type, or averaging. You can also save a customized profile so that you can always access the same set of activity information or share the Resource Usage Profile with someone else.

The Resource Usage Profile is available only in the bottom layout of the Activities window. The bottom layout window is divided into two panes.

- The left pane lists all the resources or roles stored in the hierarchy, depending on your current view. In the stacked histogram view, the left pane lists all the resource or role filter/group names in the hierarchy.
- The right pane displays the values for the activities assigned to each resource or role in the histogram, or resource or role filter/group name in the stacked histogram.

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Note

- If you are displaying actual to date values (rather than past period actual values) and you do not want the resource unit/cost values spread evenly, use resource curves to distribute those values nonlinearly, or manually enter values for assignments in the Resource Usage Spreadsheet. The Resource Usage Profile reflects the resource curves and manual values. If the planned work on an activity cannot be accurately captured by applying a resource curve, you should manually enter values to achieve the most accurate resource distribution per timeperiod.
- When you display a financial period timescale and display data for all projects (rather than for open projects only), activity and resource data must be summarized by financial period to accurately display data for closed projects.
- When connected to a P6 Professional database: If you have administrator rights, to ensure that activity and resource data is summarized by financial period when you summarize projects, choose Admin, Admin Preferences, select the Options tab, then mark the 'By financial periods' checkbox.
- When connected to a P6 EPPM database: If you have administrator rights, to ensure that activity and resource data is summarized by financial period when you summarize projects, use the application Settings, General link in P6, then mark the 'By financial periods' checkbox.
- When displaying units, bars do not display for summary rows if your selection contains mixed units of measure or a mixture of labor/ nonlabor and material type resources.
- Bars and cumulative curves with negative values do not display in the profile. You can view the negative values in the profile details. Double-click in the profile area to view the profile details.
- When you print a layout which includes the Resource Usage Profile, you can choose to print the resources included in that profile in the header or footer. Where there are ten or fewer resources in the profile, the Resource IDs of all resources included in the profile are included in the footer. You may need to increase the height or width of the footer to see all the resources included in the profile. Where there are 11 or more resources in the profile, the filter selected for resources is printed instead.

Display the Resource Usage Profile

With the Activities window active, do one of the following:

- Choose View, Show on Bottom, Resource Usage Profile.
- Click the Layout Options bar and choose Show on Bottom, Resource Usage Profile.
- Click  on the Bottom Layout toolbar.

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Note

- The numbers on the left side of the Resource Usage Profile correspond to the vertical bars. The numbers on the right side of the Resource Usage Profile correspond to the cumulative curves (these numbers appear only if you include cumulative curves in the profile).
- To view a stacked histogram in the Resource Usage Profile, click the Display Options bar and select Stacked Histogram.
- Bars and cumulative curves with negative values do not display in the profile. You can view the negative values in the profile details. Double-click on the profile to view the profile details.
- When you print a layout which includes the Resource Usage Profile, you can choose to print the resources included in that profile in the header or footer. Where there are ten or fewer resources in the profile, the Resource IDs of all resources included in the profile are included in the footer. You may need to increase the height or width of the footer to see all the resources included in the profile. Where there are 11 or more resources in the profile, the filter selected for resources is printed instead.

Define the Resource Usage Profile

Display the Resource Usage Profile, then click the Display Options bar in the profile and choose Resource Usage Profile Options.

To display the profile options for the stacked histogram, click the Display Options bar in the profile and choose Stacked Histogram. Then, click the Display Options bar in the profile and choose Resource Usage Profile Options. You can also right-click in the profile and choose Resource Usage Profile Options.

The options available to define the Resource Usage Profile depend on whether you display the Regular Histogram or the Stacked Histogram.

Define the Resource Usage Profile - Regular Histogram

The options you can specify for a Resource Usage Profile differ depending on whether you display the profile in resource or role view, and on whether you choose to display resource allocation for one or more open projects or total allocation for all projects across the enterprise.

You choose the resources to include in the profile by selecting them in the left pane of the Bottom Layout window. To specify whether you want to display the profile in role or resource view, click the Display Options bar in the left pane, then choose Select View, By Resource or By Role.

1. In the Resource Usage Profile Options, click the Data tab.
2. Choose the type of information to display: Cost or Units.
3. Mark the Display Actual using Financial Period data option if you want to display past period actual values. Do not mark the checkbox if you want to display actual to date values.
4. In the Show Bars/Curves area, mark the checkbox to specify which cost/unit categories you want to display and whether to show these data by date or as a curve representing cumulative value. Select the color for each bar/curve.

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5. If the profile displays resource allocation across the enterprise (all projects), you can choose how you want to display remaining values: as total values across all projects in the enterprise, or as values in the open projects vs. values in closed projects. If you are displaying roles in the profile, you can choose to view staffed vs. unstaffed costs/units. Staffed units are those for which resources have been assigned to fill role assignments.
6. To display additional resource data in the profile, mark the corresponding checkboxes: Show Overtime (open projects view only): Mark to show the resource's overtime units for each time unit in the current layout. Show Limit: Mark to show the resource's maximum units for each timescale interval in the current layout. This option is available only if you choose to display Units. Show Overallocation: Mark to display overallocated values in the current layout. This option is available only if you choose to display Units and select Show Limit. Show Available Units: Mark to display a horizontal line that indicates the resource's available units. This option is available only if you choose to display Units.
7. Click the Graph tab.
8. To display a vertical background line for major and/or minor timescale increments, in the Vertical Lines area, mark the corresponding checkbox. For example, in a Year/Month format timescale, major lines would display between years; minor lines would display between months.
9. To display horizontal lines for each numerical increment listed along the side of the profile, choose the type of line you want to display, then select the line color. Choose None to hide background horizontal lines.
10. To specify additional profile display options, mark the corresponding checkboxes: Show Legend: Mark to display a legend for the profile's bars/curves. 3D Bars: Mark to display the profile's bars in 3D. Show Values: Mark to display the values of each bar in the histogram. Background Color: Click to change the profile's background color. Calculate Average: Mark to specify the values you want to use to divide the timescale interval totals. Divide Interval Totals By: To divide the timescale interval totals by an increment you specify, type it in this field. Base on Hours Per Timeperiod: To divide the timescale interval totals by automatic increments, based on the date interval selected, mark this checkbox. When you choose this option, the Divide Interval Totals By field displays the division increment based on the division increment specified in User Preferences for the corresponding date interval: 1h for Hour date interval, 2h for Shift date interval, 8h for Day date interval, 40h for week date interval, and so on. Unit of Measure: Specify the unit of measure for the timescale intervals.
11. To specify the interval and dates to use to calculate time-distributed data for the profile, and to specify which projects are included (open only or open and specific closed projects) when you select the Show Remaining Bars As, Total Remaining option, click Preferences. Then, click the Resource Analysis tab.

Define the Resource Usage Profile - Stacked Histogram

The options you can specify for a Resource Usage Profile differ depending on whether you display the profile in resource or role view. Add resource filters to choose the resources to include in the profile The profile legend in the left pane displays a list of the resource filters and their corresponding colors and patterns. To specify whether you want to display the profile in role or resource view, click the Display Options bar in the left pane, then choose Select View, By Resource or By Role.

1. In the Resource Usage Profile Options, click the Data tab.
2. Select the type of information to display: At Completion Units or At Completion Cost.

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3. Mark the Display Actual using Financial Period data option if you want to display past period actual values. Do not mark the checkbox if you want to display actual to date values.
4. In the Show area, choose to show individual curves representing the cumulative value for each filter/group name of resources or choose to show one cumulative curve as a total for all filter/group names of resources .
5. Add a resource or role filter to view in the profile. Double-click the Resource/Role Filter/ Group Name field to modify the selected resource or role filter specification. Click Add to specify a new resource or role filter. Create a resource or role filter specification to select an individual resource or role, or a group of resources or roles. For example, you can specify a filter that selects resources with the same resource code value. Click Delete to remove a resource/role filter/group name.
6. Select the pattern and color for the selected resource/role filter/group name. Click the Up or Down arrows to arrange the filter list in the order it will display in the stacked histogram.
7. Click the Graph tab.
8. To display a vertical background line for major and/or minor timescale increments, in the Vertical Lines area, mark the corresponding checkbox. For example, in a Year/Month format timescale, major lines would display between years; minor lines would display between months.
9. To display horizontal lines for each numerical increment listed along the side of the profile, choose the type of line you want to display, then select the line color. Choose None to hide background horizontal lines.
10. Specify the additional profile display options: 3D Bars: Mark to display the profile's bars in 3D. Show Values: Mark to display the values of each bar in the histogram. Background Color: Click to change the profile's background color. Calculate Average: Mark to specify the values you want to use to divide the timescale interval totals. Divide Interval Totals By: To divide the timescale interval totals by an increment you specify, type it in this field. Base on Hours Per Timeperiod: To divide the timescale interval totals by automatic increments, based on the date interval selected, mark this checkbox. When you choose this option, the Divide Interval Totals By field displays the division increment based on the division increment specified in User Preferences for the corresponding date interval: 1h for Hour date interval, 2h for Shift date interval, 8h for Day date interval, 40h for week date interval, and so on. Unit of Measure: Specify the unit of measure for the timescale intervals.
11. To specify the interval and dates to use to calculate time-distributed data for the profile, and to specify which projects are included (open only or open and specific closed projects) when you select the Show Remaining For, All Projects option, click Preferences. Then, click the Resource Analysis tab.

View a profile of resource allocation across all projects

1. In the Activities window, choose View, Show on Bottom, Resource Usage Profile. You can also click the Layout Options bar, then choose Show on Bottom, Resource Usage Profile.
2. In the right pane of the bottom layout window, click the Display Options bar and choose Show All Projects, if it is not already selected. A check next to Show All Projects indicates that it is selected. To view total allocation by resource, click the Display Options bar in the left pane of the bottom layout window, then choose Select View, By Resource. To view total allocation by role, click the Display Options bar in the left pane of the bottom layout window, then choose Select View, By Role.

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Tip

- When viewing total resource allocation across all projects, you can include resource limits, planning limits, overallocation, and available units in the profile. You can specify whether you want to display remaining units as one value or as separate values for open versus closed projects. When viewing by role, an additional option is available for displaying remaining units as separate values for staffed versus unstaffed projects.
- When viewing past period actual values across all projects, the profile displays summary past period actual values for closed projects.

Note

- Bars do not display for summary rows if your selection contains a mixture of labor/nonlabor and material resources. Dashes display in the Total and Cumulative columns in the profile details.
- Bars and cumulative curves with negative values do not display in the profile. You can view the negative values in the profile details. Double-click in the profile to view the profile details.

View a profile of resource allocation for a specific project

1. Open one or more projects for which you want to view a resource profile.
2. In the Activities window, choose View, Show on Bottom, Resource Usage Profile. You can also click the Layout Options bar, then choose Show on Bottom, Resource Usage Profile.
3. In the right pane of the bottom layout window, click the Display Options bar and make sure Show All Projects is not selected. A check next to Show All Projects indicates that it is selected. To view resource allocation by resource, click the Display Options bar in the left pane of the bottom layout window, then choose Select View, By Resource. To view resource allocation by role, click the Display Options bar in the left pane of the bottom layout window, then choose Select View, By Role.

Tip

When viewing resource allocation for a specific project, you can include resource overtime. When viewing by role, you can include remaining units in the profile and specify whether you want remaining units displayed as a single value for all projects or as separate values for staffed versus unstaffed projects.

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> **Note**
>
> - Bars do not display for summary rows if your selection contains a mixture of labor/nonlabor and material resources. Dashes display in the Total and Cumulative columns in the profile details.
> - Bars and cumulative curves with negative values do not display in the profile. You can view the negative values in the profile details. Double-click in the profile to view the profile details.

Show or hide resource limits in the Resource Usage Profile

1. In the Activities window, choose View, Show on Bottom, Resource Usage Profile. You can also click the Layout Options bar, then choose Show on Bottom, Resource Usage Profile.
2. Click the Display Options bar in the profile and choose Resource Usage Profile Options. You can also right-click in the profile and choose Resource Usage Profile Options.
3. Click the Data tab. In the Additional Data Options section, mark or clear the Show Limit and Show Allocated Limit checkboxes.

> **Tip**
>
> The Show Limit and Show Allocation Limit checkboxes are available only when you display units for the histogram. The Show Allocated Limit checkbox is only available if you display open projects only.

Show or hide resource overallocation in the Resource Usage Profile

1. In the Activities window, choose View, Show on Bottom, Resource Usage Profile. You can also click the Layout Options bar, then choose Show on Bottom, Resource Usage Profile.
2. Click the Display Options bar in the profile and choose Resource Usage Profile Options. You can also right-click in the profile and choose Resource Usage Profile Options.
3. Click the Data tab. To display resource overallocation information, in the Additional Data Options section, mark the Show Limit and Show Overallocation checkboxes. To remove resource overallocation information, in the Additional Data Options section, clear the Show Overallocation checkbox.

> **Note**
>
> The Show Limit and Show Overallocation checkboxes display only when you display Units.

Show or hide resource availability in the Resource Usage Profile

1. In the Activities window, choose View, Show on Bottom, Resource Usage Profile. You can also click the Layout Options bar, then choose Show on Bottom, Resource Usage Profile.

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2. In the right pane of the bottom layout window, click the Display Options bar, then choose Show All Projects. A check next to Show All Projects indicates that it is selected.
3. Click the Display Options bar again and choose Resource Usage Profile Options. You can also right-click in the profile and choose Resource Usage Profile Options.
4. Click the Data tab. In the Additional Data Options section, mark or clear the Show Available Units checkbox.

> **Note**
>
> - The Show Available Units checkbox appears only when you view resource allocation for all projects across the enterprise, that is, when Show All Projects is selected. However, to show resource availability only for open projects, you can edit your user preferences. In the Resource Usage/Role Profile Options dialog box, click Preferences, then click the Resource Analysis tab. In the All Projects section, choose Opened Projects Only.
> - Bars and cumulative curves with negative values do not display in the profile. You can view the negative values in the profile details. Double-click on the profile to view the profile details.

Show or hide overtime information in the Resource Usage Profile

1. In the Activities window, choose View, Show on Bottom, Resource Usage Profile. You can also click the Layout Options bar, then choose Show on Bottom, Resource Usage Profile.
2. In the right pane of the bottom layout window, click the Display Options bar and make sure Show All Projects is not selected. A check next to Show All Projects indicates that it is selected.
3. Click the Display Options bar again and choose Resource Usage Profile Options. You can also right-click in the profile and choose Resource Usage Profile Options.
4. Click the Data tab.
5. Mark or clear the Show Overtime checkbox.

> **Note**
>
> The Show Overtime checkbox displays only when you view resources for a specific project. It is not available when viewing projects across the enterprise.

Filter activities according to the Resource Usage Profile

When viewing the Resource Usage Profile for a specific project, you can filter the activities displayed in the Activity Table, Gantt Chart, Activity Usage Spreadsheet, or Activity Network, so that they correspond to the resource information currently displayed in the profile.

- To display only the activities to which a specific resource has been assigned, in the left pane of the bottom layout select the resource, then, in the Display Activities for Selected section, mark the Resource checkbox.
- To display only the activities to which a specific resource has been assigned within an individual timeperiod, in the left pane of the bottom layout select the resource, then, in the

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Display Activities for Selected section, mark the Time Period checkbox. In the Resource Usage Profile, click the timeperiod for which you want to display the resource's activity assignments.

> **Note**
>
> When you mark the Time Period checkbox, the currently selected timeperiod highlights and the cursor changes to a crosshair when you position it within the Resource Usage profile. When you select a timeperiod, it is highlighted and the activities in the Activity Table, Gantt Chart, or Activity Network are filtered to correspond to the timeperiod.

Show or hide the profile legend

1. In the window displaying the profile, click the Display Options bar and choose Top Layout Options or Bottom Layout Options, Profile Settings.
2. Click the Graph tab.
3. In the Additional Display Options area, mark or clear the Show Legend checkbox.

> **Note**
>
> You can move the profile legend within the profile. Move the mouse over the legend, click and hold the mouse button, and drag the legend..

Activity Usage and Resource Usage Spreadsheets

Activity Usage Spreadsheet

The Activity Usage Spreadsheet

The Activity Usage Spreadsheet displays activity data in a spreadsheet format. View baseline, budgeted or planned, actual, remaining, and at completion values or review information such as earned value cost, actual labor and nonlabor units, and remaining total cost for the activities in your project.

Display the Activity Usage Spreadsheet in the top or bottom layout of the Activities window.

Use the Activity Usage Spreadsheet to

- Quickly analyze activity data
- Filter activities
- Group and sort activity data

The Activity Usage Spreadsheet is split into two panes. The left pane displays the Activity Table, including all the columns, grouping, sorting, and filtering options defined for the Activity Table. The right pane displays timescaled spreadsheet data for each activity; you can specify the data fields you want to include.

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Tip

You can display past period actual values in the Activity Usage Spreadsheet. In the right pane of the bottom layout, click the Display Options bar and choose Spreadsheet Fields, Customize. The available past period actual fields are listed in the Financial Period Value section for both Cumulative and Time Interval. If the Financial Period Value section is not available in the Columns dialog box, you must specify the range of financial periods available for display as columns on the User Preferences, Application tab. When displaying Financial Period Value fields, past period actuals stored per financial period are distributed evenly, within each financial period, from the financial period start date to the financial period end date and earned value calculations are based on these stored period quantities. For all other columns, actuals are spread evenly from the actual start to the data date or actual finish date of the activity or assignment.

Note

You cannot change the data in the Activity Usage Spreadsheet.

- Multiple resource rates are not reflected in the Activity Usage Spreadsheet.
- When you display a financial period timescale and display data for all projects (rather than for open projects only), activity and resource data must be summarized by financial period to accurately display data for closed projects.
- When connected to a P6 Professional database: If you have administrator rights, to ensure that activity and resource data is summarized by financial period when you summarize projects, choose Admin, Admin Preferences, select the Options tab, then mark the 'By financial periods' checkbox.
- When connected to a P6 EPPM database: If you have administrator rights, to ensure that activity and resource data is summarized by financial period when you summarize projects, use the Application Settings, General link in P6, then mark the 'By financial periods' checkbox.

Display the Activity Usage Spreadsheet

With the Activities window active, do one of the following:

- Choose View, Show on Top or Show on Bottom, Activity Usage Spreadsheet.
- Click the Layout Options bar and choose Show on Top or Show on Bottom, Activity Usage Spreadsheet.
- Click on the Top Layout toolbar or Bottom Layout toolbar.

Customize Activity Usage Spreadsheet columns

You can customize the columns that display in the left pane of the Activity Usage Spreadsheet.

1. Display the spreadsheet, then choose View, Columns.

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2. To add a column to the spreadsheet, select it in the Available Columns section, then click .
3. To add all available columns to the spreadsheet, click .
4. To remove a column from the spreadsheet, select it in the Selected Options section, then click .
5. To remove all current columns from the spreadsheet, click

   . You must select at least one column to display in the spreadsheet.
6. To change the order in which columns display, in the Selected Options section, select a column you want to move: To move the column left, click

   .To move the column right, click

   .
7. To update columns in the spreadsheet, click OK, or to view your changes without closing this dialog box, click Apply. To restore the default columns, click Default.

Select Activity Usage Spreadsheet fields

1. Right-click in the spreadsheet, then choose Spreadsheet Fields.
2. To add a field to the spreadsheet, select it in the Available Options section, then click .
3. To add all available fields to the spreadsheet, click .
4. To remove a field from the spreadsheet, select it in the Selected Options section, then click .
5. To remove all current fields from the spreadsheet, click

   . You must select at least one field to display in the spreadsheet.
6. To change the order in which fields display, in the Selected Options section, select a field you want to move:To move the column left, click

   .To move the column right, click

   .

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7. To update fields in the spreadsheet, click OK, or to view your changes without closing this dialog box, click Apply. To restore the default fields, click Default.

Resource Usage Spreadsheet

The Resource Usage Spreadsheet

Use the Resource Usage Spreadsheet to analyze quantity or cost usage for resources or roles. For every role and resource in the project, you can review cost or quantity information for a specific project or for all projects across the enterprise (total allocation). You can also select the spreadsheet fields to specify which cost or quantity information you want to view and set the timescale for displaying data values. If you have the appropriate security privilege, you can manually enter values for budgeted or planned and remaining (early) units in the spreadsheet.

Use the Resource Usage Spreadsheet to

- Quickly analyze resource data.
- View past period actual data.
- View resource or role data.
- Filter resources, roles, and activities.
- Group and sort resource data.
- Manually plan future resource distribution.

In the Activities window, the Resource Usage Spreadsheet is available only in the bottom layout.

When you choose to display information for all projects, the bottom layout is divided into two panes.

- The left pane lists all the resources or roles stored in the hierarchy, depending on your current view.
- The right pane displays the values for the activities assigned to each resource or role.

When you choose to display information only for a specific project, the bottom layout is divided into three panes.

- The left pane lists all the resources or roles stored in the hierarchy, depending on you current view.
- The middle pane displays all of the activity assignments for the resource or role currently selected in the left pane.
- The right pane displays the values for the activities assigned to the resource or role currently selected in the left pane.

In the Resource Assignments window, the Resource Usage Spreadsheet is available in the right pane.

You can group, sort, or filter the resources or roles displayed in the Resource Usage Spreadsheet.

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Note

In the Activities window, the Resource Usage Spreadsheet must display data for open projects only if you want to manually plan future period resource distribution. If the spreadsheet is displaying data for all projects, click the Display Options bar, then choose Show All Projects to remove the checkmark; the title of the Display Options bar changes to 'Display: Open Projects Only."

- The hierarchy in the Resource Usage spreadsheet does not represent rolled up values for resource groups; therefore, if you select a resource group, only the values directly related to that group appear in the spreadsheet. Values for the individual resources belonging to that group do not appear.
- If you are displaying actual to date values (not past period actual values) and you do not want the resource unit/cost values spread evenly, use resource curves to distribute those values nonlinearly, or manually enter the values. The Resource Usage Spreadsheet reflects the resource curves. If the planned work on an activity cannot be accurately captured by applying a resource curve, you should manually enter values to achieve the most accurate resource distribution per timeperiod. If you are displaying past period actual values, the resource unit/cost data is spread by financial period.
- Multiple resource rates are not reflected in the Resource Usage Spreadsheet.
- Dashes display in the cells of summary rows if your selection contains a mixture of labor/ nonlabor and material type resources.

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Tip

- You can display stored past period actual values in the Resource Usage Spreadsheet. In the right pane of the bottom layout, click the Display Options bar and choose Spreadsheet Fields, Customize. The available past period actual fields are listed in the Financial Period Value section for both Cumulative and Time Interval. If the Financial Period Value section is not available in the Columns dialog box, you must specify the range of financial periods available for display as columns on the User Preferences, Application tab. When displaying Financial Period Value fields, past period actuals stored per financial period are distributed evenly, within each financial period, from the financial period start date to the financial period end date and earned value calculations are based on these stored period quantities. For all other columns, actuals are spread evenly from the actual start to the data date or actual finish date of the activity or assignment.
- When you display a financial period timescale and display data for all projects (rather than for open projects only), activity and resource data must be summarized by financial period to accurately display data for closed projects.
- When connected to a P6 Professional database: If you have administrator rights, to ensure that activity and resource data is summarized by financial period when you summarize projects, choose Admin, Admin Preferences, select the Options tab, then mark the 'By financial period' checkbox.
- When connected to a P6 EPPM database: If you have administrator rights, to ensure that activity and resource data is summarized by financial period when you summarize projects, you can do so from the Applications Settings page in P6.
- With the appropriate security privilege, you can edit the Budgeted or Planned Units and Remaining (Early) Units fields. Your ability to manually enter/edit data in these fields is determined by user preference settings, timescale settings, and other factors. For information on the types of activities that are ideal candidates for manual planning, refer to Future Period Bucket Planning. For detailed information on entering and editing data in the Resource Usage Spreadsheet, including troubleshooting information, refer to Future period bucket planning FAQ.
- You can paste data directly into the Resource Usage Spreadsheet from Excel using Range Paste. See: Copy and paste data from Microsoft Excel into P6 Professional

Display the Resource Usage Spreadsheet

With the Activities window active, do one of the following:

- Choose View, Show on Bottom, Resource Usage Spreadsheet.
- Click the Layout Options bar and choose Show on Bottom, Resource Usage Spreadsheet.
- Click  on the Bottom Layout toolbar.

With the Resource Assignments window active, do one of the following:

- Choose View, Show on Top, Resource Usage Spreadsheet.
- Click the Layout Options bar, then choose Resource Usage Spreadsheet.
- Click  on the Top Layout toolbar.

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> **Tip**
>
> To hide the upper layout and display only the Resource Usage Spreadsheet in the Activities window, drag the split bar separating the upper layout from the Resource Usage Spreadsheet all the way to the top.

Display roles in the Resource Usage Spreadsheet

- In the Activities window, click the Display Options bar in the left pane of the Resource Usage Spreadsheet, then choose Select View, By Role. This option is only available if the spreadsheet is displaying data for all projects, rather than open projects only.

> **Note**
>
> To redisplay resources in the Resource Usage Spreadsheet, click the Display Options bar in the left pane, then choose Select View, By Resource.

Select resources or roles for the Resource Usage Spreadsheet

- In the left pane of the Resource Usage Spreadsheet, select the resource or role for which you want to view values.

> **Tip**
>
> You can display data for multiple resources or roles in the Resource Usage Spreadsheet. To select a block of contiguous resources or roles, click the first resource or role you want to display, then hold down the Shift key while clicking the last resource or role you want to display. To select noncontiguous resources or roles, press and hold the Ctrl key while clicking the various resources or roles whose values you want to display.

View a spreadsheet of resource allocation across all projects

1. In the Activities window, choose View, Show on Bottom, Resource Usage Spreadsheet. You can also click the Layout Options bar, then choose Show on Bottom, Resource Usage Spreadsheet.
2. In the right pane of the bottom layout window, click the Display Options bar and choose Show All Projects, if it is not already selected. A check next to Show All Projects indicates that it is selected. To view total allocation by resource, click the Display Options bar in the left pane of the bottom layout window, then choose Select View, By Resource. To view total allocation by role, click the Display Options bar in the left pane of the bottom layout window, then choose Select View, By Role.

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> **Note**
>
> - Dashes display in the cells of summary rows if your selection contains a mixture of labor/ nonlabor and material resources.

View a spreadsheet of resource allocation for a specific project

1. Open one or more projects for which you want to view a resource spreadsheet.
2. In the Activities window, choose View, Show on Bottom, Resource Usage Spreadsheet. You can also click the Layout Options bar, then choose Show on Bottom, Resource Usage Spreadsheet.
3. In the right pane of the Activity window's bottom layout, click the Display Options bar and make sure that Show All Projects is not selected. To view resource allocation by resource, click the Display Options bar in the left pane of the bottom layout window, then choose Select View, By Resource. To view resource allocation by role, click the Display Options bar in the left pane of the bottom layout window, then choose Select View, By Role.
4. In the Resource Assignments window, choose View, Resource Usage Spreadsheet. You can also click the Display Options bar, then choose Resource Usage Spreadsheet.

> **Note**
>
> - Dashes display in the cells of summary rows if your selection contains a mixture of labor/ nonlabor and material resources.

View a spreadsheet of resource overallocation across all projects

You can choose Resource Usage Spreadsheet fields to spread overallocated resources units over early and late dates.

1. In the Activities window, choose View, Show on Bottom, Resource Usage Spreadsheet. You can also click the Layout Options bar, then choose Show on Bottom, Resource Usage Spreadsheet.
2. In the right pane of the bottom layout window, click the Display Options bar and choose Show All Projects, if it is not already selected. A check next to Show All Projects indicates that it is selected.
3. Right-click in the spreadsheet, then choose Spreadsheet Fields, Customize. Select Overallocated Early Units and/or Overallocated Late units in the available options section, then click the right arrow to add the fields to the spreadsheet. When a resource is spread over the early dates of activities, to view the number of units beyond the resource's limit that are planned over a given timeperiod, select Overallocated Early Units. When a resource is spread over the late dates of activities, to view the number of units beyond the resource's limit that are planned over a given timeperiod, select Overallocated Late Units.
4. Click Ok.

Filter activities according to the Resource Usage Spreadsheet

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When viewing the Resource Usage Spreadsheet for a specific project, you can filter the activities displayed in the Activity Table, Gantt Chart, Activity Usage Spreadsheet, or Activity Network, so that they correspond to the resource information currently displayed in the Resource Usage Spreadsheet.

- To display only the activities to which a specific resource has been assigned, in the left pane of the bottom layout select the resource, then, in the Display Activities for Selected section, mark the Resource checkbox.
- To display specific activities for a resource, in the left pane of the bottom layout select the resource, then, in the middle pane of the bottom layout, select one or more of the resource's activity assignments. In the Display Activities for Selected section, mark the Assignments checkbox.

Customize Resource Usage Spreadsheet columns

You can customize the columns that display in the left and middle panes of the Resource Usage Spreadsheet layout in the Activities window.

1. In the left pane, click the Display Options bar, then choose Columns, Customize. In the middle pane, click the Display Options bar and choose Columns, Customize. You can select different columns to appear in each pane.
2. To add a column to the spreadsheet, select it in the Available Options section, then click .
3. To add all available columns to the spreadsheet, click .
4. To remove a column from the spreadsheet, select it in the Selected Options section, then click .
5. To remove all current columns from the spreadsheet, click

   . You must select at least one column to appear in the spreadsheet.
6. To change the order in which columns appear, in the Selected Options section, select a column you want to move: To move the column left, click

   .To move the column right, click

   .
7. To update columns in the spreadsheet, click OK, or to view your changes without closing this dialog box, click Apply. To restore the default columns, click Default.

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> **Note**
>
> You can also customize the columns that display in the Resource Usage Spreadsheet layout in the Resource Assignments window. Click the Display Options bar, then choose Spreadsheet Fields, Customize. To customize the spreadsheet, follow steps 2 through 7.

Select Resource Usage Spreadsheet fields

- Right-click in the spreadsheet, then choose Spreadsheet Fields. Choose one of the predefined spreadsheet fields, or, to customize the fields you want to display, choose Customize.

Resize the panes of the Resource Usage Spreadsheet

You can resize any of the panes of the Resource Usage Spreadsheet to display more or less data.

- Drag the split bar separating the panes you want to enlarge or reduce to the left or right.

Group and sort Resource Usage Spreadsheet columns in the Activities window

- In the left or middle panes of the Resource Usage Spreadsheet layout, click the Display Options bar, then choose Group and Sort By. Choose one of the predefined group and sort options, or, to customize grouping and sorting, choose Customize.

If you choose Customize

1. In the Group By column, double-click the cell, then select the field by which you want to group.
2. Click Sort, then select the field names you want to sort by for the grouping. Click OK.
3. To change a group's display color and font, double-click the appropriate Font & Color field.
4. To group and sort by additional fields, repeat steps 1 and 2.

> **Tip**
>
> To remove a grouping field, select the field you want to remove, then click Delete.

Group and sort Resource Usage Spreadsheet columns in the Resource Assignments window

- In the Activity Resource Assignments layout, click the Display Options bar, then choose Group and Sort By. Choose one of the predefined group and sort options, or, to customize grouping and sorting, choose Customize.

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If you choose Customize

1. In the Group By column, double-click the cell, then select the field by which you want to group.
2. Click Sort, then select the field names you want to sort by for the grouping. Click OK.
3. To change a group's display color and font, double-click the appropriate Font & Color field.
4. To group and sort by additional fields, repeat steps 1 and 2.

> **Tip**
>
> To remove a grouping field, select the field you want to remove, then click Delete.

Copy and paste resource spreadsheet data to Microsoft Excel

1. Choose Project, Resource Assignments.
2. Select a row, then choose Edit, Copy. All associated spreadsheet data, as well as row and column headers and values, will be copied to the clipboard.
3. In Excel, right-click in the spreadsheet, then choose Paste.

> **Note**
>
> - Excel may try to reformat data pasted into its cells. You can reformat the cells as text before pasting your data, or try pasting into a different application.
> - Any edits made in Excel will not be returned to the project. This can be used for reporting only.
> - If you have any fields with #######, simply expand the column width to accommodate the project information.

Copy and paste data from Microsoft Excel into P6 Professional

Before copying data from Excel into P6 Professional, it is important to ensure that the data in Excel and the configuration of P6 Professional are optimal.

In P6 Professional:

- If time period labels are showing in P6 Professional, they should be set to the default settings in admin preferences.
- Your decimal format must be set to dot and thousands separator to comma in P6.

In Excel:

- Ensure that any numeric data does not have thousand separators included.

1. Open Excel and select and copy the range of cells you want to paste into P6 Professional.
2. In P6 Professional, select the range into which you want to paste the data, then right click and choose Range Paste.

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Note

- You cannot paste data from Excel into grouping bands or read-only cells.
- You cannot copy and paste data between Excel and P6 Professional using the Range Copy and Range Paste functionality if your layout uses a timescale comprising financial periods.
- You can also select a single cell in P6 Professional to paste a range of cells copied from Excel. If you choose Range Paste on a single cell in P6 Professional, the data copied from Excel will be pasted into a range beginning at the cell you selected.

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8

Tracking Projects

Overview

Tracking

The tracking features assist you in performing schedule, cost, and resource analysis by enabling you to access, display, and manipulate project data in a variety of formats. Review summarized or live project data at various levels of detail. The Tracking window always displays summarized data for closed projects but also when you choose to open only global data. When P6 Professional is connected to a P6 Professional database, note that summarized data are available only for projects that have been summarized in the Oracle Job Service. For open projects, you can display live WBS data.

Tip

To check if and when project data were summarized, select the project in the Project Explorer window, then right-click, choose Project Details, and click the Summary tab.

The Summary tab displays the date the summarizer was last run for the selected project. This gives you an idea of how current your summary data are. The Summary tab also displays information about the WBS level to which the project was summarized. For example, a project may use four WBS levels, but only be summarized to WBS level 2. As a result, the Tracking window data show rolled up values to the second WBS level for that project, when viewed in Summary mode.

In the Tracking window, you display data in a layout, which is simply a set of criteria that control how data are presented. The sample database includes several sample layouts that reflect common project analysis methods, for example, earned value, resource allocation, resource forecast, and total costs over time. You can also create customized layouts for viewing project data based on your own requirements.

Tracking layouts

You can create four types of tracking layouts: Project Bar Charts, Project Gantt/Profiles, Project Tables, and Resource Analyses. Each of these layout types enable you to survey your project first at a comprehensive level, then at more detailed levels according to the Enterprise Project Structure (EPS), project, work breakdown structure (WBS), organizational breakdown structure (OBS), WBS category, or specific WBS data elements. You can use features such as filtering and grouping to customize the format and level of information you want to include in a tracking layout.

When you create and save a layout, only the presentation options are saved, not the data. This enables you to use the layout with different projects. When you open a layout, you can choose

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the project for which you want to display information by selecting it in the Project Explorer window on the left. By clicking another item in the Project Explorer window, you can present data for a different EPS element using the same layout.

You can specify whether a layout you create is available to all users (global) or only to a specific user. Tracking layouts can be published to Web sites and imported from and exported to spreadsheet programs. To help you monitor a project's problem areas, you can assign tracking layouts to thresholds and issues.

Tip

In the Open Layout dialog box,  identifies global tracking layouts. Layouts assigned to specific users are identified by .

Open a tracking layout

1. Choose Enterprise, Tracking, then choose View, Layout, Open. You can also click the Display Options bar in the Layout window and choose Layout, Open.
2. Select a layout and click OK.

Types of tracking layouts

You can create four types of tracking layouts:

Project Table: displays project data in a table.

Project Bar Chart: displays project data in a horizontal bar chart.

Project Gantt/Profile: displays project information in columns and a Gantt Chart in the Top Layout window and as time-distributed project data in spreadsheet or profile in the Bottom Layout window. The Bottom Layout window also includes column data when you display a spreadsheet.

Resource Analysis: displays time-distributed resource usage information in three formats: Gantt Chart, profile, and spreadsheet. When you display the Gantt Chart or spreadsheet, the Layout window also includes column data in the left pane. You can use a Resource Analysis layout to examine resource allocation for one or more specific projects and/or total allocation for all projects across the enterprise.

Share a layout with other users

You can share a layout with other users several different ways:

- When you first create the layout (Tracking only), specify that it be available to All Users.
- Save an existing layout using a different name and then specify that it be available to All Users or Another User. If you specify Another User, select a specific user.
- Export the layout to a file and then Email the file or its location to other users.
- Publish the layout to a Web site.

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Save a tracking layout

1. Choose View, Layout, Save or Save As. You can also click the Display Options bar in the Layout window and choose Layout, Save or Save As.
2. If you choose Save As, type a new name for the layout and indicate whether the layout should be available to All Users, the Current User, or Another User. If you select Another User, click  in the User field, then select the user.

Export a tracking layout

1. Choose View, Layout, Open. You can also click the Display Options bar in the Layout window and choose Layout, Open.
2. Select the layout you want to export, then click Export.
3. Specify the drive and folder to which you want to export the layout, type a name for the layout, then click Save. The layout is saved in Primavera Layout File (. PLF) format.

Import a tracking layout

1. Choose View, Layout, Open. You can also click the Display Options bar in the Layout window and choose Layout, Open.
2. Click Import.
3. Locate the layout you want to import and select it, then click Open.

Delete a tracking layout

1. Choose View, Layout, Open. You can also click the Display Options bar in the Layout window and choose Layout, Open.
2. Select the layout you want to delete, then click Delete.
3. Click Yes.

Expand all information in a tracking layout

When information in the Top Layout window is displayed in a table, you can quickly open all levels of information it contains.

- Choose View, Expand or click the Display Options bar in the Top Layout window, then choose Expand All.

Collapse all information in a tracking layout

When information in the Top Layout window is displayed in a table or spreadsheet, you can quickly close all detailed levels of information to display only the highest level.

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- Choose View, Collapse All or click the Display Options bar in the Layout window and choose Collapse All. You can also right-click in the Top Layout window, then choose Collapse All.

Hide or show the bottom window in a tracking layout

- To hide the Bottom Layout window when it is displayed, click the Display Options bar in the Top Layout window and select Hide Bottom Window, or choose View, Show on Bottom, No Bottom Layout.
- To show the Bottom Layout window when it is hidden, click the Display Options bar in the Top Layout window and select Hide Bottom Window.

Hide or show the top window in a tracking layout

- To show or hide the Top Layout window when it is displayed, click the Display Options bar in the Top Layout window and select Hide Top Window, or click in the top layout toolbar.

Hide or show the left columns in a tracking layout

- To show or hide the left columns displayed in a layout, or click the Display Options bar in the Top Layout window and select Hide Left Columns, or click in the top layout toolbar.

Change the table font, color, and row height used in a tracking layout

You can specify the font, background color, and row height for information displayed in a table.

1. In the Top Layout window, click the Display Options bar and choose Top Layout Options, Table Font and Row. In the Bottom Layout window, right-click in the table and choose Table Font and Row.
2. To specify a general table font, click the Font button. To select a background color, click the Color button.
3. Specify a row height for all rows in the current layout. Type a new row height in the field, or click the arrow buttons.
4. To display symbols, mark the Show Icons checkbox.
5. To specify a different font and background color for individual levels in the table, in the Group Rows section Font & Color column, double-click the level item, then click the Font or Color buttons.

Define columns for a tracking layout

For layout elements displayed in column format, you can specify the columns you want to include.

1. In the Top Layout window, click the Display Options bar and choose Top Layout Options, Columns. In the Bottom Layout window, right-click in the table and choose Columns.
2. Choose one of the following options. Default: Displays the standard columns for the current layout type. Cost: Displays cost-related columns for the current layout type. OBS: Displays

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OBS-related columns for the current layout type. Customize: Displays the Columns dialog box so you can select the columns to include in the layout.

3. If you choose Customize, under Available Options select the column you want to add and click



. To add all available columns, click



.To remove columns, under Selected Options select the column you want to remove and click



.To remove all columns, click



. To change the order in which the columns are displayed, under Selected Options select the column you want to move and click



or



to change the column's position. To use the default column display, click Default. To preview the selected columns without closing this dialog box, click Apply.

4. To change a column title, width, or heading alignment, click Edit Column. Type a new title and width, select an alignment option, then click OK.
5. When you are finished defining layout columns, click OK.

> **Tip**
>
> The Summary columns category contains several columns that you can include to identify layouts that display summarized data and identify when data were last summarized.

Modify a column's title, width, and alignment

1. With the Tracking window active: To customize columns in the Top Layout, choose View, Columns, Customize. You can also click the Display Options bar and choose Top Layout Options, Columns, Customize. To customize columns in the Bottom Layout, right-click in the table and choose Columns, Customize.

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2. In the Selected Options area, select the column whose title you want to change, then click Edit Column.
3. Type a new title, then specify its width and choose an alignment.

> **Note**
>
> To change the title back to the original title, click Default.

Filter a tracking layout

For layouts that include data displayed in column or table format, you can add one or more filters to further customize the type of information you want display.

1. Choose View, Filter By, Customize. In the Top Layout window, you can also click the Display Options bar (in the right pane), then choose Top Layout Options, Filters, or right-click in the table and choose Filters.
2. In the Parameter column, double-click the first row and select Any of the Following or All of the Following.
3. In the Parameter column, double-click the first blank row, then select a field by which to filter.
4. In the Is column, double-click the corresponding field and select the filter's search condition or comparison operator.
5. In the Value column, double-click the corresponding field and type or select the value you want to display for the specified field.
6. To add another filter field, click Add, then repeat steps 2 through 6 for each field you want to include in the filter.

> **Tip**
>
> - To change the order of the filter criteria, select an item, then click  or .
> - To delete an item in the filter, select it, then click Delete.

Group and sort a tracking layout using standard settings

Tracking offers various standard options for grouping and sorting layout information displayed in a table. For example, when viewing project-level information you can group and sort by project, EPS/ WBS, OBS, or WBS category.

- Choose View, Group and Sort By, and the group and sort option you want to use. You can also right-click in the table in the Top Layout window, then choose Group and Sort By, and the group and sort option you want to use.

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Tip

- Grouping a layout by OBS enables you to display information about activities that belong to WBS elements for which a particular OBS is responsible.
- The Group and Sort options list the name of the WBS category, for example, Phase, which is the WBS category defined in Admin Categories when P6 Professional is connected to a P6 Professional database and in P6 when connected to a P6 EPPM database.

Group and sort a tracking layout using custom settings

You can specify custom group and sort settings for layout information displayed in a table format. For example, data displayed in a Project Table or column data displayed to the left of a Gantt Chart or spreadsheet.

1. Choose View, Group and Sort By, Customize. In the Top Layout window toolbar, you can also click the Display Options bar (in the right pane), then choose Top Layout Options, Group and Sort By, Customize, or right-click in the table, then choose Group and Sort By, Customize.
2. To include totals in the layout, mark the Show Grand Totals checkbox.
3. To show only summary data for each hierarchical level included in the layout, mark the Show Summaries Only checkbox.
4. In the first row of the Group By column, double-click, then select the first category by which to group.
5. If you select WBS, mark the Indent checkbox to list the WBS levels you select in the To Level column. (To hide WBS levels that do not contain any data, mark the Hide If Empty checkbox at the bottom of the Group and Sort dialog box.) Select a font and color for each data group.
6. If you select date fields, select the group interval.
7. Mark the appropriate checkbox to determine the text that displays on the grouping band. To display the field name on the grouping band, mark the Show Title checkbox. To display the ID or Code value on the grouping band, mark the Show ID/Code checkbox. To display the Name or Description on the grouping band, mark the Show Name/Description checkbox.
8. Mark Sort grouping bands alphabetically to display the grouping bands in alphabetical order rather than their order in their respective hierarchy.
9. Mark Hide if empty to hide group title bands that do not contain activities within the group.
10. To define sort fields, click Sort.
11. Click Add, then in the Field Name column, double-click and select a sort field. In the Sort Order column, select Ascending, Descending, or Hierarchical (option only appears for fields that are hierarchical). Repeat this step for each sort field you want to add.
12. Click OK, then click OK again.

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Tip

- To use the predefined grouping, click Default.
- To delete a group or sort item, select it, then click Delete.

Zoom in and out of a timescaled layout

Zooming in on a timescaled layout (Gantt Chart, spreadsheet, or profile), displays a shorter range of time using smaller time intervals, for example, zooming from a quarterly to monthly to weekly display.

- To view a smaller timeperiod at a greater level of detail, click on the Display toolbar, or position the mouse pointer in the layout, then right-click and choose Zoom In.

Zooming out displays a longer range of time using larger time intervals, for example, zooming from a weekly to monthly to quarterly display.

- To view a larger timeperiod at a lesser level of detail, click on the Display toolbar, or position the mouse pointer in the layout, then right-click and choose Zoom Out.

Note

- When the Top and Bottom Layout windows both display a timescaled layout, zooming in or out changes the timescale in both windows.
- The right-click zoom options are not available in the Gantt Chart.

Expand or contract the visible area of a timescaled tracking layout

- To expand or contract a timescaled layout's visible area, move the mouse pointer over the minor time unit of the timescale, then click and hold the mouse button while dragging the timescale. To expand the timescale, drag it to the right. To contract the timescale, drag it to the left.

Change the display timeperiod for a timescaled tracking layout

- To change the timeperiod for which a timescaled layout is displaying information, position the mouse pointer over the major time unit of the timescale until the pointer changes to a hand. Click and hold the mouse button while dragging. To move backward in time, drag the timescale to the right. To move forward in time, drag the timescale to the left.

Project Table

Project Table layouts

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In the Tracking window, a Project Table displays project data in a row-and-column format. You can specify which columns you want to include in the table. The rows displayed correspond to your selection in the Project Explorer window and the current group and sort option. You can group by project, EPS/WBS, OBS, phase, or by specific WBS data, and sort by any WBS-level column. You can show grand totals and/or summary data only. In addition, you can create filters to more narrowly define the information you see.

Create a Project Table

A Project Table displays nontimescaled project data in a row and column format. When you first create a table, you are prompted to select the columns included in the table and uses default settings for all other layout elements. You can change these other elements after the layout is created.

1. With the Tracking window active, choose View, Layout, New. You can also click the Display Options bar in the Top Layout window and choose Layout, New.
2. Type the new layout's name.
3. Select the users who will be able to access the layout: Current User or All Users.
4. Choose Project Table, then click OK.
5. To accept the columns automatically included in the table, which are the earned value fields, click OK. - Or - In the Available Options section, click each column you want to include, while holding down the Ctrl key, then click

   .To remove a selected column, select it in the Selected Options section, then click

   .
6. To change the title, width, and alignment of a column, select the item in the Selected Options section, then click Edit Column.
7. Type a new title, specify a new width (in number of characters), and choose an alignment. Click OK.
8. To preview your Project Table column selections without closing the Columns dialog box, click Apply.

Customize a Project Table

You can customize an existing Project Table by specifying the font, colors, and row height; filtering the information it includes; specifying how you want the data grouped and sorted; and specifying which data field columns you want to include.

- Display the table, then use the View menu to select the type of information you want to change.

Project Bar Chart

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Project Bar Charts

A Project Bar Chart consists of bars representing either cost, unit, earned value, earned value labor unit, or total activities data for EPS nodes, projects, or WBS elements.

You can include up to three bars for any data category. For example, choose to display earned value data and include bars to represent Planned Value Cost, Earned Value Cost, and Actual Cost. You can specify the color of each bar and indicate whether you want the bars to be stacked or included on the same line as the preceding bar.

The EPS node, project, or WBS element that corresponds to each bar is listed in columns to the left of the Bar Chart; the order in which these elements are listed depends on the current group and sort options. You can choose to hide the left columns. You can group the Bar Chart by project, EPS/WBS, OBS, WBS category, or by specific WBS data. You can also show grand totals and/or summary data only, and sort by any available WBS data type.

Create a Project Bar Chart

A Project Bar Chart is a graphical representation of project data. When you first create a Project Bar Chart, you are prompted to select the bars included in the bar chart and uses default settings for all other layout elements. You can change these layout elements after the layout is created.

1. With the Tracking window active, choose View, Layout, New. You can also click the Display Options bar in the Top Layout window and choose Layout, New.
2. Type the new layout's name.
3. Select the users who will be able to access the layout: Current User or All Users.
4. Choose Project Bar Chart, then click OK.
5. In the Display section, select the category of data to include in the Project Bar Chart, then, in the Show Bars section, select up to three fields within that category to show as a bar. You must select at least one field.
6. To select the color for a bar, click the Color button next to its field. If you choose to show more than one bar, mark or clear the Show Stacked checkboxes to indicate whether to show the bars side-by-side or stacked one upon the other.
7. To preview the Project Bar Chart without closing the Bar Chart dialog box, click Apply.
8. When you are finished specifying bar options, click OK.

Customize a Project Bar Chart

You can customize an existing Project Bar Chart by specifying the data you want each bar to represent, selecting the bar display options, and specifying how the information is grouped and sorted.

- Display the Project Bar Chart, then use the View menu to select the type of information you want to change.

Specify Project Bar Chart data and display options

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1. Display the layout, then click the Display Options bar (in the right pane) in the Top Layout window and choose Top Layout Options, Bars.
2. In the Display section, select the category of data to include in the Project Bar Chart, then, in the Show Bars section, select at least one and up to three fields within that category to display as a bar.
3. To select the color for a bar, click the Color button next to its field. If you choose to show more than one bar, mark or clear the Show Stacked checkboxes to indicate whether to show the bars side-by-side or stacked one upon the other.
4. To preview the Project Bar Chart without closing the Bar Chart dialog box, click Apply.
5. When you are finished specifying bar options, click OK.

View bar details in a Project Bar Chart

- To view details such as total units or total cost for bars in a Project Bar Chart, double-click a bar.

Project Gantt/Profile and Resource Analysis

Project Gantt/Profiles

In the Tracking window, a Project Gantt/Profile displays columns of project data on the left side of the Top Layout window, along with a corresponding Gantt Chart to the right. The Bottom Layout window shows time-distributed cost or unit data rolled up to WBS summary levels—these data are displayed as either a profile or spreadsheet.

You can hide the Bottom or Top Layout window and/or the columns displayed to the left of the Top and Bottom Layout windows and you can customize the various elements of a Project Gantt/Profile.

For column data, you can specify which columns are included; group, sort, and filter the data; and show grand totals and/or only summary data.

In the Gantt Chart, you can specify the data you want a bar to represent, for example actual or forecast values, and specify the bar color, shape, pattern, and label. For the spreadsheet, you can select the time-distributed fields you want to view. Profile settings enable you to choose whether to display cost or unit data; display actual to date or past period actual values; filter labor, nonlabor, material, and/or expense data; define bars/curves to depict baseline, actual, and/or remaining values by date or cumulatively; and display earned value curves cumulatively. You can also define various profile display options, such as bar and line color.

For the Gantt Chart, profile, and spreadsheet, you can determine the timeperiod and increments for which you want to view data by specifying a timescale and date format. For example, you might elect to view a six-month range of actual values, time-distributed on a scale that uses fiscal year/month increments.

Resource Analysis layouts

A Resource Analysis tracking layout displays time-distributed project data and resource usage data in several formats. In the Top and Bottom Layout windows, you can display resource usage data for one or more resources you select in the Resource Explorer window. You can

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choose to display resource usage data as either a profile or spreadsheet. In the Top Layout window, you can display a Gantt Chart for one or more individual EPS elements you select in the Project Explorer window.

You can review resource allocation for one or more selected EPS elements and you can review total allocation for all projects across the enterprise. The Top Layout window displays the selected resource's allocation for one or more individual EPS elements you select in the Project Explorer window. The Bottom Layout window displays the selected resource's allocation for all projects in the enterprise. You can click the Display Options bar in the Resource Explorer window to specify whether you want to display resource information in role or resource view.

When you display the Gantt Chart in the Top Layout window, or the resource spreadsheet in either window, additional project data are displayed in column format to the left of the chart or spreadsheet. You can specify which columns are included; group, sort, and filter the data; and show grand totals and/or only summary data. You can also choose to hide the columns and/or the Bottom or Top Layout windows.

In the Gantt Chart, you can specify the data you want a bar to represent, for example, current or forecast values, and specify the bar color, shape, pattern, and label. For the spreadsheet, you can select the time-distributed fields you want to view. Profile settings enable you to choose whether to display cost or unit data and to define bars/curves to depict the values by date or cumulatively. You can choose additional profile data options, such as displaying overallocation, and define various profile display options, such as bar and curve color. You can also display a stacked histogram in the Bottom Layout window that displays the profile using different colors and patterns on bars to represents usage from different resources.

For the Gantt Chart, profile, and spreadsheet, you can determine the timeperiod and increments for which you want to view data by specifying a timescale and date format. For example, you might elect to view a six-month range of actual values, time-distributed on a scale that uses fiscal year/month increments.

Using Resource Analysis forecasting to dynamically level resources

You can use Resource Analysis forecasting features to create a what-if scenario for adjusting resource overallocation. By including a bar that represents forecast dates in the Gantt Chart, you can dynamically adjust schedule dates and see the implications of the change in the resource profile. If you decide to implement the schedule changes as a result of your forecasting, reschedule the project and use the project forecast start date.

The sample database includes a resource forecast layout that you can use with your projects, or you can create your own layout.

To create a resource layout that you can use to dynamically level resources and eliminate overallocation, you will need to

- Include a forecast bar in the Gantt Chart
- Display limits and overallocation in the resource profile
- Adjust User Preferences setting to display time-distributed data using forecast dates

Resource Explorer window

The Resource Explorer window displays in the left pane of the Tracking Bottom Layout window when a Resource Analysis layout is open. See Resource Analysis layouts. You can choose to

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arrange the resource information in this window according to resource or role and you can filter, group and sort resources, and specify which column data you want to display.

- To change the display options in the Resource Explorer window, click the Display Options bar.
- To display data in the current layout for a resource element, click the element in the Resource Explorer window.
- When resource security is enabled (you have limited or no resource access), the layout options behave the following way.
  - The Current Project's Resources option displays the current project resources of the currently selected project only.
  - The All Resources and All Active Resources options display all (active) resources you have access to, and all current project resources for all the projects you select. As you select another project, its current project resources are added to the resource list. This list gets cleared only when you exit P6 Professional. If you want to view the current project resources only for the currently selected project, choose the Current Project's Resources option.

Specify how resources are listed in the Resource Explorer window

1. Open a Resource Analysis layout.
2. Click the Display Options bar in the Resource Explorer window, then choose Select View and one of the following options: By Resource: Displays resources by resource ID. By Role: Displays all resources by role.

Create a Project Gantt/Profile

A Project Gantt/Profile consists of a project Gantt Chart and a project profile or spreadsheet. When you first create this type of layout, select the bars to include in the Gantt Chart. Default settings are used for all other layout elements. You can change these elements after the layout is created.

1. With the Tracking window active, choose View, Layout, New. You can also click the Display Options bar in the Top Layout window and choose Layout, New.
2. Type the new layout's name.
3. Select the users who will be able to access the layout: Current User or All Users.
4. Choose Project Gantt/Profile, then click OK.
5. To accept the bars automatically included in the project Gantt Chart , click OK. - Or - To add additional bars, select the bar below which you want the new bar to appear, then click Add. Mark the Display checkbox next to the new bar. Type a name for the new bar. In the Timescale column, select the timescale you want the new bar to represent. In the Filter column, choose the filter you want the bar to represent. Click the Bar Style tab and configure the new bar's style. Click the Bar Labels tab and specify the new bar's label.
6. To preview the bars without closing the Bars dialog box, click Apply.
7. Click OK.

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> **Tip**
>
> You can also change the name, timescale, filter, and bar style and label for existing bars.

Display project data as a profile or spreadsheet

1. In the Tracking window, open or create a Project Gantt/Profile layout.
2. To display a project profile, in the Bottom Layout window, click



. To display a project spreadsheet, in the Bottom Layout window, click



.

Customize a Project Gantt/Profile

You can customize an existing Project Gantt/Profile by specifying options that determine the data that are displayed and how they are displayed.

- Display the Project Gantt/Profile. In the Top Layout window, click the Display Options bar and choose Top Layout Options, then choose the type of information you want to change. In the Bottom Layout window, click the Display Options bar and choose Bottom Layout Options, then choose the type of information you want to change.

This layout displays a Gantt Chart in the Top Layout window and a project profile or spreadsheet in the Bottom Layout window of the Tracking window. Column data are displayed to the left of the Gantt Chart in the Top Layout window and to the left of the spreadsheet in the Bottom Layout window. You can specify the bar data, spreadsheet fields, and columns you want to display and choose filter, group, and sort options to customize the information included in the layout. You can also specify the font, background color, and row color and height for the columns; bar display options for the Gantt Chart; and bar, curve, and graph display options for the profile. You can specify the timescale for the Top and Bottom Layout windows.

Create a Resource Analysis tracking layout

A Resource Analysis layout consists of a Gantt Chart and a resource profile or spreadsheet. When you first create a Resource Analysis layout, select the bars to include in the Gantt Chart. Default settings are used for all other layout elements. You can change these elements after the layout is created.

1. Choose View, Layout, New. You can also click the Display Options bar in the Top Layout window and choose Layout, New.
2. Type the new layout's name.
3. Select the users who will be able to access the layout: Current User or All Users.

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4. Choose Resource Analysis, then click OK.
5. To accept the bars automatically included in the Gantt Chart, click OK. - Or - To add additional bars, select the bar below which you want the new bar to appear, then click Add. Mark the Display checkbox next to the new bar. Type a name for the new bar. In the Timescale column, select the timescale you want the new bar to represent. In the Filter column, choose the filter you want the bar to represent. Click the Bar Style tab and configure the new bar's style. Click the Bar Labels tab and specify the new bar's label.
6. To preview the bars without closing the Bars dialog box, click Apply.
7. Click OK.

> **Tip**
>
> You can also change the name, timescale, filter, and bar style and label for existing bars.

Display resource data as a profile or spreadsheet

1. In the Tracking window, open or create a Resource Analysis layout, then, in the Resource Explorer window, select the resource(s) whose allocation you want to view.
2. To display a profile of the selected resource's allocation for one or more projects selected in the Project Explorer window, in the Top Layout window, click

   . To display a spreadsheet of the selected resource's allocation for one or more projects selected in the Project Explorer window, in the Top Layout window, click

   .
3. To display a profile of the selected resource's total allocation (all projects across the enterprise), in the Bottom Layout window, click .
4. To display a spreadsheet of the selected resource's total allocation (all projects across the enterprise), in the Bottom Layout window, click .

> **Note**
>
> If the projects you select are not currently open, it is necessary to run the summary job service to see the resource data. To view resource data live, open the projects.

Customize a Resource Analysis layout

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You can customize an existing Resource Analysis layout by specifying options that determine the data that are displayed and how they are displayed.

- In the window displaying the layout, click the Display Options bar and choose Top Layout Options or Bottom Layout Options, then choose the type of information you want to change.

The Resource Explorer window displays to the left of the Bottom Layout window. You select resource elements in this window to control the data that you want to display in the resource profile or spreadsheet. You can filter, group, and sort the resource information in this window. You can also change the font, colors, and row height and specify which columns are included.

- To change the Resource Explorer window options, click the Display Options bar in the Resource Explorer window, then choose the appropriate option.

For the Gantt Chart and column data that display next to the chart in the Top Layout window, you can

- Specify the bar and column data you want to display
- Filter the bar and column data
- Group and sort the bar and column data
- Specify the font, table color, and row height for the columns
- Set the Gantt Chart timescale

When you display the profile or spreadsheet, you can configure the following options in the Top and Bottom Layout windows

- Specify the profile and spreadsheet data you want to display
- Specify the columns you want to include next to the spreadsheet display
- Filter the profile and spreadsheet data
- Specify the font, table color, and row height for the spreadsheet
- Specify the profile bar, curve, and graph display options
- Set the timescale

When you display the stacked histogram for the profile, you can configure the following options in the Bottom Layout window

- Specify the profile data you want to display
- Specify the profile curve and graph display options
- Specify the profile patterns and colors for the selected resource filters
- Set the timescale

> **Note**
>
> When you adjust the timescale, it affects both the Top and Bottom Layout windows.

Group and sort resources in the Resource Explorer window

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1. To view by resource, in the Resource Explorer window, click the Display Options bar and choose Select View, By Resource.
2. Click the Display Options bar again, then choose Group and Sort By and choose Default to show resources by level, List to show resources in a flat list, Primary Role to show resources grouped by their primary role, or Customize to specify more detailed group and sort options.

> **Tip**
>
> When you group resources by resource code or primary role, the resource profile displays a total for the code or role, as well as for each resource assigned to the code or role.

Filter resources in the Resource Explorer window

- Click the Display Options bar in the Resource Explorer window, then choose Filter By and one of the options listed below.

View by Resource

All Active Resources: Displays all resources assigned in the enterprise.

All Resources: Displays all resources defined for the enterprise.

Current Project's Resources: Displays resources assigned to the project currently selected in the Project Explorer window.

Customize: Enables you to specify how you want to filter resources.

View by Role

All Roles: Displays all roles defined for the enterprise.

Current Project's Roles: Displays roles assigned to the project currently selected in the Project Explorer window.

Customize: Enables you to specify how you want to filter roles.

Working with the Gantt Chart

Specify Gantt Chart bar data and display options

1. Display the Gantt Chart, then choose View, Top Layout Options, Bars.
2. To add a bar, click Add, mark the Display checkbox next to the new bar, and type a name for the new bar. To keep an existing bar, but exclude it from the layout, clear the Display checkbox next to it. To delete a bar, select it and click Delete.
3. In the Timescale column, select the timeperiod you want the bar to represent.
4. In the Filter column, select the filter you want the bar to represent.
5. Click the Bar Style tab and configure the bar's style.
6. Click the Bar Labels tab and specify the bar's label.

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7. To preview the current bars without closing the Bars dialog box, click Apply.
8. Click OK.

Add or modify a Gantt Chart bar filter

To add a filter to a bar

1. Display the Gantt Chart, then choose View, Top Layout Options, Bars.
2. Select the bar.
3. Double-click the Filter column.
4. Click New.
5. Type a name for the filter.
6. In the top row, click the Parameter column and select All of the Following or Any of the Following.
7. In the Where row, double-click the Parameter column and select an item to include in the new filter.
8. In the Is column, double-click the corresponding field and select the filter's search condition or comparison operator.
9. In the Value column, double-click the corresponding field and type or select the value you want to display for the specified field.
10. To add another filter field, click Add, then repeat steps 7 through 9 for each field you want to include in the filter.

To modify a bar's filter

> **Note**
>
> You can only modify user-defined filters. You cannot modify the default filters.

1. Display the Gantt Chart, then choose View, Top Layout Options, Bars.
2. Select the bar.
3. Double-click the Filter column.
4. Click Modify.
5. Change any of the filter criteria.

Assign a filter to a Gantt Chart bar

1. Display the Gantt Chart, then choose View, Top Layout Options, Bars.
2. Select the bar.
3. Double-click the Filter column.
4. Mark the Select checkbox next to each filter you want the bar to represent.
5. To preview the new bar filter settings without closing the Bars dialog box, click Apply.

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Change a Gantt Chart bar's timescale

1. Display the Gantt Chart, then choose View, Top Layout Options, Bars.
2. Select the bar.
3. In the Timescale column, select the timeperiod you want the bar to represent.
4. To preview the new bar without closing the Bars dialog box, click Apply.

Here is more detail about specifying a bar's timescale:

Depending on whether an activity layout or a tracking layout is displayed, the options vary for specifying the timeperiod represented by a Gantt Chart bar. Some timeperiods are available for both layout types. In activity layouts the bars represent dates for an activity; in tracking layouts, depending on the current view, bars may represent an EPS node, project, or WBS element.

To represent this value:	Select this bar:
Start Date to Finish Date	Current Bar
Percent Complete	% Complete Bar
Performance Percent Complete	Performance % Complete Bar
Planned Start Date to Planned Finish Date	Plan Bar
Actual Start Date to Actual Finish Date	Actual Bar
Remaining Start Date to Remaining Finish Date	Remain Bar
Primary Baseline Planned Start Date to Primary Baseline Planned Finish Date	Primary Baseline Bar
Secondary Baseline Planned Start Date to Secondary Baseline Planned Finish Date	Secondary Baseline Bar
Tertiary Baseline Planned Start Date to Tertiary Baseline Planned Finish Date	Tertiary Baseline Bar
Early Start Date to Early Finish Date	Early Bar
Late Start Date to Late Finish Date	Late Bar
Remaining Finish Date to Late Finish Date	Float Bar
Remaining Finish Date to Late Finish Date with Remaining after the late date	Neg Float Bar
User start and end dates defined in the activity columns	User Defined Bars

Change a Gantt Chart bar's label

1. Display the Gantt Chart, then choose View, Top Layout Options, Bars.
2. Select the bar.
3. Click the Bar Labels tab. To add a label to your bar, click Add at the bottom of the Bar Labels tab. To delete a label from your bar, select the label and click Delete at the bottom of the Bar Labels tab. To change the position of a label, select the label, click the Position field, and select a new position. To change a label's display value, select the label, click the Label field, and select a new value.
4. Click OK. To view your changes without closing this dialog box, click Apply.

Change a Gantt Chart bar's style

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1. Display the Gantt Chart, then choose View, Top Layout Options, Bars.
2. Select the bar.
3. Click the Bar Style tab.
4. To change the shape of the bar's Start Endpoint (first field), the height and position of the bar (second field), and the Finish Endpoint (end field), click each corresponding field and select a shape.
5. To change the color of the bar's Start Endpoint (first field), body (second field), and the Finish Endpoint (end field), click each corresponding field and select a color.
6. To change the pattern of the bar's Start Endpoint (first field), body (second field), and the Finish Endpoint (end field), click each corresponding field and select a pattern.
7. To show the bar when you collapse the display to summary level information or to show the bar as a summary bar only, mark the appropriate checkbox.
8. Specify the row in which the bar should appear in the Gantt Chart.
9. Click OK. To view your changes without closing this dialog box, click Apply.

Change a Gantt Chart's background lines

1. Display the Gantt Chart, then choose View, Top Layout Options, Bars.
2. Click Options.
3. Click the General tab.
4. To show background horizontal lines before every Summary bar, mark the Show Major Lines checkbox in the Horizontal Lines section.
5. To show background horizontal lines at a specific interval of rows, mark the Show Minor Lines Every checkbox in the Horizontal Lines section, then type or select the row interval at which you want to the minor lines to be displayed.

Customize the data date line

You can customize the data date line in the Activities and Tracking windows.

1. With the Activities window active, choose View, Bars. You can also click the Layout Options bar and choose Bars. With the Tracking window active, display the layout, then choose View, Bars. You can also click the Display Options bar (in the right pane) in the Top Layout window and choose Top Layout Options, Bars.
2. Click Options.
3. Click the Data Date tab.
4. To change the style for your data date line, select a style from the drop down list. The line can be solid, or contain dashes and dots. To change the thickness of your data date line, select a value between 1 and 10 pixels. This option is only available when the solid line is selected as the style. If your line style is something other than the solid line and you increase the size to a number greater than one, the bar style will switch to a solid line. To change the color of your data date line, choose a color from the color palette.
5. Click OK. To view your changes without closing this dialog box, click Apply.

Show or hide a Gantt Chart's legend

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1. Display the Gantt Chart, then choose View, Barchart Options.
2. Click Options.
3. Click the General tab.
4. Mark or clear the Show Legend checkbox.

Delete a bar from a Gantt Chart

1. Display the Gantt Chart, then choose View, Bars.
2. Select the bar.
3. Click Delete.

> **Tip**
>
> To remove the bar from the Gantt Chart display without deleting it, clear the Display checkbox.

Working with the Profile and Spreadsheet

Select spreadsheet data fields

You can choose to show one of three default spreadsheet fields, or you can customize the spreadsheet fields.

To use default spreadsheet fields

- In the window displaying the spreadsheet, click the Display Options bar, choose Top Layout Options or Bottom Layout Options, Spreadsheet Fields, then choose one of the default fields.

To customize the spreadsheet fields

1. In the window displaying the spreadsheet, click the Display Options bar, choose Top Layout Options or Bottom Layout Options, Spreadsheet Fields, Customize.
2. In the Available Options area, select one or more fields you want to add and click



. To add all available fields, click



.To remove one or more fields, in the Selected Options area select the fields you want to remove and click



.To remove all fields, click

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. To change the order in which your fields display, in the Selected Options area, select the field you want to move and click



or



to change the field's position. To preview the selected fields without closing this dialog box, click Apply.

Modify a spreadsheet field title in a tracking layout

1. Click the Display Options bar in the layout displaying the spreadsheet, then choose Top Layout Options or Bottom Layout Options, Spreadsheet Fields, Customize.
2. In the Available Options area, select the spreadsheet field whose title you want to change, then click Edit Title.
3. Type a new title, specify its width and choose an alignment, then click OK. To preview the new title without closing the dialog box, click Apply.

Show or hide resource availability in a profile

You can view resource available units only in the total allocation resource profile, not when displaying the Resource Profile for selected projects.

1. Display the profile in the Bottom Layout window, click the Display Options bar, and choose Bottom Layout Options, Profile Settings. You can also click

   in the Bottom Layout window toolbar.
2. Click the Data tab.
3. In the Display area, choose Units.
4. In the Additional Data Options area, mark or clear the Show Available Units checkbox.

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> **Note**
>
> - Although the Show Available Units checkbox is available only when you are viewing resource allocation for all projects across the enterprise, you can edit your user preferences to show resource availability only for open projects. In the Resource Usage/Role Profile Options dialog box, click Preferences, then click the Resource Analysis tab. In the All Projects section, choose Opened Projects Only.
> - Bars and cumulative curves with negative values do not display in the profile. You can view the negative values in the profile details. Double-click on the profile to view the profile details.

Show or hide resource limits and overallocation in a profile

1. Display the profile in the Bottom Layout window, click the Display Options bar, and choose Bottom Layout Options, Profile Settings. You can also click

   in the Bottom Layout window toolbar.
2. Click the Data tab.
3. In the Display area, choose Units.
4. In the Additional Data Options area, mark or clear the Show Limit and Show Overallocation checkboxes. You can choose to show resource limits only, but to show overallocation, you must also choose the Show Limit option.

Show or hide resource overtime in a profile

You can view resource overtime, in a regular histogram,only when displaying the resource profile for selected projects, not in the total allocation resource profile.

1. Display the profile in the Top Layout window, then click the Display Options bar in the profile and choose Top Layout Options, Profile Settings. You can also click

   in the Top Layout window toolbar.
2. Click the Data tab.
3. In the Additional Data Options area, mark or clear the Show Overtime checkbox.

Display past period actuals in a profile

1. In the Tracking window, display the profile in the Bottom Layout window, click the Display Options bar, then choose Bottom Layout Options, Profile Settings.
2. Click the Data tab.

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3. In a project profile, mark the Display Actual and Earned Value using Financial Period data option. In a resource profile, mark the Display Actual using Financial Period data option.

> **Note**
>
> If projects are summarized by financial period (which is controlled by an administrative setting), the financial period profile setting is ignored. When projects are summarized by financial period and you display a financial period timescale, the profile displays past period actual values if performance has been stored for a financial period; for financial periods that do not have stored performance, the profile displays actual to date values stored in financial period intervals.

Dynamically level resources

Within a Resource Analysis layout (Tracking window), you can adjust forecast dates in the Gantt Chart and examine, in the resource total allocation profile, the impact that the date change has on total allocation for one or more specific resources or roles. To implement allocation adjustments in the project schedule, you can then reschedule the project using the project forecast dates.

The Resource Analysis layout must include a forecast bar in the Gantt chart. To use dynamic leveling to adjust overallocation, set the resource profile options to display limits and overallocation and set Resource Analysis user preferences to calculate time-distributed values using forecast dates.

The sample database includes a resource forecast layout that you can use to dynamically level resources, or you can create your own layout.

To dynamically level resources

1. Open the Resource Analysis layout and display the Gantt Chart in the Top Layout window and the profile in the Bottom Layout window. If you create your own layout, you need to include a forecast bar in the Gantt Chart, set the resource profile options to display resource limits and overallocation, and set the resource analysis user preferences to calculate time-distributed values using forecast dates. When you specify resource profile options, you can also set the resource analysis user preferences.
2. Select the resource or role whose allocation you want to review.
3. Position the mouse pointer over the end of the forecast bar for the EPS/WBS element you want to adjust; when the pointer changes to a hand, drag the bar to the left (earlier start date) or right (later start date).
4. To restore the forecast dates to their original values, in the Top Layout window toolbar, click .

To reschedule the project using the forecast dates

1. Choose Tools, Schedule.
2. Mark the Set Data Date and Project Planned Start to Project Forecast Start During Scheduling checkbox.
3. Click Options.
4. In the General tab, mark the Level Resources During Scheduling checkbox.

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5. Click Close, then click Schedule.

Change a profile's background lines

1. Right-click on the profile and choose Activity Usage Profile Options, Resource Usage Profile Options, or Profile Settings, depending on the type of profile and the active window.
2. Click the Graph tab.
3. To display a vertical background line for major and/or minor timescale increments, in the Vertical Lines area, mark the corresponding checkbox. For example, in a Year/Month format timescale, major lines would display between years; minor lines would display between months.
4. To display horizontal lines for each numerical increment listed along the side of the profile, choose the type of line you want to display, then select the line color. Choose None to hide background horizontal lines.
5. To specify additional profile display options, mark the corresponding checkbox(es): Show Legend: Mark to display a legend for the profile's bars. 3D Bars: Mark to display the profile's bars in 3D. Background Color: Click to change the profile's background color.

Show or hide a profile legend

1. In the window displaying the profile, click the Display Options bar and choose Top Layout Options or Bottom Layout Options, Profile Settings.You can also click

   in the Layout toolbar.
2. Click the Graph tab.
3. In the Additional Display Options area, mark or clear the Show Legend checkbox.

> **Note**
>
> You can move the profile legend within the profile. Move the mouse over the legend, click and hold the mouse button, and drag the legend.

Specify a project profile's data, filter, and display options

1. Open the project profile, then click the Display Options bar in the Bottom Layout window and choose Bottom Layout Options, Profile Settings.You can also click

   in the Bottom Layout window toolbar.
2. Click the Data tab.
3. Choose the category of information to display: Cost or Units.

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4. Mark the Display Actual and Earned Value using Financial Period data option if you want to display past period actual values. Do not mark the checkbox if you want to display actual to date values.

> **Note**
>
> If projects are summarized by financial period (which is controlled by an administrative setting), this option is ignored. When projects are summarized by financial period and you display a financial period timescale, the profile displays past period actual values if performance has been stored for a financial period; for financial periods that do not have stored performance, the profile displays actual to date values in financial period intervals.

5. To select the data included in the profile, mark the checkbox next to each filter type. Then, select the pattern to use to display each data type. If you choose to display cost data, you can select more than one filter to view a combination of cost values in the project profile. To display cost totals, mark the Total checkbox.
6. In the Show Bars/Curves area, mark the checkbox for each category of cost/units you want to display. To show this data by date, mark the By Date checkbox. To show this data as a curve representing cumulative value, mark the Cumulative checkbox. To select the color for each bar/curve, click the Color button.
7. In the Show Earned Value Curves area, mark the checkbox for each cumulative earned value curve you want to display. To select the color for each curve, click the Color button.
8. Click the Graph tab.
9. To display a vertical background line for major and/or minor timescale increments, in the Vertical Lines area, mark the corresponding checkbox. For example, in a Year/Month format timescale, major lines would display between years; minor lines would display between months.
10. To display horizontal lines for each numerical increment listed along the side of the profile, choose the type of line you want to display, then select the line color. Choose None to hide background horizontal lines.
11. To specify additional profile display options, mark the corresponding checkboxes: Show Legend: Mark to display a moveable legend for the profile's bars. 3D Bars: Mark to display the profile's bars in 3D. Background Color: Click to change the profile's background color. Calculate Average: Mark to specify the values you want to use to divide the timescale interval totals. Divide Interval Totals By: To divide the timescale interval totals by an increment you specify, type it in this field. Base on Hours Per Timeperiod: To divide the timescale interval totals by automatic increments, based on the date interval selected, mark this checkbox. When you choose this option, the Divide Interval Totals By field displays the division increment based on the division increment specified in User Preferences for the corresponding date interval: 1h for Hour date interval, 2h for Shift date interval, 8h for Day date interval, 40h for week date interval, and so on. Unit of Measure: Specify the unit of measure for the timescale intervals.
12. To view your profile options without closing the dialog box, click Apply.

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> **Note**
>
> If you choose the Display Actual and Earned Value using Financial Period data option, the profile displays past period actual values for the Actual bar and curve, the Earned Value curve, the Planned Value curve, and the Estimate at Completion curve.

Specify a resource profile's data and display options for a regular histogram

The options you can specify for a resource profile differ depending on whether you display the profile in resource or role view and on whether the profile displays resource allocation for one or more selected projects or total resource allocation across the enterprise.

The profile displayed in the Top Layout window shows resource allocation for one or more projects you select in the Project Explorer window. The profile displayed in the Bottom Layout window shows one or more selected resources' total allocation across the enterprise. You choose the resources to include in the profile by selecting them in the Resource Explorer window. To specify whether you want to display the profile in role or resource view, click the Resource Explorer window Display Options bar, then choose Select View, By Resource or By Role.

To specify data and display options

1. In the window displaying the profile, click the Display Options bar and choose either Top Layout Options or Bottom Layout Options, Profile Settings.
2. Click the Data tab.
3. Select the type of information to display: Units or Cost.
4. Mark the Display Actual using Financial Period data option if you want to display past period actual values. Do not mark the checkbox if you want to display actual to date values.

> **Note**
>
> If projects are summarized by financial period (which is controlled by an administrative setting), this option is ignored. When projects are summarized by financial period and you display a financial period timescale, the profile displays past period actual values if performance has been stored for a financial period; for financial periods that do not have stored performance, the profile displays actual to date values in financial period intervals.

5. In the Show Bars/Curves area, mark the checkbox to specify which unit/cost categories you want to display and whether to show this data by date or as a curve representing cumulative value. Select the color for each bar/curve.
6. If the profile displays resource allocation across the enterprise (all projects), you can choose how you want to display remaining values: as total remaining values across all projects in the enterprise, or as remaining values in the open projects vs. remaining values in closed projects. If you are displaying roles in the profile, you can choose to view staffed vs. unstaffed units/costs. Staffed units are those for which resources have been assigned to fill role assignments.

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7. To display additional resource data in the profile, mark the corresponding checkboxes: Show Limit: Mark to display the resource's maximum units for each time unit in the current layout. This option is available only if you choose to display Units. Show Overallocation: Mark to display overallocated values in the current layout. This option is available only if you choose to display Units and select Show Limit. Show Available Units: Mark to display a horizontal line that indicates the resource's available units. This option is available only if you choose to display All Projects. Show Overtime (open projects view only): Mark to show the resource's overtime units for each time unit in the current layout.
8. Click the Graph tab.
9. To display a vertical background line for major and/or minor timescale increments, in the Vertical Lines area, mark the corresponding checkbox. For example, in a Year/Month format timescale, major lines would display between years; minor lines would display between months.
10. To display horizontal lines for each numerical increment listed along the side of the profile, choose the type of line you want to display, then select the line color. Choose None to hide background horizontal lines.
11. To specify additional profile display options, mark the corresponding checkboxes: Show Legend: Mark to display a moveable legend for the profile's bars. 3D Bars: Mark to display the profile's bars in 3D. Show Values: Mark to display the values of each bar in the histogram. Background Color: Click to change the profile's background color. Calculate Average: Mark to specify the values you want to use to divide the timescale interval totals. Divide Interval Totals By: To divide the timescale interval totals by an increment you specify, type it in this field. Base on Hours Per Timeperiod: To divide the timescale interval totals by automatic increments, based on the date interval selected, mark this checkbox. When you choose this option, the Divide Interval Totals By field displays the division increment based on the division increment specified in User Preferences for the corresponding date interval: 1h for Hour date interval, 2h for Shift date interval, 8h for Day date interval, 40h for week date interval, and so on. Unit of Measure: Specify the unit of measure for the timescale intervals.
12. To specify the interval and dates to use to calculate time-distributed data for the profile, and to specify which projects are included (open only or open and specific closed projects) when you select the Show Remaining For, All Projects option, click Preferences. Then, click the Resource Analysis tab.

See More Detail: Set Resource Analysis Preferences for more detail.

Note

- The histogram will only display bars that have positive values. Double-click in the profile to display the negative period values in the profile details.
- If you choose the Display Actual using Financial Period data option, the profile displays past period actual values for the Actual bar and curve as well as the Show Overallocation and Show Available Units options.

Specify a resource profile's data and display options for a stacked histogram

The stacked histogram profile displayed in the Top Layout or Bottom Layout window shows resource allocation for one or more resource filters you specify in the profile settings. You must add a resource filter that selects the resources to include in the profile, then specify the color and pattern for the filter's bar. The profile legend in the left pane displays a list of the resource

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filters and their corresponding colors and patterns. To specify whether you want to display the profile in role or resource view, click the Display Options bar in the left pane, then choose Select View, By Resource or By Role.

To specify data and display options

1. In the window displaying the profile, click the Display Options bar and choose either Top Layout Options or Bottom Layout Options, Stacked Histogram.
2. Click the Display Options bar and choose either Top Layout Options or Bottom Layout Options, Profile Settings.
3. Click the Data tab.
4. Select the type of information to display: At Completion Units or At Completion Cost.
5. Mark the Display Actual using Financial Period data option if you want to display past period actual values. Do not mark the checkbox if you want to display actual to date values.

> **Note**
>
> If projects are summarized by financial period (which is controlled by an administrative setting), this option is ignored. When projects are summarized by financial period and you display a financial period timescale, the profile displays past period actual values if performance has been stored for a financial period; for financial periods that do not have stored performance, the profile displays actual to date values in financial period intervals.

6. In the Show area, choose to show individual curves representing the cumulative value for each filter/group name of resources or choose to show one cumulative curve as a total for all filter/group names of resources .
7. Add a resource or role filter to view in the profile. Double-click the Resource/Role Filter/ Group Name field to modify the selected resource or role filter specification. Click Add to specify a new resource or role filter. Create a resource or role filter specification to select an individual resource or role, or a group of resources or roles. For example, you can specify a filter that selects resources with the same resource code value. Click Delete to remove a resource/role filter/group name.
8. Select the pattern and color for the selected resource/role filter/group name. You can click the Up or Down arrows to arrange the filter list in the order it will display in the stacked histogram.
9. Click the Graph tab.
10. To display a vertical background line for major and/or minor timescale increments, in the Vertical Lines area, mark the corresponding checkbox. For example, in a Year/Month format timescale, major lines would display between years; minor lines would display between months.
11. To display horizontal lines for each numerical increment listed along the side of the profile, choose the type of line you want to display, then select the line color. Choose None to hide background horizontal lines.
12. To specify additional profile display options, mark the corresponding checkboxes: 3D Bars: Mark to display the profile's bars in 3D. Show Values: Mark to display the values of each bar in the histogram. Background Color: Click to change the profile's background color. Calculate Average: Mark to specify the values you want to use to divide the timescale interval totals. Divide Interval Totals By: To divide the timescale interval totals by an

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increment you specify, type it in this field. Base on Hours Per Timeperiod: To divide the timescale interval totals by automatic increments, based on the date interval selected, mark this checkbox. When you choose this option, the Divide Interval Totals By field displays the division increment based on the division increment specified in User Preferences for the corresponding date interval: 1h for Hour date interval, 2h for Shift date interval, 8h for Day date interval, 40h for week date interval, and so on. Unit of Measure: Specify the unit of measure for the timescale intervals.

13. To specify the interval and dates to use to calculate time-distributed data for the profile, and to specify which projects are included (open only or open and specific closed projects) when you select the Show Remaining For, All Projects option, click Preferences. Then, click the Resource Analysis tab.

> **Note**
>
> The histogram will only display bars that have positive values. Double-click in the profile to display the negative period values in the profile details.

Why are some spreadsheet cells gray?

Spreadsheet cells are gray/uneditable when any of the following are true:

- The activity associated with the assignment has a duration type of Fixed Units or Fixed Units/Time (you can only manually enter future period values for activities with a duration type of Fixed Duration & Units and Fixed Duration & Units/Time).
- The resource or role assigned to the activity does not have any valid worktime for the timeperiod. For resource assignments to task-dependent activities, and for all role assignments to activities, the module determines if there is valid worktime based on the activity calendar. For resource assignments to resource-dependent activities, the module determines if there is valid worktime based on the resource calendar.
- The displayed timescale unit in the spreadsheet is smaller than the minimum timescale unit used for time-distributed resource calculations. You can change this setting in the 'Interval for time-distributed resource calculations' field (User Preferences, Resource Analysis tab). For example, if this option is set to Week, you can only enter or edit data in weekly, monthly, or quarterly timescale buckets.
- The date of the timescale unit is prior to the Project Planned Start date (for the Budgeted or Planned Units field) or the Remaining Early Start date (for the Remaining Units field) of the activity.
- The activity associated with the assignment has an Actual Finish date.
- The timescale is set to Day/Shift or Day/Hour.
- The timescale is set to display only ordinal dates. You must display primary dates (with or without ordinal dates) to edit future period buckets.
- When the timescale is set to display financial period intervals, no financial period is defined for the timeperiod.
- You choose to display time-distributed Remaining Early units and costs according to forecast dates rather than remaining early dates in the User Preferences, Resource Analysis tab. This only applies to the Remaining Units field.
- You choose to calculate average values for the spreadsheet in the Spreadsheet Options dialog box.

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- You have not been assigned the Edit Future Periods project privilege.
- In the Resource Usage Spreadsheet of the Activities window, you are displaying assignment data for all projects rather than for open projects only. If you are displaying data for all projects, the title of the Display Options bar in the Resource Usage Spreadsheet is "Display: All Projects." To display data for open projects only, click the Display Options bar, then choose Show All Projects to remove the checkmark; the title of the Display Options bar changes to "Display: Open Projects Only."

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9

Grouping, Filtering, and Summarizing Data

Grouping and Sorting

Grouping activities by field

Organize activities by grouping one or more data items, including phase, department, responsible person, dates, total float, custom user field, and others. Grouping data enables you to focus on activities that have something in common.

You can further organize your layout by using sorting to arrange the order of activities. If you use both grouping and sorting to organize your layout, the items are grouped first and then sorted.

Grouping by hierarchy

Various hierarchies are available for viewing project data, including the EPS (Enterprise Project Structure), OBS (organizational breakdown structure), and WBS (work breakdown structure).

You can further organize a hierarchical view of data by grouping and sorting activities.

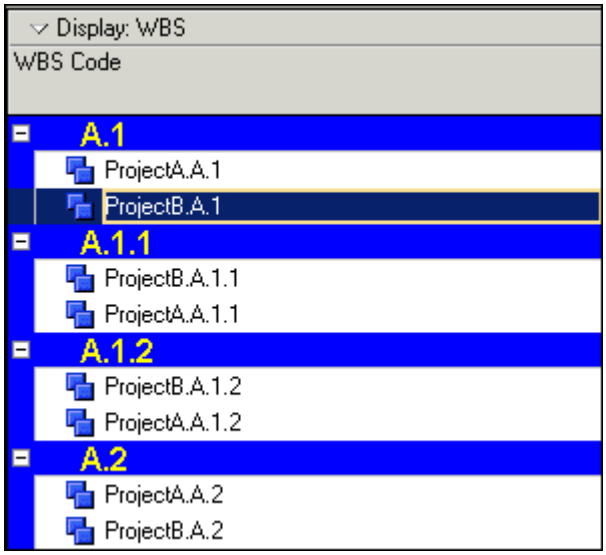
In addition, some fields available for grouping may also have a hierarchy (or number of levels) associated with them. For example, cost accounts may contain several levels of codes. You can specify the number of levels to display in the layout when you group by a hierarchical code.

Grouping activities by WBS path

You can organize multiple projects that use the same WBS structure by grouping their identical WBS levels. The WBS path lists activities grouped by WBS levels, without displaying the project level node. Group by WBS path in the Activities and WBS views. You can also filter or display the WBS Path as a column in your projects and reports.

Further organize your layout by using sorting to arrange the order of activities. If you use both grouping and sorting to organize your layout, the items are grouped first, then sorted.

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Sorting

Arrange how activities are ordered in a layout by specifying sorting criteria. Sort activities chronologically, alphabetically, numerically, or hierarchically depending on the data items you select. When you use both grouping and sorting to organize your layout, the data are grouped first and then sorted.

The following table describes how dates, numbers, and text are sorted.

Data	Ascending Order	Descending Order	Hierarchical
Dates	Sorts chronologically, from earliest to latest dates.	Sorts chronologically, from latest to earliest dates.	Dates can not be sorted hierarchically.
Numbers	Sorts from largest negative number to largest positive number.	Sorts from largest positive number to largest negative number.	Numbers can not be sorted hierarchically.
Codes and Text	Sorts alphanumerically, from 0 to 9, and then A to Z.	Sorts alphanumerically, from Z to A, and then from 9 to 0.	Sorts codes in the order in which they occur in their respective hierarchy.

> **Note**
>
> The option to sort Hierarchical only appears for fields that are hierarchical (for example, WBS or Responsible Manager).

Setting Page Breaks by Group Band

You can specify group bands to cause page breaks when printing a layout from the Projects, Resources, Activities (except for the Activity Network layout), and Resource Assignments windows.

The group band or bands you select for page breaks can be for items grouped by hierarchy, non-hierarchy, or both.

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- If the items are grouped only by hierarchy, you can set a page break for each level where you want a page break. Each level for which you specify a page break prints on a separate page. However, if no items are beneath a level, then the next page break occurs after the next level of the hierarchy that contains items.
- If the items are grouped by non-hierarchy, you can set page breaks for each band, but only the last page break in the list (in the Group By area of the Group and Sort dialog box) is used. For example, suppose you select to group by Early Start, Total Float, and Activity Type, in that order.
  - If you specify a page break only for Early Start, a new page is created for each Early Start band with total float, activity type items and activities showing under the Early Start band.
  - If you specify a page break only for Total Float, a new page is created for each Total Float band with activity type and activities showing under the band. The first Total Float band that falls under each Early Start band prints on the same page with the Early Start band; each subsequent Total Float band under that same Early Start band prints on a separate page.
  - If you specify a page break for both Early Start and Activity Type, only the Activity Type page break is used; the Early Start page break is ignored. A new page is created for each activity type band with activities showing under the band. The first Activity Type that falls under each Early Start band prints on the same page; each subsequent Activity Type band prints on a separate page.
- If the items are grouped both hierarchically and non-hierarchically, you can set page breaks for each band. If you set page breaks for more than one band, the page break set for the last band (in the Group By area of the Group and Sort dialog box) takes precedence unless the following condition occurs: If you set more than one page break, the last page break is overridden by a page break set for a higher band when the lower band does not fall under the higher band. For example, suppose you select to group by Activity Type and WBS to level 5, in that order.
  - If you specify a page break only for Activity Type, a new page is created for each Activity Type with WBS levels and activities showing under the Activity Type band.
  - If you specify a page break only for WBS level 3, a new page is created for each WBS level 3 band. The first WBS level 3 band that falls under each Activity Type band prints on the same page with the Activity Type band. Each subsequent WBS level 3 under that same Activity Type band prints on a separate page with levels 4 and 5 under it.
  - If you specify page breaks for both Activity Type and WBS level 3, only the WBS level 3 page break is used unless an Activity Type has no WBS Level 3, in which case the page break for that Activity Type band will be used, causing that Activity Type band and its associated WBS Level 2 entries (if any) to print on a separate page.

Group activities by field

1. Choose Project, Activities, then choose View, Group and Sort By.
2. In the Group By section, click the cell, then select the item by which you want to group.
3. Click Sort, then select a sort order for the group. Click OK.
4. To change a grouping band's attributes, such as the color and font, double-click the appropriate Font & Color field.
5. To group by additional items (up to 20 levels), repeat step 2.

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Tip

To remove a field, select the field you want to remove, then click Delete.

Note

In the Activity Network, when you select a field grouping, the hierarchy on the left side of the window contains the WBS hierarchy so you can filter activities according to the hierarchy.

Group activities by hierarchy

When viewing hierarchical data, such as by EPS, you can further organize the layout by grouping and sorting.

1. Choose Project, Activities, then choose View, Group and Sort By.
2. Click a cell in the Group By section, then select the field by which you want to group.
3. If the field you are grouping by has a hierarchy (or levels) associated with it, choose whether to display all levels or up to a specific level in the layout in the To Level field. Hierarchical fields include WBS, resources, roles, cost accounts, activity codes, resource codes, and project codes.
4. To change the grouping band's appearance, double-click the Font & Color cell and select the text properties and color you want to use.
5. To group by additional fields (up to 20 levels or items), repeat steps 2 through 4.

Note

- If both Indent and Sort Grouping Bands Alphabetically are checked, the grouping bands are sorted alphabetically within each parent.
- In the Activity Network, when you select a hierarchy grouping, the left side of the window contains the WBS hierarchy so you can filter activities according to the WBS.

Group activities by WBS path

1. Choose Project, Activities, then choose View, Group and Sort By. To view the WBS Path in the WBS view, choose Project, WBS. Then choose View, Group and Sort by, WBS Path.
2. In the Group By section, click the cell, then select WBS Path.
3. Click Sort, then select a sort order for the WBS path. Click OK.
4. To change the grouping band's attributes, such as the color and font, double-click the appropriate Font & Color field.

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Sort activities

You can specify one or more sorting criteria to control the order of activities in a layout.

1. Choose Project, Activities, then choose View, Group and Sort By.
2. Click Sort.
3. Click Add.
4. Click the Field Name column to select the field by which you want to sort.
5. Double-click the Sort Order column, then select a sort order: ascending (A to Z or lowest to highest), descending (Z to A or highest to lowest), or hierarchical (this option only appears for fields that are hierarchical). To sort by additional fields, repeat steps 3 through 5.
6. Click OK.
7. To preview your changes, click Apply.

> **Note**
>
> If you use both grouping and sorting to organize your layout, the items are grouped first and then sorted.

Remove activity groupings

1. Choose Project, Activities, then choose View, Group and Sort By.
2. In the Group By column, select the grouping fields you want to remove, then click Delete. To preview your changes, click Apply.

Format grouping bands

1. Choose View, Group and Sort By, or View, Group and Sort By, Customize.
2. Double-click the Font & Color cell you want to change. Click the Font box to change the text properties. Click the Color box to change the grouping band color.
3. Mark the appropriate checkbox to determine the text that displays on the grouping band. To display the field name on the grouping band, mark the Show Title checkbox. To display the ID or Code value on the grouping band, mark the Show ID/Code checkbox. To display the Name or Description on the grouping band, mark the Show Name/Description checkbox.

Set Page Breaks by Group Band

You can set page breaks by group bands from the Projects, Resources, Activities (except for the Activity Network layout), and Resource Assignments windows.

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Note

- This procedure assumes you have already set or selected the applicable Group By fields in the Group and Sort dialog box to group items.
- When you set page breaks by group band for a layout, the Break Page Every Group option on the Page Setup dialog box Options tab is disabled for that layout.

1. From the Projects, Resources, or Resource Assignments windows, choose View, Group and Sort By, Customize. From the Activities window, choose View, Group and Sort.
2. Mark the Page Break checkbox in the row of the group you want to set to cause a page break when printing this layout. Repeat this step for each additional group by field that you want to set to cause a page break.
3. Click OK.

Tip

- Page breaks are only visible in Print Preview and in published layouts.
- Page break settings are saved with the layout.

Show or hide empty title bands

When you group activities by field, a title band is listed for all values in that field. You can specify whether to show or hide the title bands that do not contain activities within the group.

1. Choose Project, Activities, then choose View, Group and Sort By.
2. Mark the Hide If Empty checkbox at the bottom of the dialog box to hide empty group title bands. Clear the Hide If Empty checkbox at the bottom of the dialog box to display empty group title bands.

Show field titles in grouping bands

1. Choose Project, Activities, then choose View, Group and Sort By.
2. Mark the Show Title checkbox at the bottom of the dialog box.

Group and sort resource assignments

1. Choose Project, Resource Assignments, then choose View, Group and Sort By, Customize or click the Display Options bar and choose Group and Sort By.
2. Choose one of the predefined group and sort options, or, to customize grouping and sorting, choose Customize.

If you choose Customize

1. In the Group By column, double-click the cell, then select the field by which you want to group.
2. Click Sort, then select a sort order for the grouping. Click OK.

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3. To change a group's display color and font, double-click the appropriate Font & Color field.
4. To group and sort by additional fields, repeat steps 1 and 2.

Tip

- To remove a grouping field, select the field you want to remove, then click Delete.
- If you manually plan future period resource/role allocation in the Resource Usage Spreadsheet, you should group and sort data in a way that enables you to easily identify resources/roles, the activities to which they are assigned, and the activities' associated projects (because the same activity name may appear in different projects). For example, you can group and sort the Resource Usage Spreadsheet by project and by resource.

Filtering

Filtering data

A filter temporarily limits the projects or activities that appear on screen, according to criteria you establish. For example, you can view active projects or activities scheduled to start during the next three weeks. Use the filters supplied or create your own. Apply one or more filters to the layout at any time.

Default filter criteria

The following table lists the criteria used for the predefined activity filters.

Filter Name	Display all rows	Parameter	Is	Value
Completed	Where	Activity Status	Equals	Completed
Critical	Where	Critical	Equals	Yes
Has Finish Constraint	Where	Primary Constraint	Equals	Finish On
	Or	Primary Constraint	Equals	Finish On or Before
	Or	Primary Constraint	Equals	Finish On or After
	Or	Primary Constraint	Equals	Mandatory Finish
	Or	Secondary Constraint	Equals	Finish On
	Or	Secondary Constraint	Equals	Finish On or Before
	Or	Secondary Constraint	Equals	Finish On or After
	Or	Secondary Constraint	Equals	Mandatory Finish
Has Start Constraint	Where	Primary Constraint	Equals	Start On
	Or	Primary Constraint	Equals	Start On or Before
	Or	Primary Constraint	Equals	Start On or After
	Or	Primary Constraint	Equals	Mandatory Start
	Or	Secondary Constraint	Equals	Start On
	Or	Secondary Constraint	Equals	Start On or Before
	Or	Secondary Constraint	Equals	Start On or After
	Or	Secondary Constraint	Equals	Mandatory Start

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Filter Name	Display all rows	Parameter	Is	Value
In Progress	Where	Activity Status	Equals	In Progress
Level of Effort	Where	Activity Type	Equals	Level of Effort
Longest Path	Where	Longest Path	Equals	Yes
Milestone	Where Or	Activity Type Activity Type	Equals Equals	Start Milestone Finish Milestone
Negative Float	Where	Total Float	Is less than	0.0d
This criterion only appears when P6 Professional is connected to a P6 Professional database. New Feedback to Review	Where	New Feedback	Equals	Yes
Non What-If	Where	Project Status	Is not equal to	What If
Non Critical	Where	Critical	Is not equal to	Yes
Normal	Where Or	Activity Type Activity Type	Equals Equals	Task Dependent Resource Dependent
Not Started	Where	Activity Status	Equals	Not Started

Create a filter

1. Choose Project, Activities, then choose View, Filter By, Customize.
2. Click New, then type a filter name.
3. Click the Parameter field and select a data item.
4. Double-click the Is field to select a filtering criteria. Specify a value in the Value field.
5. To add multiple criteria to the filter, click Add. In the new row, click the Parameter field and select a value. Double-click the Is field and select a filter criteria. Specify a value. To review your filter criteria to eliminate redundancy, from the Display Options bar, choose Optimize.
6. When you are finished specifying filter criteria, click OK.

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Note

- New selection criteria enables you to select values within or outside a specified range. "Is within range of" enables you to select date or numeric items that fall within the specified range. "Is not within range of" enables you to select date or numeric items that fall outside the specified range.
- When you type a value for duration or units in the Value field, the value is entered into the database without being converted to hours. So, for example, if you enter 2d, the value stored is 2 days, not 16 hours. If you do not specify a unit when entering a value (for example, you enter 2 rather than 2d), the time unit defaults to the time unit specified in user preferences (User Preferences, Time Units tab).
- When connected to a P6 Professional database: If you are filtering by unit or duration field and the Use assigned calendar to specify the number of work hours for each time period checkbox is cleared (Admin Preferences, Time Periods tab), then filtering applies the unit or duration value based on the Admin Preferences hours per time period settings.
- When connected to a P6 EPPM database: If you are filtering by unit or duration field and the Use assigned calendar to specify the number of work hours for each time period checkbox is cleared (Application Settings, Time Periods link in P6), then filtering applies the unit or duration value based on the Application Settings, Time Periods link, Hours per Time Period in P6.
- If the checkbox is marked, then filtering applies the unit or duration values as follows: For a task-dependent activity, duration or unit values are applied based on the applicable global or project calendar; for a resource-dependent activity, duration or unit values are applied based on the resource calendar.

Tip

To make this filter available to all users, select it, then click Make Global in the Filters dialog box.

Apply a filter

1. Choose Project, Activities.
2. Choose View, Filter By, Customize.
3. Mark the checkbox next to the filter you want to apply. To preview your changes, click Apply.

Tip

Combine existing filters to narrow the activities selected. Use any combination of default, global, layout, and user-defined filters. For example, combine the Critical and Milestone filters to view critical start and finish milestone activities in the layout.

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Combine filters

You can combine existing filters to narrow your activity selection. Use any combination of default, global, layout, and user-defined filters. For example, combine the Critical and Milestone filters to view critical start and finish milestone activities in the layout.

1. Choose Project, Activities, then choose View, Filter By, Customize.
2. Mark the checkbox next to each filter you want to apply.
3. Choose All or Any to determine how criteria are met.
4. Click Apply to preview the results.

Change a Gantt Chart bar's filter

1. Choose Project, Activities, then display the Gantt Chart.
2. Choose View, Bars.
3. Select the Gantt Chart bar for which you want to change the filter. Double-click the Filter column.
4. Mark the checkbox next to each filter you want to use.
5. Click OK. To view your changes without closing this dialog box, click Apply.

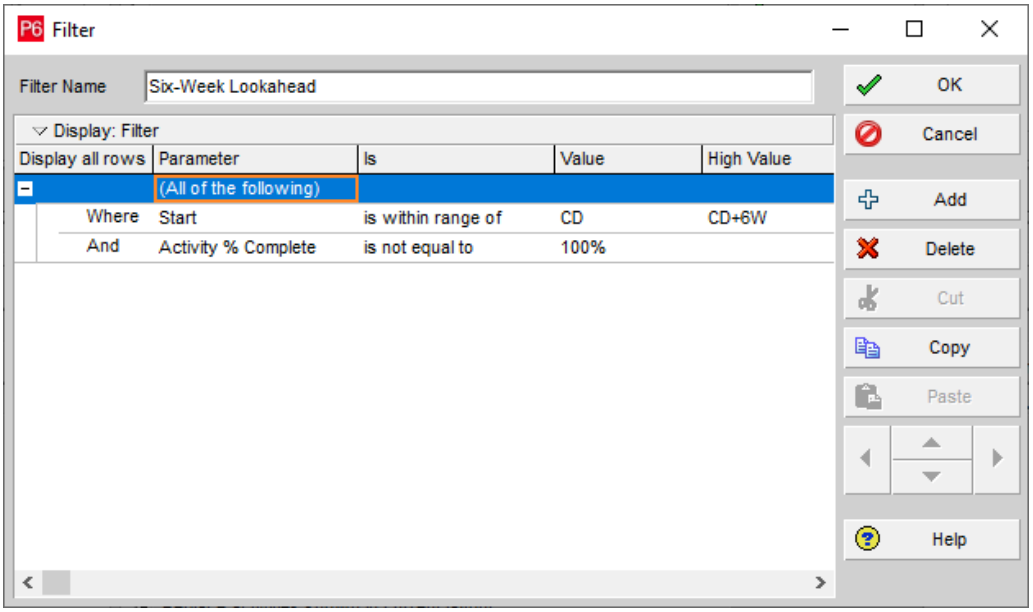
Create a lookahead filter

When defining filters, you can select data based on their relationship to the project start date, finish date, or current date, rather than specific calendar dates. This prevents you from having to update the filter each time you update the project.

To create a six-week lookahead filter

1. Choose Project, Activities, then choose View, Filter By.
2. Click New....
3. Type a filter name, such as Six-Week Lookahead.
4. In the top row of the table, select "(All of the following)".
5. In the next row of the table:
   a. In the Parameter field, select Start.
   b. In the Is field, select "is within range of".
   c. In the Value field, select CD - Current Date.
   d. In the High Value field, type `CF+6w`.
6. Click Add, then in the new row:
   a. In the parameter field, select Activity % Complete.
   b. In the Is field, select "is not equal to".
   c. In the Value field, type 100.
   Your filter should look like this:

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7. In the When applying the selected filter(s): area:
   - Select "Replace activities shown in current layout" to remove activities that do not match your filter from the view.
   - Select "Highlight activities in current layout which match criteria" to keep all activities on screen, but highlight those that match your filter.
8. Click OK to save the filter criteria.
9. Mark the checkbox in the Select column next to the newly created filter, then click OK.

Tip

- You can type into the Parameter field to perform a type-ahead search for the parameter you need.
- You can type into the Value and High Value fields, for example "CD+6w" sets the value as the current date plus six weeks.

Filter by project status

You can change an active (Open) project to inactive (Closed) when it is completed or determined as finished by all applicable parties. You can also assign a What-If status to a copied project for modification and analysis. Project status can be used when creating user-defined groups of projects called portfolios, for organizing and summarizing information, and for filtering projects.

- Choose File, Open, then click the Display Options bar and choose Filter By, Status. Choose the project status type that you want to view: either Active, Inactive, Planned, What-If, or Non What-If.

Remove filters

1. Choose Project, Activities, then choose View, Filter By, Customize.
2. To remove a specific filter, clear the Select checkbox next to it.

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3. To view all activities again, mark the All Activities checkbox at the top of the Filter dialog box.

Delete filters

1. Choose Project, Activities, then choose View, Filter By, Customize.
2. Select the filter you want to delete, then click Delete.

> **Note**
>
> You can only delete user-defined filters unless you have been granted access rights to delete global filters.

Summarizing

Summarizing activity data

When you group a layout by data item, you can easily "roll up" activity data to calculate group totals and simplify the data presentation. Click the plus (+) or minus (-) symbols to the left of any grouping band to expand or collapse information, or right-click in the layout and choose Expand All or Collapse All. You can also double-click grouping bands to show or hide details.

To show both group totals and detailed information for reporting, you can collapse or expand individual groups and then show a grand total at the top of the layout.

> **Note**
>
> The Summary Service also enables you to summarize project-level values and store them in the database for analysis and reporting across the enterprise.

How data is summarized

This topic describes how P6 Professional calculates and displays summary information for costs and units, custom user fields, dates, durations, float, progress, baselines, comparison data, and variances.

Costs and units: P6 Professional totals cost and unit data items, such as budgeted or planned cost and budgeted or planned quantity, by adding the values for each activity in the summary.

Custom user fields: P6 Professional summarizes user fields according to type. For example, items representing start dates show the earliest start date, and items for finish dates show the latest finish dates. A numeric user field is totaled for the summarized activities.

Dates: If you display early dates, P6 Professional shows the earliest early (or actual) start and the latest early (or actual) finish dates. The same rules apply for late dates and target early and late dates.

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Durations: P6 Professional summarizes original or planned and remaining duration values. For activities with no progress, the original or planned and remaining durations are the number of workperiods between the earliest start and latest finish dates. If the summary activity has an actual start date, P6 Professional calculates the original or planned duration from the actual start date to the latest finish date. In this case, P6 Professional calculates remaining duration from the earliest early start date to the latest early finish date.

If the summary activity is 100 percent complete, P6 Professional calculates the original or planned duration as the difference between the actual start and the actual finish dates; the remaining duration is zero.

If you display actual duration, the data is calculated as follows:

Earliest Actual Start - Data Date (for activities with no actual finish date)

Earliest Actual Start - Latest Actual Finish (all activities in the summary must have an actual finish date)

Float: You can base total float of the summarized data on the start dates, finish dates, or most critical dates. Set this option in the Compute Total Float As field on the General tab of the Schedule Options dialog box (choose Tools, Schedule, Options). If you base float on start dates, and all activities are assigned to the same calendar, total float is the difference between the earliest late start and the earliest early start dates in workperiods. For finish dates, P6 Professional uses the latest late finish and the latest early finish dates to calculate total float. The most critical float is the lowest total float encountered in the detailed activities from each summary group.

If all activities are not assigned to the same calendar, P6 Professional defines total float based on the default global calendar.

Progress: The simplest measure of percent complete uses duration to compare the amount of time remaining to complete the activities to their original or planned duration. In this case, P6 Professional uses the following ratio for each summarized group.

[(Summary Current Original or Planned Duration – Summary Remaining Duration) / Summary Current Original or Planned Duration] * 100

Baseline data, comparison data, and variances: You classify each baseline, comparison, or variance data item as either a date or a duration data item. See the Dates and Durations sections earlier in this topic for descriptions of how P6 Professional summarizes dates and durations.

Calendar used to calculate units and durations in grouping (summary) bands

Duration and unit values in grouping bands are calculated using the hours per time period settings defined in the default global calendar, default project calendar, resource calendar, or activity calendar, as follows:

For live (detail) data:

Activities window

- When a single project is open and all activities in a group are using the same calendar, then the rolled up duration and unit values are calculated using that calendar. If all the activities are not using the same calendar, then the rolled up duration and unit values are calculated using the project's default calendar.
- When multiple projects are open and all the activities in a group are using the same calendar, then the rolled up duration and unit values are calculated using that calendar. However, if all the activities are not using the same calendar, then the values are calculated as follows:

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  - If all the activities under the group band are in the same project, then rolled up duration and unit values are calculated using the project's default calendar.
  - If all activities under the group band do not belong to the same project, then rolled up duration and unit values are calculated using the default global calendar.

Work Breakdown Structure window

- When all activities under a WBS use the same calendar, then the rolled up duration values are calculated using that calendar. If all the activities are not using the same calendar, then the rolled up duration values are calculated using the project's default calendar.

Projects window

- When projects are open, rolled up duration values are calculated based on live rollup calculations. When projects are closed, the rolled up duration values are calculated based on summarized data. The project's default calendar is typically used to calculate the project's duration values for live data. However, if all activities under a group band are using the same calendar (one that is other than the project's default calendar), then the duration values are calculated using that calendar.

Resource Assignments window (the following applies only to an open project)

- If all resource assignment records under a band belong to the same resource (that is, are grouped by resource), then duration values are calculated using the resource's calendar.
- If resource assignment records under a band belong to different resources (using the same calendar or not), then duration values are calculated using the default global calendar.

> **Note**
>
> The Resource Assignments window may display duration values you do not expect because resource assignment durations are based on the activity's calendar when task dependent and on the resource calendar when resource dependent. The following items provide the reasoning for the duration values that are displayed:

  - If grouped by resource and all tasks are resource dependent, then the resource's duration for tasks and group bands will be the same duration value.
  - If grouped by resource and all tasks are task dependent, then the resource's duration for tasks and group bands can show different duration values based on the calendars assigned to each. For example, the duration value for the group band may be 12.0h based on the resource calendar in the group band, while the duration value for an associated task dependent task may be 10.0h, based on the task calendar. However, if both resource and activity are assigned to the same calendar, then the values at task and group bands are the same.
  - If grouped by resource and all tasks are a mix of resource and task dependent, then the resource's duration for tasks and group bands will show different duration values based on the calendars assigned to each.

Tracking window

- When projects are open, rolled up duration values are calculated based on live rollup calculations. When projects are closed, the rolled up duration values are calculated based on summarized data. The project's default calendar is typically used to calculate the project's duration values for live data. However, if all activities under a group band are

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using the same calendar (one that is other than the project's default calendar), then the duration values are calculated using that calendar.

For summarized data:

- For project-level and WBS-level summary data: If all activities under the group band are using the same calendar, then the summarized duration and unit values are calculated using that calendar. If all the activities are not using that calendar, then the values are calculated using the project's default calendar.
- For enterprise resource and role summaries: The summarized duration and unit values are calculated using the resource's calendar.
- For EPS-level summary data: If all projects under an EPS are assigned to the same default project calendar, then the summarized duration and unit values are calculated using that calendar. If all projects under an EPS are not assigned to the same default calendar, then the summarized duration and unit values are calculated using the default global calendar.

> **Tip**
>
> For hierarchical banding, the calendars for all activities directly under the band and all bands under that must be the same or else the default project or global calendar is used. The rules for whether the default project or global calendar is used are the same as listed above.

Collapse or expand grouped data

In a grouped layout, you can summarize activities to show a simple overall picture of the schedule without all the details for each activity. Summarize by any item available for grouping, such as by project, activity code, WBS, resource, or date.

1. Choose Project, Activities, then choose View, Group and Sort By.
2. Group activities by any data item.
3. To summarize a grouping band, click the minus sign (-) to the left of the band. All values roll up into a summarized grouping band.
4. To expand a summarized grouping band, click the plus sign (+).

Collapse or expand all groups in a layout

To summarize all groups

- Choose View, Collapse All. You can also right-click in the layout window, then choose Collapse All.

To unsummarize all groups

- Choose View, Expand All. You can also right-click in the layout window, then choose Expand All.

Show a grand total

1. Choose Project, Activities, then choose View, Group and Sort By.

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2. Select the data items by which you want to group.
3. Mark the Show Grand Totals checkbox at the top of the dialog box.

Display summary data when grouping

1. Choose Project, Activities, then choose View, Group and Sort By.
2. Select the data items by which you want to group.
3. Mark the Show Summaries Only checkbox at the top of the dialog box.

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10

Publishing Project Web sites

Project Web Site Publisher

To facilitate communicating project data in a company with offices local or worldwide, you can publish project plans in HTML format using the Project Web Site Publisher. Transfer these documents to either the World Wide Web (using FTP) or your office intranet, and view them using an Internet browser.The documents contain hypertext links, or jumps, to other pages in the structure, allowing you to move between projects and reports and from page to page within a report.

> ⚠ **Caution**
>
> **Caution** Personal information (PI) may be at risk of exposure. Depending on local data protection laws organizations may be responsible for mitigating any risk of exposure.

When publishing a project Web site, you control the level of detail published in terms of activity information and personal information for resources, as well as which project reports you want to include in the Web site.

> ⓘ **Note**
>
> You can use the default Web site template, or "scheme," to build your project Web site. You can customize the existing scheme or create your own, adding or changing graphics, fonts, and colors.

Project Web sites

The Project Web Site layout enables you to both browse a project plan at a high level and quickly view more detailed information about specific activities, work products and documents, resources, and so on. The Project Web Site layout is divided into three panes. The upper pane contains a navigation toolbar that enables you to look at the various sections of the Web site. The left pane is the navigation pane; the right pane displays the specific details for project elements. Select the element you want to view in the left pane; the right pane displays detailed information about that element.

You can navigate a project Web site using the project's work breakdown structure (WBS), resource hierarchy, roles, work products and documents outline, activity codes, and issues. For example, visitors can select a resource in the left pane and view the resource's information and activity assignments in the right pane. Similarly, visitors can select a work product or document

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and view the document's details and WBS and activity assignments. The level of detailed information a visitor can view depends on the information you choose to publish.

You can also view reports, activity layouts, and tracking layouts in the project Web site. The list of reports or layouts appears in the left pane, and the report or layout itself is displayed in the right pane when you select it.

Publishing activity and tracking layouts

In addition to publishing activity and tracking layouts as part of a project Web site, you can publish individual activity and tracking layouts on the Internet or on your corporate intranet. These layouts are not connected to any previously created project Web site, but instead are self-contained Web sites consisting of the activity or tracking layouts you specify. When no projects are open, layout publishing features are disabled.

For activity and tracking layouts

- Published layouts are a snapshot of your project; they are not interactive.
- The columns displayed in the Web pages are defined by the layout you select.
- Header and footer information saved for a layout is included in the published layout.
- Regardless of the view settings, layouts are published with all project elements expanded.
- For timescaled layouts, the published timescale begins with the earliest Start Date and ends with the latest Finish Date, regardless of the view settings.

For tracking layouts

- Information is published only for open projects, regardless of the layout view. To publish a layout that includes closed projects, publish the layout through the Print Preview feature.

  Choose File, Print Preview, then click .

Publish projects as Web sites

Before you publish a project as a Web site for the first time, you might choose to create a new folder on your computer or network or verify that the existing folder you want to use is empty.

1. Open the project you want to publish.
2. Choose Tools, Publish, Project Web Site.
3. Click the General tab.
4. In the Web Site Name field, type the title of the Web site.
5. In the Web Site Description field, type a description of the Web site. This description appears on the Web site's initial page.
6. In the Publish Directory field, type the full path for the folder in which you want to save the project's Web site files, or click  and select the location.
7. Click Edit Scheme to modify the specified scheme or select another scheme.
8. Click the Topics tab and mark the appropriate checkboxes to specify the project information you want to publish on the project's Web site. The checkboxes determine what Activity Details are available on the project Web site. If you clear all checkboxes, then the

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General activity information option is automatically selected because at least one type of activity detail information must be included in the Web site.

9. Click the Graphics tab and specify which activity or tracking layouts to include as graphical reports in the Web site.
10. Click the Reports tab and specify which reports to include in the Web site.
11. Click Publish. If the folder you selected contains older Web site files or other files, a message warns you that those files will be deleted. Choose Yes to continue or No to cancel.

> **Tip**
>
> To preview the Web site after creating the files, mark the Automatically Launch Web Site Preview After Publishing checkbox in the General tab.

Publish activity and tracking layouts on a Project Website

Before you publish a project as a Web site for the first time, you might choose to create a new folder on your computer or network or verify that the existing folder you want to use is empty.

1. Open the project you want to publish.
2. Choose Tools, Publish, Project Web Site.
3. Click the Graphics tab.
4. Mark the Include in Project Web Site checkbox to include activity and/or tracking layouts in the project Web site.
5. In the Activity Layouts section, click the Assign button, select the activity layouts you want to include in the Web site, then click the Select button.
6. In the Tracking Layouts section, click the Assign button, select the tracking layouts you want to include in the Web site, then click the Select button.
7. Click Publish. If the folder you selected contains older Web site files or other files, a message warns you that those files will be deleted. Choose Yes to continue or No to cancel. The layouts are added to the project Web site's HTML folder.

Publish reports on a Project Website

Before you publish a project as a Web site for the first time, you might choose to create a new folder on your computer or network or verify that the existing folder you want to use is empty.

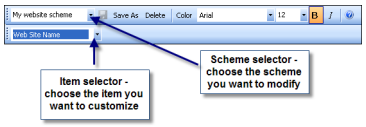
1. Open the project you want to publish.
2. Choose Tools, Publish, Project Web Site.
3. Click the Reports tab.
4. Mark the Include in Project Web Site checkbox to include reports in the project Web site.
5. Click the Assign button.
6. Select the reports you want to include in the Web site, then click the Select button.

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7. Click Publish. If the folder you selected contains older Web site files or other files, a message warns you that those files will be deleted. Choose Yes to continue or No to cancel. The reports are added to the project Web site's HTML folder.

Customize a Project Website

1. Choose Tools, Publish, Project Web Site.
2. Click the General tab, then click Edit Scheme.
3. Click the Splash Tab.
4. Click a splash screen element to select it, or choose an element from the item selector (see image below), then customize it in the fields at the top of the dialog box.
5. Click the Main tab.
6. Click a screen element to select it, or choose an element from the item selector (see image below), then customize it in the fields at the top of the dialog box.
7. Click Save As to save the modified scheme. Use the existing scheme name to replace the old scheme with the modified one, or give the scheme a new name to save it as a separate project Web site scheme.



Publish Activity layouts

1. Open the project you want to publish.
2. Choose Tools, Publish, Activity Layouts.
3. Select the layouts you want to publish.
4. Click the Select button.
5. Specify a location for the new files and type a filename (with no extension).
6. Click Open.

Publish tracking layouts

1. Open the project you want to publish.
2. Choose Tools, Publish, Tracking Layouts.
3. Select the layouts you want to publish.
4. Click the Select button.
5. Specify a location for the new files and type a filename (with no extension).
6. Click Open.

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Remove activity or tracking layouts from a Project Web site

1. Open the project you published.
2. Choose Tools, Publish, Project Web Site.
3. Click the Graphics tab.
4. Select the activity or tracking layouts you want to delete.
5. Click the Remove button, then click Yes.

Remove reports from a Project Website

1. Open the project you published.
2. Choose Tools, Publish, Project Web Site.
3. Click the Reports tab.
4. Select the reports you want to delete.
5. Click the Remove button, then click Yes.

Delete a Project Website scheme

1. Choose Tools, Publish, Project Web Site.
2. Click the General tab, then click Edit Scheme.
3. Select the scheme you want to remove in the Scheme field.
4. Click Delete.

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11

Tools

Launching External Applications

Open external applications from the Tools menu

You can add menu items for other applications to the Tools menu in P6 Professional.

To add an external application to the Tools menu in P6 Professional:

1. Navigate to `%APPDATA%\Oracle\Primavera P6\P6 Professional\<VERSION>` and make a backup copy of the Primavera.Config.xml file.
2. Using an XML editor, or any program that can save files as XML files edit the Primavera.Config.xml file to specify the external applications to show on the Tools menu. If you are using a PPM database, add the node to the <External_Applications> node inside the <P6Professional> node. If you are using an EPPM database, add the node to the <External_Applications> node inside the <P6EPPM> node.

   The following is a sample node that adds an entry to the tools menu which will open a Calculator application:

   ```
   <Calculator>
   <Menu_Name>Calculator</Menu_Name>
   <APIApplication>N</APIApplication>
   <Application>C:\windows\system32\calc.exe</Application>
   <EnableIfNoProjects>Y</EnableIfNoProjects>
   <Parameters>/username="$USER" /password=$AESPASSWORD</Parameters>
   <VisibleInMenu>Y</VisibleInMenu>
   <Working_Dir>C:\windows\system32</Working_Dir>
   </Calculator>
   ```
3. Save the file and close the XML editor.
   You can specify more than one external application by creating multiple nodes within the <External_Applications> node. Each node must have a unique name. For example:

   ```
   <Exteral_Applications>
   <Calculator>
   <Menu_Name>Calculator</Menu_Name>
   <APIApplication>N</APIApplication>
   <Application>C:\windows\system32\calc.exe</Application>
   <EnableIfNoProjects>Y</EnableIfNoProjects>
   ```


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```
<Parameters>/username="$USER" /password=$AESPASSWORD</Parameters>
<VisibleInMenu>Y</VisibleInMenu>
<Working_Dir>C:\windows\system32</Working_Dir>
</Calculator>
<Notepad>
<Menu_Name>Notepad</Menu_Name>
<APIApplication>N</APIApplication>
<Application>C:\windows\system32\notepad.exe</Application>
<EnableIfNoProjects>Y</EnableIfNoProjects>
<VisibleInMenu>Y</VisibleInMenu>
<Working_Dir>C:\windows\system32</Working_Dir>
</Notepad>
</Exteral_Applications>
```

> **Note**
>
> Do not remove any of the existing nodes in the <External_Applications> section of the Primavera.Config.xml file

Parameters

You can pass any of the following parameters when the user opens the external application by including them inside the <Parameters> tags.

Tag	Description
<Menu_Name>	Required. The text to be shown in the Tools menu.
<APIApplication>	Required. Specifies whether to invoke the P6 Integration API when opening the application. Possible values are Y and N.
<Application>	Required. The path and name of the .exe file to be opened.
<EnableIfNoProjects>	Required. Specifies whether the application should show in the tools menu even if there are no projects open.

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Tag	Description
<Parameters>	Optional. Specifies any parameters to be passed to the application. You can pass any of the following parameters: • $USER • $ENC_PASSWORD • $PROJECT_IDS • $CURRENT_DBNAME • $PROJECT_CODES • $LANGUAGE • $COUNTRY • $APPNAME • $CALLING_APP • $BREBOOTSTRAPFILEPATH • $SCHEDCOMPAREBRAND • $AESPASSWORD • $ALIASNAME • $TSLDSELECTEDPROJECTS • $BRE_CONNECTION_PARAMS • $COOKIELOCATION • $RUNDIR • $TEMPDIR • $SELECTED_PROJECT_ID • $SELECTED_BASELINE_ID • $PRODUCT_CODE • $UPDATE_BASELINE_OPTION_FILE If you specify the $PROJECT_CODES or $PROJECT_IDS parameters, the menu item will be disabled on the Tools menu when you do not have any projects open.
<VisibleInMenu>	Required. Specifies whether the menu item should be visible in the Tools menu. Possible values are Y and N.
<Working_Dir>	Required. The working directory of the application to be called. This is usually the installation directory for the application.

Note

- If using multiple parameters, you must use a semicolon as the separator.
- The Default string value is automatically added when you add a new key.
- If you use $PROJECT_CODES or $PROJECT_IDS and you do not have a project open in P6 Professional, your applications will be disabled on the Tools menu.

P6 Visualizer

P6 Visualizer overview

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P6 Visualizer is a reporting-tool that you can use to create customizable Gantt charts, Timescaled Logic Diagrams and Schedule Comparisons for time-based, daily comparison reporting. Visualizer can be launched as a standalone application that can connect to P6 Professional and P6 EPPM databases. You can also open Visualizer from P6 Professional by selecting Tools, Visualizer. To access Visualizer, you need to have Visualizer module access.

Project data is not sent from P6 Professional to Visualizer. Instead, you can select projects from within the Visualizer.

Gantt charts provide a graphical display of the project's schedule information in the order determined by grouping and sorting options. The Gantt chart shows each activity's duration, using the timescale specified, as a horizontal bar. A line connecting activity bars indicates a relationship. Gantt charts allocate a row for each activity.

TSLDs allow more than one activity per row, which condenses the project entire project plan and the chains of activities that drive the project schedule. TSLDs present a graphic depiction of activities and the overall logic of a project according to time.

Schedule Comparison enables you to generate a report that compares selected data fields in a revised project and its corresponding original project or a revised project and a corresponding baseline.

Visualizer allows you to set options, then visualize the reports. You can directly output reports to print or an XPS document.

When you start the Visualizer application, the Visualizer workspace appears. The Visualizer workspace is the user interface. From the Visualizer workspace, you can draw, view, edit, print, and save Gantt Charts and TSLDs.

See the P6 Visualizer Help for more information about Visualizer. That help is available from the Visualizer workspace.

Launching P6 Visualizer from P6 Professional

Use this procedure to launch P6 Visualizer. Project data is not sent from P6 Professional, therefore, it does not matter if projects are currently opened, scheduled, or filtered. You can select projects from Visualizer. You can select or create a Gantt or Timescaled Logic Diagram layout and draw a Gantt chart or TSLD.

To launch P6 Visualizer, click Tools, Visualizer.

Approvals (P6 EPPM Only)

Timesheets overview

With the optional P6 Team Member Web module installed, users can submit timesheets reflecting their work assignments on projects. Timesheet approval managers can then approve or reject those timesheets.

Timesheets allow the user to record hours for assigned activities. Timesheets are assigned a period and an approval level. The period defines the amount of time the timesheet covers, lasting from one week to a month, and what day of the week will conclude the timesheet. The approval level specifies how many levels of approval are necessary to submit a timesheet. Approval levels range anywhere from no approval required to two approval levels.

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After a resource completes an online timesheet, the assigned approval manager for the resource, or a designated delegate, then performs any of the following tasks in P6 Professional:

- approves or rejects the timesheet
- notifies the resource about the status of the timesheet
- views/determines if a resource has started or submitted a particular timesheet
- adds timesheet notes

> **Note**
>
> If you are a timesheet approval delegate for a project manager, you can review timesheets for resources who are assigned to activities within the projects for which you have been granted approval rights. A project manager can transfer timesheet approval rights to different delegates for each project.

Approving or rejecting timesheets

1. Choose Tools, Approve, Timesheets.
2. On the Approving As list, select Project Manager or Resource Manager.
3. Select a timesheet to review.
4. View the details of the timesheet in the Details dock.
5. Click Approve to approve the timesheet or Reject to reject it.

> **Tip**
>
> - Select a timesheet and click Email to send an email to the resource who submitted the selected timesheet.
> - You can filter the list of timesheets in the view in several ways:
>   - Use the Action Required button to filter the list to only timesheets awaiting your action.
>   - Select a time period from the list or enter a Start date and End Date and then click to filter your view by the date a timesheet was submitted.
>   - Select one or more statuses and then click to view only timesheets with the selected statuses.
> - Use the Action Required button to filter the list to only timesheets awaiting your action.
> - Select a time period from the list or enter a Start date and End Date and then click to filter your view by the date a timesheet was submitted.
> - Select one or more statuses and then click to view only timesheets with the selected statuses.

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Assigning a project manager delegate for timesheets

1. Choose Tools, Approve, Timesheets.
2. Select Delegate > Project Manager Delegate.
3. For each project for which you want delegate timesheet approval, in the Delegate column click ..., select a user, and click .
4. Mark the checkbox next to each of the projects for which you want to delegate timesheet approval.
5. Click Apply.

> **Tip**
>
> You can set up approval delegates for projects separately from activating the delegated responsibility. For example, if you will always delegate timesheet approval responsibilities for a project to the same person when you are out of the office, you can select that user and click Apply to assign them as a delegate. At a later date, you can mark the checkbox next to the projects for which you want to delegate approval responsibilities and click Apply to activate the delegation responsibilities to the associated users.

Assigning a resource manager delegate for timesheets

1. Choose Tools, Approve, Timesheets.
2. Select Delegate > Resource Manager Delegate.
3. Click ..., select a user, and click .

Adding notes to a timesheet

1. Choose Tools, Approve, Timesheets.
2. In the timesheet list, on the row of the timesheet for which you want to add notes, click .
3. Type notes in the Add Notes box.
4. Click Add.

Status Updates overview

With the optional P6 Team Member Web module installed, project managers can require that updates made to activities must be approved before they are applied. If they have the appropriate OBS privileges, reviewers can process those updates in P6 Professional when connected to a P6 EPPM database. Users assigned the Project Superuser or Admin Superuser profiles can also process status updates.

Status updates are be configured in P6 and can require one or multiple reviewers to approve each update before applying it. Reviewers can approve, reject, hold, remove hold from, or

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override a status update and can communicate with the submitting user by email or in a Discussion thread saved with the status update.

> **Note**
>
> You cannot review status updates for projects that are checked out, projects that are opened exclusively by another user, or if you are working in offline mode.

Approving or rejecting status updates

You can see the changes made during a status update in cards in the Status Updates page. If all the changes are correct, you can then approve the card. If the updates are not correct, and you cannot or do not want to override the updates or put them on hold, you can reject the updates.

1. Choose Tools, Approvals, Status Updates.
2. On the Group By list, select whether to group the list by Project, Resource, or Review.
3. Select the projects for which you want to review status updates.
4. On the toolbar, select whether to view Pending, Held, or Rejected status updates.
5. Review the changed fields for each status update you will action. If necessary, scroll within the status update card, or click View More to see all the changes.
6. Optionally, choose to send an email to the submitting user, view or participate in the discussion about the activity, view the reviewers, and see more information about the status update.
7. Select one or more status update cards, then click Approve to approve the updates or click Reject to reject the updates.
8. Click Close to close the Status Updates dialog box.

Overriding status updates

If status updates have been submitted with incorrect information, you can override the update to change the values submitted by the resource. Optionally, you can notify the resource who entered the update. After you have changed the data entered for the update, you can later approve the update.

1. Choose Tools, Approvals, Status Updates.
2. On the Group By list, select whether to group the cards by Project, Resource, or Review.
3. Select the projects for which you want to review status updates.
4. Select the card or cards for which you want to override the status updates, then click Override.
5. In the New column, modify the values for the fields you need to change for each card you are overriding.
6. Optionally, mark the Notify Team Member by Email checkbox, if you want the team member who submitted the status update to receive an email about the overridden values.
7. Click Override.

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Putting status updates on hold

You can put status updates on hold when you need more information about the changes, or more time to review the data before you choose to apply the changes or reject the status update.

1. Choose Tools, Approvals, Status Updates.
2. On the Group By list, select whether to group the list by Project, Resource, or Review.
3. Select the projects for which you want to review status updates.
4. Select to view Pending status updates.
5. Select the updates you want to place on hold, then click Hold.

> **Note**
>
> You can remove a hold from status updates in the Held view by selecting them, then clicking Remove Hold.

Participating in discussions

You can use the Discussion dialog box to have a conversation about an activity with your team members who use P6 or P6 Team Member. The conversation is saved with the activity and is available for future reference.

To send a message to team members:

1. Choose Tools, Approvals, Status Updates.
2. On the Group By list, select whether to group the list by Project, Resource, or Review.
3. Scroll to a card relating to the activity you want to discuss, then click Discussions.
4. Optionally select whether to show all discussion entries, only those you sent, or only those received.
5. Optionally select whether to sort the discussion entries with the newest entries or oldest entries at the top of the list.
6. Review the conversation so far.
7. Type your comments into the Enter discussion comments field.
8. When you have finished making your addition to the discussion, click Post.

Viewing the update history of an activity

1. .....

Summary Service

Viewing summary project information

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After you summarize project data, you can easily view this information. For example, add the Planned Value Cost, Earned Value Cost, Actual Cost, Cost Variance, and Schedule Variance columns to the Projects view and group by EPS to quickly see which projects are behind schedule and/or over budget in the enterprise.

The module summarizes two sets of project data: past period actuals and actual to date. You can choose the set of data you want to view in profile options.

> **Note**
>
> A schedule variance occurs when earned value is less than planned value. Cost variances occur when actual cost exceeds earned value.

Rolling up data with the summary service

The summary service enables you to roll up and save resource quantity, cost, and/or custom user field information starting at an EPS node or from a specific WBS level. You can then view summary data such as planned value and other cost values at various levels of the EPS.

You can customize EPS columns to view summary data before you open a project.

You can roll up data using the Tools, Summarize command. P6 Professional considers the summary settings for each project before including it in the rollup. When you roll up data, P6 Professional saves the new summary values to the project database, overwriting any previously calculated summary values.

Set a project's summarization options

1. Choose Enterprise, Projects.
2. Select the project you want to summarize.
3. Display Project Details, then click the Settings tab.
4. In the Summarized Data section, type the maximum WBS level to which the project can be summarized in the Summarize to WBS Level field. When P6 Professional is connected to a P6 EPPM database, this value represents the number of levels of data that will display in the Portfolios section of P6. The Last Summarized On field displays the last time data were summarized for the project.

Set global summarization options (P6 Professional Only)

In addition to specifying summarization options per project (Project Details, Settings tab), if you have administrator rights, you can specify global summarization options for storing resource spreads at the activity and resource levels.

1. Choose Admin, Preferences.
2. Select the Options tab.
3. In the 'Select summarization periods' section, choose how you want to summarize and store resource data: By calendar, By financial period, or both. If you choose to summarize and store resource data by calendar intervals, in the WBS Level field, choose the time interval, such as week or month, for storing summarized activity data. Then, in the

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Resource/Role Assignment Level field, choose the time interval, such as week or month, for storing summarized resource data. If you choose to summarize and store resource data by financial period intervals, activity and resource data is stored in financial period intervals that correspond to the financial periods defined in the financial period calendars. Choosing this option enables P6 Professional to display all activity and resource data (including non-past period actual data) in financial period timescale intervals.

Tip

- If you want all project data in the database to be summarized by financial period (including closed projects), you must create financial periods that span the date range of all projects in the database using each financial period calendar. For example, if the oldest project using a specific financial period calendar has a project start date of October 1st, 2001, the financial periods defined for that calendar should begin on or before that date.
- If you choose to summarize data by financial period, you must summarize closed projects at least once to store project data in financial period intervals. Doing so ensures that data will display accurately in profiles and spreadsheets when users choose to display data for all projects in a financial period timescale interval (rather than open projects only).

Note

- If you choose to summarize by both calendar and financial period intervals, the runtime of summarizer jobs will increase.
- If you summarize projects with the 'By calendar' option selected, then clear the checkbox and summarize projects again, the previously existing summary activity and resource spreads are not removed; you must remove them manually.
- If no financial period calendars are defined, you can select the 'By financial period' option but data will not be summarized by financial period.

Summarize project data

Follow these steps to use the summary service to roll up and save resource quantity, cost, and/or custom user field information for projects at any level of the WBS or EPS.

1. Choose Enterprise, Projects.
2. Select the project you want to summarize.
3. Choose Tools, Summarize, then choose Open Projects or All Projects.
   When connected to a P6 EPPM database: The job is now sent to a queue and run as an ASAP service. Because the job is not run locally from P6 Professional, there may be a time lag before it is processed. The status of your job, such as pending, failed, running, or completed, appears in the Last Job Request field in the status bar of your screen. You can also click Tools, Job Status to display the Job Status dialog box for details about the status of jobs. Finally, a message appears in the taskbar, along with the Oracle icon, when the job completes successfully or if it fails to complete successfully. The message appears for ten seconds and displays the internal job name of the job. After ten seconds only the Oracle icon continues to appear, and you can click it to view the message.

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4. When connected to a P6 EPPM database: When the job completes successfully, press F5 to refresh open windows with the latest data.

Tip

- When connected to a P6 Professional database: P6 Professional can automatically summarize project data at regularly scheduled intervals.
- When connected to a P6 EPPM database: The Last Job Request field in the status bar of your screen displays the status of the last job request that you submitted. So if you submit two jobs, only the status of the last request appears.

Note

- When connected to a P6 Professional database: Global resource summaries are only recalculated when you select "All Projects."
- When connected to a P6 EPPM database: Global resource summaries always occur.
- When connected to a P6 EPPM database: Enterprise project summaries do not occur when you run a summarizer job from the client.

Select a baseline for summarization

1. Choose Project, Assign Baselines.
2. In the Project field, select the project to which you want to assign a project baseline.
3. In the Project Baseline field, select the baseline you want to use to summarize baseline project data. If you want to use the current project to summarize baseline project data, select the current project.

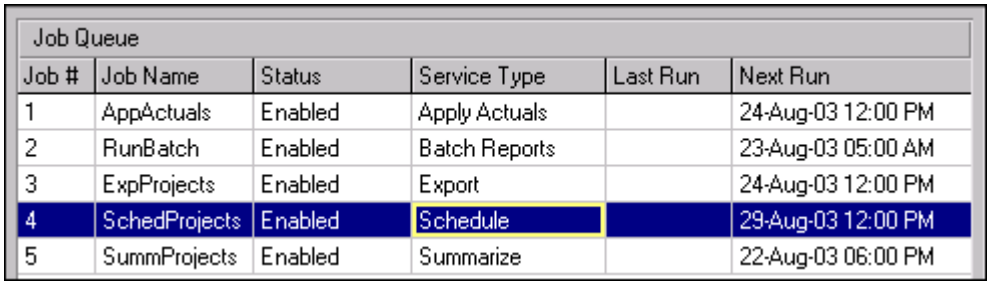
Job Services (P6 Professional Only)

Automating processes with Job Services (P6 Professional Only)

Job services let you automate certain functions in P6 Professional. You can apply actuals, run a batch report, export projects, schedule projects, and summarize projects.

Set up jobs in the Job Services dialog box by entering a job name, selecting a service type, and specifying when to run the job. For example, you might set up a job to schedule all projects in a particular division every Friday at noon.

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Job Queue

Job #	Job Name	Status	Service Type	Last Run	Next Run
1	AppActuals	Enabled	Apply Actuals		24-Aug-03 12:00 PM
2	RunBatch	Enabled	Batch Reports		23-Aug-03 05:00 AM
3	ExpProjects	Enabled	Export		24-Aug-03 12:00 PM
4	SchedProjects	Enabled	Schedule		29-Aug-03 12:00 PM
5	SummProjects	Enabled	Summarize		22-Aug-03 06:00 PM

To prevent a job from being run, change the Status field setting to Disabled.

Note

- The Job Service Server component must be installed to use the Job Services feature. Also, using the Job Services feature requires the appropriate level of security. If a job does not run as scheduled, check with your system administrator.
- Job Services may be configured as distributed or non-distributed. In distributed job services, the Job Service is installed on multiple machines. One machine is designated as a Controller. The Controller determines which servers run which jobs. This functionality enables multiple jobs to run concurrently on separate Job Service machines and is especially useful when summarizing large projects. In non-distributed job services, the Job Service is installed on a single machine that processes jobs in the order specified. Before running Job Services, contact your system administrator to determine if your network is configured for distributed or non-distributed job services. Refer to the Administrator's Guide to learn more about distributed job services.

Configure a job service (P6 Professional Only)

You can use the Job Service to automatically apply actuals, run a batch report, export projects, schedule projects, or summarize projects at regularly scheduled intervals.

1. Choose Tools, Job Services.
2. Click Add.
3. In the Job Name field, type a brief job description.
4. In the Status field, select Enabled to activate this job. You can prevent a job from being run by changing this selection to Disabled at any time.
5. In the Service Type field, select Apply Actuals, Batch Reports, Export, Schedule, or Summarize. The date the service was last run appears (if applicable), as well as the date the next run is scheduled to occur.
6. Click the Job Details tab to schedule how often to run the job. The Application User Login Name field displays the user login name associated with this job. Be sure that this user has appropriate rights to perform the job. The Last Run Status field shows a status message from the last job run. The message "OK" displays if the job ran without errors. In the Run Job field, choose when to run the job, such as every week/2weeks/month at a specific time, or immediately after a previous job has completed. You can mark the Log to File checkbox to send log information on the current job to a file you specify.
7. For Apply Actuals jobs, click the Job Options tab and add each project/EPS node that you want to apply actuals to in the selected job. To remove a project/EPS node from a job,

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select it and click Remove. Mark the checkbox for the project you want to use as the Default Project. If the project you want to select as the default is not listed because it is part of an EPS node you have listed, you must add the project separately to the list. Select the date up to which you want to apply the open project's actuals. A new data date is used for all projects when actuals are applied. Click Browse to select a new date. For Batch Reports jobs, click the Job Options tab and add each project/EPS node for which you want to run the batch report. Project batch reports will only run for the project to which they are assigned. To remove a project/EPS node from the job, select it and click Remove. In the Batch Report field, click



to select the batch report you want the job service to run. To specify where to send the output of the batch report, click Send Report To.For Export jobs, click the Job Options tab and add each project/EPS node that you want to export in the selected job. In the Export To field, click



to specify the name and location for the export file. To remove a project/EPS node from a job, select it and click Remove. For Schedule jobs, click the Job Options tab and add each project/EPS node that you want to schedule in the selected job. Mark the checkbox for the project you want to use as the Default Project. If the project you want to select as the default is not listed because it is part of an EPS node you have listed, you must add the project separately to the list. To remove a project/EPS node from a job, select it and click Remove. For Summarize jobs, click the Job Options tab and add each project/EPS node that you want to summarize in the selected job. To remove a project/EPS node from a job, select it and click Remove.

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Note

- The Job Service Server component must be installed to use the Job Services feature. Also, using the Job Services feature requires the appropriate level of security. If a job does not run as scheduled, check with your system administrator.
- Job Services may be configured as distributed or non-distributed. In distributed job services, the Job Service is installed on multiple machines. One machine is designated as a Controller. The Controller determines which servers run which jobs. This functionality enables multiple jobs to run concurrently on separate Job Service machines and is especially useful when summarizing large projects. In non-distributed job services, the Job Service is installed on a single machine that processes jobs in the order specified. Before running Job Services, contact your system administrator to determine if your network is configured for distributed or non-distributed job services. Refer to the Administrator's Guide to learn more about distributed job services.
- For Apply Actuals jobs, the activity remaining duration is calculated based on the setting in the Apply Actuals dialog box. The setting for the default project is used for all projects in the job service.
- For Batch Reports jobs, only one batch report can be run. Add a separate job service for each batch report you want to run.
- When you assign EPS nodes to the job list in the Job Options tab, this automatically includes all child EPS nodes and projects in the job list.

Global Change

Global change

The Global change feature enables you to make changes to all activities, resource assignments, or project expenses, or a selected group of these items, at one time. In the Global Change Report, you can then select the changes you want to apply to your data before committing the change. You can use Global change to edit existing values or assign new values. For example, you can create a statement to assign resource assignments to a group of activities.

When you run Global change, data exclusively locked by another user does not change. To obtain exclusive access, before opening the project, choose Exclusive in the Access Mode section of the Open Project dialog box.

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> **Note**
>
> You must have access to the activities, resource assignments, and expenses to which you want to make global changes. If your security profile does not enable you to access all of these items, you will not be able to commit the changes you make.
>
> If you manually plan future period resource/role allocation, changing data globally may change or delete manual future period values. How?
>
> - For activity resource assignments, globally changing the Planned Finish, Remaining Finish, and Actual Start may cause manual future period values to change. Manual future period values are deleted when you globally change the assigned Curve, specify an Actual Finish date, or set the Budgeted or Planned and Remaining Units or Units/Time (Labor, Non-Labor, or Material) to zero.
> - For activities, globally changing the Actual Start, Planned Finish, Planned or Original Duration, Remaining Finish, or Remaining Duration may cause manual future period values to change. Manual future period values are deleted when you globally change the Duration Type to Fixed Units or Fixed Units/Time, specify an Actual Finish date, or set the Budgeted or Planned Units/Time to zero.

Global change conditions

If statements control which project data changes. Then statements and Else statements specify the changes to be made. You can define an unlimited number of If, Then, or Else statements.

All global change specifications require at least one Then statement. If statements are optional. A Then statement with no If statement is applied to all activities in the current filter.

Multiple instances of global change specifications are not stored. When you choose Tools, Global Change, the last set of conditions you specified are the only ones available.

If statements

If statements define the conditions used to make changes to project data. When you define multiple If statements, link them by selecting All of the Following or Any of the Following. When you select All of the Following, data changes only if all If statement conditions are true. When you select Any of the Following, data changes if at least one of the If statement conditions are true.

Then statements

Then statements specify the changes to make to project data when the If conditions are satisfied. Multiple Then statements are run in the sequence you list them. If you want to set the Parameter/Value equal to a user-entered number, the second Parameter/Value field and the Operator field must be left blank.

Else statements

Else statements specify the changes to make to project data when the If conditions are not met. To specify an Else statement, you must define at least one If statement. If you want to set the Parameter/Value equal to a user-entered number, the second Parameter/Value field and the Operator field must be left blank.

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Change data globally

1. Choose Tools, Global Change.
2. Click New.
3. Select a Subject Area.
4. Type a name to identify the global change specification.
5. Define If, Then, Else and statements to specify the data you want to change. Click Add to define additional If, Then, or Else statements.
6. Click Change.
7. To accept the changes, click Commit Changes; to cancel the global change and return the data to its original state, click Cancel Changes.

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Note

- If you manually plan future period resource/role allocation, changing data globally may change or delete manual future period values. How?
- For activity resource assignments, globally changing the Planned Finish, Remaining Finish, and Actual Start may cause manual future period values to change. Manual future period values are deleted when you globally change the assigned Curve, specify an Actual Finish date, or set the Budgeted or Planned and Remaining Units or Units/Time (Labor, Non-Labor, or Material) to zero.
- For activities, globally changing the Actual Start, Planned Finish, Planned or Original Duration, Remaining Finish, or Remaining Duration may cause manual future period values to change. Manual future period values are deleted when you globally change the Duration Type to Fixed Units or Fixed Units/Time, specify an Actual Finish date, or set the Budgeted or Planned Units/Time to zero.
- You must have access to the activities to which you want to make global changes. If your security profile does not enable you to access all the activities, you will not be able to commit the changes you make.
- When you type a value for duration or units in Parameter/Value fields (in Then and Else statements), the value is entered into the database without being converted to hours. So, for example, if you enter 2d, the value stored is 2 days, not 16 hours. If you do not specify a unit when entering a value (for example, you enter 2 rather than 2d), the time unit defaults to the time unit specified in user preferences (User Preferences, Time Units tab).
- When connected to a P6 Professional database: If you are applying a global change to a unit or duration field, the Use the assigned calendar to specify the number of work hours for each time period checkbox (on the Admin Preferences, Time Periods tab) is ignored if set.Because it is ignored, the global change applies the unit or duration value based on the Admin Preferences hours per time period settings.
- When connected to a P6 EPPM database: If you are applying a global change to a unit or duration field, the Use the assigned calendar to specify the number of work hours for each time period checkbox (set using the P6, Application Settings) is ignored if set. Because it is ignored, the global change applies the unit or duration value based on the Application Settings hours per time period settings.

Add an If statement

An If statement defines conditions under which certain changes should be made to project data. When the If statement is true, the changes specified in the Then statement are applied. When the If statement is not true, the changes in the Else statement are applied.

1. Choose Tools, Global Change.
2. Click New, or select an existing specification and click Modify.
3. In the topmost section of the Modify Global Change dialog box, select Activities, Activity Resource Assignments, or Project Expenses for Subject Area.
4. Type a name to identify the Global change specification.

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5. For Parameter, select to include All of the Following conditions in the If statement, Any of the Following conditions in the statement, or a data item.
6. Select a statement criteria in the Is field.
7. Define a value for the specified parameter.
8. If necessary, define a high value for the specified parameter.
9. To define more than one If statement for this Global change session, click Add and repeat steps 5 through 8.

Add Then and Else statements

1. Choose Tools, Global Change.
2. Click New, or select an existing specification and click Modify.
3. Click in the Then section to define a Then statement and in the Else section to define an Else statement.
4. Click Add.
5. In the Parameter field, select a data item.
6. In the Parameter/Value field, select a data item to use as the first parameter in the statement. Select Custom to type a text or numeric value.
7. Select an operator to define an arithmetic equation to change numeric data. Arithmetic operators can connect two data items, a data item and a number, or two numbers.
8. Depending on the data items selected for the first parameter, either type a value in the second Parameter/Value field, or select it from a predefined list. If the first parameter requires a valued definition rather than a second parameter, you can leave this field empty.

> **Note**
>
> You can define Then statements without defining either an If statement or an Else statement. To define an Else statement, you must first define an If statement.

Edit a statement

1. Choose Tools, Global Change.
2. Select a global change specification, then click Modify.
3. Click in the If, Then, or Else sections of the Global Change dialog box.
4. Double-click the parameter, criteria, parameter/value, or operator you want to change.
5. Type or select a new data item, condition, operator, or value.

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> **Note**
>
> - Changing some parameters of an If, Then, or Else statement may affect the operators and criteria available in the statement.
> - Changing the subject area of a specification will clear all existing If, Then, and Else statements.

Rearrange Global change statements

Global change statements run in the order they are presented in the Global Change dialog box.

1. Select the statement you want to move.
2. Click the arrows in the Global Change dialog box to move a statement within the list of defined statements.

Cut, copy, or paste a statement

1. Choose Tools, Global Change.
2. Select the global change specification you want to edit, then click Modify.
3. Select the statement you want to cut or copy, then click either Cut or Copy.
4. Click the section into which you want to paste the statement.
5. Click Paste. The new statement is placed at the bottom of the list of statements.

> **Note**
>
> You cannot paste statements from the If section of the Global Change dialog box into the Then or Else sections; however, you can cut or copy and paste between the Then and Else sections.

Search for blank fields

You can use Global change to search for blank fields.

1. Choose Tools, Global Change.
2. Click New, or select an existing specification and click Modify.
3. In the If section, specify a data item in the Parameter field.
4. Specify a criteria in the Is field.
5. Type " " (two quotation marks separated by a space) in the Value field.

Preview Global Change in a report

1. Choose Tools, Global Change.

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2. Click New.
3. Define If, Then, and Else statements to specify the data you want to change.
4. Click Change. A Global Change Report displays in the Global Change Report dialog box.
5. Select the rows to apply to your data.
6. To save the report, click Save to File and type a name for the report. The report saves as an ASCII document.
7. To accept the changes, click Commit Changes; to cancel the Global Change and return the data to its original state, click Cancel Changes.

Delete a statement

1. Choose Tools, Global Change.
2. Select the Global change specification you want to edit, then click Modify.
3. Select the statement you want to delete.
4. Click Delete.
5. Click Yes.

Combine text fields

You can use Global Change to modify text data items such as activity IDs and names, and activity codes by linking two text fields using the ampersand (&) operator. This is called concatenation. The following statement adds the Location activity code value to the Activity ID field, if a value is assigned to the activity:

Then: Activity ID = Activity ID & Location

> **Tip**
>
> Use a dash (-) or underscore (_) to represent spaces when concatenating data.

Copy and paste a specification

1. Choose Tools, Global Change.
2. Select the specification you want to copy, then click Copy.
3. Click Paste. The new specification is placed alphabetically in the list.

Delete a specification

1. Choose Tools, Global Change.
2. Select the specification you want to delete.
3. Click Delete.
4. Click Yes.

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Export a Global Change specification

1. Choose Tools, Global Change.
2. Click Export, and select a location to save the PCF file.
3. Type a name for the export file.
4. Click Save.

Global change functions

Use the following string functions in Then statements and Else statements to select and change values for fields such as the activity ID, descriptions, resource names, and other text parameters.

Function	Purpose	Examples
SubString(Parameter,#,#)	Begins with the character in position # and extracts # number of characters.	Extract mid-string characters
RightString(Parameter,#)	Extracts # of characters, beginning with the last character in the parameter.	Extract data from the right side of a value
LeftString(Parameter,#)	Administer the list of global external applications.	Extract data from the left side of a value
DayOfWeek(Parameter)	Finds the day of the week on which the date falls.	Assign a day of the week to a date

Import a Global Change specification

1. Choose Tools, Global Change.
2. Click Import, then select the PCF file to import into the open project(s).
3. Click Open to add the specification to the project.

Operators and valid calculations

The following expressions describe the valid arithmetic operators and calculations available in Global Change.

Addition:Integer + Integer = Integer

Date + Integer = Date

Adding an integer to a date adds a number of workperiods to the date.

Subtraction:

Date - Date = Integer

Integer - Integer = Integer

Date - Integer = Date

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If you subtract two dates, the result is the difference between their workperiod numbers.

Multiplication:

Integer * Integer = Integer

Division:

Integer ÷ Integer = Decimal number to two-digit accuracy

Concatenation:

Use the ampersand (&) as an operator to join text in the first Parameter/Value column with text in the second Parameter/Value column. For example, the following statement results in Activity ID ABCD1234.

Then : Activity ID = ABCD & 1234

Use arithmetic with Global change

You can use mathematical equations to change numeric data such as quantities, costs, and durations. Use addition, subtraction, multiplication, and division to calculate new values. Click the Operator column to list the various operator symbols. Join text strings with an ampersand (&) symbol.

Arithmetic operators can link two data items, a data item and a number, or two numbers that you enter. Use arithmetic operators in Then and Else statements to calculate new values for a data item. Arithmetic operations are not used in If: statements; only comparisons.

Use date arithmetic

In the Modify Global Change dialog box, you can add or subtract a date from one another to calculate the number of workperiods between them, based on the activity or resource calendar. The following example find the difference between a baseline and the open project's start dates, based on the activity calendar:

30-Jul-02 - 27-Jul-02 = 3

Start - BL Start = (User_number field)

You can add a number to a date to calculate a new (later) date, or subtract a number from a date to calculate a new

(earlier) date. For example, 27-Sep-02 + 3 = 30-Sep-02 27-Sep-02 - 3 = 30-Sep-02

Assign a day of the week to a date

The DayOfWeek function returns the day of the week (Monday, Tuesday, and so on) to the specified date field, such as the Start or Finish.

Function: DayOfWeek(Parameter)

Example	Explanation
Then: User_text1=DayOfWeek(Start)	Stores the day of week corresponding to the start date in the User_text1 user field.

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Store Period Performance

Store Period Performance

Using the Store Period Performance feature, you can track actual units and costs to date. For example, if you increase the actual this period by 50, P6 Professional increases the Actual to Date by the same amount. At the end of each financial period, reset the Actual This Period values of all activities and assignments to zero by choosing Tools, Store Period Performance. Resetting the Actual This Period values does not affect Actual to Date values; rather, it prepares you to begin tracking new use for the current period.

Storing period performance records actuals for the selected financial period along with earned value and planned value, so you can track previous periods and compare current and future trends. If past period data changes after you store period performance, you can edit the data in financial period columns of the Activity Table, Resource Assignments window, and the Resources tab of Activity Details.

Your projects may be scheduled to update every two weeks, monthly, or even quarterly. To track actual costs and progress recorded, update your schedule at the times established in the financial period calendar assigned to the project, then store period performance at the end of the update period and before the start of the next schedule update.

When P6 Professional is connected to a P6 EPPM database, you can only store period performance if financial period calendars have been defined in P6.

Post actual amounts for a period

1. Choose Tools, Store Period Performance. The Store Period Performance dialog box lists all open projects.
2. Determine the projects you want to post actual amounts for, then double-click in the Financial Period column to select a financial period for each applicable project. When connected to a P6 Professional database: The Select Financial Period dialog box lists all financial periods defined in the financial period calendar assigned to the project. When connected to a P6 EPPM database: The Select Financial Period dialog box lists all financial periods defined for the financial period calendar in P6.
3. Determine the projects you do not want to post actual amounts for, then clear the corresponding checkbox in the Selected column for each applicable project.
4. Click Store Now. P6 Professional stores the Actual This Period values in the selected financial period for each project (regardless of the data date or Actual Start dates), then sets Actual This Period values to zero in anticipation of the next schedule update period.

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Tip

- To store period performance on a project, the actual and actual this period units and cost must be linked. Before storing period performance on a project, verify that the Link actual to date and actual this period units and costs option is selected in the Project Details, Calculations tab.
- You can store period performance for the same financial period for a project more than once. When you store period performance after it has already been stored for a period, P6 Professional overwrites any existing values with the new values for the existing period.
- You can customize the Resource Usage and Activity Usage spreadsheets to display Financial Period Value fields. When displaying Financial Period Value fields, past period actuals stored per financial period are distributed evenly from the start date to the finish date defined for a financial period and earned value calculations are based on these stored period quantities. Financial Period Value fields are only available for display if you define the range of financial periods that are available for display as columns in User Preferences.

Note

- When connected to a P6 Professional database: To store period performance, you must be assigned the Store Period Performance and Add/Edit Activities Except Relationships project privileges.
- When connected to a P6 EPPM database: To store period performance, you must have the appropriate project privileges as defined in P6.
- If any open project is read only or checked out, the Store Period Performance menu option is disabled.
- You do not have to store period performance sequentially (that is, you can skip periods).
- Earned value cost and units, as well as planned value cost and units, are calculated as follows (using Earned Value Units as an example): Actual Earned Value Units = This Period Earned Value Units - total Earned Value Units for all stored periods in the database.

Edit past period actual data

You can view and edit past period actual data for any financial period in the Activity Table and the **Resources** tab of **Activity Details**. The available financial period columns are listed in the Financial Period Value group of columns in the **Columns** dialog box.

You can display Activity Table columns for all of the following financial period fields:

- (Period Name): Actual Expense Cost
- (Period Name): Actual Labor Cost
- (Period Name): Actual Labor Units
- (Period Name): Actual Material Cost
- (Period Name): Actual Nonlabor Cost

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- (Period Name): Actual Nonlabor Units
- (Period Name): Earned Value Cost
- (Period Name): Earned Value Labor Units
- (Period Name): Planned Value Cost
- (Period Name): Planned Value Labor Units

You can change the **Resources** tab columns of **Activity Details** to display **Actual Cost** and **Actual Units** columns for any financial period.

After you expose the columns you want, you can edit any value by clicking in the field.

Tip

- There might be several financial periods specified in the financial period calendar assigned to the project. The **Columns** dialog box lists all the fields listed above for the range of financial periods you select in the **User Preferences**, **Application** tab. You must define a range of financial periods to display; otherwise, financial period columns are not available.
- To edit past period actual data, the actual and actual this period units and cost must be linked in the project. Before editing past period actual data, verify that the **Link actual to** date and actual this period units and costs option is selected on the **Project Details**, **Calculations** tab.

Note

- You cannot edit past period actual data for activities that do not have an actual start date. You can edit past period actual data for activities that have resource assignments in the **Resource Assignments** window or in the **Resources** tab of **Activity Details**.
- You cannot edit past period actual data if the project is read only or checked out.
- For milestone activities, you can only edit past period expense costs.
- When connected to a P6 Professional database: You must be assigned the Edit Period Performance, View Project Cost/Financials, Edit WBS Costs/Financials, and Add/Edit Activities Except Relationships project privileges to edit past period actual data.

When connected to a P6 EPPM database: You must be assigned the appropriate project privileges as defined in P6 to edit past period actual data.

View past period actual data in spreadsheets

You can view past period actual data spread by financial period in the Resource Usage Spreadsheet and Activity Usage Spreadsheet.

1. Right-click in the spreadsheet, then choose Spreadsheet Fields, Customize.
2. In the Available Options section, expand either the Cumulative or Time Interval sections, then expand the Financial Period Value section.

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3. Move the Financial Period Value fields you want to the Selected Options section.
4. Click Ok.

Tip

- If Financial Period Value is not an available section in the Columns dialog box, you have not specified a range of financial periods that are available for display. To specify an available range, choose Edit, User Preferences. Select the Application tab, then specify the range of financial periods you want to display as columns in the Columns section.
- If your organization manually plans future period resource distribution, you can manually enter future period assignment values in Financial Period timescale intervals. Once you baseline the project plan, progress the current project schedule, and store period performance, you can compare the baseline plan's manual assignment values to the current project's past period actuals in spreadsheets and reports.

Note

You cannot edit past period actual data in spreadsheets. You can edit past period actuals in columns of the Activity Table, Resource Assignments window, and the Activity Details, Resources tab.

Auto-Reorganization

Reorganizing window data automatically

By default, when you add, edit, or remove data in a window (for example, the Activities or Projects window), the module automatically reorganizes data in the active window according to the group and sort criteria specified for the window.

You can disable this feature temporarily per view (Tools, Disable Auto-Reorganization) to make it easier if you have many changes to make. If you close the project you are working on or log out of P6 Professional, Auto-Reorganization will automatically be switched on again. However, if you are working on one project with Auto-Reorganization turned off and open another project (without closing the first), Auto-Reorganization will stay switched off.

Note

- When you change views, apply a filter, cut, copy, paste, or refresh data, P6 Professional will reorganize the data, regardless of whether Disable Auto-Reorganization is enabled or disabled.
- Auto-reorganization applies to main windows only; dialog boxes are not affected. Additionally, your auto-reorganization setting (enabled or disabled) applies to the active window only.

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Enable or disable auto-reorganization

The module automatically reorganizes data in the current window according to the group and sort criteria specified for the window when you add or move data, unless you disable auto-reorganization. Do one of the following:

- With any window active, choose Tools, Disable Auto-Reorganization.
- Click  on the Tools toolbar.

Tip

- By default, Disable Auto-Reorganization is turned off, meaning that window data will be automatically reorganized unless you turn this feature on.
- A square outline surrounding the icon on the menu or in the toolbar indicates that Auto-Reorganization is currently disabled.
- Auto-reorganization applies to window-level data only; it does not apply to data stored in dialog boxes. For example, activities in the Activities window may be reorganized using this feature, but related elements in an associated dialog box will not be reorganized, even if Disable Auto-Reorganization is turned off.
- When you change views, apply a filter, cut, copy, paste, or refresh data, P6 Professional will reorganize the data, regardless of whether Disable Auto-Reorganization is enabled or disabled.
- Your auto-reorganization setting (enabled or disabled) applies to the active window only.

Performing Top-down Estimation (P6 Professional Only)

Top-Down Estimation enables you to apply labor, nonlabor, and/or material resource units to activities in a top-down manner using assigned weights.

To perform top-down estimations, you must first assign estimation weights to WBS elements and activities. You can limit the scope of your estimate according to WBS element and resource. After you develop a top-down estimate, save the estimate for later reference or use, or apply the estimate to the project. If you apply an estimate, remaining labor/nonlabor units are updated for activities that are not started or are in progress and activity resource assignments within the estimation scope. Completed activities, that is activities with remaining units equal to zero, are not affected by top-down estimation. Top-down estimations do not affect project expenses.

When performing a top-down estimation, you should first determine the total number of labor or nonlabor resource units to apply. You can determine this number using prior experience on similar projects. You can also use the Function Point option if you are estimating an information technology project.

You must select material resources individually because their units of measure may differ.

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Performing top-down estimations using prior experience (P6 Professional Only)

1. Choose Tools, Top Down Estimation.
2. Choose to estimate labor or nonlabor resource units.
3. In the WBS field, click the Browse button to select the WBS element whose activities you want to estimate. Click Select.
4. In the Resource field, select the resource to estimate activities assigned to a specific resource within the specified WBS element. Click Select.
5. Choose Prior Experience.
6. Enter the estimate in the Estimated Units field.
7. Mark the Apply adjustment checkbox to apply an adjusted percentage to the estimate. Type the adjustment percentage. For example, if the estimated units are 400.00h and you apply an adjustment of 50%, P6 Professional will add 200.00h (50% of 400) to the estimated units. The Adjusted Units field will display 600.00h.
8. Click Save As to save the estimate without applying it. Type a name and any assumptions and notes about the estimate, then click Save.
9. Click apply to perform top-down estimation. Click Yes when prompted to confirm that you want to apply a top-down estimate to the project, then Click OK.

Performing top-down estimations using function points (P6 Professional Only)

1. Choose Tools, Top Down Estimation.
2. Choose to estimate labor or nonlabor resource units, or select a material resource in the Resource field.
3. In the WBS field, click the Browse button to select the WBS element whose activities you want to estimate. Click Select.
4. Choose Function Point, then click Function Points.
5. In the Function Point Estimation dialog box, enter the Unadjusted Function Point Count (UFP) value you want to use, or click Calculate to calculate the UFP. If you choose to calculate the UFP, the Function Point Estimation - Data and Transactions dialog box will appear.
6. In the Function Point Estimation - Data and Transactions dialog box, enter the number of low, average, and high complexity files and transactions to be developed under the WBS element and resource, if any, you are estimating.
7. Click Close. In the Function Point Estimation dialog box, the UFP value is listed in the Unadjusted Function Point Count (UFP) field.
8. Enter the Total Degree of Influence (TDI) value you want to use, or click Characteristics to calculate the TDI. If you choose to calculate the TDI, the Function Point Estimation - System Characteristics dialog box will appear.

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9. In the Function Point Estimation - System Characteristics dialog box, select a system characteristic, then choose the numeric value that indicates the characteristic's degree of influence on the WBS element you are estimating. Zero (0) indicates no influence while 5 indicates the strongest influence. When you select a value, the Value Description box displays text describing the value for the selected characteristics. Select a value for all system characteristics, then click Close.
10. In the Function Point Estimation dialog box, the TDI value is listed in the Total Degree of Influence (TDI) field.
11. Type the average productive value (function points/person month), then click Close.
12. Mark the Apply adjustment checkbox to apply an adjusted percentage to the estimate. Type the adjustment percentage. For example, if the estimated units are 400.00h and you apply an adjustment of 50%, P6 Professional will 200.00h (50% of 400) to the estimated units. The Adjusted Units field will display 600.00h.
13. Click Save As to save the estimate without applying it. Type a name and any assumptions and notes about the estimate, then click Save.
14. Click apply to perform top-estimation. Click Yes when prompted to confirm that you want to apply a top-down estimate to the project, then Click OK.

Applying Saved Top-Down Estimations To a Project (P6 Professional Only)

After you specify the number of units you want to apply, P6 Professional distributes the total units to the selected activities, using the estimated weights assigned to the project's WBS elements and activities. P6 Professional uses these weights to calculate the proportion of resource units that each WBS element and activity should receive in relation to other WBS elements. P6 Professional also maintains a history of saved top-down estimations.

1. Choose Tools, Top Down Estimation.
2. Click History.
3. In the Estimation History dialog box, select the estimate you want to apply, then click Apply.

1. Choose Tools, Top Down Estimation.
2. Click History.

> **Note**
>
> To apply top-down estimations to a project, you must have the "Add/Edit Activities Except Relationships" privilege, which is set in the Security Profiles dialog box.

Project Checker

Project Checker

Use the Project Checker to assess the health of the data that constitutes projects. The project checker searches for data that violates unique key constraints, foreign key constraints, and P6 Professional business rules. Violations of business rules, foreign keys and unique key

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constraints in a database are not necessarily a problem, but can be an indication that a database contains orphaned data that could be cleaned up.

If P6 Professional is using Oracle, Microsoft SQL, or using Cloud Connect, only users with Admin Superuser or Project Superuser rights can access the Project Checker. Users with Project Superuser rights can only run the Project Checker against the projects for which they are a Project Superuser.

If P6 Professional is using SQLite, any user can access the Project Checker.

Business rule checks

Business rules in P6 Professional determine how data is structured and works together to create useful projects. For example, it is P6 Professional business rules that ensure that a baseline can only be associated with one project at a time, and that if an activity has resources assigned one of them must be assigned as the primary resource.

Foreign key checks

Foreign keys link data together. For example, foreign keys determine which activities belong to which projects, the roles assigned to each resource working on an activity, and how activity code values are associated with activity codes.

Unique key checks

Unique key constraints ensure that data items do not conflict with each other. For example unique keys prevent there being two activities with the same ID in the same project, or two projects with the same ID.

> **Tip**
>
> On Oracle, MS SQL Server, and Cloud Connect, the Enable Project Checker option must be enabled during Database Configuration.

Running the Project Checker

1. Choose Tools, Project Checker.
2. Select at least one project from the list of available projects and click Add to list.
3. In the Options area select or clear the options to determine the aspects of the project to check.
   If you select Business Rule Checks, the report will show information about any violations of P6 Professional business rules in the selected projects, including orphaned and mismatched data.

   If you select Foreign Key Checks, the report will show information about missing foreign keys within the data associated with the selected projects.

   If you select Unique Key Constraints, the report will show information about data with matching unique keys associated with the selected projects.
4. In the Report area, choose how and where you want the report to be written.
   If you choose to Group By Options, the report will have expandable sections for each of the options you selected and each of the checks performed will be numbered. If you choose to clear this option, the report will list all checks on performed in a flat list without numbering.

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If you choose to Overwrite Existing, you will no longer be able to access earlier versions of the report if they are stored in the location entered in the Save Report To field. If you choose to clear this option, P6 Professional will append the date and time in revers notation to the report file name.

If you choose to Run Priority Checks Only, severity 3 and 4 checks will not be run against the projects selected. If you choose to clear this option, all checks will be run against the projects selected, regardless of the priority of the check.

If you choose to Report Errors Only, the report will only list violations of Business Rules, Foreign Key Constraints, and Unique Key Constraints (depending on the options you selected). If you choose to clear this option, the report will include information about all Business Rule, Foreign Key Constraint, and Unique Key Constraint checks even where no violations were found.

5. Click Run Report.

Viewing the project checker report

After the project checker has completed, you will be given the option to view the report. However, you can also view the report by opening the html file manually. You can configure the file location for the report in the Report section of the Project Checker dialog box. If you do not configure a location, the report is saved in your Documents folder on the machine you were using when you ran the report, for example, `C:\Users\<username>\Documents`). The default name for the file is ProjectCheckReport.html. However, if you selected not to overwrite existing reports, P6 Professional will append the date and time in reverse notation to the file name. For example, if you ran the report at 9:30:42 on April 17th, 2023, the report name will be `ProjectCheckReport202304017093042.html`.

The top of the report provides an overview grid. The grid breaks down the report results by check group (Business Rules, Foreign Key, and Unique Key) and the severity (Important, Significant, Moderate, and Low). You can view the failed checks for each grouping and severity cross-section by clicking on the number in the appropriate cell, or you can click a link below the table to view the entire report. You can view the SQL query used to check for each report criteria.

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Administration

Managing Personal Information in P6 Professional

About Consent Notices

Consent notices inform users how personal information (PI) is collected, processed, stored, and transmitted, along with details related to applicable regulations and policies. Consent notices also alert users that the action they are taking may risk exposing PI. P6 Professional helps you to ensure that you have requested the appropriate consent to collect, process, store, and transmit the PI your organization holds as part of P6 Professional data.

Consent notices should:

- be written in clear language which is easy to understand.
- provide the right level of detail.
- identify the purpose and legal basis for your collection, processing, storage, and transmission of PI.
- identify whether data will be transferred to named third parties.
- identify PI categories and list the data which will be collected, processed, stored, and transmitted.

About Personal Information

Personal information (PI) is any piece of data which can be used on its own or with other information to identify, contact, or locate an individual or identify an individual in context. This information is not limited to a person's name, address, and contact details. For example a person's IP address, phone IMEI number, gender, and location at a particular time could all be personal information. Depending on local data protection laws, organizations may be responsible for ensuring the privacy of PI wherever it is stored, including in backups, locally stored downloads, and data stored in development environments.

As part of P6 EPPM Cloud Services, you may be using an identity domain to manage your user access and entitlements across a number of cloud and on-premises applications and services. If you are using or accessing an identity domain, you are responsible for deleting your details and data from the identity domain environment. You are responsible for retrieving your content in the identity domain during your applicable services period.

Cookies Usage in P6 Professional

Oracle might use cookies for authentication, session management, remembering application behavior preferences and performance characteristics, and to provide documentation support.

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Also, Oracle might use cookies to remember your log-in details, collect statistics to optimize site functionality, and deliver marketing based on your interests.

Your Responsibilities

Information security and privacy laws can carry heavy penalties and fines for organizations which do not adequately protect PI they gather and store. If these laws apply to your organization, it is your responsibility to configure consent notices before they are required. You should work with your data security and legal teams to determine the wording of the consent notices you will configure in P6 Professional.

If a consent notice is declined, it is your responsibility to take any necessary action. For example, you may be required to ensure that the data is not stored or shared.

Personal Information (PI) Data in P6 Professional

PI may be visible in multiple areas of P6 Professional, including but not limited to user administration, resource and role administration, assignments, work products and documents, reports, issues, notebooks, risks, user defined fields, codes, calendars, project websites, P6 Visualizer, and timesheets.

PI may be at risk of exposure in multiple areas of P6 Professional, including but not limited to project export, downloaded tables, reports, documents, project websites, API, and log files.

As part of the Primavera Virtual Desktop Cloud Service, you may be using an identity domain to manage your user access and entitlements across a number of cloud and on-premises applications and services. If you are using or accessing an identity domain, you are responsible for deleting your details and data from the identity domain environment. You are responsible for retrieving your content in the identity domain during your applicable services period.

Configuring Consent Notices (P6 Professional Only)

To configure consent notices for P6 Professional, complete the following steps:

1. Log in to P6 Professional.
2. Choose **Admin, Admin Preferences**.
3. Click the **Consent Notice** tab.
4. Select a consent type from the list.
   a. Enter and format the text for the consent notice in the **Consent Message** area.

      > **Note**
      >
      > Work with your data security and legal teams to determine the wording of the consent notice.

   b. Select **Enable Consent Notice** to allow the notice to be shown to users of the selected consent type.
5. Continue to configure consent notices for other consent types.

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Auditing Consent Notices (P6 Professional Only)

You can see the status of consent acceptance for users. You can also email users who have rejected a consent notice, print a list of the users who have accepted, rejected, or not yet responded to consent notices, and reset consent acceptance for all users if there is a need to regain consent.

To audit consent notices for P6 Professional, complete the following steps:

1. Log in to P6 Professional.
2. Choose **Admin, Admin Preferences**.
3. Click the **Status of User Acceptance** tab.
4. Select a consent notice type from the list.
   - To email users who have rejected or not responded to a consent notice click **Email**.
   - To print a list of all users and their consent status click **Print**.
   - To reset all users status of this consent notice type, click **Forget All User Acceptance**.

Defining Administrative Preferences (P6 Professional Only)

Administrative preferences (P6 Professional Only)

Your organization can define a series of application-wide parameters and values that apply to all projects. Your organization can use these settings to customize your project to meet specific project management requirements and standards. While all users can view these settings, a user must have special security privileges to edit them. There are two types of settings: Administrative Preferences and Administrative Categories.

Application administrators use the Admin Preferences dialog box to establish default settings. You can use this dialog box to check the defaults that have been defined.

Define invalid file types for upload (P6 Professional Only)

Prevent users from uploading potentially harmful files as documents in P6 Professional by providing a list of invalid file types. Oracle recommends that at least the default values of .exe, .com, .bat, .cmd, .vbs, .js, and .msi should be entered in this field.

> **Note**
>
> This is not intended to replace robust virus checking software and procedures.

1. Choose Admin, Admin Preferences.
2. Click the Options tab, then type a comma-separated list of file types in the Invalid document types field.

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Define Clickable Websites

You can create a list of websites that users can launch from user defined fields (UDFs), projects websites, and Notebook topics, by double clicking on the website and selecting **Launch**.

For any text field in edit mode, users can right click on the website, then choose to either launch or copy the site.

To add a website, complete the following steps:

1. Log in to P6 Professional.
2. Choose **Admin, Admin Preferences**.
3. Click the **Exception Site List** tab.
4. Click **Add** and enter the website.
5. Mark the checkbox next to a website to make it clickable by users.

Here are some rules on how to specify websites:

- Website paths cannot contain spaces. You can include **%20** in a path to represent a space. For example: `http://www.magnacorp.com/Primavera%20Applications`
- Wildcards are allowed. For example, you can add `https://*` and `http://*` to allow all sites that begin with these roots to be launchable.
- Here are some examples of entries and how they would be handled:
  Website paths must begin with any of the following:

  `https://` `http://` `ftps://` `ftp://` `mailto:` `telnet://`

  Allowed site: **https://www.magnacorp.com/document**

  This would allow:

  – `https://www.magnacorp.com/document`

  – `https://www.magnacorp.com/document/RiceB/1MCSbdcXKQ`

  but would NOT allow:

  – `http://www.magnacorp.com/document/RiceB/1MCSbdcXKQ`
  because the exception site begins with https://

  – `https://www.magnacorp.com/projectnano/document`
  because the allowed site specifies /document after .com.

  Allowed site: **https://*.magnacorp.com**

  This would allow:

  – `https://www.magnacorp.com`

  – `https://server.magnacorp.com/user/942374/my-drive`

  – `https://apps.magnacorp.com/development/projectnano`

  But would not allow:

  – `https://magnacorp.com`
  because the template requires there to be something between `https://` and `magnacorp.com`.

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A selected item with a wildcard in the site allow list overrides an unselected item if it matches the template specified with the wildcard.

For example:

- Selected: `https://*.magnacorp.com`
- Unselected: `https://apps.magnacorp.com`

In this situation, the website https://apps. `magnacorp.com` will be clickable, because the template including the wildcard * is selected.

Change the global code separator (P6 Professional Only)

The global code separator is the character that separates cost account and activity codes to indicate hierarchy levels. The global code separator is used to indicate work breakdown structure (WBS) hierarchy levels if you do not specify a code separator for a project.

1. Choose Admin, Admin Preferences.
2. Click the General tab, then type a new code separator character in the Code Separator section.

Set the week start day (P6 Professional Only)

You can specify the day on which the calendar week begins.

1. Choose Admin, Admin Preferences.
2. Click the General tab.
3. In the Starting Day of Week section, select the day on which you want the workweek to begin.

> **Note**
>
> This setting applies to all global, project, and resource calendars.

Set a default activity duration (P6 Professional Only)

You can specify the default activity duration for new activities added in all projects.

1. Choose Admin, Admin Preferences.
2. Click the General tab.
3. In the Activity Duration section, type a default activity duration in minutes, hours, days, weeks, months, or years.

> **Note**
>
> If you change the default activity duration setting, the new default applies only to activities added after the change; existing activities are not affected.

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Define maximum hierarchy levels (P6 Professional Only)

1. Choose Admin, Admin Preferences.
2. Click the Data Limits tab.
3. Specify the number of hierarchy levels each hierarchy may have.

> **Note**
>
> If you change maximum hierarchy level settings, your change only applies when you add new elements or edit existing elements.

Define maximum project activity codes (P6 Professional Only)

1. Choose Admin, Admin Preferences.
2. Click the Data Limits tab.
3. In the bottom section, specify the maximum number of activity codes per project.

Define maximum baselines (P6 Professional Only)

1. Choose Admin, Admin Preferences.
2. Click the Data Limits tab.
3. In the bottom section of the tab, specify the maximum number of baselines per project.

Define maximum ID lengths (P6 Professional Only)

1. Choose Admin, Admin Preferences.
2. Click the ID Lengths tab, then specify the number of characters each code may have. Valid values are 1-40.

> **Note**
>
> If you change the maximum number of characters in a code length, your change only applies when you add new codes or edit existing codes.

Set default workhours (P6 Professional Only)

P6 Professional calculates and stores time unit values in hourly increments, but users can set preferences to display time units in other increments, such as days or weeks. The values specified for Hours per Time Period 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. As an administrator, you can globally specify the conversion factors, or you can enable the Hours

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per Time Period settings defined for each calendar to control how units and durations are converted and stored.

1. Choose Admin, Admin Preferences.
2. Click the Time Periods tab.
3. If you want to globally specify conversion factors, in the Hours per Time Period section, type the default number of work hours you want to use for each time period. If you want to use the Hours per Time Period settings defined in each calendar as conversion factors, mark the "Use assigned calendar to specify the number of work hours for each time period" checkbox.

Set abbreviations for displaying time (P6 Professional Only)

1. Choose Admin, Admin Preferences.
2. Click the Time Periods tab.
3. In the Time Period Abbreviations section, type the abbreviations you want to use when displaying each time period.

Define default earned value settings (P6 Professional Only)

1. Choose Admin, Admin Preferences.
2. Click the Earned Value tab.
3. In the Technique for Computing Performance Percent Complete section, select the default completion percentage method you want to use for computing earned-value percent complete when calculating an activity's earned value.
4. In the Technique for Computing ETC section, select the default method for computing earned value estimate-to-complete you want to use when calculating an activity's Estimate to Complete (ETC) value.
5. In the Earned Value Calculation section, choose how you want to calculate earned value. Choose to use the baseline's At Completion values and current dates, planned values with planned dates, or planned values with current dates when calculating earned value from a baseline. The current dates options use the Start/Finish dates for an activity or resource assignment.

> **Tip**
>
> For each project, earned value is calculated using the project baseline or each user's defined primary baseline, depending on a preference setting on the Settings tab of Project Details.

Set global summarization options (P6 Professional Only)

In addition to specifying summarization options per project (Project Details, Settings tab), if you have administrator rights, you can specify global summarization options for storing resource spreads at the activity and resource levels.

1. Choose Admin, Preferences.

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2. Select the Options tab.
3. In the 'Select summarization periods' section, choose how you want to summarize and store resource data: By calendar, By financial period, or both. If you choose to summarize and store resource data by calendar intervals, in the WBS Level field, choose the time interval, such as week or month, for storing summarized activity data. Then, in the Resource/Role Assignment Level field, choose the time interval, such as week or month, for storing summarized resource data. If you choose to summarize and store resource data by financial period intervals, activity and resource data is stored in financial period intervals that correspond to the financial periods defined in the financial period calendars. Choosing this option enables P6 Professional to display all activity and resource data (including non-past period actual data) in financial period timescale intervals.

Tip

- If you want all project data in the database to be summarized by financial period (including closed projects), you must create financial periods that span the date range of all projects in the database using each financial period calendar. For example, if the oldest project using a specific financial period calendar has a project start date of October 1st, 2001, the financial periods defined for that calendar should begin on or before that date.
- If you choose to summarize data by financial period, you must summarize closed projects at least once to store project data in financial period intervals. Doing so ensures that data will display accurately in profiles and spreadsheets when users choose to display data for all projects in a financial period timescale interval (rather than open projects only).

Note

- If you choose to summarize by both calendar and financial period intervals, the runtime of summarizer jobs will increase.
- If you summarize projects with the 'By calendar' option selected, then clear the checkbox and summarize projects again, the previously existing summary activity and resource spreads are not removed; you must remove them manually.
- If no financial period calendars are defined, you can select the 'By financial period' option but data will not be summarized by financial period.

Set the Online Help location (P6 Professional Only)

1. Choose Admin, Admin Preferences.
2. Click the Options tab.
3. In the P6 Professional Online Help URL field: Leave the default URL to launch the version of the Help hosted by Oracle when Online Help is selected from the Help menu. Remove the URL to disable the Online Help option from the Help menu for all users. Users will only be able to access the local version of the help. Specify a new URL location to launch when Online Help is selected from the Help menu.
4. The Always launch Online Help for the F1 shortcut key and context-sensitive help option is not selected by default. To always launch online help for F1 key and help shortcuts, select this option.

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> **Note**
>
> - Using the hosted version ensures that you always have the most current help content.
> - Clicking on Online Help will launch the URL specified in Admin Preferences.
> - If the P6 Professional Online Help URL field is blank, the Always launch Online Help for the F1 shortcut key and context-sensitive help option is disabled.
> - When connected to a P6 EPPM database: Use P6 to set the online help location.

Set the Industry Type (P6 EPPM Only)

P6 Professional requires you to choose an industry type. The industry type determines the terminology and default calculation settings that display in P6 Professional. You choose an industry type from P6, Application Settings, General link.

The following table lists each industry type and its corresponding terminology and default settings. Choose the option that best matches your industry.

Industry Types

Industry Type	Industry Terminology Examples	Default startup window in P6 Professional
Engineering and Construction	Budgeted Units Budgeted Cost Original Duration	Activities window
Government, Aerospace, and Defense	Planned Units Planned Cost Planned Duration	Projects window
High-Technology, Manufacturing	Planned Units Planned Cost Planned Duration	Projects window
Utilities, Oil, and Gas	Budgeted Units Budgeted Cost Original Duration	Projects window

Setting the Industry Type

After installing P6 Professional, you must set the industry type for the software. The industry type determines the terminology and default calculation settings that display in P6 Professional.

To set the industry type, complete the following steps:

1. Log in to P6 Professional.
2. Choose **Admin, Admin Preferences**.
3. Click the **Industry** tab.
4. Select the option that most closely aligns with your industry.

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> **Note**
>
> If you set the industry type and later change it, the new industry setting is immediately effective for new users. However, the change will not take effect for users who have logged in since it was last set. For information on how to make it effective for existing users, see: How To Change The P6 Industry Type In P6 PPM (Professional), P6 EPPM R8.2 And Later Releases (KB670189).

The following table lists each industry type and its corresponding terminology and default settings:

Industry Type	Industry Terminology Examples	Default startup window in P6 Professional
Engineering and Construction	Budgeted Units Budgeted Cost Original Duration	Activities window
Government, Aerospace, and Defense	Planned Units Planned Cost Planned Duration	Projects window
High-Technology, Manufacturing, and Others	Planned Units Planned Cost Planned Duration	Projects window
Utilities, Oil, and Gas	Budgeted Units Budgeted Cost Original Duration	Projects window

Installing Local Copies of P6 Professional and Visualizer Help

By default, online help for P6 Professional and Visualizer is hosted by Oracle. If you prefer to access Help locally, you can install a local copy of the Help.

> **Note**
>
> The hosted versions always contain the most current version of P6 Professional and Visualizer help.

To install a local of the P6 Professional and Visualizer help, complete the following steps:

1. Download the Downloadable P6 Professional Help and extract it locally.
2. In the extracted zip file, double-click **P6ProHelpInstaller.msi** to launch the installation wizard.
3. Click **Next**.
4. Expand **Local Help Files**.
5. Do the following to install a local copy of P6 Professional help.
   a. Expand **PM Help.**
   b. Click the drop-down for the language you use in the P6 Professional user interface and select **Will be installed on local hard drive**.

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> **Note**
>
> P6 Professional Help is available in English, French, German, Japanese, and simplified Chinese. Selecting any other language installs Help in English.

6. Do the following to install a local copy of Visualizer Help.
   a. Expand **Visualizer Help.**
   b. Click the drop-down for the language you use in the Visualizer user interface and select **Will be installed on local hard drive**.

> **Note**
>
> Visualizer Help is available in English only. Selecting any other language installs Help in English.

7. Click **Next**.
8. Click **Install**.
9. Click **Finish**.

Defining Administrative Categories (P6 Professional Only)

Administrative categories (P6 Professional Only)

Your organization can define a series of application-wide parameters and values that apply to all projects. Your organization can use these settings to customize your projects to meet specific project management requirements and standards. While all users can view these settings, a user must have the have Add/Edit/Delete Categories global privilege to edit them.

Use the Admin Categories dialog box to define standard categories and values you can apply across all projects, including custom categories and category values for projects, resources, and WBS elements.

Use the following tabs to establish the following default categories and values:

Baseline Types: Create, edit, and delete baseline types. Use these categories to standardize and categorize baselines, and to help benchmark performance across projects.

Expense Categories: Create, edit, and delete expense categories. Use these categories to standardize and categorize project expenses, and organize and maintain expense information.

WBS Category: Create a WBS category and create, edit, and delete WBS category values. Use this category to standardize and categorize WBS elements.

Document Categories: Create, edit, and delete categories for work products and documents. Use these categories to standardize and categorize work products and documents, and organize and maintain work product and document information.

Document Status: Create, edit, and delete document status types. Use these status types to identify the current status of work products and documents within a project.

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Risk Categories: Create, edit, and delete risk categories. Use these categories to classify risk types and to organize risks.

Notebook Topics: Create, edit, and delete notebook topics. Use notebook topics to organize related notes about an activity.

Units of Measure: Add, delete, and organize units of measure.

Baseline Types (P6 Professional Only)

Create a baseline type

When P6 Professional is connected to a P6 EPPM database, you can use P6 to create baseline types that you can assign to baselines in any project. You can use baseline types to standardize baselines for all projects.

When P6 Professional is connected to a P6 Professional database, you can create baseline types that you can assign to baselines in any project. You can use baseline types to standardize baselines for all projects.

1. Choose Admin, Admin Categories.
2. Click the Baseline Types tab, then click Add.
3. Type the name of the new baseline type.

Edit a baseline type (P6 Professional Only)

1. Choose Admin, Admin Categories.
2. Click the Baseline Types tab.
3. Double-click the baseline type you want to change, then enter a new baseline type.

Tip

- To change the order in which baseline types are listed, select the baseline type you want to move, then click Shift Up or Shift Down.
- If you change a baseline type, your change applies to all baseline assigned that baseline type.

Delete a baseline type (P6 Professional Only)

1. Choose Admin, Admin Categories.
2. Click the Baseline Types tab.
3. Select the baseline type you want to delete, then click Delete.
4. Click Yes.

Expense Categories (P6 Professional Only)

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Create expense categories (P6 Professional Only)

You can create expense categories that you can assign to expenses in any project. You can use these categories to organize and maintain your expense information.

1. Choose Admin, Admin Categories.
2. Click the Expense Categories tab, then click Add.
3. Type the name of the new expense category.

Rename expense categories (P6 Professional Only)

1. Choose Admin, Admin Categories.
2. Click the Expense Categories tab.
3. Double-click the category whose name you want to change, then type the expense category's new name.

Tip

- To change the order in which expense categories are listed, select the expense category you want to move, then click Shift Up or Shift Down.
- If you change an expense category's name, your change applies to all expense items assigned that category.

Delete expense categories (P6 Professional Only)

1. Choose Admin, Admin Categories.
2. Click the Expense Categories tab.
3. Select the category you want to delete, then click Delete.
4. Click Yes.

WBS Category (P6 Professional Only)

Edit the WBS category (P6 Professional Only)

You can use a custom work breakdown structure (WBS) category to organize and maintain WBS information in all projects.

1. Choose Admin, Admin Categories.
2. Click the WBS Category tab, which displays the current name of the WBS category, for example Project Phase. Project phase is the default WBS category. (See the graphic below.)
3. In the WBS Category field, type the new WBS category name. (This name will appear in the associated tab on the left side of this dialog box.)

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> **Note**
>
> The category's current values and value assignments do not change when you change the WBS category.

Create WBS category values (P6 Professional Only)

1. Choose Admin, Admin Categories.
2. Click the tab that displays the name of the current WBS category, then click Add.
3. Type the new value.
4. Use the Shift Up and Shift Down arrows to position the new value in the Category Value list.

Assign WBS Category values (P6 Professional Only)

You can assign a WBS category value from the Work Breakdown Structure window.

1. Display a column for the WBS category, if it is not already displayed. Click the Display Options bar, choose Columns, and then choose Customize. In the Available Options section, under the General subsection, choose the WBS category. Click

   , then click OK.
2. In the WBS table, select the WBS element to which you want to assign a WBS category value, then double-click in the WBS category column.
3. Double-click the category value you want to assign.

Change WBS category values (P6 Professional Only)

1. Choose Admin, Admin Categories.
2. Click the tab that displays the name of the current WBS category.
3. Double-click the value you want to change, then type the new value.

> **Note**
>
> If you change a category value, your change applies to all WBS assignments.

Delete WBS category values (P6 Professional Only)

1. Choose Admin, Admin Categories.
2. Click the tab that displays the name of the current WBS category.
3. Select the value you want to delete, then click Delete.

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4. Click Yes.

Document Categories (P6 Professional Only)

Create document categories (P6 Professional Only)

You can set up categories to assign to work products and documents.

1. Choose Admin, Admin Categories.
2. Click the Document Categories tab, then click Add.
3. Type the name of the new document category.

> **Tip**
>
> To change the order in which document categories are listed, select the document category you want to move, then click Shift Up or Shift Down.

Rename document categories (P6 Professional Only)

1. Choose Admin, Admin Categories.
2. Click the Document Categories tab.
3. Double-click the category whose name you want to change, then type the document category's new name.

> **Tip**
>
> - To change the order in which document categories are listed, select the document category you want to move, then click Shift Up or Shift Down.
> - If you change a document category's name, your change applies to all document items assigned that category.

Delete document categories (P6 Professional Only)

1. Choose Admin, Admin Categories.
2. Click the Document Categories tab.
3. Select the category you want to delete, then click Delete.
4. Click Yes.

Document Statuses (P6 Professional Only)

Create a document status (P6 Professional Only)

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You can create status types that you can assign to documents in any project. A document's status helps you determine which documents are approved work products and documents, standards, and deliverables, and if they can be assigned to activities or work breakdown structure elements.

1. Choose Admin, Admin Categories.
2. Click the Document Status tab, then click Add.
3. Type the name of the new status.

> **Tip**
>
> To change the order in which document statuses are listed, select the document status you want to move, then click Shift Up or Shift Down.

Change document status names (P6 Professional Only)

1. Choose Admin, Admin Categories.
2. Click the Document Status tab.
3. Double-click the status whose name you want to change, then type the new name.

> **Tip**
>
> - To change the order in which document statuses are listed, select the document status you want to move, then click Shift Up or Shift Down.
> - If you change the name of a document status, your change applies to all documents with that status assigned.

Delete a document status (P6 Professional Only)

1. Choose Admin, Admin Categories.
2. Click the Document Status tab.
3. Select the status you want to delete, then click Delete.
4. Click Yes.

Risk Categories (P6 Professional Only)

Create risk categories (P6 Professional Only)

You can create hierarchical risk categories of possible risks that you can assign to risks. Risk categories are a classification of risk types customized to your specific project or business that are used to categorize and organize risks. Categorizing risks enables you to analyze the types of risks occurring and see trends within the project or across multiple projects.

1. Choose Admin, Admin Categories.

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2. Click the Risk Categories tab, then click Add.
3. Type the name of the new risk category.

> **Tip**
>
> To change the hierarchical order in which risk categories are listed, select the risk category you want to move, then click Shift up, Shift down, Shift Right, or Shift Left, as applicable.

Edit risk categories (P6 Professional Only)

1. Choose Admin, Admin Categories.
2. Click the Risk Categories tab.
3. Double-click the category you want to change, then enter the new risk category name.

> **Tip**
>
> - To change the hierarchical order in which risk categories are listed, select the risk category you want to move, then click Shift up, Shift down, Shift Right, or Shift Left, as applicable.
> - If you change a risk category, your change applies to all risks assigned that category.

Delete risk categories (P6 Professional Only)

1. Choose Admin, Admin Categories.
2. Click the Risk Categories tab.
3. Select the risk category you want to delete, then click Delete.
4. Click Yes.

> **Note**
>
> Deleting a risk category deletes all children and their assignments.

Notebook Topics (P6 Professional Only)

Create notebooks (P6 Professional Only)

Use notebooks to set up general categories for activity, project, EPS, and WBS notes. You can assign notebooks in any project.

1. Choose Admin, Admin Categories.

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2. Click the Notebook Topics tab, then click Add.
3. Type the name of the new notebook.
4. Mark the checkbox in the appropriate column to make the new notebook available in EPS, Project, WBS, or Activity views.

> **Tip**
>
> To change the order in which notebook topics are listed, select the notebook topic you want to move, then click Shift Up or Shift Down.

Change notebook names (P6 Professional Only)

1. Choose Admin, Admin Categories.
2. Click the Notebook Topics tab.
3. Double-click the notebook whose name you want to change, then enter the notebook's new name.

> **Tip**
>
> - To change the order in which notebook topics are listed, select the notebook topic you want to move, then click Shift Up or Shift Down.
> - If you change a notebook's name, your change applies to all assignments of that notebook.

Delete notebooks (P6 Professional Only)

1. Choose Admin, Admin Categories.
2. Click the Notebook Topics tab.
3. Select the notebook topic you want to delete, then click Delete.
4. Click Yes.

Units of Measure (P6 Professional Only)

Define the units of measure for material resources (P6 Professional Only)

A unit of measure describes the quantity of a particular resource. Labor resources are often measured in units of time, such as hours or days; materials can be measured in cubic or linear feet, or perhaps in tons or kilos; items used one-by-one can be measured individually (EA) or as shipped: a box, a case, a pallet. Money is generally measured in monetary units, such as dollars, Euros, or yen.

1. Choose Admin, Admin Categories.
2. In the Units of Measure tab, click Add.

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3. In the Unit Abbreviation column, type the abbreviation to use as the label for the new unit of measure.
4. In the Unit Name column, type the name of the new unit of measure.

Delete Units of Measure (P6 Professional Only)

You can delete any available unit of measure.

1. Choose Admin, Admin Categories.
2. Select the Units of Measure tab, then select a Unit Abbreviation or Unit Name.
3. Click Delete.

> **Note**
>
> If the units of measure you attempt to delete is in use, a message will prompt you that the unit of measure is still in use. Click Yes to continue deleting. The unit of measure is deleted from the resource, but the resource remains.

Defining Currencies (P6 Professional Only)

Currencies (P6 Professional Only)

You can specify the monetary unit or base currency used to store costs for all projects in the database, as well as the monetary unit or view currency used to display costs in windows and dialog boxes.

The exchange rate for the base currency is always 1.0. If you select a different currency than the base currency to view costs, the base currency value is multiplied times the current exchange rate for the view currency to calculate the values displayed in cost fields.

For example, if the base currency is U.S. Dollars, the view currency is Euros, and the exchange rate is €0.75 = $1, a value of $10 stored in the database is displayed as €7.5 in cost fields in windows and dialog boxes. Similarly, if you enter €7.5 in a cost field, it is stored in the database as $10.

> **Note**
>
> - Only a user with Admin Superuser privileges can change the base currency and define additional view currency types.
> - When you enter values in cost fields, they are always displayed in the view currency.
> - If you are upgrading from a previous version, you should set up the base currency in the new version before you start adding and changing projects.

Add a view currency (P6 Professional Only)

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1. Choose Admin, Currencies.
2. Click Add.
3. Click the General tab, then type an ID that clearly identifies the currency type.
4. Type the currency's name.
5. Enter the symbol used to identify the currency.
6. Enter the global exchange rate for the currency.
7. Click the Appearance tab, then select the symbol used to separate whole values from decimal values in the currency display, for example, 500.5 or 500,5.
8. Select the symbol used to separate groups of digits in the currency display, for example, 300,000 or 300-000.
9. Select the number of decimal places to display in currency values, for example, none (70), one (70.1), or two (70.14).
10. Select the format used to display positive and negative currency values.

Define a base currency (P6 Professional Only)

The base currency, by default, is U.S. dollars. The Base check box indicates the currency used to store cost data. You cannot mark or clear this check box, but to change the base currency you can reconfigure the base currency to represent your required base currency.

1. Choose Admin, Currencies.
2. Select the current base currency, then click the General tab.
3. Type the new ID, name, and symbol over the existing values, to define the new base currency.
4. Click the Appearance tab.
5. Select the symbol used to separate whole values from decimal values in the currency display, for example, 500.5 or 500,5.
6. Select the symbol used to separate groups of digits in the currency display, for example, 300,000 or 300-000.
7. Select the number of decimal places to display in currency values, for example, none (70), one (70.1), or two (70.14).
8. Select the format used to display positive and negative currency values.

Tip

If you want to view costs in the old base currency, you will need to add it back to the list of available currencies.

Managing Financial Periods (P6 Professional Only)

Financial Periods (P6 Professional Only)

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P6 Professional enables you to define your organization's global financial period calendars in the Financial Period Calendars dialog box. Customized financial periods provide more accurate display and reporting of actual units and costs. Rather than spreading costs evenly throughout the length of a project, users can view how actual costs were incurred by customized financial period.

If your organization always updates the schedule according to the same time interval (for example, every week, every month, every quarter, etc.), you can quickly create a calendar and add a batch of financial periods to it. If the schedule may be updated irregularly, you can create a single financial period for any financial period calendar at any time.

When financial period calendars exist, users can store period performance for any defined period of the financial period calendar assigned to the project. When you store period performance, actual units and costs are stored as past period actuals. The past period actual values can be edited for any financial period in columns of the Activity Table and Activity Details, Resources tab. Past period actual spreads per financial period can be viewed in the Activity Usage Spreadsheet and Resource Usage Spreadsheet, and past period actual data can be displayed in profiles, time-distributed reports, and the Tracking view.

Tip

To ensure that data is displayed correctly in financial period timescale intervals in P6 Professional, activity and resource data must be summarized by financial period. To summarize project data by financial period, choose Admin, Preferences, then select the Options tab. In the 'Select summarization periods' section, choose the 'By financial period' option; for each project, data will be stored in financial period intervals the next time you summarize the project.

Create a financial period calendar (P6 Professional Only)

You can create a financial period calendar to allow users to store data by financial period. If your projects are reported according to differing financial periods, you can create several financial periods calendars and assign the appropriate financial period calendar on a project-by-project basis.

1. Choose Admin, Financial Period Calendars.
2. Click Add.
3. In the Financial Period Calendar Name field, type the name for the new calendar.
4. If you want this calendar to be the default financial period calendar to be assigned to new projects and projects imported without a financial period calendar, mar the Default option.
5. Click Close.

Tip

After you have created a financial period calendar, you must create financial periods for the calendar before your users can use the financial period calendar to store data for their projects.

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> **Note**
>
> You must have the Add/Edit/Delete Financial Period Calendars global privilege to add or edit data in the Financial Period Calendars dialog box.

Create a financial period (P6 Professional Only)

If the duration of your organization's financial periods is not consistent, you can create individual financial periods. You should create a batch of financial periods when each financial period will have the same duration (for example, two weeks, one month, three months, etc.) over an extended period of time.

1. Choose Admin, Financial Period Calendars.
2. Select a financial period calendar and click Modify.
3. In the Financial Periods dialog box, click Add.
4. In the Select Financial Period Timescale dialog box, enter or select the period Start Date and End Date.
5. Click Add. The Select Financial Period Timescale dialog box remains open. You can add additional financial periods by repeating steps 4 and 5.
6. When you have finished adding financial periods, click Close. The financial periods you just created are listed in the Financial Periods dialog box.

> **Tip**
>
> - To create daily financial periods, enter or select the same date as the period Start Date and End Date.
> - When you create a financial period, the default name is YYYY-MM-DD (e.g., 2004-04-01). To ensure the financial periods are listed in the proper order (e.g., in the Columns dialog box), you should use the default name or add a letter or number to the beginning of the name (e.g., 1 Fiscal Month, 2 Fiscal Month, etc.). Click on a period in the Period Name column to edit the name.

> **Note**
>
> - You must have the Add/Edit/Delete Financial Period Calendars global privilege to add or edit data in the Financial Periods dialog box.
> - The start and end dates of a financial period cannot overlap existing financial period dates.
> - You cannot modify the start and end dates of a financial period after you create it. To modify the start and end dates of a period, you must delete the financial period, then create a new period with the new dates.
> - All periods start at midnight and end at 11:59 PM.

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Create a batch of financial periods (P6 Professional Only)

You can create a batch of financial periods when each financial period will have the same duration (for example, two weeks, one month, three months, etc.) over an extended period of time. When creating a batch of financial periods, the financial periods must be at least one week in duration.

1. Choose Admin, Financial Period Calendars.
2. Select a financial period calendar and click Modify.
3. In the Batch Create Financial Periods section of the Financial Periods dialog box, enter the Batch Start Date and the Batch End Date.
4. Choose the duration of each financial period by selecting one of the following options: To make each financial period in the batch a certain number of weeks long, choose Every n Weeks (where n is the number of weeks) and enter a number of weeks. To make each financial period in the batch a certain number of months long, choose Every n Months and enter a number of months. Select Every Year to make each financial period in the batch one year long.
5. In the Period Ends On field, choose the weekday or the month you want each financial period to end on. If you selected weeks as the duration for the batch, you must select a day of the week. If you selected years as the duration for the batch, you must select a month. If you selected months as the duration for the batch, this field is disabled because each financial period will end on the last day of the month.
6. Click Batch Create. The financial periods will be created and displayed in the list of financial periods.

Tip

- When you create a financial period, the default name is YYYY-MM-DD (e.g., 2004-04-01). To ensure the financial periods are listed in the proper order (e.g., in the Columns dialog box), you should use the default name or add a letter or number to the beginning of the name (e.g., 1 Fiscal Month, 2 Fiscal Month, etc.). Click on a period in the Period Name column to edit the name.
- If your organization summarizes project data by financial period, to ensure that all project data in the database will be summarized (including closed projects), you must create financial period calendars that span the date range of all projects in the database. For example, if the oldest project using a particular financial period calendar has a project start date of October 1st, 2001, the financial periods for that calendar should begin on or before that date.

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Note

- You must have the Add/Edit/Delete Financial Period Calendars global privilege to add or edit data in the Financial Periods dialog box.
- The start and end dates of a financial period cannot overlap existing financial period dates.
- You cannot modify the start and end dates of a financial period after you create it. To modify the start and end dates of a period, you must delete the financial period, then create a new period with the new dates.
- All periods start at midnight and end at 11:59 PM.

Delete a financial period (P6 Professional Only)

1. Choose Admin, Financial Period Calendars.
2. Click the financial period calendar containing the period you want to delete.
3. In the list of financial periods, select the period you want to delete.
4. Click Delete.

Note

- You cannot delete a financial period that contains past period actual data for at least one project. If you attempt to delete multiple financial periods at the same time, none of the financial periods will be deleted if any period contains past period actual data. In this case, to delete a financial period, you must archive and delete the project containing past period actuals, then delete the financial period.
- You must have the Add/Edit/Delete Financial Period Calendars global privilege to delete a financial period.

Managing User Security (P6 Professional Only)

Users (P6 Professional Only)

A user account provides a secure means for a person in your organization to access and use P6 Professional, however a user account alone isn't sufficient to access the software. A user account requires access to modules, and to be assigned security profiles. You might also need to assign your user access to resources.

Modules

The modules available for P6 Professional are:

- P6 Professional
- P6 Visualizer

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You can assign a user access to either or both.

Security Profiles

Security profiles are collections of privileges that determine what a user assigned that security profile will or will not be allowed to do in P6 Professional. Users you create will not have access to any projects or features until you assign them a security profile.

Global security profiles allow you to restrict what users can do with global data (for example, resources, roles, codes, and calendars) and the actions they can take (for example, importing and exporting data, running services, using secure codes, and provisioning users).

Project security profiles allow you to restrict what users can do in projects assigned to a given OBS (also known as a Responsible Manager).

Resource Security

Resource security allows the administrator to restrict a user's resource access. By default, new users do not have access to resources.

Rules for Usernames and Passwords

The following rules apply to the usernames you can create and the passwords your users can use.

- Login names for users must be between 1 and 255 characters long.
- If the Enable Password Policy check box is cleared in the Admin Preferences dialog box, passwords must be between 1 and 20 characters long. If the Enable password policy check box is selected in the Admin Preferences dialog box, passwords must be at least 8 characters long and must contains at least one alpha and one numeric character.
- If you intend to use reporting software, avoid using commas when creating data other than Project names. The way that data is passed to some reporting software can cause a comma to be interpreted as a delimiter between data items.
- Oracle recommends the use of strong passwords. Strong passwords in P6 Professional are defined as passwords containing between 8 to 20 characters and at least one numeric and one alpha character. To further strengthen the password, use a mixture of upper and lower case letters.

To set up a new user:

Add a new user.

Assign the user access to the modules they will need to use.

Assign a global security profile.

Assign project security profiles to OBS nodes.

Setting up user security (P6 Professional Only)

For each user, you perform the following steps to implement access to P6 Professional.

1. Choose Admin, Users.
2. Click Add to add a user.
3. On the General tab:
   - Enter the user's login name and personal name.

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- Click Password to enter the user's password. The minimum password requirements depend on the status of the password policy, and are described in the Change Password dialog box.

4. On the Global Access tab:
   - Assign a global security profile to the user. Global security profiles determine the global actions the user can perform and are defined in the Security Profiles dialog box (choose Admin, Security Profiles).
   - Enable or disable resource security for the user. To enable access to all resources, mark the All Resource Access checkbox (Admin Superusers automatically get All Resource Access). To restrict resource access to specific resource nodes, select up to five resource nodes. To disable access to all resources, clear the All Resource Access checkbox (if necessary), and do not select a resource node.
5. On the Project Access tab, click Assign to assign the user to an OBS element (responsible manager), then select an existing project security profile. This grants the user access to WBS elements (and associated activities) for which the assigned OBS element is responsible, in all projects. For the projects the user can access based on the user's OBS assignment, the project security profile determines the actions the user can perform for these projects.
6. On the Module Access tab, mark the checkbox for P6 Professional. This enables the user to access the application.

> **Note**
>
> - While a user is working offline, changes to certain data can cause them not to be able to switch to working online. To ensure users who are currently working offline are not prevented from switching to working online, avoid making changing any of the following data if any user might currently be working offline: User details, Global or project security profiles, OBS assignments (both for users and for projects), and Resource security.
> - Only an Admin Superuser can add, edit, or delete Admin Superusers or change an Admin Superuser's password.
> - Only an Admin Superuser can apply the Admin Superuser profile to a user. Any user with the *Add/Edit/Delete Users* privilege can apply the Project Superuser profile to a user.

Module access (P6 Professional Only)

The P6 Professional module access option controls whether users can attempt to log into the P6 Professional application.

The Visualizer module access option controls whether users can attempt to log into the Visualizer application.

For each defined user, a user with the required security privilege can enable or disable access to the products listed in the Users dialog box (choose Admin, Users, then click the Module Access tab).

Security profiles

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Security profiles determine a user's level of access to project information. The security profiles include both global profiles and project profiles. A global profile determines the user's access to application-wide information. A project profile determines the user's level of access to each project within the Enterprise Project Structure (EPS).

When connected to a P6 EPPM database: When you assign a project profile to a user as defined in P6, you also associate the project profile with an OBS element/responsible manager.

When connected to a P6 Professional database: When you assign a project profile to a user, you also associate the project profile with an OBS element/responsible manager.

The user's access privileges, as defined in the project profile, will then apply only to those elements of the EPS that are assigned to the OBS element/responsible manager you selected.

> **Note**
>
> While a user is working offline, changes to certain data can cause them not to be able to switch to working online. To ensure users who are currently working offline are not prevented from switching to working online, avoid making changing any of the following data if any user might currently be working offline: User details, Global or project security profiles, OBS assignments (both for users and for projects), and Resource security.

Global profiles

P6 Professional requires that all users have a global profile. A global profile defines a set of privileges for access to global, or application-wide, information such as cost accounts, resources, and roles.

When P6 Professional is connected to a P6 EPPM database:

To control user access to global information, you create global profiles using P6, and then assign specific profiles to individual users.

To allow complete access to all global information and all projects (assuming all applicable options have been applied using P6), you can assign a global profile called Admin superuser. You can assign the Admin Superuser profile to as many users as you like. However, since the Admin Superuser profile enables access to all information, you would typically restrict the number of users to whom you assign this profile. You cannot edit the Admin Superuser security profile.

> **Note**
>
> Only an Admin Superuser can apply the Admin Superuser profile to a user.

When P6 Professional is connected to a P6 Professional database:

To control user access to global information, you create global profiles, and then assign specific profiles to individual users.

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To allow complete access to all global information and all projects (assuming all applicable checkboxes are marked on the Users dialog box, Module Access tab), you can assign a global profile called Admin superuser.

Global Privilege Definitions (P6 Professional Only)

A global profile definition specifies the individual access privileges associated with the profile. For a global profile, access privileges apply to application-wide information and settings. The module requires you to assign a global profile to each user.

Edit Global Change Definitions option

Determines whether the profile will enable users to create, modify, and remove Global Change specifications available to all users in P6 Professional.

Add/Edit/Delete Categories option

Determines whether the profile will enable users to create, modify and remove categories data as defined in the Admin Categories dialog box.

Delete Resources option

Determines whether the profile will enable users to remove resource data. This privilege also selects the 'Add Resources' and 'Edit Resources' global privileges.

> **Note**
>
> When a resource is deleted, all historical data for that resource and its assignments is also deleted. This includes resource costs and spreads from all projects to which that resource was assigned. Deleting resources can change the costs and units figures for all projects to which that resource was assigned. In most circumstances users should not delete reresources, but clear the Active option for the resource on the Resources tab on the Resources Administration page.
>
> Exercise extreme caution when assigning the Delete Resources privilege.

Add Resources option

Determines whether the profile will enable users to create resource data. This privilege also selects the 'Edit Resources' global privilege.

Edit Resources option

Determines whether the profile will enable users to modify resource data. This privilege also enables users to assign, modify, and remove role assignments. To display resources' price/unit in reports, users must have this privilege and the 'View Resource and Role Costs/Financials' global privilege assigned to their profile. To display resource skill level (a resource's role proficiency) in the application and in reports, users must have this privilege and the 'View Resource Role Proficiency' global privilege assigned to their profile.

View Resource Role Proficiency option

Determines whether the profile will enable users to display, group/sort, filter, search, and report on resource and role proficiency. To display resource skill level (a resource's role proficiency), users must have this privilege and the Edit Resources global privilege assigned to their profile.

Add/Edit/Delete Cost Accounts option

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Determines whether the profile will enable users to create, modify, and remove cost accounts data.

Import P6 Professional XER and MPX option

Determines whether the profile will enable users to import projects, resources, and roles from XER and MPX formats using P6 Professional. To create new projects when importing, users must also have the 'Create Project' project privilege assigned to their profile. Users must be an Admin or Project Superuser to update a project from an XER file.

Import XML option

Determines whether the profile will enable users to import projects from P6 Professional and Microsoft Project using XML format. To create new projects when importing, users must also have the 'Create Project' project privilege assigned to their profile.

> **Note**
>
> For Microsoft Project imports, you can only create a new project (not update an existing one) during import. Also, P6 Professional supports imports from Microsoft Project 2002.

Import XLSX option

Determines whether the profile will enable users to import projects, resources, and roles from XLSX files into P6 Professional.

Add/Edit/Delete Global Reports option

Determines whether the profile will enable users to create, modify, and remove global reports, including editing report groups and global report batches and saving global reports created or modified in P6 Professional.

Edit Global Tracking Layouts option

Determines whether the profile will enable users to create, modify, and remove global tracking layouts in P6 Professional.

Add/Edit/Delete Roles option

Determines whether the profile will enable users to create, modify, and remove roles data.

Edit Global Activity Codes option

Determines whether the profile will enable users to modify global activity codes data. This privilege also enables users to create, modify, and remove global activity code values and associated Visualizer colors.

Add Global Activity Codes option

Determines whether the profile will enable users to create global activity codes and code values data. This privilege also selects the 'Edit Global Activity Codes' global privilege.

Delete Global Activity Codes option

Determines whether the profile will enable users to remove global activity codes and code values data. This privilege also selects the 'Add Global Activity Codes' and 'Edit Global Activity Codes' global privileges.

Add/Edit/Delete Global Calendars option

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Determines whether the profile will enable users to create, modify, and remove global calendars data.

Add/Edit/Delete Resource Calendars option

Determines whether the profile will enable users to create, modify, and remove resource calendars data. This privilege also enables users to edit Shifts in P6 Professional.

Add/Edit/Delete Security Profiles option

Determines whether the profile will enable users to create, modify, and remove global and project security profiles, which grant access to application-wide and project-specific information.

Add/Edit/Delete Users option

Determines whether the profile will enable users to create, modify, and remove P6 Professional user data. To search the LDAP directory when provisioning, users must also have the Provision Users from LDAP global privilege.

Add/Edit/Delete Global Activity and Assignment Layouts and Filters option

Determines whether the profile will enable users to create, modify, and remove global activity and resource assignment layouts and filters.

Add/Edit/Delete OBS option

Determines whether the profile will enable users to create, modify, and remove hierarchical data for the global Organizational Breakdown Structure.

Edit Project Codes option

Determines whether the profile will enable users to modify project codes data. This privilege also enables users to create, modify, and remove project code values.

Add Project Codes option

Determines whether the profile will enable users to create project codes and code values data. This privilege also selects the 'Edit Project Codes' global privilege.

Delete Project Codes option

Determines whether the profile will enable users to remove project codes and code values data. This privilege also selects the 'Add Project Codes' and 'Edit Project Codes' global privileges.

Edit Assignment Codes option

Determines whether the profile will enable users to modify assignment codes data. This privilege also enables users to create, modify, and remove assignment code values.

Add Assignment Codes option

Determines whether the profile will enable users to create assignment codes and code values data. This privilege also selects the 'Edit Assignment Codes' global privilege.

Delete Assignment Codes option

Determines whether the profile will enable users to remove assignment codes and code values data. This privilege also selects the 'Add Assignment Codes' and 'Edit Assignment Codes' global privileges.

Edit Resource Codes option

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Determines whether the profile will enable users to modify resource codes data. This privilege also enables users to create, modify, and remove resource code values.

Add Resource Codes option

Determines whether the profile will enable users to create resource codes and code values data. This privilege also selects the 'Edit Resource Codes' global privilege.

Delete Resource Codes option

Determines whether the profile will enable users to remove resource codes and code values data. This privilege also selects the 'Add Resource Codes' and 'Edit Resource Codes' global privileges.

Add Role Codes option

Determines whether the profile will enable users to create role codes and code values data. This privilege also selects the 'Edit Role Codes' global privilege.

Edit Role Codes option

Determines whether the profile will enable users to modify role codes data. This privilege also enables users to create, modify, and remove role code values.

Delete Role Codes option

Determines whether the profile will enable users to remove role codes and code values data. This privilege also selects the 'Add Role Codes' and 'Edit Roles' global privileges.

Add/Edit/Delete Global Portfolios option

Determines whether the profile will enable users to create, modify, and remove global portfolios.

Administer Global External Applications option

Determines whether the profile will enable users to create, modify, and remove entries in the list of global external applications in P6 Professional.

Add/Edit/Delete Funding Sources option

Determines whether the profile will enable users to create, modify, and remove funding source data.

View Resource and Role Costs/Financials option

Determines whether the profile will enable users to display all values for labor, material, and nonlabor resource costs, price/unit values for roles, and costs for resource and resource assignments User Defined fields. For users who do not have this privilege assigned to their profile, all areas that display monetary values for labor, material, and nonlabor resources and roles will display dashes and cannot be edited. For resources, such areas include resource price/unit, values in resource spreadsheets and histograms in Resource Analysis and Team Usage, and Cost data types for Resource User Defined fields. For roles, the area is the price/unit value in roles data. To display resources' price/unit, users must have this privilege and the 'Edit Resources' global privilege assigned to their profile.

Administer Job Services option

Determines whether the profile will enable users to set up the Apply Actuals, Batch Reports, Export, Schedule, and Summarize services to run at specific time intervals using the Job Service.

Add/Delete Secure Codes option

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Determines whether the profile will enable users to create and remove all secure project codes, global and EPS-level activity codes, resource codes, role codes, issue codes, and code values data. This privilege also selects the 'Edit Secure Codes,' 'Assign Secure Codes,' and 'View Secure Codes' global privileges.

Edit Secure Codes option

Determines whether the profile will enable users to modify all secure project codes, global and EPS-level activity codes and associated activity code value colors, and resource codes and code values data, as well as all secure issue codes, and code values data. This privilege also selects the "Assign Secure Codes" and "View Secure Codes" global privileges.

Assign Secure Codes option

Determines whether the profile will enable users to assign all secure project codes, global and EPS-level activity codes, resource codes role codes, issue codes, and code values data. This privilege also selects the 'View Secure Codes' global privilege.

View Secure Codes option

Determines whether the profile will enable users to display all secure project codes, global and EPS-level activity codes, and resource codes and code values data, as well as all secure issue codes and code values data.

Add/Edit/Delete Currencies option

Determines whether the profile will enable users to create, modify, and remove currencies data.

Add/Edit/Delete Categories option

Determines whether the profile will enable users to modify administrative categories as defined in the Admin Categories dialog box.

Edit Admin Preferences option

Determines whether the profile will enable users to modify administrative preferences as defined in the Admin Preferences dialog box.

Provision Users from LDAP

Determines whether the profile will enable users to search the LDAP directory when provisioning. For users who do not have this privilege assigned to their profile, the option to load an LDIF file to provision users will still be enabled. To search the LDAP directory, users also must also have the 'Add/Edit/Delete Users' global privilege.

Add/Edit/Delete Global Visualizer Layouts option

Determines whether the profile will enable users to edit, rename, and delete global Visualizer layouts, and allows users to promote (add) layouts from the User or Project Layouts category. To promote layouts from the Projects Layout category, you also need the Add/Edit/Delete Project Visualizer Layouts privilege.

Add/Edit/Delete Global Visualizer Filters option

Determines whether the profile will enable users to create, modify, and remove global filters in Visualizer.

Add/Edit/Delete Resource Curves option

Determines whether the profile will enable users to create, modify, and remove resource distribution curves definitions.

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Add/Edit/Delete User Defined fields option

Determines whether the profile will enable users to create, modify, and remove User Defined fields. Even without this privilege, users can still display User Defined fields information.

Add/Edit/Delete Global Project/WBS Layouts option

Determines whether the profile will enable users to create, modify, and remove global project and WBS layouts.

Add/Edit/Delete Microsoft and Primavera Templates option

Determines whether the profile will enable users to create, modify, and remove templates that are used to import and export data to and from Microsoft Excel, Microsoft Project, Primavera XML, and Primavera XER formats.

Add/Edit/Delete Activity Step Templates option

Determines whether the profile will enable users to create, modify, and remove Activity Step Templates, which are used to add a set of common steps to multiple activities.

Add/Edit/Delete Financial Period Calendars option

Determines whether the profile will enable users to create, modify, and remove financial period calendars and financial period calendar data. To edit period data, users must also have the 'Edit Period Performance' project privilege assigned to their profile.

Add/Edit/Delete Stored Images option

Determines whether the profile will enable users to create, modify, and remove stored images.

Tip

- P6 Professional includes a global profile called Admin Superuser. This profile automatically gives a user all of the preceding privileges for all projects and P6 Professional features (assuming all applicable checkboxes are marked on the Users dialog box, Module Access tab). To enable read/write privileges for all projects and features, you can apply the Admin Superuser profile to a user.
- The previous table groups each privilege by functionality. The privileges are listed in the same order as displayed in the Security Profiles dialog box. To view the privileges in alphabetical order in the Security Profiles dialog box, click the Privileges bar.

Project profiles

A project profile defines a set of privileges for access to project-specific information. Project profiles are assigned to users based on the OBS hierarchy. To control access to project-specific information, you create project profiles, and then assign specific OBS elements and associated project profiles to individual users. When P6 Professional is connected to a P6 EPPM database, you do those tasks using P6. The assigned OBS element determines the EPS and WBS elements for which the user can access project information. The assigned project profile determines the type of access privileges the user has to that project information.

All WBS elements must have an assigned responsible OBS. If a user's project profile assignment includes a WBS element's responsible OBS, then the user can access all activities and issues related to that WBS element. Similarly, all thresholds and project issues

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also have an assigned responsible OBS. If a user's project profile assignment includes a threshold or issue's responsible OBS, then the user can access that threshold or issue.

When P6 Professional is connected to a P6 Professional database:

The module does not require that each user have a profile for every project. However, unless a user's global profile is Admin Superuser, that user cannot access a project without a project profile. See Admin superuser. To allow complete access to a project/OBS assignment, the module includes a project profile called Project Superuser. You can apply the Project Superuser profile to as many users and for as many projects as you like. See Project superuser. Only an Admin Superuser can apply the Admin Superuser profile to a user.

When P6 Professional is connected to a P6 EPPM database:

When Each user does not require a profile for every project. However, unless a user's global profile is Admin Superuser, that user cannot access a project without a project profile. See Admin superuser. To allow complete access to a project/OBS assignment, you can apply a project profile called Project Superuser. You can apply the Project Superuser profile to as many users and for as many projects as you like. See Project superuser. Only an Admin Superuser can apply the Admin Superuser or Project Superuser profile to a user.

Project Privilege Definitions (P6 Professional Only)

A project profile definition identifies the specific access privileges that are granted by the profile. Each project profile is associated with an organizational breakdown structure (OBS) element to determine which EPS structure elements an individual user can access.

Add Projects option

Determines whether the profile will enable users to modify EPS budget logs, funding sources, and spending plans.

Delete Projects option

Determines whether the profile will enable users to delete, cut, and paste projects within the EPS node.

Summarize Projects option

Determines whether the profile will enable users to summarize data for all projects in the EPS.

Edit Project Details Except Costs/Financials option

Determines whether the profile will enable users to edit fields in General, Dates, Defaults, Resources, and Settings tabs in Project Details. To assign a project baselines, users must also have the "Assign Project Baselines" project privilege assigned to their profile.

Add/Edit/Delete Issues and Issue Thresholds option

Determines whether the profile will enable users to create, modify, and remove thresholds and issues assigned to projects. The privilege also enables users to assign issue codes to project issues.

Add/Edit/Delete Project Baselines option

Determines whether the profile will enable users to create, modify, and remove baselines for projects.

Add/Edit/Delete Project Calendars option

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Determines whether the profile will enable users to create, modify, and remove calendars assigned to projects.

Add/Edit/Delete Risks option

Determines whether the profile will enable users to create, modify, and remove risks assigned to projects.

Add/Edit/Delete Template Documents option

Determines whether the profile will enable users to create, modify, remove project template documents. If the content repository is installed and configured, this privilege also enables P6 users to check out and start reviews for project template documents. P6 Professional users cannot open documents added via a P6 installation with a configured content repository. A profile must be assigned the 'Add/Edit/Delete Work Products and Documents' project privilege before you can select this privilege.

Add/Edit/Delete Work Products and Documents option

Determines whether the profile will enable users to create, modify, and remove project documents that do not have a security policy applied. Document security policies are available only in P6 and only for documents stored in the content repository. When the content repository is installed and configured, this privilege also enables users to create document folders in P6.

Assign Project Baselines option

Determines whether the profile will enable users to assign project baselines to projects. To assign project baselines, users must also have the 'Edit Project Details Except Costs/ Financials' project privilege assigned to their profile.

Approve Timesheets as Project Manager option

Determines whether the profile will enable users to approve or reject submitted timesheets as a Project Manager in Timesheet Approval.

Administer Project External Applications option

Determines whether the profile will enable users to modify entries in the External Applications feature in P6 Professional.

Schedule Projects option

Determines whether the profile will enable users to schedule a project.

Level Resources option

Determines whether the profile will enable users to level resources.

Apply Actuals option

Determines whether the profile will enable users to apply actuals to activities in a project.

Store Period Performance option

Determines whether the profile will enable users to track an actual this period value for actual units and costs in a project. A user must be assigned the Add/Edit Activities Except Relationships project privilege before you can assign this privilege.

Edit Period Performance option

Determines whether the profile will enable users to modify period performance values for labor and nonlabor units as well as labor, nonlabor, material, and expense costs using P6

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Professional. The 'Add/Edit Activities Except Relationships' and 'View Project Costs/Financials' project privileges are also required for this functionality.

Maintain Project Baselines option

Determines whether the profile will enable users to create, modify, and remove baselines for projects.

Run Baseline Update option

Determines whether the profile will enable users to update a project's baselines with new project information using the Update Baseline utility.

Assign Project Baselines option

Determines whether the profile will enable users to assign project baselines to projects. To assign project baselines, users must also have the 'Edit Project Details Except Costs/ Financials' project privilege assigned to their profile.

Add/Edit/Delete Work Products and Documents option

Determines whether the profile will enable users to create, modify, and remove a project's work products and documents.

View Project Costs/Financials option

Determines whether the profile will enable users to display all monetary values for projects. For users who do not have this privilege assigned to their profile, all areas that display monetary values will display dashes and cannot be edited. To use the Recalculate Assignment Costs feature, users must also have the 'Add/Edit Activities Except Relationships' project privilege assigned to their profile. To display the resource price/unit, users must have the 'View Resource and Role Costs/Financials' global privilege assigned to their profile.

Edit Project Activity Codes option

Determines whether the profile will enable users to modify project activity codes data. This privilege also enables users to create, modify, and remove project activity code values and associated Visualizer colors.

Add Project Activity Codes option

Determines whether the profile will enable users to create project activity codes and code values data. This privilege also selects the 'Edit Project Activity Codes' project privilege.

Delete Project Activity Codes option

Determines whether the profile will enable users to remove project activity codes and code values data. This privilege also selects the 'Add Project Activity Codes' and 'Edit Project Activity Codes' project privileges.

Edit EPS Activity Codes option

Determines whether the profile will enable users to modify the name of EPS-level activity codes. This privilege also enables users to create, modify, and remove EPS-level activity code values and associated Visualizer colors.

Add EPS Activity Codes option

Determines whether the profile will enable users to create EPS-level activity codes and code values. This privilege also selects the 'Edit EPS Activity Codes' project privilege.

Delete EPS Activity Codes option

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Determines whether the profile will enable users to remove EPS-level activity codes and code values data. This privilege also selects the 'Add EPS Activity Codes' and 'Edit EPS Activity Codes' project privileges.

Monitor Project Thresholds option

Determines whether the profile will enable users to run the threshold monitor for a project.

Publish Project Web site option

Determines whether the profile will enable users to publish a project's Web site.

Edit Project Reports option

Determines whether the profile will enable users to edit a project's reports, edit a project's report batches, and export reports.

Add/Edit/Delete Project Calendars option

Determines whether the profile will enable users to create, modify, and remove calendars assigned to projects.

Run Global Change option

Determines whether the profile will enable users to run Global Change to update activity detail information.

Check In/Check Out Projects and Open Projects Exclusively option

Determines whether the profile will enable users to check projects out to work remotely and then check them back in. Also determines whether the profile will enable users to open projects exclusively.

Add/Edit/Delete WBS Except Costs/Financials option

Determines whether the profile will enable users to create, modify, and remove WBS hierarchy nodes and other WBS level data including notebook entries, earned value settings, milestones, and dates. This privilege does not allow users to edit cost and financial data at the WBS level.

Edit WBS Costs/Financials option

Determines whether the profile will enable users to modify Project or WBS budget logs, funding sources, spending plan, and financial data at the project level. To edit costs and financials at the WBS level, including cost UDFs, users must also have the ‘Add/Edit/Delete WBS Except Costs/Financials' project privilege assigned to their profile. The ‘Edit WBS Costs/Financials' privilege also selects the 'View Project Costs/Financials' project privilege.

Add/Edit/Delete EPS Except Costs/Financials option

Determines whether the profile will enable users to create, modify, and remove EPS hierarchy nodes, edit EPS notebook, and edit all EPS-related data except financial information.

Edit EPS Costs/Financials option

Determines whether the profile will enable users to modify EPS budget logs, funding sources, and spending plans.

Add/Edit/Delete Expenses option

Determines whether the profile will enable users to create, modify, and remove expenses assigned to projects.

Add/Edit/Delete Issues and Issue Thresholds option

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Determines whether the profile will enable users to create, modify, and remove thresholds and issues assigned to projects. The privilege also enables users to assign issue codes to project issues.

Add/Edit/Delete Activity Relationships option

Determines whether the profile will enable users to create, modify, and remove activity relationships assigned to projects.

Add/Edit Activities Except Relationships option

Determines whether the profile will enable users to create and modify all activity information in projects, except activity relationships. To modify activity IDs, users must also have the 'Edit Activity ID' project privilege assigned to their profile. To use the Recalculate Assignment Costs feature, users must also have the 'View Project Costs/Financials' project privilege assigned to their profile.

Delete Activities option

Determines whether the profile will enable users to remove activities from projects.

Edit Activity ID option

Determines whether the profile will enable users to modify activity IDs. To modify activity IDs, users must also have the 'Add/Edit Activities Except Relationships' project privilege assigned to their profile.

Edit Future Periods option

Determines whether the profile will enable users to enter, modify, and delete future period assignment values in the Planned Units and Remaining (Early) Units fields of the Resource Usage Spreadsheet using P6 Professional. The 'Add/Edit Activities Except Relationships' project privilege is also required for this functionality.

Add/Edit/Delete Project Level Layouts option

Determines whether the profile will enable users to create, edit, and delete project level layouts in Activities, Assignments, or WBS views.

Add/Edit/Delete Project Visualizer Layouts option

Determines whether the profile will enable users to create, modify, and remove project layouts in Visualizer.

Add/Edit/Delete Risks option

Determines whether the profile will enable users to assign risks to activities and to create, modify, and remove risks.

> **Note**
>
> To view resources' price/unit in reports, users must have "Edit Resources" and "View Resource and Role Costs/Financials" global privileges assigned to their profile.

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Tip

- A project profile, Project Superuser, automatically gives a user all of the above privileges for each project, according to the specified OBS element.
- To allow read-write privileges for all aspects of a project, you can assign a user to a project's root OBS element and then apply the Project Superuser profile to the project/OBS assignment.
- The previous table groups each privilege by functionality. The privileges are listed in the same order as displayed in the Security Profiles dialog box. To view the privileges in alphabetical order in the Security Profiles dialog box, click the Privileges bar.

Add new users (P6 Professional Only)

1. Choose Admin, Users.
2. Click Add.
3. What appears next depends on your security configuration:
   a. If P6 Professional is running in Native authentication mode, the Add User dialog box will appear:
      i. Fill in the Login Name, Personal name, Enter new password, and Confirm new password fields.
      ii. Click OK.
      iii. If the ability to edit a personal resource calendar is required, you can select an associated resource from the Resource ID / Resource Name for Personal Calendar field, or you can create the link when you add resources.
      iv. Click the Contact tab. Enter the user's email address and office phone number.
      v. Click Close.
   b. If P6 Professional is running in LDAP authentication mode, the Import Domain Users dialog box will appear:

      Note

      You must have the Add/Edit/Delete Users privilege and the Provision Users from LDAP privilege to search the LDAP directory. You do not need the Provision Users from LDAP privilege to import users from the LDIF file.

      i. Click the Load LDIF button, or enter an LDAP query under LDAP User Search Criteria. If you clicked the Load LDIP button, browse to the location of the LDIF file, and click Open. If you entered an LDAP query (for example, for example, UID=*) click Search.
      ii. A list of users will appear, grouped by category. For example, LDAP repository users that do not exactly match P6 Professional users will be grouped together. If users exist in the LDAP repository, the Login Name, Personal Name, User EMail Address, and Office Phone fields are populated based on the field mappings in the LDAP configuration settings.

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iii. Select the Import option next to each Login Name that you with to import. New or modified users are automatically selected.

iv. Click Import Users.

v. Click Close in the Users dialog box.

Tip

- When you create new users, they are automatically assigned the default global profile.
- If a user is also a resource, the email address and office phone number you type in the Users dialog box overwrites the email address and office phone number recorded in the Resources window General tab, if that information is different. Likewise, email and phone information you enter in the Resources window overwrites the information in the Users dialog box.
- If P6 Professional is running in LDAP authentication mode, the Password button does not appear because password management is handled through the directory server.

List number of users having access to P6 Professional (P6 Professional Only)

1. Choose Admin, Users.
2. Click Count. The Count dialog box displays the number of users and the user name of each user assigned access to P6 Professional. Expand a module to display the user name of each user assigned access to a module.
3. If you want to print the displayed information, click Print. Otherwise, click Close.

Tip

When you click Print, the table prints the same as it appears on the screen. So collapsed nodes are not expanded for printing, and expanded nodes print the entire list of users.

Change user security profiles (P6 Professional Only)

1. Choose Admin, Users.
2. Select the user whose security profiles you want to change.
3. To change a global profile, click the Global Access tab and select a new global profile.
4. To change a project profile, click the Project Access tab. To remove the user's current access to project information associated with a specific responsible manager, select the manager, then click Remove. To grant the user access to project information associated with a specific responsible manager, click Assign. Double-click the OBS element to which you want to grant access, then click Close. To change the user's security profile for a project, double-click the security profile you want to change, then select a new project profile.

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> **Note**
>
> While a user is working offline, changes to certain data can cause them not to be able to switch to working online. To ensure users who are currently working offline are not prevented from switching to working online, avoid making changing any of the following data if any user might currently be working offline: User details, Global or project security profiles, OBS assignments (both for users and for projects), and Resource security.

Change user passwords (P6 Professional Only)

1. Depending on your global profile, you may be able to change a user's password or your own.
2. Choose Admin, Users.
3. Select the General tab.
4. Select the user who requires a change of password.
5. Click Password.
6. In the New Password field, enter the new password.
7. In the Confirm New Password field, enter the password again, to verify it.
8. Click OK.

> **Note**
>
> - If the Enable password policy setting is selected in the Password Policy field of the Admin Preferences dialog box, enter a password that is a minimum of 8 characters long, and that contains one alpha and one numeric character.
> - If the Enable password policy setting is not selected, enter a password up to 20 characters long.
> - If P6 Professional is running in LDAP authentication mode, password management is handled through the directory server. You cannot change your password through the module and the Password button does not appear on the Users dialog box General tab.
> - Passwords are case-sensitive.
> - Passwords that were set before the new password policy was enabled are valid and usable.

Enable or disable user access to P6 Professional (P6 Professional Only)

1. Choose Admin, Users.
2. Select the user for whom you want to enable or disable module access, then click the Module Access tab.
3. In the Access column, mark or clear the checkbox for the modules you want to enable or disable for the selected user.

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Remove users (P6 Professional Only)

1. Choose Admin, Users.
2. Select the user you want to remove, then click Delete.
3. Click Yes.

Create global profiles (P6 Professional Only)

1. Choose Admin, Security Profiles.
2. Choose Global Profiles, then click Add.
3. Type the new profile's name.
4. To make the new profile the default global profile, mark the Default checkbox.
5. Mark the appropriate checkboxes to grant specific privileges to the profile.

Assign global profiles (P6 Professional Only)

1. Choose Admin, Users.
2. Select the user to whom you want to assign a global profile.
3. Click the Global Access tab, then select a global security profile.

Tip

- A global profile, Admin Superuser, allows complete access to global information, features, and all projects. To grant the user read/write privileges for all projects and features, select Admin Superuser as the global profile. You can apply the Admin Superuser profile to as many users as you like.
- Only an Admin Superuser can apply the Admin Superuser profile to a user.
- To verify which privileges are associated with a particular global profile, open the Security Profiles dialog box (choose Admin, Security Profiles).

Change global profiles (P6 Professional Only)

1. Choose Admin, Security Profiles.
2. Choose Global Profiles. To change a profile's name, double-click the profile, then type a new name. To make a profile the default profile, mark its corresponding Default checkbox. To change a profile's privileges, select the profile, then mark or clear the checkboxes to grant or deny each privilege.

Delete global profiles (P6 Professional Only)

1. Choose Admin, Security Profiles.
2. Choose Global Profiles.

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3. Select the profile, then click Delete.
4. Click Yes.

Create project profiles (P6 Professional Only)

1. Choose Admin, Security Profiles.
2. Choose Project Profiles, then click Add.
3. Type the new profile's name.
4. To make the new profile the default project profile, mark the Default checkbox.
5. Mark the appropriate checkboxes to grant specific privileges to the profile.

> **Note**
>
> Unless a user's global profile is Admin Superuser, a user cannot access any projects without a project profile.

Assign project profiles (P6 Professional Only)

1. Choose Admin, Users.
2. Select the user to whom you want to assign a project profile, then click the Project Access tab.
3. Click Assign.
4. Double-click the OBS element/responsible manager whose project information you want to allow the user to access, then click Close.
5. Double-click the Security Profile field, then select a profile.
6. Repeat steps 3 through 5 for all projects to which you want the user to have access.

> **Note**
>
> A user is not required to have a profile for every OBS element. However, unless a user's global profile is Admin Superuser, a user cannot access project information without a project profile.

> **Tip**
>
> - A project profile, Project Superuser, allows complete access to a project/OBS assignment. To grant the user read/write privileges for all aspects of a project, select Project Superuser as the user's profile. Only an Admin Superuser can apply the Project Superuser profile to a user.
> - To verify which privileges are associated with a particular project profile, open the Security Profiles dialog box (choose Admin, Security Profiles).

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Change project profiles (P6 Professional Only)

1. Choose Admin, Security Profiles.
2. Choose Project Profiles. To change a profile's name, double-click the profile, then type a new name. To make a profile the default profile, mark the Default checkbox. To change a profile's privileges, select the profile, then mark or clear the checkboxes to grant or deny each privilege.

Delete project profiles (P6 Professional Only)

1. Choose Admin, Security Profiles.
2. Choose Project Profiles.
3. Select the profile you want to delete, then click Delete.
4. Click Yes.

Managing Resource Security (P6 Professional Only)

Introduction to Resource Security

When P6 Professional is connected to a P6 EPPM database, the administrator, using P6, can restrict a user's access to resource information.

When P6 Professional is connected to a P6 Professional database, the administrator can restrict a user's access to resource information.

The administrator can enable or disable resource security for each user. When resource security is disabled, the user has access to all resources. When resource security is enabled, the user has access to either none of the resources or selected parts of the resource hierarchy.

How does resource security work?

To enable resource security, the administrator assigns each user to one or more resource nodes in the resource hierarchy. These are the user's root nodes. Then, the position of each root node in the resource hierarchy determines the resources to which the user has access. Once assigned to a resource node, the user has accessy to the root node and all of its children.

The administrator can give each user access to the following:

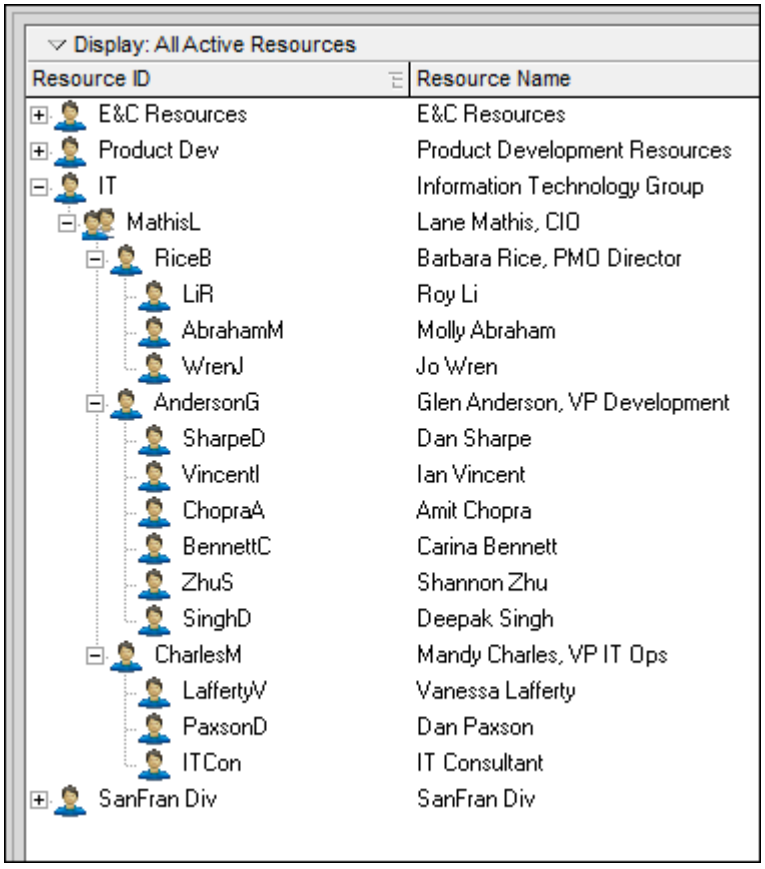
- All Resources The user has access to all resources with no restriction. This option disables resource security. For Admin superusers, resource security access settings are ignored; they are always granted All Resources access.
- No Resources The user has no access to resources. This is the default resource access to new users. Also, if a resource is deleted from the resource hierarchy, users that previously had been assigned to the deleted resource automatically get no access to resources. If a user has no resources access, all global resource-related privileges are ignored.
- Resource nodes (Selected Resources) The user has access to the assigned resource nodes and their children.

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> **Note**
>
> - When connected to a P6 EPPM database: You need the appropriate global privilege to manage resource security. When connected to a P6 Professional database: You need Add/Edit/Delete Users global privilege to manage resource security.
> - In the Resource Assignments window you still have access to current project resources.

Example

The following examples illustrate how resource security applies to users assigned to different resource nodes:



Shannon Zhu has restricted access with the root resource *IT - Information Technology Group* assigned. Shannon sees the following resources in the resource dictionary: IT, MathiasL, RiceB, LiR, AbrahamM, WrenJ, AndersonG, SharpeD, VincentI, ChopraA, BennettC, ZhuS, SinghD, CharlesM, LaffertyV, PaxsonD, and ITCon.

Vanessa Lafferty has restricted access with the root resources *AndersonG - Glen Anderson, VP Development* and *CharlesM - Mandy Charles, VP IT Ops* assigned. Vanessa sees the following resources in the resource dictionary: AndersonG, SharpeD, VincentI, ChopraA, BennettC, ZhuS, SinghD, CharlesM, LaffertyV, PaxsonD, and ITCon.

Roy Li has no resource access. Roy cannot see any resources in the Resource Administration page. Roy can see resources assigned to a project he has open.

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Lane Mathis has access to All Resources. Lane can see all of the resources in the entire resource dictionary.

Implementing Resource Security (P6 Professional Only)

Before you implement resource security in your organization, you should know about the impact of restricting resource access in P6 Professional. Users with restricted resource access may experience the impact of the feature in the following major areas:

Resources View

If resource security is enabled, the Resources View's Filter By options display the following resources:

- All active resources Displays all active resources that you have access to in a hierarchy. Those current project resources that are outside of your resource root nodes are not displayed.
- All resources Displays all resources that you have access to in a hierarchy. Those current project resources that are outside of your resource root nodes are not displayed.
- Current Project's Resources Displays only those current project resources that you have access to. In other words, those current project resources, who are under your root resource nodes. (Resources that you do not have access to are not displayed even if they are current project resources.)

Resource Assignments View

In the Resource Assignments View you still have access to all current project resources even if they are not under your root nodes. If you have the proper privilege, you can modify their assignments or reassign any resource to new activities.

Importing and Exporting Resources/Projects

If you have no resource access, you cannot import new resources or activity resource assignments, or issues associated with new resources. If you have limited resource access, new resources are imported under your root nodes and you can update existing resources only if you have access to them.

Enable Resource Security (P6 Professional Only)

Resource security allows the administrator to restrict a user's resource information access by assigning the user to one or more resource nodes in the hierarchy. Those resource nodes are the user's root nodes. Once assigned to those root nodes, the user has access only to those resource nodes and all of their children.

Resource security settings are honored the next time the user logs in. Thus, if you modify your own resource security settings, the changes will not take place until you exit the module and login again.

To enable resource security by assigning the user to a resource node:

1. Choose Admin, Users.
2. Click the Global Access tab.
3. Select a user from the list. The bottom of the Global Access tab displays the selected user's current resource access information.

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4. To enable resource security, click the browse button in the Resource Access field, and assign up to five resource nodes to the current user. The current user gets access only to the selected resources and their children after the next login.

To enable resource security by giving the user no access to any resources:

1. Choose Admin, Users.
2. Click the Global Access tab.
3. Select a user from the list. The bottom of the Global Access tab displays the selected user's current resource access information.
4. To give the current user no access to resources:
   - Clear the All Resources Access checkbox, if it is marked.
   - Delete the Resource Access field, if it is not empty. The current user gets no access to any resources after the next login. This is the default for new users.

> **Note**
>
> – The All Resources Access option disables resource security and gives the user access to all resources.
>
> – Admin Superuser always has All Resources access, regardless of the resource security access settings.
>
> – If you have restricted or no resource access, you cannot give All Resource access. This option is enabled only for users with all resource access.

Disable Resource Security (P6 Professional Only)

Resource security allows the administrator to restrict a user's resource information access by assigning the user to up to five resource nodes in the hierarchy. Those resource nodes are the user's root nodes. Once assigned to those root nodes, the user has access only to those resource node and all of their children.

To disable resource security:

1. Choose Admin, Users.
2. Click the Global Access tab.
3. Select the user from the list. The bottom of the Global Access tab displays the selected user's current resource access information.
4. Select All Resources.
   - All Resources This option disables resource security for the selected user and gives access to all resources.

> **Note**
>
> Admin Superuser always has All Resources access, regardless of the resource security access settings.

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Displaying Resource Access Information (P6 Professional Only)

The Global Access tab in the Users dialog displays the selected user's resource access settings. The same settings can be displayed as columns as well. To view resource access information, add the Resource Access and All Resources Access columns to display in the Users dialog box. These columns are not displayed by default.

All Resources Access The All Resource Access column displays a checkbox for each user. If the checkbox is marked, the user has access to all resources. This option disables resource security. This column is available only for users with all resource access or Admin Superusers.

Resource Access The Resource Access column displays the user's assigned nodes. The user has access to these resource nodes and all their children. If the Resource Access column is empty and the All Resources Access checkbox is unmarked, the user has no access to any resources.

Change Resource Security (P6 Professional Only)

You can change each user's resource access in the Users dialog any time. The new settings apply when the user logs in.

To change resource security:

1. Choose Admin, Users.
2. Click the Global Access tab.
3. Select a user from the list. The bottom of the Global Access tab displays the selected user's current resource access information.
4. Change the user's resource access settings.

> **Note**
>
> - While a user is working offline, changes to certain data can cause them not to be able to switch to working online. To ensure users who are currently working offline are not prevented from switching to working online, avoid making changing any of the following data if any user might currently be working offline: User details, Global or project security profiles, OBS assignments (both for users and for projects), and Resource security.
> - Since a user's resource access depends on the position of the assigned resources in the hierarchy, changing that position also means changing the user's resource access.

Managing EPS-level Activity Code Security (P6 Professional Only)

Set up security for EPS-level activity codes (P6 Professional Only)

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The EPS-level activity codes that a user has access to is based on their project access. Do the following to set up user security:

1. Set up the OBS security.
2. Set up the EPS structure and select the responsible manager (OBS name) for the EPS level. The EPS levels the user can access is based on the OBS selected.
3. Assign a project profile to the user. The project profile determines the privileges for all aspects of a project.

Global and project privileges for EPS-level activity code security (P6 Professional Only)

Only users with the appropriate combination of secure code and global EPS-level activity code privileges can add, edit, delete, view, and assign "secure" EPS-level activity codes and values.

- To limit the access of a specific EPS-level activity code and its values to certain users, mark the Secure checkbox for the code in the Activity Code Definitions - EPS dialog box. You must have the Add EPS Activity Codes project-level security privilege and the Add and Delete Secure Codes global security privilege to set up a secure code.
- To add a secure EPS-level activity code in the Activity Code Definitions - EPS dialog box, you must have the Add EPS Activity Code project security privilege, and the Add and Delete Secure Code global security privilege.
- To edit a secure EPS-level activity code in the Activity Code dictionary, you must have the Edit EPS Activity Code project security privilege, and the Add and Delete Secure Codes or Edit Secure Codes global security privileges.
- To delete a secure EPS-level activity code from the Activity Code dictionary, you must have the Delete EPS Activity Code project security privilege, and the Add and Delete Secure Codes global security privilege.
- To assign and remove EPS-level activity code values to/from an activity you have access to, you must have the project security privilege to Add/Edit Activities Except Relationships and access to the activity. Activity access is based on the OBS security settings.
- To assign or remove a secure EPS-level activity code to or from an EPS in the Activity Codes dictionary, you must have the Add/Edit Activities Except Relationships project security privilege, and the Assign Secure Codes global security privilege.

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Reference

Working with remote projects

Managing remote projects

You can "check out" projects, with their respective baselines, so that they can be worked on remotely. Once a project is checked out, it can no longer be modified until it has been checked in. In addition to checking in the project, you may replace the existing project with the remote copy of the project by using the Import wizard.

If you are working in P6 EPPM, you can choose whether to check out to an XML file or to a local database. If you choose to check out to a local database, a new local database is created for you the first time you check out projects from P6 EPPM. Each time you check out the local database is overwritten. To avoid losing your work, you must check projects back in again before you check out more projects from the same EPPM database. If you connect to more than one EPPM database, checking out projects to a local database will create separate local databases for each EPPM database.

Once you have checked out the projects you need to work on offline, you can log into the local database. While you have projects checked out, other users will be able to open the projects in the EPPM database but will not be able to modify them. After you have finished updating the projects offline, you can check them back into the EPPM database so that other users can work in those projects.

When checking out to a local database:

- Users' security settings do not apply to checked out projects; all data for the project is exported to the local database, including data which the user is prevented from seeing by their security profile.
- If errors occur during the process of checking in from a local database, no data will be imported.
- Checking in from a local database does not respect admin preferences limits during import and can therefore import invalid data. For example, codes are imported even if they are longer than the code length specified in admin preferences.
- When you check in projects, project calendar data is replaced not merged. Global calendar data is not imported.
- When you check in projects from a local database, resource security is not honored so resources can be assigned to the project even if the user who checks in the project does not have permissions to view that resource.

Check out a project to XML

1. Open the projects you want to check out.

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2. Choose File, Check Out...
3. Select the projects you want to check out. To check out a project, it must be open. If the project you want to check out is not on the list, click Cancel, open the project, and restart the wizard.
4. Optionally, for each project you selected to export, click Select.. in the Baselines to Export column, then select which baselines to export with the project.
5. Select Check out to XML.
6. Click Finish. An XML file is created that exports complete project information to other P6 Professional or P6 EPPM applications.

> **Note**
>
> To move between different wizard windows, click Prev or Next.

Check out a project to P6 Pro Local Database

1. Open the projects you want to check out.
2. Choose File, Check Out.
   Select the projects you want to check out and click Next. To check out a project, it must be open. If the project you want to check out is not on the list, click Cancel, open the project, and restart the wizard.
3. Optionally, for each project you selected to export, click Select.. in the Baselines to Export column, then select which baselines to export with the project.
4. Select Check out to P6 Pro Local Database (SQLite).
5. Enter a password in the Enter new password and Confirm new password boxes and then click Finish. An new local database is created, named as the database you are checking out from, with "_Local" added to the end of the name. Use the same login name as you use to log into P6 EPPM.

> **Note**
>
> If you have previously checked out projects from this database and need to check out additional projects, check the original projects back in, then check out all the projects you need.

View the check-out status of a project

1. Choose Enterprise, Projects. A red check mark displays beside any project that is currently checked out.
2. Choose View, Show on Bottom, Project Details.
3. Click the General tab, and check the status of the project in the Check Out Status field. Privileged users can also change the status of a project in this field. The Checked Out By field indicates the user that checked out the project. The Date Checked Out field indicates the date and time the user checked out the project.

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Note

- Changing the status of a project to Checked Out or Checked In, in the General tab, does not export project information or import updated project information. To import or export information when checking in or out a project, select Check In or Check Out on the File menu.
- The Checked Out By and Date Checked Out fields are blank when the Check Out Status is Checked In.

Modify check in update options for an XML file

1. Open the projects you want to check in.
2. Choose File, Check In, then select the project you want to check in.
3. In the Update Project Options dialog box, select the layout you want to modify and click Modify.
4. In the Modify Import Configuration dialog box, select the data you want to modify.
5. Select the action to perform during the check-in process.
6. Mark the Delete checkbox to remove unreferenced data, data in the project you are updating but not included in the check-out file, from the project.
7. Click OK.

Note

The Delete field applies only to relationships to external projects, thresholds, activities, activity relationships, and activity resource assignments. Global data types are not affected by this setting.

Check in a project from XML

1. Open the projects you want to check in.
2. Choose File, Check In.
3. Browse to and select Check in from XML, then select the file you want to check in.
4. Double click the Import Action field to select how the project data is checked in. Select Update Existing Project to update with any new new/modified date in the XML file. Select Replace Existing Project to delete the existing project and replace it with the project checked in from the XML file Select Ignore this Project to not check in the project.
5. Optionally select which baselines to import with the project.
6. Optionally select the data to check in by editing the template in the Update Project Options dialog box.
7. If you are connected to a P6 EPPM database, select the currency for the projects in the Currency Type dialog box.
8. Click Finish.

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> **Note**
>
> To move between different wizard windows, click Prev or Next.

Check in a project from P6 Pro Local Database

1. Log into the EPPM database.
2. Open the projects you want to check in.
3. Choose File, Check In...
4. Select Check in from P6 Pro local database (SQLite) and click Next.
5. Enter the Login name and Password for the local database.
6. Select the projects to check in.
7. Optionally select the baselines to import with the checked in projects and click Next.
8. Click Finish.

> **Note**
>
> - When you check in from a local database, the check in process uses Update Existing rules at the project level. If you do not want to use Update Existing rules, you must use XML check in.
> - Existing global data which is used in the project is not updated when you check in a project. New global data which is used in the project is added added to when you check in a project.

Working with multiple projects

Single-project mode versus multiproject mode

You are in single-project mode when you open only one project. When an EPS node containing one or more projects is open, or when you simply open two or more projects, you are in multiproject mode.

Most features function the same way in either single-project or multiproject mode. These include the Activity Table, Activity Network, and Gantt Chart; scheduling, applying actuals, and leveling resources; and thresholds, issues, tracking, and reporting features. The baselines, calendars, activity codes, work products and documents, and OBS features function slightly different in multiproject mode. For example, when saving a baseline in multiproject mode, the baseline saves to all projects in an EPS node, but not to the node itself. In multiproject mode, you can also assign a project's calendars, activity codes, and work products and documents to project elements. In addition, you can assign OBS elements to WBS elements, project thresholds, and project issues in the projects.

In multiproject mode, the work breakdown structures (WBS) and organizational breakdown structures (OBS) of the entire hierarchy are integrated. You can also define relationships between activities in different projects within the EPS hierarchy.

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When connected to a P6 EPPM database: When you copy and paste a WBS within the same project, the WBS, activities, and associated risks from P6 are copied; risks are not copied when you copy and paste the WBS to a different project. Likewise, when you copy and paste activities within the same project, any associated risks are also copied; risks are not copied when you copy and paste activities to a different project.

When connected to a P6 Professional database: When you copy and paste a WBS within the same project, the WBS, activities, and associated risks are copied; risks are not copied when you copy and paste the WBS to a different project. Likewise, when you copy and paste activities within the same project, any associated risks are also copied; risks are not copied when you copy and paste activities to a different project.

Project security privileges function the same way in either single- or multiproject mode; a user can access any area of the WBS for which the user's assigned OBS is responsible.

To simplify potential confusion when in multiproject mode, all project-owned elements follow a simple rule: the project that owns the element is the only project that may use the element. For example, if Project A owns Document A, then Document A may only be assigned to activities within Project A, even if many other projects are also opened.

Details on how project elements are handled in multiproject mode

In multiproject mode, all project-owned elements follow a simple rule: the project that owns the element is the only project that may use the element. In addition, the following elements are handled as follows:

Project-level activity codes: All project-owned activity codes are included with their respective projects when they are opened in multiproject mode. The activity code types are grouped by project and you can add, edit, or remove project-level activity codes as well as assign them to activities within their respective projects.

Project-level reports: All global reports and all project-specific reports for the open projects are available. Project-owned reports use the project as a filter.

Project-level calendars: All the project-level calendars are included with their corresponding projects when the projects are opened either alone or in multiproject mode. In multiproject mode, the layout is grouped by project, so you can easily add, edit, or remove project-level calendars as well as assign them to activities within their respective projects.

Default project: If multiple projects are open in the Projects window, but your layout is not grouped by project, you can select the default project you want to use when performing scheduling, leveling, or other functions you initiate. Choose Project, Set Default Project, to select the project from among those open that you want to use. Mark the Default checkbox next to the name of the project to be used as the default project.

Issues, risks, and thresholds (P6 Professional Only): The additional By Project grouping item is available in multiproject mode. If you are inserting a new issue, risk, or threshold, the project into which the new record should be added cannot be determined, the default project is used. However, you can change project ownership by choosing a WBS element from a different project.

Issues and thresholds (P6 EPPM Only): The additional By Project grouping item is available in multiproject mode. If you are inserting a new issue or threshold, the project into which the new record should be added cannot be determined, the default project is used. However, you can change project ownership by choosing a WBS element from a different project.

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Documents: Documents are grouped by project to make it clear that documents from one project may not be moved into the document hierarchy of another project. To group by documents, group by Category; the subsequent grouping will automatically be done by project.

Expenses: The additional By Project grouping item is available in multiproject mode to group expenses.

Activities: If you are adding a new activity, and the project into which the new activity should be added is not provided within the context of the current grouping, the activity is added to the default project. Choose Project, Set Default Project, to specify which project to use.

Activity layouts: All project-level elements, such as activity codes, are available for columns, grouping, filters, dialogs, and so on. Project-level elements are similar to global elements, with the addition of the following guidelines for multiproject mode.

Item	Details
Columns	When viewing project-level activity codes as columns, activities belonging to other projects have a blank value in this column.
Grouping	When grouping by project-owned elements, such as project-level activity codes, any records from other projects are shown in the No Code group.
Filters	When filtering by project-owned elements, such as project-level activity codes, any records from other projects are excluded by the filter.
Copy/Cut and paste or Drag and drop	You cannot move WBS and OBS elements, expenses, and reports from one project to another. You can move all other project-owned elements within the hierarchy using the following guidelines: Calendars, activity codes, or documents cannot be moved if any of these elements is assigned to one or more activities in the current project. When connected to a P6 Professional database: Risks cannot be moved between projects. When connected to a P6 EPPM database: Risks from P6 cannot be moved between projects. Thresholds and issues can be moved between projects. However, any link between issues generated by thresholds is broken. Reports cannot be moved; project-level reports can be grouped or filtered based on project-specific data. Expenses cannot be moved; they are closely tied to specific activities.

Selections and assignments: If you select a WBS or activity element in a different project, the project ownership of the element changes. For example, you might select a WBS element from the Activities window, an activity from the Expenses window, and a WBS element from the Thresholds, Risks, and Issues windows when P6 Professional is connected to a P6 Professional database and a WBS element from the Thresholds and Issues windows when connected to a P6 EPPM database.

Threshold monitor: Each threshold monitors the WBS/activities within its own project only; a threshold from one project cannot generate an issue for another project. Additionally, all detailed (not summarized) projects are monitored, and the primary baseline of each project is used.

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Baselines: No baseline information is saved at the EPS level. If a baseline does not exist for one or more of the open projects, each of those projects uses the current plan as its primary baseline. You can select all open projects in the Baseline dialog box and click Add to add a baseline for all open projects.

Publish project Web site: All the open, detailed (not summarized) projects are published to the same Web site in multiproject mode. When you select which reports to publish, all global reports and project-specific reports for the open projects are available.

Apply actuals: Each open project's data date is used. The Apply Actuals dialog box includes a grid showing all projects opened in detail mode (not summarized). You can change each project's data date from this dialog box before applying actuals.

Scheduling/leveling: When scheduling multiple projects, you can select whether each project should use its own data date, or whether all open project should be scheduled with a data date you specify. When multiple projects are open, all projects will be scheduled or leveled using the options of the same project. You can specify which project's scheduling options should be used in the Schedule Options dialog box and which project's leveling options should be used in the Level Resources dialog box.

Project open/access level: When you open projects from the Open Project dialog box, the projects are opened with the same access level.

Scope of data opened: All EPS nodes, including the root nodes of all projects in a branch of the hierarchy, are automatically opened at the summary level when you log-in. From the Projects window, you can then open one or more projects at the detail level.

If one or more projects are opened at the detail level, you can access the project-specific views, such as the Tracking window. If no projects are opened at the detail level, you cannot access the project-specific views. Additionally, when you open a project-specific window, you can only see and work with data for projects that have been opened at the detail level.

Project menu: The entire Project menu is disabled if projects are not opened in detail mode.

Working With Oracle Primavera Cloud (P6 EPPM Only)

Exchanging data with Oracle Primavera Cloud using Primavera Gateway (P6 EPPM Only)

If your Administrator has set up integration between P6 EPPM and Oracle Primavera Cloud, you can exchange data with Oracle Primavera Cloud for risk, task, work package, and scope integration.

To send data to Oracle Primavera Cloud:

1. Open the project or projects that you want to exchange with Oracle Primavera Cloud.
2. Select Exchange Data from the File Menu, and then select the menu option for sending data to Oracle Primavera Cloud.

To update the projects from Oracle Primavera Cloud:

1. Open the project or projects that you want to exchange with Oracle Primavera Cloud.
2. Select Exchange Data from the File Menu, and then select the menu option for updating data from Oracle Primavera Cloud.

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Note

- You must have the Exchange Project Data with Oracle Primavera Cloud privilege set in P6 and P6 EPPM must be configured for integration with Oracle Primavera Cloud.
- The process for updating from Oracle Primavera Cloud updates the WBS structure, including work packages for scope integration. This option also updates pre response and post response pessimistic dates for activities based on risk analysis in Oracle Primavera Cloud, even though you cannot see them in P6 Professional.
- Do not modify the WBS structure, including WBS names and codes, once a project has been integrated with Oracle Primavera Cloud for scope management. Do not move activities between WBS nodes once a project has been integrated with Oracle Primavera Cloud for scope management

Primavera Cache Service (P6 EPPM Only)

In high latency environments, performance can be affected by the amount of data that needs to be transferred between P6 Professional and the P6 database. Enabling client-side cache can help to improve performance in these high latency environments by improving the speed of the most frequent operations: adding, deleting, and updating activities.

While you work in P6 Professional you are working in the local cache database which provides increased performance over connecting to the Cloud Connect database directly. In the background, the Primavera Cache Service continues to synchronize global data and data for the projects you are working in between the local cache database and the Cloud Connect database.

Note

Using the local cache can also prevent data loss if your P6 Professional session times out. The duration for session time out is set in P6 Administrator application.

Primavera.CacheService.exe

Primavera.CacheService.exe manages local cache databases for each P6 Professional Cloud Connect database you log in to and ensures that each local cache database is synchronized with the relevant Cloud Connect database.

When you open P6 Professional from the shortcut, Primavera.CacheService.exe runs and allows you to log in to and manage Cloud Connect database connections. When you log in to a Cloud Connect database, Primavera.CacheService.exe starts P6 Professional and then minimizes, but continues to run in the status tray. When you connect to a P6 Professional Cloud Connect database, Primavera.CacheService.exe continues to run even after you close P6 Professional so that the service can continue to synchronize the local cache databases with the relevant Cloud Connect databases.

If you most recently logged into a Cloud Connect alias, Primavera.CacheService.exe continues to run as a status tray application after P6 Professional exits. This allows the cache service to

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continue synchronizing the local cache databases with Cloud Connect databases, so that P6 Professional starts more quickly the next time you connect. If the Primavera.CacheService.exe is running in the status tray, you can right click on it and select **Start P6 Professional** to restart P6 Professional. You can maximize Primavera.CacheService.exe at any time by right-clicking on the icon in the status tray and selecting **Show**.

Logging on and creating a local cache for Cloud

When you first log on to a Cloud Connect database, the Primavera Cache Service initializes the relevant local cache database and copies all global data from the cloud database to the newly created local cache database, including the EPS structure as well as project IDs and Names. The first time you open a project, all data in that project and any related global data is copied to the local cache database. From that point onwards, regular synchronizations will transfer all changed data for open projects and all global data between the cloud and local cache databases. If no projects are open only global data is synchronized.

There can be a delay during startup under certain circumstances. The first time you connect to a specific Cloud Connect database, the service builds and then loads data into a local cache database from the Cloud Connect database. If you select the **Reinitialize local cache** option when you log on to a Cloud Connect database, the service rebuilds the local cache database. Performance is significantly improved when connecting to an existing local cache or when Primavera.CacheService.exe is already running.

If you want to connect to a different Cloud Connect alias, click **Disconnect** for the alias you most recently used. After the service has disconnected from the previous database, you can select a different Cloud Connect alias.

Reinitializing Primavera Cache

Primavera Cache Service synchronizes data between the local cache and Cloud Connect database for the projects you are currently working in and any global data used by those projects. Data will be added to the cache as necessary. If there are projects stored in your local cache which you no longer need to work on, you can clear this data from the local cache by selecting the **Reinitialize local cache** option when you log into a Cloud Connect alias. The local database will be reinitialized and repopulated with the projects you had open last time you worked in that Cloud Connect database and the global data used by those projects. Restarting P6 Professional after reinitializing the local cache will take longer than restarting without reinitializing the local cache because the fresh data must be downloaded before P6 Professional can open.

> **Note**
>
> If data is present in the local cache database but has not yet been synchronized to the Cloud Connect database, reinitializing the local cache will result in that local data being lost.

Synchronizing the Local Cache and Cloud Connect Database

Primavera Cache Service performs two-way synchronization, that is the service synchronizes data from the local cache to the Cloud Connect database and from the Cloud Connect database to the local cache. The date and time of the last successful synchronization for each project is shown in the Last Sync Date column in P6 Professional.

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By default, the synchronization will run at 20 second intervals, which is optimum for most systems. If you need to adjust the frequency at which synchronizations are initiated, change the value for the SyncInterval key in the Primavera.CacheService.Exe.Config file. The value represents the number of seconds between synchronizations. Values lower than 1 are ignored.

To determine which data needs to be synchronized, the last update date or insert date for each data item is compared between the cloud database and the local cache. If your data connection is interrupted, your changes are stored in your local cache database and will be synchronized with the cloud database when connectivity is restored.

During the synchronization process, there is potential for conflicting changes if multiple users are modifying the same data. The synchronization service applies the following rules to resolve conflicts:

1. A delete operation will always take precedence over other operations.
2. If the same data is modified both on the server and on the client, client-side changes takes precedence over server-side changes.

> **Note**
>
> Primavera Cache Service does not check for the chronological order of updates to resolve conflicts.

For example, consider a situation where Client A and Client B are both connecting to the same cloud database and working in the same project. Client A applies an actual start to activity A1000. The next time Client A synchronizes with the cloud database, the last updated date for activity A1000 will be compared between the local cache database and the cloud database. Since the data is newer on the client than on the server, Primavera Cache Service running on Client A will copy the data for Activity A1000, including the status and actual start date, from the cache database on Client A to the cloud database. The next time Client B synchronizes with the cloud database, the Primavera Cache Service running on Client B compares the last updated date for activity A1000 between the client cache database and the cloud database. Because the cloud database has a later last updated date for activity A1000, the Primavera Cache Service running on Client B will copy the data for activity A1000, including the status and actual start date, from the server to the cache database on Client B.

Viewing the synchronization log

When you have been working offline and re-connect to the Cloud, the Primavera Cache Service generates a log file of the data that was changed when the local cache database was synchronized to the Cloud Connect database. You can view the Sync Reconciliation log file in you temp directory (for example the AppData\Local\Temp folder for your user profile). The file name of the log file is SyncReconciliation<TimeStamp>.log (where <TimeStamp> is the date and time the log file was created).

Alternatively you can view the file from the system tray by right-clicking on the P6 icon and selecting Sync History Report. The file provides a table-by-table report of each change made, including where and how the data was changed as well as reporting on the state of the data in the server and locally after the synchronization.

Working offline

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It is not always possible to have a steady connection to the internet. Offline mode uses the Primavera Cache Service to allow you to continue working in P6 Professional while your internet connection is unavailable. When internet connectivity is restored, click **Connect to Cloud** to reconnect to the cloud database and synchronize the data in the local cache database with the Cloud Connect database.

> **Note**
>
> - To work offline, you must connect to the Cloud Connect database using an alias which has the client-side cache enabled and log into P6 Professional as a user with the relevant security privilege. Administrative settings also control the availability of the option to work offline.
> - Oracle recommends you reconnect to the cloud database at least once a day, but preferably as soon as internet connectivity is restored. Reconnecting to the cloud database allows the local cache database to synchronize with the Cloud Connect database to minimize the possibility of data loss.

When you are working in P6 Professional, you can choose to work offline at any time, either by selecting the **Work Offline** option on the file menu, or selecting the **Work Offline** button on the toolbar. When you are ready to go back online, use the **Connect to Cloud** file menu item or toolbar button.

Whether you have chosen to go offline or have been forced into offline mode by losing your connection to the internet, a status bar indicator shows whether you are working offline or online.

If you close P6 Professional while you are working offline, the next time you open P6 Professional the login dialog box shows a Work Offline option. If you want to continue working offline, ensure the option is selected before you log in. Alternatively, clear the option to log into the Cloud Connect database and work online.

When you are working offline, some features will be unavailable, including: Copy Project when your view is sorted by EPS, Create Baseline, Update Baseline, Import XML, Apply Actuals, Summarize, Check In/Check Out, and Create Reflection.

Guidance and Best Practice for Working Offline

Working offline might be helpful for you if the following are true:

- You work in an area where internet connectivity is inconsistent or not available at all.
- You are usually the only person updating a given project or set of projects at any one time or multiple planners or schedulers might be making updates in a project or set of projects at the same time, but each is working on data unrelated to the data others are updating.

Working offline might not be helpful in your organization if any of the following is true:

- Multiple planners or schedulers typically make updates to the same data in project or set of projects at the same time.
- Your team requires updates to the schedule to be available in real time.

While a user is working offline, changes to certain data can cause them not to be able to switch to working online. To ensure users who are currently working offline are not prevented from

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switching to working online, avoid making changing any of the following data if any user might currently be working offline:

- User details
- Global or project security profiles
- OBS assignments (both for users and for projects)
- Resource security

Operations that are Not Cached for Cloud

Some data and operations are only available when you are connected directly to the Cloud Connect database. These include:

- Projects which were not open when you were connected to the Cloud Connect database are not cached and are not available in the cache database.
- Almost all operations which use job services require an active connection to the Cloud Connect database. This includes: creating and updating baselines, copying baselines with a project, creating reflection projects, applying actuals, and summarizing projects. The only job service operation which can be completed in the cache database is copying a project without copying baselines.
- Checking projects in or out and restoring baselines can only be done when connected directly to the Cloud Connect database.
- Summary data for projects is retrieved directly from the Cloud Connect database and is not available when working in the cache database.
- Modifying global objects that have project-level dependencies, including resource assignments and shared calendars, can be done both in the cache database and when connected to the Cloud Connect database. However you can only delete those objects when you are connected to the Cloud Connect database.

> **Note**
>
> If the permissions assigned to a user profile change after loading the project, the new permissions will take effect the next time Primavera.CacheService.exe is started.

Linking Primavera Unifier data (P6 EPPM only)

Link a project with a Primavera Unifier Project (P6 EPPM Only)

> **Note**
>
> before you can link a project with a Primavera Unifier your administrator must set up Primavera Gateway integration on the Application Settings page in P6.

There are multiple ways to link P6 Professional with Primavera Unifier:

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- Schedule Sheet Integration.
- Summary Sheet Integration.
- Activity Sheet Integration.

Ask your administrator which type of integration you use and which actions you should use on the Exchange Data menu.

Linking a Project with a Unifier Schedule Sheet

1. Choose Enterprise, Projects.
2. Display Project Details, then click the Primavera Unifier tab.
3. Under Schedule Sheet Integration mark Allow this project to link with a Primavera Unifier Project.
4. In the Project Name field, click to select the Primavera Unifier project you want to link with a P6 Professional project.
5. In the Schedule Sheet field, click to select the schedule sheet for the selected project.
6. In the Data Mapping field, click to select the data mapping defined for the selected schedule sheet.
7. Mark Delete from Primavera Unifier any activities no longer in the P6 Schedule if you want to remove activities from Primavera Unifier that are not in the P6 Schedule.
8. Mark Only send activities with CBS codes assigned if you want to send only activities that are assigned a CBS code.

Linking a Project with a Primavera Unifier Summary Sheet

1. Choose Enterprise, Projects.
2. Display Project Details, then click the Primavera Unifier tab.
3. Under Summary Sheet Integration select a Schedule Type.
   - Select Duration to send dates summarized by CBS code, to Primavera Unifier and have Primavera Unifier calculate costs based on the duration of the project and WBSes.
   - Select Resource Loaded to send the following data to Primavera Unifier and have Primavera Unifier calculate costs based on the resource and unit loading information from P6:
     Summary and spread data by CBS code on the expense category about dates, units and cost for expenses.

     Summary and spread data by CBS code on the resource assignment about dates and units for resource assignments.
   - Select Cost Loaded to send the following data to Primavera Unifier. Primavera Unifier will not calculate costs:
     Summary and spread data by CBS code on the expense category about dates, units and cost for expenses.

     Summary and spread data by CBS code on the resource assignment about dates, units and costs for resource assignments.

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> **Note**
>
> The Schedule Type applies to both projects and baselines.

4. Mark Synchronize WBS Hierarchy if you want to send the WBS hierarchy to the Primavera Unifier Project.

> **Note**
>
> The WBS hierarchy will be used to create or update the CBS hierarchy in Primavera Unifier. If you do not send the WBS hierarchy to Primavera Unifier , only summary and spread data will be sent.

5. If you selected to send the WBS hierarchy, choose how much of the WBS hierarchy to send - Complete, Partial, or Levels.
6. If you selected to send levels of the WBS hierarchy to Primavera Unifier, set the number of Levels.

Linking a Project with a Primavera Unifier Activity Sheet

> **Note**
>
> The first time you exchange data between P6 Professional and Primavera Unifier using Activity Sheet integration, you must initiate the exchange from Primavera Unifier. After the first time, you can initiate the exchange of data either from Primavera Unifier or P6 Professional.

1. Choose Enterprise, Projects.
2. Display Project Details, then click the Integration tab.
3. In the Deployment field, click to select a deployment.

Exchanging data with Primavera Unifier using Schedule Sheet Integration

> **Caution**
>
> **Caution** Check with your administrator what type of integration you are using and which actions you should use. Choosing the incorrect integration type or using the incorrect action could result in data corruption.

To exchange data with Primavera Unifier using schedule sheet integration:

1. Open the project or projects that you want to exchange with Primavera Unifier.
2. Select Exchange Data, from the File menu and then select **Send to Schedule Sheet**.
   - You must have the Exchange Project Data with Primavera Unifier privilege set in P6 and P6 EPPM must be configured for integration with Primavera Unifier.

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- Before you exchange project data with Primavera Unifier you must link a project with a Primavera Unifier Project.

Exchanging data with Primavera Unifier using Summary Sheet Integration

> ⚠ **Caution**
>
> **Caution** Check with your administrator what type of integration you are using and which actions you should use. Choosing the incorrect integration type or using the incorrect action could result in data corruption.

To exchange data with Primavera Unifier using summary sheet integration:

1. Open the project or projects that you want to exchange with Primavera Unifier.
2. Select Exchange Data, from the File menu and then select an action.
3. If the action you selected is an export action, in the action dialog box:
   a. Mark Summary and Spread data.
   b. Mark WBS Hierarchy if you want to send the WBS hierarchy to Primavera Unifier.
   c. Verify that the projects you want to send to Primavera Unifier are listed.
   d. Mark the Send checkbox next to each baseline you want to send to Primavera Unifier.
   e. Click Send.

> ⓘ **Note**
>
> - You must have the Exchange Project Data with Primavera Unifier privilege set in P6 and P6 EPPM must be configured for integration with Primavera Unifier.
> - Before you exchange project data with Primavera Unifier you must link a project with a Primavera Unifier Project.

Exchanging data with Primavera Unifier using Activity Sheet Integration

> ⚠ **Caution**
>
> **Caution** Check with your administrator what type of integration you are using and which actions you should use. Choosing the incorrect integration type or using the incorrect action could result in data corruption.

To exchange data with Primavera Unifier using activity sheet integration:

1. Open the project or projects that you want to exchange with Primavera Unifier.
2. Select Exchange Data, from the File menu and then select an action.

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3. If the action you selected is an export action, in the action dialog box:
   a. Mark Activity Data.
   b. Verify that the projects you want to send to Primavera Unifier are listed.
   c. Click Send.

> **Note**
>
> - You must have the Exchange Project Data with Primavera Unifier privilege set in P6 and P6 EPPM must be configured for integration with Primavera Unifier.
> - Before you exchange project data with Primavera Unifier you must link a project with a Primavera Unifier project.
> - The first time you exchange data between P6 Professional and Primavera Unifier using activity sheet integration, you must initiate the exchange from Primavera Unifier. After the first time, you can initiate the exchange of data either from Primavera Unifier or P6 Professional.

Moving EPS-level activity codes

You might choose to create EPS-level activity codes at the highest root level of the EPS so that all projects under this EPS level can access these activity codes. The following information explains how the codes are handled if you cut, copy, or paste to move a project with EPS-level activity codes to a different EPS level, based on the following EPS example.

```
EPS 1 - EPS Code Location
   Project A
   EPS 2
      EPS 3 - EPS Code Department
         Project B
```

If you move a project to its parent EPS level, and the parent EPS does not have the same EPS-level activity code assigned to it, a project level activity code with the same code name and values is created, under the parent EPS. For example, if Project B is copied to the EPS 2 level, the code Department will be copied as a project level activity code in the new EPS 2 level project. All assignments will remain the same.

If you move a project to a different branch or child of the EPS, a project level activity code is created. For example, if you move Project A to EPS 2 or EPS 3, the Location code will be a new project level activity code in the new EPS.

> **Note**
>
> Any code associated with an EPS-level you do not have access to, will appear under "No EPS ID". You can not modify or delete EPS-level activity codes listed under "No EPS ID".

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Using Undo

The Undo command (Edit, Undo) allows you to change information back to its pre-modified value in the Activities, Resources, and Resource Assignments windows. Undo stores each action performed in sequence, beginning with the most recent action performed. The following actions will clear the Undo history in P6 Professional:

- Summarizing data
- Updating Progress
- Applying actuals
- Refreshing data
- Creating projects
- Opening and closing projects
- Importing
- Changing portfolios
- When connected to a P6 Professional database: Opening the Project Portfolios, User Preferences, and Admin Preferences dialog boxes

When connected to a P6 EPPM database: Opening the Project Portfolios and User Preferences dialog boxes

- When connected to a P6 Professional database: Opening the OBS, User Defined Fields, Resource Codes, Project Codes, and Activity Codes dialog boxes

When connected to a P6 EPPM database: Opening the OBS, User Defined Fields, Resource Codes, and Activity Codes dialog boxes

- Exiting the application

Note

- You can only undo modifications in the General, Status, Resources, and Relationships tabs of Activity Details.
- Scheduling, leveling, making layout changes, and opening a new layout do not clear the Undo history.
- You can only undo activity code value assignments that were assigned using the columns in the Activities window. Code values that are assigned and/or removed from the Codes tab cannot be undone.
- If you delete a resource and use Undo to restore it, you must reassign the resource to any previous project issues, risks, and expenses. Also, you must reassign the primary flag for the restored resource to its activity assignments.

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Dialog Box Helps (CSH)

Activities tab - Update Baseline dialog box

All Activities: Choose to update data for all activities or activities that meet a filter's criteria. If you select All Activities, updating the baseline will overwrite the entire baseline.

Show activities that match

All selected filters: When more than one filter is selected, choose to indicate that activities must meet all selection criteria in each filter.

Any selected filter: When more than one filter is selected, choose to indicate that activities must meet only one selection criteria in each filter.

Filter: Lists filter names according to filter category. Mark or clear the appropriate checkbox to apply or remove a filter. To search for a filter, start to type the name of the filter into the search box to limit the list.

Add new activities and activity data (except actuals): Mark to add new project activities and activity data (except actual units and costs) to the baseline. If you apply a filter, the module will add only new activities that meet the selected filter's criteria.

Delete from baseline any activities no longer in the current project: Mark to delete activities from the baseline that have been removed from the current project. If you apply a filter, this option is not available.

Update existing activities already in the baseline: Mark to update activities in the baseline with activity data that has been modified or added in the current project. If you select this option, click Update Options to select the types of activity and resource/role assignment data to update.

Activity Box Template tab - Activity Network Options dialog box

Activity Box Template field and graphic: Use the field to select from a list of Activity Network box templates. A graphical example of the currently selected template is displayed beneath the select field. When you select a new box layout, the sample area changes to display the new box layout.

Font & Colors: Click this button to customize the fonts, background color, and box color of the Activity Network display.

Box Template: Click this button to customize the currently selected box template.

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Activity Code Definitions - EPS dialog box

Use the Activity Code Definitions - EPS dialog box to create, edit, and delete EPS-level activity codes. You can use these codes to sort, filter, group, and report activity information in all projects.

Display Options bar: Click to search for a specific activity code.

Activity Code: Lists EPS-level activity codes. The list includes the EPS levels the user has access to use. All codes associated with an inaccessible EPS node are listed under "No EPS ID".

Secure Code: Mark the checkbox for codes you want to define as viewable only to users with the appropriate access rights. Clear the checkbox to make this code and its values visible to all users. Using this feature requires the Add and Delete Secure Codes privilege.

Activity Code Name: The name of the selected activity code. You can type a new name.

Max Length: The maximum number of characters the selected code's values can have. Type or click the arrows to select a new number.

Add: Adds an activity code to the selected EPS level.

Delete: Deletes the selected activity code.

Shift Up: Moves the selected code to a higher position in the display. This changes the order in which the codes display when you assign a code to an activity.

Shift Down: Moves the selected code to a lower position in the display. This changes the order in which the codes display when you assign a code to an activity.

Make Global: Changes the selected EPS-level activity code and its values to a global activity code with global values.

Activity Code Definitions - Global dialog box

Use the Activity Code Definitions - Global dialog box to create, edit, and delete global activity codes. You can use these codes to sort, filter, group, and report activity information in all projects.

Display Options bar: Click to search for a specific activity code.

Activity Code: Lists global activity codes.

Secure Code: Mark the checkbox for codes you want to define as viewable only to users with the appropriate access rights. Clear the checkbox to make this code and its values visible to all users. Using this feature requires the Add and Delete Secure Codes privilege.

Activity Code Name: The name of the selected activity code. You can type a new name.

Max Length: The maximum number of characters the selected code's values can have. Type or click the arrows to select a new number.

Add: Adds an activity code.

Delete: Deletes the selected activity code.

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Shift Up: Moves the selected code to a higher position in the display. This changes the order in which the codes display when you assign a code to an activity.

Shift Down: Moves the selected code to a lower position in the display. This changes the order in which the codes display when you assign a code to an activity.

Activity Code Definitions - Project dialog box

Use the Activity Code Definitions – Project dialog box to create, edit, and delete activity codes for the open project. You can use these codes to sort, filter, group, and report the open project's activity information.

Display Options bar: Click to search for a specific activity code.

Activity Code: Lists activity codes for the open project.

Activity Code Name: The name of the selected activity code. You can type a new name.

Max Length: The maximum number of characters the selected code's values can have. Type or click the arrows to select a new number.

Add: Adds an activity code.

Delete: Deletes the selected activity code.

Shift Up: Moves the selected code to a higher position in the display. This changes the order in which the codes display when you assign a code to an activity.

Shift Down: Moves the selected code to a lower position in the display. This changes the order in which the codes display when you assign a code to an activity.

Make Global: Changes the selected project activity code and its values to a global activity code with global values.

Make EPS: Changes the selected project activity code and its values to an EPS-level activity code.

Activity Codes dialog box

Use the Activity Codes dialog box to create, edit, and delete global, project, and EPS activity codes and values. Use these codes and values to sort, filter, group, and report activity information. When P6 Professional is connected to a P6 Professional database, you can also use this dialog box to assign colors, applicable only in the context of Visualizer drawings, to activity code values.

Global: Choose to display activity codes and values for all projects in the enterprise. You can edit these codes.

EPS: Choose to display activity codes and values for levels of the EPS. You can edit these codes.

Project: Choose to display activity codes and values for the open project(s) only. You can edit these codes.

Select Activity Code: The name of the current activity code. You can select a code.

Modify: Allows you to create, modify, or delete a global, EPS, or project activity code, depending on your current selection.

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Display Options bar: Click to search for a specific activity code value and change the display.

Code Value: Lists activity code values for the current activity code. To change a value, double-click it. To sort the display, click the Code Value column label.

Description: Lists each activity code value's description. To change a description, double-click it. To sort the display, click the Description column label.

Color: Lists each activity code value's color, which can be applied to color a bar from within a Visualizer diagram. To change a color, double-click in the color cell of the applicable code value.

Add: Adds a value to the current activity code.

Delete: Deletes the selected value from the current activity code.

Cut: Cuts the selected code value so you can delete it or move it to another position in the list. Select a new position, then click Paste.

Copy: Copies the selected code value so you can quickly create a similar value in another position in the list. Select a new position, then click Paste.

Paste: Pastes a code value you have copied or cut.

Up/Down/Left/Right Arrow keys: Moves the selected value to a different position in the display. This changes the order in which the values display when you assign a value to an activity.

Activity Network Layout tab - Activity Network Options dialog box

Organization Options

Organize along the top: Aligns activity boxes towards the top of the Activity Network window in relation to their predecessors/successors.

Organize centered: Centers activity boxes in relation to their predecessors/successors.

Adjust to show all relationships: Repositions activity boxes so that all relationship lines are visible. For example, when an activity's predecessor/successor is not immediately adjacent to the activity in the Activity Network, the relationship line might be blocked by other activity boxes. Choosing this option adjusts the display to show relationship lines.

Always zoom to best fit after reorganize: Automatically zooms in/out after each reorganize to find the best fit for showing all of the activity boxes in the Activity Network.

Show progress: Indicates an activity is in progress by displaying a slash (\) through the activity. When an activity completes, an (X) appears.

Vertical spacing factor: The vertical space between activity boxes in the Activity Network. Type a value or click the arrows to change the space.

Horizontal spacing factor: The horizontal space between activity boxes in the Activity Network. Type a value or click the arrows to change the space.

Network Order Options

Longest on Top: Choose to display the activity networks with the longest path of linked activities on top.

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Shortest on Top: Choose to display the activity networks with the shortest path of linked activities on top.

Activity Network Options dialog box

Use the Activity Network Options dialog box to specify and/or customize the activity boxes used for the Activity Network display. Also use this dialog box to specify Activity Network display options such as organization, auto zoom, show progress, and vertical and horizontal spacing.

The dialog box includes these tabs:

- Activity Box Template tab - Activity Network Options dialog box
- Activity Network Layout tab - Activity Network Options dialog box

In addition, the following buttons are available in the Activity Network Options dialog box:

Apply: Applies the selected Activity Network settings without closing this dialog box.

Copy From: Applies the Activity Network settings from another activity layout.

Activity Step Templates dialog box

Use the Activity Step Templates dialog box to create a template containing a group of steps common to multiple activities. You can then assign the template to activities using the Assign Activity Step Templates dialog box.

The upper grid of the dialog box contains the following fields and buttons:

Step Template Name: The name of the step template. Enter a name that describes the steps contained in the template or the activities to which the template will typically apply.

Step Count: The number of steps contained in the template.

Add: Adds a step template.

Delete: Deletes the selected step template.

Shift Up: Moves the selected step template up a row in the list.

Shift Down: Moves the selected step template down a row in the list.

The bottom grid of the dialog box contains the following fields and buttons:

Step Name: The name of the step.

Step Weight: The weight of the step. Weighted steps enable you to track the progress of an activity based on the number of steps completed.

Add: Adds a step after the selected step.

Add from template: Adds steps from user-defined activity step templates.

Delete: Deletes the selected step.

 Moves the selected step to an earlier stage in the selected activity.

 Moves the selected step to a later stage in the selected activity.

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To add these additional columns, right click on the Steps tab and choose Customize Steps Columns.

Add: Adds a step to the template.

Delete: Deletes a step from the template.

Step Description: Displays the name of the selected step and the step's description. You can only view the step description in this field; to add or edit a description, you must use the HTML editor.

Modify: Click to add or edit the description for the selected step in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.

Copy: Click to copy the selected text. After copying text, you can paste it into the HTML editor or into another application.

Print: Click to print the displayed description.

Activity tab - IPMDAR Template dialog box

Use the Activity tab of the Add/Modify Template dialog box to specify activity data, codes, and user defined fields to be exported to an IPMDAR file.

Template Name: The name of the template that will show in the Select Template dialog box.

Fields

Task Subtype ID: The activity level code or user defined field to export as the task subtype ID for activities.

Planning Level ID: The activity level code or user defined field to export as the task planning level ID for activities.

Control Account ID: The activity level code or activity or WBS user defined field to export as the control account ID for activities.

Work Package ID: The activity level code or activity or WBS user defined field to export as the work pacakge ID for activities.

IMP Element ID: The activity level code or user defined field to export as the lowest level IMP element associated with activities.

SOW Reference: The activity level code or user defined field to export as the SOW reference for activities.

Subcontractor Reference: The activity level code or user defined field to export as the subcontractor reference for activities.

Other Earned Value Technique: The activity level code or user defined field to export as the earned value technique for activities if the technique indicated by the Earned Value Technique ID is OTHER_DISCRETE or FIXED_X_Y.

Source Subproject Reference: Activity level code or user defined field to export as the Subproject Reference for activities.

Source Task Reference: Activity level code or user defined field to export as the source task reference for activities.

Comments: The activity level code or user defined field to export as comments about tasks.

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Activity Codes

Select the activity codes to export.

Activity UDFs

Select the activity user defined fields to export.

Activity tab - Modify Template or View Template dialog box

Import

Import milestones with resource assignments as: Choose to import milestones with associated resources as start milestone activities with associated expenses, or as task dependent activities with associated resource assignments.

Import Microsoft Project's Task ID field to: Choose to import the Task ID field to P6 Professional's Activity ID field or a specified user defined text field.

Import Microsoft Project's fixed costs as expenses: Choose this option if you want to import Microsoft Project's fixed costs as expenses in P6 Professional. If you do not select this option, fixed costs are not imported.

Export

Export Activity ID to Microsoft Project's task field: Mark if you want to export P6 Professional's Activity ID field to a text field in Microsoft Project. Click the drop down arrow to select the Microsoft Project field.

Activity tab of the UN/CEFACT Export Template dialog box

Use the Activity tab of the Template dialog box to specify information about the activities in the project.

The following tabs are available:

- Miscellaneous tab of the UN/CEFACT Export Template dialog box
- Dates and Duration tab of the UN/CEFACT Export Template dialog box
- Notes tab of the UN/CEFACT Export Template dialog box

Activity tab of Update Options - Update Baseline dialog box

When updating activity data, include:

Specify the types of activity data you want to update and include the updated baseline.

General activity information: Mark to include general information related to each activity accounted for in the baseline. This data includes the activity name, activity type, duration type, percent complete type, status, calendar, and primary resource.

Relationships: Mark to update and include relationships within a project and with external projects.

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Constraints: Mark to include updated constraints and their associated dates.

Dates, duration, and data date: Mark to include Original or Planned Duration, Remaining Duration, Actual start/finish, Anticipated start/finish, Remaining start/finish, Start/finish, Remaining late start/finish, Suspend/resume dates and Data Date.

WBS assignments: Mark to include activities assigned to a WBS.

Risk assignments (P6 Professional Only): Mark to include risks associated with activities.

Activity UDFs: Mark to include updated UDFs assigned to activities.

Activity code assignments: Mark to include project, global and EPS assignments.

Activity notebooks: Mark to include notebooks assigned to activities.

Steps: Mark to include new steps and changes to previous steps.

Step UDFs: Mark to include updated UDFs assigned to steps.

Expenses: Mark to include existing expenses and to adds new expenses to activities.

Expense UDFs: Mark to include updated expense UDFs.

For activities without resource assignments

Budgeted units and cost: Mark to include planned costs per unit for activities without assigned resources.

Actual units and cost: Mark to include actual costs per unit for activities without assigned resources.

Add Code Value dialog box

Use the Add Code Value dialog box to create a new activity code value.

Assign the new activity code value after using this dialog box.

Code Value: Type the new activity code value.

Code Value Description: Type a description of the new value.

Add New Baseline dialog box

Use the Add New Baseline dialog box to create a new baseline based on the current project or an existing project.

Save a copy of the current project as a new baseline: Choose to save the current state of the open project as a baseline for the project.

Convert another project to a new baseline of the current project: Choose to select a different project to use as a baseline for the current project.

Add Projects dialog box

Use the Add Projects dialog box to specify the projects to include in the selected portfolio.

Display Options bar: Click to change the table display.

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Add Projects table: Lists your organization's project hierarchy. To sort the display, click a column label.

Assign: Assigns the selected projects to the portfolio.

Remove: Removes the selected projects from the portfolio.

Add Sort dialog box

Use the Add Sort dialog box to define sort settings for information compiled by the selected data source.

Sort by Object: Lists categories of information you can use to sort data compiled by the data source. The list of available categories reflects the type of data compiled by the data source. You can select a category.

Sort By Field: Lists names of fields you can use to sort data compiled by the data source. The list of available fields reflects the Sort by Object you select. You can select a field.

Ascending: Choose to sort by ascending value.

Descending: Choose to sort by descending value.

- When compiling reports, all information sorts in ascending order.

Add user dialog box (P6 Professional Only)

Use the Add User dialog box to set a password for a new user. The type of password required depends on whether the Enable Password Policy check box is marked or cleared in the Password Policy section of the Admin Preferences dialog box.

Login Name: Enter a user name for the new user.

Personal Name: Enter the user's complete name.

Enter new password: Enter a password for the new user according to the following requirements:

- If the Enable Password Policy checkbox is marked in the Admin Preferences dialog box, enter a password with a minimum length of 8 characters, including one alpha and one numeric character.
- If the Enable Password Policy checkbox is cleared in the Admin Preferences dialog box, enter a password with a maximum length of 20 characters. This password can also serve as the authentication password for your email server.

Confirm new password: Enter the new password again.

Admin Categories dialog box (P6 Professional Only)

Use the Admin Categories dialog box to define standard categories and values that you can apply to all projects.

The Admin Categories dialog box contains the following tabs:

- Baseline Types tab - Admin Categories dialog box
- Expense Categories tab - Admin Categories dialog box

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- WBS Category tab - Admin Categories dialog box
- Document Categories tab - Admin Categories dialog box
- Document Status tab - Admin Categories dialog box
- Notebook tab - Admin Categories dialog box
- Risk Categories tab - Admin Categories dialog box
- Units of Measure tab - Admin Categories dialog box

Admin Preferences dialog box (P6 Professional Only)

Use the Admin Preferences dialog box to specify default settings established by the project administrator.

These are the available tabs:

- General tab - Admin Preference dialog box
- Data Limits tab - Admin Preferences dialog box
- ID Lengths tab - Admin Preferences dialog box
- Time Periods tab - Admin Preferences dialog box
- Earned Value tab - Admin Preferences dialog box
- Reports tab - Admin Preferences dialog box
- Options tab - Admin Preferences dialog box
- Rate Types tab - Admin Preferences dialog box
- Industry tab - Admin Preferences dialog box
- Consent Notice tab - Admin Preferences dialog box
- Status of User Acceptance tab - Admin Preferences dialog box
- Exception Site List tab - Admin Preferences dialog box

Advanced tab - Import Options dialog box

Use this tab to view and modify global data present in the XML file being imported. Global data includes codes, UDFs, calendars, and resources. This tab is disabled if multiple projects are being imported.

The following tabs are available:

- Codes tab - Import Options dialog box
- UDFs tab - Import Options dialog box
- Calendars tab - Import Options dialog box
- Resources tab - Import Options dialog box

Advanced tab - Schedule Options dialog box

Calculate multiple float paths: Mark to calculate multiple critical float paths (sequences of activities) in the project schedule. You can specify the number of critical float paths to identify in

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the Specify the number of paths to calculate field. If you do not select this option, you cannot edit the remaining fields.

Calculate multiple paths using

Total Float - Choose this option to identify critical paths based on the total float of activity relationships. To calculate the most critical path, the module first determines which relationship has the most critical total float. Using this relationship as the starting point, the module determines which predecessor and successor activities have the most critical relationship total float, among all possible paths, until an activity is reached that does not have any relationships. The path that contains these activities is the most critical path.

Free Float - Choose this option to define critical float paths based on longest path. The most critical path will be identical to the critical path that is derived when you choose to define critical activities as Longest Path in the General tab. In a multicalendar project, the longest path is calculated by identifying the activities that have an early finish equal to the latest calculated early finish for the project and tracing all driving relationships for those activities back to the project start date. After the most critical path is identified, the module will calculate the remaining sub-critical paths.

Display multiple float paths ending with activity: Select the activity, typically a milestone or significant activity with an unchanging start or end date, to represent the end of the float paths.

Specify the number of paths to calculate: Enter the number of critical float paths to calculate. If you enter 5, the module will calculate the five most critical float paths ending with the activity you selected. The module ranks each float path from most critical to least critical and stores the value for each activity in the Float Path field. For example, if you calculate five float paths, the module will store a value of 1 in the Float Path field for each activity in the most critical float path; the module will store a value of 5 for each activity in the least critical float path.

Appearance tab - Currencies dialog box (P6 Professional Only)

Decimal symbol: The symbol used to separate whole values from decimal values in the currency display: a period or a comma. You can select a new symbol.

Number of decimal places: The number of decimal places to include in the currency display: 0, 1, or 2. You can select a new number.

Digit grouping symbol: The symbol used to group digits in the currency display: a comma, period, or dash. You can select a new symbol.

Universal Currency Symbol

Positive currency format: The format used to display the currency value as positive. You can select a new format.

Negative currency format: The format used to display the currency value as negative. You can select a new format.

Application tab - User Preferences dialog box

Startup Window

Application Startup Window: The name of the window displayed each time you open the module. You can select a new window.

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Show the Issue Navigator dialog at startup: Mark to view the Issue Navigator each time you open the module.

Show the Welcome dialog at startup: Mark to view the Welcome dialog box each time you open the module.

Grouping and Sorting

Labels on grouping bands: Choose the labels you want to display in grouping bands. This setting affects any window/dialog box where you cannot access a Group and Sort dialog box.

Show ID/Code: Mark to display the ID/Code as the label on grouping bands.

Show Name/Description: Mark to display the Name/Description as the label on grouping bands.

Codes

Specify how to display code values: Select to view either the ID or the description for code values throughout P6 Professional.

Columns

Select financial periods to view in columns: Select a range of financial periods you want to make available for display as columns in the Activity Table, the Resources tab of Activity Details, and the Resource Assignments window.

Job Alert Polling Interval

Frequency to poll for job alerts (in seconds): The interval, in seconds, that P6 Professional polls the database for job alerts. A job alert is created every time a job you submit completes or fails. This setting takes effect only after you close and restart P6 Professional.

Apply Actuals dialog box

Use the Apply Actuals dialog box to update or apply actuals to open projects.

Project(s) to be updated: Lists the currently open projects to which actuals can be applied. The table lists Project ID, Project Name, Current Data Date, and Project Planned Start date.

A new data date is used when actuals are applied: Specify whether each project uses its own new data date or if the same new data date is used for all projects.

New Data Date: If you choose to apply the same new data date for all projects, select the date up to which you want to apply the default project's actuals. Click Browse to select a new date or click the arrows to browse for a new date according to timesheet end dates.

When actuals are applied from timesheets, calculate activity remaining durations: Specify whether to recalculate the remaining duration based on the activity duration type or to always recalculate. If you choose to always recalculate, all activities are treated as Fixed Units and Fixed Units/Time.

Apply: Applies actuals to the open projects and updates the current data date.

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Assign Access to OBS dialog box

Use the Assign Access to OBS dialog box to enable the selected user to access project data for the EPS and WBS elements related to a specific OBS member.

Display Options bar: Lists options for changing the organizational breakdown structure (OBS) display.

OBS Name: Lists the organizational breakdown structure (OBS). To sort the display, click the OBS Name column label.

Assign: Assigns the selected OBS element to the Project Access list.

Remove: Removes the selected OBS element from the Project Access list.

Assign Activities dialog box (P6 Professional Only)

Use the Assign Activities dialog box to assign the selected activity to the risk.

Display Options bar: Lists options for changing the activities display. You can change the columns, filtering, grouping and sorting, font, and colors.

Search: Type an Activity ID or name to display a filtered list of activities that begin with this value.

Activity table: Lists the ID, name, and status of activities in the open project. To sort the display, click a column label.

Assign: Assigns the selected activity to the selected risk.

Remove: Removes the selected activity assignment.

Assign Activity Codes dialog box

Use the Assign Activity Codes dialog box to assign an activity code to the selected activity. You can also use this dialog box to create and assign a new activity code value.

Global: Click to display global activity codes.

EPS: Click to display EPS-level activity codes.

Project: Click to display project-specific activity codes.

Display Options bar: Click to change the activity code values display.

Search: Type an activity code or description to display a filtered list of activities whose ID or name begins with this value.

Activity Code Value: Lists code values according to activity code. To sort the display, click the Code Value column label.

Description: Describes each activity code value. To sort the display, click the Description column label.

Assign: Assigns the selected activity code value to the selected activity.

Remove: Removes the selected activity code value from the selected activity.

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New: Click to create a new activity code value. You can then assign the new value to a selected activity. This icon is disabled if no code band is selected or if you do not have security to edit the selected type of activity code (global, EPS, or project).

Assign Activity Step Templates dialog box

Use the Assign Activity Step Templates dialog box to assign a step template to an activity. By using Ctrl-Click, you can assign multiple templates to a single activity. You can also use Ctrl-Click to select multiple activities, then assign the applicable template(s) to those activities.

Step Template Name:

When connected to a P6 Professional database: The names of all the activity step templates present in the Activity Step Templates dialog box.

When connected to a P6 EPPM database: The names of all the activity step templates.

Step Count: The number of steps contained in the template.

Assign Assignment Codes dialog box

Use the Assign Assignment Codes dialog box to assign an assignment code to the selected resource or role assignment.

Display Options bar: Click to change the display.

Search: Type an assignment code name or description to display a filtered list of assignment codes whose code or description begins with this value.

Assignment Code: Lists code values according to assignment code. To sort the display, click the Assignment Code column label.

Code Description: Describes each code value.

Assign: Assigns the selected code to the current resource or role assignment.

Remove: Removes the selected code from the current resource or role assignment.

Assign Baselines dialog box

Use the Assign Baselines dialog to assign project, primary, secondary, and tertiary baselines to a project.

Project: Lists all open projects. Select the project to which you want to assign baselines.

Project Baseline: Select the baseline to use as the project baseline. If a baseline does not exist, the current project is the default value.

User Baselines

Primary: Select the primary baseline from the list of available baselines. If a baseline does not exist, the current project is the default value.

Secondary: Select the second baseline from the list of available baselines. A second baseline is not required.

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Tertiary: Select the tertiary baseline from the list of available baselines. A tertiary baseline is not required.

OK: Click to assign the selected baselines to the selected project.

Cancel: Closes the dialog without saving your changes.

Assign Financial Period Calendars dialog box

Use the Assign Financial Period Calendar dialog box to assign a financial period calendar to a project.

Financial Period Calendar Name: Displays the name of each financial period calendar.

Default: Displays whether the corresponding calendar is the default calendar assigned when you create a new project or import a project which does not have a financial period calendar assigned.

Assign Funding Sources dialog box

Use the Assign Funding Sources dialog box to assign a funding source to the selected project.

Display Options bar: Click to change the font or colors in this dialog box.

Search: Begin typing the first few letters of a funding source to display a filtered list of sources beginning with the letters typed.

Funding Source: Lists all funding sources defined for the enterprise.

Assign: Assigns the selected funding source to the selected project.

Remove: Removes the selected funding source from the selected project.

Assign Notebook Topic dialog box

Use the Assign Notebook Topic dialog box to assign a notebook to the selected activity.

Display Options bar: Click to change the font or colors in this dialog box.

Search: Begin typing the first few letters of a Notebook Topic to display a filtered list of topics beginning with the letters typed.

Notebook Topic: Lists note topics or categories predefined by the project administrator. To sort the display, click the Notebook Topic column label.

Assign: Assigns the selected note to the selected activity.

Remove: Removes the selected note from the selected activity.

Assign Predecessors dialog box

Use the Assign Predecessors dialog box to define a predecessor for an activity. To display this dialog box, click Assign in the Predecessors tab of Activity Details or click  on the Assign

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toolbar. You can also click Assign in the Predecessors area of the Relationships tab in Activity Details.

Display Options bar: Click to change the activities display and to select another project when you want to assign external relationships to an activity. You can customize columns, filters, grouping and sorting, font, and colors.

Search: Type an activity ID or name to display a filtered list of activities whose ID or name begins with this value.

Activity ID: Displays activities in the open project.

Activity Name: Displays the names of the activities in the open project.

Activity Status: Displays the status of the activities in the open project.

Assign: Assigns the selected predecessor activity.

Remove: Removes the selected predecessor activity.

Assign Project Codes dialog box

Use the Assign Project Codes dialog box to assign a project code to the current project.

Display Options bar: Click to change the display.

Search: Type a project code or code description to display a filtered list of project codes whose code or description begins with this value.

Project Code: Lists code values for each project code.

Code Description: Describes each project code value.

Assign: Assigns the selected code to the current project.

Remove: Removes the selected code from the current project.

Assign Recipients dialog box

Use the Assign Recipients dialog box to select an email recipient from a list of resources or users.

Display Options bar: Lists options for displaying resources or users, and for customizing the recipient list.

Name: For the open project, lists the name of each resource or user, depending on your current display.

email Address: For the open project, lists the email address of each resource or user, depending on your current display.

Assign: Adds the selected recipient.

Remove: Removes the selected recipient.

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Assign Reports dialog box

Use the Assign Reports dialog box to add reports to and remove reports from the selected report batch.

Display Options bar: Click to filter, group, and sort the report batch display.

Report Name: Lists names of existing reports. To sort the display, click the Report Name column label.

Assign: Adds the selected report to the report batch.

Remove: Removes the selected report from the report batch.

Assign Resource Codes and Assign Role Codes dialog boxes

Use the Assign Resource Codes dialog box to assign a resource code to the selected resource. Use the Assign Role Codes dialog box to assign a role code to the selected role.

Display Options bar: Click to change the display.

Search: Type a resource code, role code, or code description to display a filtered list of resource codes or role codes whose code or description begins with this value.

Resource Code or **Role Code:** Lists code values according to resource code or role code. To sort the display, click the Resource Code or Role Code column label.

Code Description: Describes each code value.

Assign: Assigns the selected code to the current resource or role.

Remove: Removes the selected code from the current resource or role.

Assign Resources by Role dialog box

Use the Assign Resources by Role dialog box to assign a resource to the selected activity according to the resource's assigned roles.

Display Options bar: Click to change the table's fonts and colors, filter the display, or group the display by resource codes.

Search: Type a resource ID or name to display a filtered list of resources whose ID or name begins with this value.

Resource ID: Lists IDs for resources with role assignments that correspond to the selected activity's role assignments.

Resource Name: Lists names of resources with role assignments that correspond to the selected activity's role assignments.

Proficiency: Lists each resource's proficiency for the selected activity's assigned role.

Max Units/Time: Lists the selected resource's availability, or the maximum amount of work units the selected resource can perform in a single work period, according to effective date.

Assign: Assigns the selected resource to the selected activity.

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Remove: Removes the selected resource from the selected activity.

Assign Resources dialog box

Use the Assign Resources dialog box to assign a resource to a role or an activity. If resource security is enabled, you can only assign resources from under the resource root node you have access to or from current project resources.

Display Options bar: Click to change the resources display. You can change columns, filters, grouping and sorting, font, and colors.

Search: Type a resource ID or name to display a filtered list of resources whose ID or name begins with this value.

Assign Resources table: Lists your organization's resource hierarchy. To sort the display, click a column label.

Assign: Assigns the selected resource.

Remove: Removes the selected resource assignment.

Replace: Replaces the selected resource assignment.

Assign Risks dialog box (P6 Professional Only)

Use the Assign Risks dialog box to assign a risk to the current activity.

Display Options bar: Click to change the display.

Search: Type a risk name to display a filtered list of risks whose name begins with this value.

Risk ID: The unique identifier of each risk.

Risk Name: The name of each risk.

Risk Category: The name for the risk's category.

Risk Type: The kind of risk, threat or opportunity. A threat will have a negative impact on your project, while an opportunity will have a perceived benefit to the project.

Risk Status: The current state of the selected risk's status.

- **Proposed**: The risk is identified and awaits approval.
- **Open**: The risk is approved as a valid risk to the project.
- **Active**: The risk is currently impacting the project.
- **Rejected (Closed)**: The risk is not seen as a valid risk to the project and therefore will not be tracked and managed by the project manager. The data for this risk cannot be modified once it is closed.
- **Managed (Closed)**: The risk occurred and was successfully managed by the project team and is no longer an active risk. The data for this risk cannot be modified once it is closed.
- **Impacted (Closed)**: The risk occurred, impacted the project and is no longer an active risk. The data for this risk cannot be modified once it is closed.

Risk Owner: The resource that has ownership of the selected risk.

Identified By: The resource who identified the risk.

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Identified On: The date the risk was identified.

Exposure Start: The earliest start date of all activities to which the risk is assigned. If no activities are assigned to the risk, the Project Start date is shown.

Exposure Finish: The latest finish date of all activities to which the risk is assigned. If no activities are assigned to the risk, the Project Finish date is shown. If there is no Project Finish date, the Project Schedule Finish data is shown. If there is no Project Schedule Finish date, then the Project Must Finish On date is shown. If there is no Project Must Finish On date, then the Project Start date is shown.

Project: The name of the project with activities associated with this risk.

Description: A description of the risk.

Assign: Assigns the selected risk to the current activity.

Remove: Removes the selected risk from the current activity.

Assign Role dialog box

Use the Assign Role dialog box to assign a role to the selected resource or activity.

Display Options bar: Click to change the roles display.

Search: Type a role ID or name to display a filtered list of roles whose ID or name begins with this value.

Role ID: Lists role IDs. To sort the display, click the Role ID column label.

Role Name: Lists each role's name. To sort the display, click the Role Name column label.

Assign: Assigns the selected role.

Remove: Removes the selected role assignment.

Assign Roles dialog box - for selected resource or activity

Use the Assign Roles dialog box to assign a role to the selected resource or activity.

Display Options bar: Click to change the roles display.

Search: Type a role ID or name to display a filtered list of roles whose ID or name begins with this value.

Role ID: Lists role IDs. To sort the display, click the Role ID column label.

Role Name: Lists each role's name. To sort the display, click the Role Name column label.

Assign: Assigns the selected role.

Remove: Removes the selected role assignment.

Assign Roles dialog box - for selected resource or activity

Use the Assign Roles dialog box to assign a role to the selected resource or activity.

Display Options bar: Click to change the roles display.

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Search: Type a role ID or name to display a filtered list of roles whose ID or name begins with this value.

Role ID: Lists role IDs. To sort the display, click the Role ID column label.

Role Name: Lists each role's name. To sort the display, click the Role Name column label.

Assign: Assigns the selected role.

Remove: Removes the selected role assignment.

Assign Successors dialog box

Use the Assign Successors dialog box to assign a successor to the selected activity. To display this dialog box, click Assign in the Successors tab of Activity Details or click  on the Assign toolbar. You can also click Assign in the Successors area of the Relationships tab in Activity Details.

Display Options bar: Click to change the activities display and to select another project when you want to assign external relationships to an activity. You can customize columns, filters, grouping and sorting, font, and colors.

Search: Type an activity ID or name to display a filtered list of activities whose ID or name begins with this value.

WBS/Activity ID: Displays activities in the open project.

Activity Name: Displays the names of the activities in the open project.

Activity Status: Displays the status of the activities in the open project.

Assign: Assigns the selected successor activity.

Remove: Removes the selected successor activity.

Assign User dialog box (P6 Professional Only)

Use the Assign User dialog box to assign an existing user to an OBS element. Assigning a user to an OBS element grants the user access to project data for which the OBS element is responsible. The specific level of access is defined by the user's project profile.

Display Options bar: Click to change the users list display options.

Login Name: Lists users' login names, which are assigned in the Users dialog box.

Personal Name: Lists users' given names.

Global Profile: Lists users' global profiles.

Resource: Lists users' assigned resource ID and name, if any.

Assign: Assigns the selected user to the current OBS element.

Remove: Removes the selected user from the current OBS element.

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Assign WBS or Activities dialog box

Use the Assign WBS or Activities dialog box to assign the selected work product or document to an activity or work breakdown structure (WBS) element.

Display Options bar: Lists options for changing the WBS and activities display.

WBS or Activities table: Lists WBS elements and activities in the open project. To sort the display, click a column label.

Assign: Assigns the selected WBS element or activity to the selected work product or document.

Remove: Removes the selected activity or WBS assignment.

Assign Work Products & Documents dialog box

Use the Assign Work Products & Documents dialog box to assign existing work products and documents to the selected activity or work breakdown structure (WBS) element. To add new work products and documents, choose Project, Work Products and Documents.

Display Options bar: Click to change the work products and documents display.

Search: Type a title to display a filtered list of titles beginning with the letters typed.

Title: Lists the open project's work products and documents. To sort the display, click the column label.

Reference No.: Displays the document reference number. You can change the reference number on the Work Products & Documents window General details tab.

Version: Displays the document version. You can change the version on the Work Products & Documents window General details tab.

Assign: Assigns the selected work product or document.

Remove: Removes the selected work product or document from the activity or WBS element.

Assignment Code Definitions dialog box

Use the Assignment Code Definitions dialog box to create, edit, and delete assignment codes. You can use these codes to sort, filter, group, and report assignment information in all projects.

Display Options Bar: Click to search for a specific code.

Assignment Code: Lists assignment codes.

Secure Code: Mark the checkbox for codes you want to define as viewable only to users with the appropriate access rights. Clear the checkbox to make this code and its values visible to all users. Using this feature requires the Add and Delete Secure Codes privilege.

Assignment Code Name: The name of the selected assignment code. You can type a new name.

Max Length: The maximum number of characters the selected code's values may have. Type or click the arrows to select a new number.

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Add: Adds a code.

Delete: Deletes the selected code.

Shift Up: Moves the selected code to a higher position in the display. This changes the order in which the codes display when you assign a code to an assignment.

Shift Down: Moves the selected code to a lower position in the display. This changes the order in which the codes display when you assign a code to an assignment.

Assignment Codes dialog box

Use the Assignment Codes dialog box to create, edit, and delete assignment codes. You can use these codes to sort, filter, group, and report on project data across the enterprise.

Select Assignment Code: The name of the current assignment code. You can select a different code.

Modify: Allows you to create, modify, or delete codes.

Display Options Bar: Click to search for a specific code value and change the codes display.

Assignment Code Value: Lists code values for the current code. To change a value, double-click it. To sort the display, click the Assignment Code Value column label.

Code Description: Lists each code value's description.

Add: Adds a value to the current code.

Delete: Deletes the selected value from the current code.

Cut: Cuts the selected code value so you can delete it or move it to another position in the list. Select a new position, then click Paste.

Copy: Copies the selected code value so you can quickly create a similar value in another position in the list. Select a new position, then click Paste.

Paste: Pastes a code value you have copied or cut.

Arrows: Moves the selected value to a different position in the display. This changes the order in which the values display when you assign a value to an assignment.

Assistance tab - User Preferences dialog box

The Assistance tab enables you to specify whether you want to use wizards, rather than standard dialog boxes.

Wizards

Use New Resource Wizard: Mark to use the New Resource Wizard to add resources to the resource pool.

Use New Activity Wizard: Mark to use the New Activity Wizard to add activities to projects.

Responsible Manager

Retain the responsible managers that were assigned to the moved, copied, or cut data: Mark to keep the existing responsible managers assigned to the project or WBS when moving, copying, or cutting and pasting data.

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Assign the OBS node of the new parent node to be the responsible manager for all moved or pasted data: Mark to assign the new parent node's responsible manager to all areas of a project or WBS when moving, copying, or cutting and pasting data.

Out of Sequence

Warn about out-of-sequence activities: Mark to receive a warning when a change you make to the status of an activity could put it, or other activities, out-of-sequence.

Assumptions and Notes tab - Estimation History dialog box (P6 Professional Only)

Assumptions & Notes: Displays assumptions and other comments recorded for the selected estimate.

Attribute Details dialog box (P6 Professional Only)

Use the Attribute Details dialog box to view detailed project information about the selected attribute.

The available tabs are:

- Description tab - Attribute Details dialog box
- Resources tab - Attribute Details dialog box
- Roles tab - Attribute Details dialog box
- Expenses tab - Attribute Details dialog box
- WPs & Docs tab - Attribute Details dialog box
- Cost tab - Attribute Details dialog box

Attributes tab - WBS Details dialog box (P6 Professional Only)

Attribute Name: Lists attributes assigned to activities in the selected WBS.

Bar Chart dialog box

Use the Bar Chart dialog box to change your Bar Chart settings for the current layout.

Display: Select the category of WBS information to include in the project Bar Chart.

Show Bars

Field: A WBS field in the selected Display category that will be shown as a bar on the project Bar Chart. You can select up to three fields, but you must select at least one. The available data items change to reflect the current display option.

Color: Click to change the color of each bar included in the project Bar Chart.

Show Stacked: Mark to show the bars side-by-side or stacked one upon the other.

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Apply: Click to preview the specified bars on the project Bar Chart without closing the dialog box.

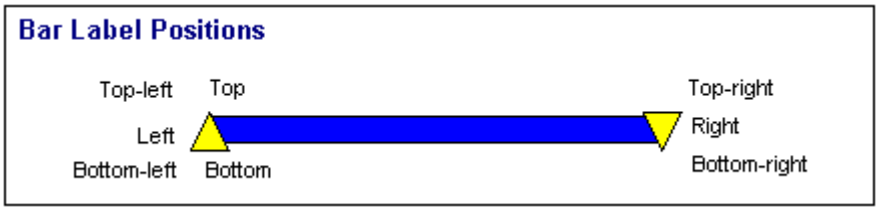
Bar Chart Options dialog box

Use the Bar Chart Options dialog box to customize your current Gantt Chart display.

- General tab - Bar Chart Options dialog box
- Collapsed Bars tab - Bar Chart Options dialog box
- Data Date tab - Bar Chart Options dialog box (Activities and Tracking windows only)
- Sight Lines tab - Bar Chart Options dialog box
- Progress Line tab - Bar Chart Options dialog box (Activities window only)

Bar Labels tab - Bars dialog box

Position: Double-click to change the position of the selected bar's label.



Label: Double-click to select a database field for the selected bar's label.

Add: Click to add a bar label to the selected bar.

Delete: Click to delete the selected bar label from the selected bar.

Bar Settings tab - Bars dialog box

Grouping Band Settings

Show bar when collapsed: Mark to include the selected bar when you collapse the display to summary level information.

Showbar for grouping bands: Mark to display the selected bar as a summary bar only.

Bar Necking Settings (Activities window)

Calendar nonwork time: Mark to show the selected bar's nonwork time, based on the activity's calendar, as a neck.

Activity nonwork intervals: Mark to show the selected bar's nonwork intervals as a neck, based on out-of-sequence progress and suspended/resumed activities.

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Bar Style tab - Bars dialog box

Shape: The shape of the selected bar's start endpoint, the bar itself, and the finish endpoint. Select the shape in each field.

Color: Click each field to select the selected bar's start endpoint color, the color of the bar itself, and the color of the finish endpoint.

Pattern: The fill pattern of the selected bar's start endpoint, the bar itself, and the finish endpoint. Select the pattern in each field.

Row: Type or select the position of the selected bar in the Gantt Chart. Select 1, 2, or 3.

Bars dialog box

Use the Bars dialog box to specify the style and labels for the bars in a Gantt Chart.

The Bars dialog box contains the following tabs:

- Bar Style tab - Bars dialog box
- Bar Settings tab - Bars dialog box
- Bar Labels tab - Bars dialog box

In addition, the following fields and buttons are available in the Bars dialog box:

Display: Mark to display the corresponding bar in the Gantt Chart.

Name: The bar name; this does not display in the layout. Double-click to change the bar name.

Timescale: The timescaled data that the bar represents. Double-click the timescale to change it.

Filter: The filter applied to the data item represented by the bar type. Double-click the filter to change it.

Preview: Shows how the bar will appear.

Apply: Click to preview your changes without closing this dialog box.

Add: Click to add a bar to the current layout.

Delete: Click to delete the selected bar. To remove a specific bar from the layout display without deleting it, clear the Display checkbox next to the bar.

Copy From: (Activity Layouts only) To apply Gantt Chart settings from another layout to the current activity layout, click this button.

ShiftUp: Click to move the selected bar up one position.

ShiftDown: Click to move the selected bar down one position.

Options: Click to specify Gantt Chart background line and legend options.

Default: Click to apply the default Gantt Chart settings.

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Baseline Duplicates dialog box

Use the Baseline Duplicates dialog box to choose whether to renumber selected activity IDs in the baselines when you are renumbering activity IDs.

The top section of this dialog box lists baselines associated with the current project that P6 Professional will not update because doing so would create duplicate activity IDs; P6 Professional does not update activity IDs in a baseline if it detects that doing so would create duplicate activity IDs.

The bottom section of this dialog box presents you with a Yes or No choice whether to continue renumbering.

- Click Yes to renumber the selected activity IDs in the baselines that do not contain duplicates. Be aware that once you click Yes, the changes are committed to the database with no chance for you to undo the renumbering. Furthermore, if you click Yes, the baselines listed in the Baseline Duplicates dialog box will not synchronize with the current project, which impacts the accuracy of comparison data and earned value if these baselines are subsequently used against the current project.
- Click No to cancel the renumbering process for baselines and to undo renumbering in the current project.

Baseline Types tab - Admin Categories dialog box (P6 Professional Only)

Use the Baselines Types tab to create, edit, and delete baseline types.

Display Options bar: Click to search for a specific baseline type.

Baseline Type: Lists baseline types. Baseline types allow you to categorize project baselines, standardize baselines, and help benchmark performance across projects. To change a baseline type, double-click the type you want to change.

Add: Adds a baseline type.

Delete: Deletes the selected baseline type.

Shift up: Moves the selected baseline type to a higher position in the display. This changes the order in which types display when you assign a baseline type to a baseline.

Shift down: Moves the selected baseline type to a lower position in the display. This changes the order in which types display when you assign a baseline type to a baseline.

Baselines to Export dialog box

Use the Baselines to Export dialog box to specify which baselines to export with a project when exporting to Primavera XML format.

Baseline Name: The project baselines that are available to export.

Baseline Type: A read-only field which shows the type of the baseline.

Data Date: A read-only field which shows the data date of the baseline project.

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Last Update Date: A read-only field which shows the date that the baseline was most recently updated.

Export: Mark this checkbox to select a baseline to export with the project.

Baselines to Import dialog box

Use the Baselines to Import dialog box to specify which baselines to import when importing a project from a Primavera XML file. If any of the baselines included in the file were assigned as the project, primary, secondary, or tertiary baseline at the time the file was exported, you can also import baseline assignments.

Baseline Name: The project baselines that are available in the import file.

Exists: A read-only checkbox which shows whether the baseline already exists in the database. This checkbox will only show that a baseline exists in the database if you chose the Update Existing Project option in the Import Action field.

Baseline Type: A read-only field which shows the type of the baseline.

Import: Mark this checkbox to select a baseline to be imported.

Basic tab - Import Options dialog box

Use this tab to modify the selected option by choosing the action to take when the same data exists in the import file and the project being updated.

The following tabs are available:

- Global tab - Import Options dialog box
- Project tab - Import Options dialog box

Batch Reports dialog box

Use the Batch Reports dialog box to define report batches for running global and project reports.

Global: Choose to add, edit, or delete report batches that are not project-specific.

Project: Choose to add, edit, or delete report batches for the open project only.

Display Options bar: Click to search for a specific report batch.

Batch Report: Lists names of report batches for the current batch type. To change a report batch name, double-click it. To sort the list, click the Batch Report column label.

Report Name: Lists names of reports included in the selected batch report.

Assign: Click to add reports to the selected report batch.

Remove: Click to remove reports from the selected report batch.

Arrows: Change the selected report's position in the report batch.

Add: Adds a report batch.

Delete: Deletes the selected report batch.

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Calculations tab - User Preferences dialog box

The Calculations tab enables you to specify how to calculate remaining values when new resource assignments are added to or removed from activities. You can also choose the default behavior when replacing a resource on an existing activity assignment and when both a resource and role share an activity assignment.

Resource Assignments

Preserve the Units, Duration, and Units/Time for existing assignments: When adding or removing multiple resource assignments on activities, choose this option for units, durations, and units/time to remain constant when additional resources are assigned to an activity. Regardless of the duration type of an activity, this equation will always remain true:

Remaining Units = Remaining Duration * Remaining Units/Time

Recalculate the Units, Duration, and Units/Time for existing assignments based on the activity Duration Type: When adding or removing multiple resource assignments on activities, choose this option to calculate a resource assignment's remaining values based on the activity's duration type specified in the Activity Details General tab.

Assignment Staffing

When assigning a resource to an existing activity assignment: When you replace the resource on an activity assignment with a different resource, choose to always use the units/time and overtime factor of the current assignment or of the new resource replacing the existing assignment; or, you can choose to be prompted to select which units/time and overtime factor you want to use each time you replace a resource on an existing activity assignment.

When a resource and role share an activity assignment: When assigning a resource to an existing role assignment (or a role to an existing resource assignment), you can choose to always use the price/unit of the resource or role; or, you can choose to be prompted to select which price/unit you want to use each time you assign a resource to an role assignment (or a role to a resource assignment).

Dissolving Activities

Regain lag: When you dissolve an activity, choose to retain the lag from the relationships with that activity. If you choose to retain lag, the lag from the predecessor relationship is added to the lag from successor relationship and applied to the newly created relationship. If this option is not selected, when you dissolve an activity, the newly created relationship has zero lag.

Calendar dialog box

Use the Calendar dialog box to view and edit a global, project, or resource calendar.

Total work hours/day: Displays the number of work hours defined for the selected day in the Work hours/day area.

Detailed work hours/day: Displays the number of work hours and nonwork hours defined for the selected workday in the Work hours area.

< (Previous timeperiod): Displays either the previous month or the previous year, depending on your current display.

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Month/Year: Displays the month and year currently selected for the calendar. Click to display a different month in the displayed year.

> (Next timeperiod): Displays either the next month or the next year, depending on your current display.

Month: Displays the selected month for the displayed year.

Day: Displays the selected day for the displayed year. Click to select the entire column (that day every week).

Date: Displays a numerical date.

Work hours/day or **Work hours:** The number of work hours for the selected date, if the Total work hours/day option is chosen above, or the number of work hours and nonwork hours for the selected date, if the Detailed work hours/day option is chosen. For Work hours/day, you can enter or select a different number. For Total work hours/day, you can select new work and nonwork hours by clicking a specific hour and then clicking Work or Nonwork.

Inherit holidays and exceptions from Global Calendar: The name of the calendar on which the open calendar is based. You can select a new calendar. This field is disabled for your personal resource calendar.

Work: Makes the selected date a workday.

Nonwork: Makes the selected date a nonworkday.

Standard: Makes the selected date a normal workday with the default number of workhours.

Workweek: Opens the Calendar Weekly Hours dialog box and enables you to change the default number of workhours for a weekday in the open calendar.

Time Periods: Opens the Hours per Time Period dialog box and enables you to define the calendar's default number of hours per timeperiod. For activities and resources to which the calendar is assigned, these values are used as conversion factors when users enter or display units and durations in time increments other than hours.

Calendar Used By dialog box

Use the Calendar Used By dialog box to view a complete list of projects and resources that use the selected calendar.

Projects: Choose to list projects that use the selected calendar either because it is assigned at project level, or because the project includes at least one activity that uses the calendar.

Resources: Choose to list resources that use the selected calendar.

Project ID/Project: If the current display is by project, lists projects that use the calendar.

Resource: If the current display is by resource, lists resources that use the calendar.

Calendar Weekly Hours dialog box

Use the Calendar Weekly Hours dialog box to specify the number of default working hours for each weekday in the open calendar.

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Using Total work hours/day

Standard work hours: Displays the default number of working hours for each day in the open calendar.

Using Detailed work hours/day

Day of the Week: Select a day of the week to set its default number of working hours.

Work hours: Displays the default number of working hours for the selected day in the open calendar.

Work: Makes the selected hour a working hour.

Nonwork: Makes the selected hour a nonwork hour.

Calendars dialog box

Use the Calendars dialog box to create, edit, and delete global, project, and resource calendars. You can also view calendar assignments, and you can specify a default global calendar.

Global: Choose to add, edit, or delete a global calendar.

Resource: Choose to add, edit, or delete a resource calendar.

Project: Choose to add, edit, or delete a project calendar.

Display Options bar: Click to search for a specific calendar. If Resource is chosen, Filter By options exist to display only shared resource calendars or only personal resource calendars.

Calendar Name: Lists global, resource, or project calendars, depending on your current display. To sort the display, click the Calendar Name column label.

Default: If your current display is Global, indicates the default global calendar for work breakdown structure elements, projects, and resources. Mark the appropriate Default checkbox to change the default global calendar. To sort the display, click the Default column label.

Add: Creates a global, resource, or project calendar, depending on your current display.

Delete: Deletes the selected calendar.

Modify: Enables you to modify the selected calendar.

Used By: Displays a list of projects and resources that use the selected calendar.

To Global: Enables you to convert the selected project or resource calendar to a global calendar.

To Shared: Enables you to convert the selected personal resource calendar to a shared resource calendar.

To Personal: Enables you to convert the selected shared resource calendar to a personal resource calendar.

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Calendars in Use dialog box

Use the Calendars in Use dialog box to specify how you want to delete a calendar.

Select Replacement Calendar: Choose to reassign the selected calendar's assignments to a calendar that you specify.

Link to Default Global Calendar: Choose to reassign the selected calendar's assignments to the default global calendar.

Calendars tab - Import Options dialog box

Use this tab to use, demote, or remove calendars and to rename calendars present in the XML file.

Basic Action section:

Global/Resource Calendars: Determines how global and resource calendars are imported.

Insert New: Retains data in the existing project and adds any new data items.

Keep Existing: Retains data in the existing project and does not overwrite it with the updated data or adds new data if the record does not exist and you have the appropriate security privileges.

Update Existing: Overwrites data in the existing project with updated data and adds new data if the record does not exist.

Do Not Import: Retains data in the existing project and does not import the updated data.

Advanced Actions section:

Name: Displays the name of the calendar in hierarchical form grouped by New and Saved. Data that is new in the XML file will be appear under New and data already saved in an the existing template will appear under Saved.

Type: Displays the type of calendar, Global or Resource.

Details: Displays the calendar's details.

Action: Determines if the calendar is imported, moved to a project, or removed.

New Name: The new name for the calendar.

Cell tab - Properties dialog box

Use the Cell tab to specify the contents of a text cell and to define the cell's settings. You can specify how you want the cell's information to be formatted in the compiled report and define an HTML link to the cell. If the selected cell is part of a data source, you can apply one or more filters to specify the information you want to compile for this cell in the report.

General Settings

Cell type: The type of information the selected cell reports. Cell type can be:

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- Field Title - duplicates the name of a field you specify. WBS Code and Activity Name are examples of field titles.
- Field Data - compiles and reports information from a field you specify. For example, a Field Data cell that refers to the field WBS Code will report WBS codes.
- Variable - reports information related to the overall report rather than a specific data source, or type of data. Report name and page number are examples of Variable type information.
- Custom Text - contains custom text that you specify.

You can select a new cell type.

Cell object: If the cell type is Field Title or Field Data, this field defines the category of information reported in the text cell, for example Activity. The list of available cell objects corresponds to the data source that contains the selected cell.

The choices in the Cell Object field reflect the data source (table) you specified. If the table is joined to one or more other tables in the database, the full path to the selected data source is displayed. For example: Activity Name \ < *activity_name* > \ Activity Code \ Project \ Default Cost Account \ Parent Cost Account.

If you change the data source, the list of available field names will also change.

The Cell Object field is not used for Variable or Custom Text cells.

You can select a new cell object.

Cell field: If the cell type is Field Title or Field Data, this is the name of the specific database field the text cell references. For example, if you want to report Activity Name in a text cell, the Cell Object would be Activity and the Cell Field would be Activity Name. The list of available cell fields reflects the Cell Object you specify for the selected cell.

You can select a new field.

Cell variable: If the cell type is Variable, this is the variable data field the selected cell reports. You can select a new field.

Custom Text: If the cell type is Custom Text, this is the text entered in the selected cell. You can type new text.

Align cell: The selected cell's position relative to the report's left and right margins. A cell's alignment may be:

- None - enables you to drag the cell to the appropriate position. If you select None, you can also enter the cell's indent from the left margin in the Left field.
- Left - positions the cell flush against the report's left margin. If you select Left, you cannot specify the cell's indent from the left or right margin.
- Right - positions the cell flush against the report's right margin. If you select Right, you cannot specify the cell's indent from the left or right margin.
- Center - extends the cell across the entire row. If you select Center, you cannot specify the cell's indent from the left or right margin.

You can select a new alignment.

Text alignment: The horizontal position of the selected cell's text, relative to the cell's left and right edges. You can select a new alignment.

Font style: The name of the style applied to text displayed in the selected cell. You can select a new style.

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Custom Font: Enables you to specify custom formatting options for text displayed in the selected cell.

Left: The cell's indent from the report's left margin, or the numeric distance between the left margin of the report and the left edge of the cell.

If the cell's alignment is Left or None, you can type a new number. If the selected cell's alignment is Right or Center, the left indent is determined for you.

Width: The numeric width or distance the selected cell occupies between the report's left and right margins.

If the cell's alignment is Left, Right, or None, type a new number. If the selected cell's alignment is Center, the cell's width is determined for you.

Color: Click to change the selected cell's color.

Timescale Type: For time-distributed data, select how you want to see summary data reported across the timescale, for example, by timescale interval, or period totals only.

Borders: Click to add or remove cell borders.

Edit filter: For field data cells that are part of a data source only, click to add or edit filters for information compiled for the selected cell.

HTML links: Click to define HTML links for the selected cell, if you want the cell to contain a link to a Web site.

Repeat over timescale: Mark to include time distributions in the displayed report. This feature compiles information according to the timescale options you select under the Report tab. This option is available only for fields that report time-distributed data, for example, fields that report units or costs.

Format Cell Text: Mark to display currency, time, and percentage symbols where appropriate within the report. For example, if you do not choose this option, 1000 labor unit hours would display simply as 1000. If you choose this option an h is appended to the value: 1000h.

Indent Cell: Mark to indent information reported in the selected cell to indicate hierarchy levels.

Change Password dialog box (P6 Professional Only)

Use the Change Password dialog box to change your password. Depending on your security profile, you can also use the Change Password dialog box to change another user's password. To display this dialog box, click Password in the Password tab of the User Preferences dialog box or the General tab of the Users dialog box.

The type of password required depends on whether the Enable Password Policy checkbox is marked or cleared in the Password Policy section of the Admin Preferences dialog box.

Enter New Password: Enter a password for the new user according to the following requirements:

- If the Enable Password Policy checkbox is marked in the Admin Preferences dialog box, enter a password with a minimum length of 8 characters, including one alpha and one numeric character.
- If the Enable Password Policy checkbox is cleared in the Admin Preferences dialog box, enter a password with a maximum length of 20 characters. This password can also serve as the authentication password for your email server.

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Verify Your New Password: The new password you specified in the Enter New Password field.

Chart Box Template dialog box

Use the Chart Box Template dialog box to customize chart box content and appearance when you view information in the Activity Network.

Sample Box: Shows the data elements selected for the box, in the order in which they will appear in the box.

Field Name: The name of a data element included in the box.

Width: The width of a data element included in the box.

Height: The height of a data element included in the box.

Total Width: The total width of all data elements included in the box.

Add: Adds a data element to the box.

Delete: Deletes the selected data element from the box.

Shift Up: Shifts the selected data element up.

Shift Down: Shifts the selected data element down.

Chart Font & Colors dialog box

Use the Chart Font & Colors dialog box to change the appearance of text, the background color, and the color of boxes in your display.

Font: Changes the appearance of text in your display.

Back Color: Changes your display's background color.

Box Color: Changes the color of boxes in your display.

Apply: Applies your changes without closing this dialog box.

Check Schedule dialog box

The Check Schedule dialog box contains the following tabs:

- Relationships and Assignments tab - Check Schedule dialog box
- Dates and Durations tab - Check Schedule dialog box
- Constraints tab - Check Schedule dialog box

In addition, the following fields and buttons are available in the Check Schedule dialog box:

Use Check Schedule parameters from: If multiple projects are open, select which projects schedule check options to use when you check the schedules.

Save Report To: Enter or select a filename to store the generated report.

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Overwrite existing: Mark to save the report to the selected file name even if the file already exists. If this option is not selected but a file with that name already exists in the location, a timestamp will be added to the report name.

Cancel: Ends the action without saving changes.

Save: Saves the settings you configure as the configuration for the project selected in the Use Check Schedule parameters from field. Each project can have its own configuration of these settings.

Check Schedule: Saves the settings you have configured, initiates the Check Schedule analysis, produces the report at the location you specified, and opens the report in a separate window.

Default: Returns all checks to their default values.

Help: Opens P6 Professional Help for this dialog box.

Codes tab - Import Options dialog box

Use this tab to use, demote, or remove codes and to rename codes and code values present in the XML file.

Basic Action section

Activity Code/Values: Determines how activity codes and activity values are imported.

Insert New: Retains data in the existing project and adds any new data items.

Keep Existing: Retains data in the existing project and does not overwrite it with the updated data or adds new data if the record does not exist and you have the appropriate security privileges.

Update Existing: Overwrites data in the existing project with updated data and adds new data if the record does not exist.

Do Not Import: Retains data in the existing project and does not import the updated data.

Advanced Actions section

Select subject area: Determines the area of the product for which you want to define codes.

Name: Displays the name of the code and their values in hierarchical form grouped by New and Saved. Data that is new in the XML file will appear under New and data already saved in an the existing template will appear under Saved.

Scope: Displays the scope, Global or EPS, of an Activity Code.

Action: Determines if the code is used, moved to a project, or removed.

New Name: The new name for the code and code values.

Codes tab - Roles dialog box

Role Code: Lists any assigned role codes.

Code Value: Lists the values for the assigned code.

Code Description: Lists a description for each code.

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Assign: Click to assign a value to the role for a selected role code.

Remove: Click to remove a selected role code from the project.

Collapse To dialog box

Use the Collapse To dialog box to select which grouping band you want to collapse or expand in the current layout. The selection available in the list is based on the grouping bands displayed in the current layout.

Collapsed Bars tab - Bar Chart Options dialog box

Collapsed Bar Formatting

Collapse to grouping bands: Choose this option to display one bar for all activities in the bar chart.

Mark Show Relationships for Collapsed Bars to show relationship lines from the collapsed bar to other collapsed and individual bars. This setting is available if the Show Relationships checkbox is marked in the General tab.

Show bar necking for: Select Calendar Nonwork Time to show nonwork time, based on the activity's calendar, as a neck on the collapsed bar. Select Activity Nonwork Intervals to show a neck on the collapsed bar for activity and its calendar nonwork intervals, including suspend/ resume dates, out of sequence progress, and gaps of time when activities are not working.

Collapse to individual bars to minimize space: Choose this option to move individual bars as close to the grouping band as possible, under the correct timescale date in the bar chart.

Mark Allow Overlapping of Bar Labels to allow P6 Professional to move the individual bars to minimize space, without overlapping other bars, under the correct timescale date,within the grouping band.

Columns dialog box

Use the Columns dialog box to specify which columns you want to display and their order.

Search: Type to search for a column by name.

Available Options: Lists columns that do not appear in the current display.

Selected Options: Lists columns that appear in the current display.

 Includes the selected available column in the display.

 Includes all available columns in the display.

 Removes the selected column from the display.

 Removes all columns from the display.

 or **Move Up**: Changes the selected column's position in the display to the left.

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 or **Move Down**: Changes the selected column's position in the display to the right.

Apply: Applies your changes without closing this dialog box.

Copy From: (Activities window only) Copies column selections from a layout you select.

Default: Applies the default column layout to your current display.

Edit Column: Allows you to edit the selected column's title and choose its alignment in the display.

Columns tab - Modify Template dialog box for use with Microsoft Excel files

Use the Columns tab to select the columns to include in the export file. The columns available are based on the selected subject area.

Available Options: Lists columns that do not appear in the current display.

Selected Options: Lists columns that appear in the current display.

 Includes the selected available column in the display.

 Includes all available columns in the display.

 Removes the selected column from the display.

 Removes all columns from the display.

 Changes the selected column's position in the display to the left.

 Changes the selected column's position in the display to the right.

Configure Connection dialog box (P6 Professional Only)

Use the Configure Connection dialog box to configure database connections and select the database you want to log into.

Available Databases

: Adds a new database configuration. Select the appropriate module heading (P6 Professional) before you click this icon.

: Deletes the selected database configuration.

P6 Professional: Lists all the database connections you have previously configured for P6 Professional.

Database Details

Database Connection

Database type: The type of database you want to connect to, either Oracle or Microsoft SQL Server.

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Host Name/IP Address: The name or IP address of the database server hosting the P6 Professional database.

Database Name/Service Name: For SQL server databases, enter the database name. For Oracle databases, enter the name of the SID that stores the P6 Professional database tables.

Port: The database's port number. For Oracle databases, the default port number is 1521; for SQL Server databases, the default port number is 1433. However, your administrator may have configured a different port number.

SSL: This checkbox appears when configuring a connection for an Oracle database. Mark if you want to connect to the database using SSL.

Username: The database's public username. For example, pubuser.

Password: The database's public password. For example, pubuser.

Test Connection: Click to test the database connection settings you specified. If successful, click Close to return to the login screen.

Advanced

The fields in this section are automatically set to the best default value and do not need to be updated unless you are instructed to do so by your administrator.

Consent Notice tab - Admin Preferences dialog box (P6 Professional Only)

Use the Consent Notice tab to configure and enable consent notices. Once a user has accepted a consent notice type, they will no longer see that consent notice unless the text has been modified since the last time they accepted the consent notice.

Consent Type: Select the type of consent notice to configure.

- **Add resources**: Enables you to create a consent notice a user must accept before they add, copy and paste, or import Resources in P6 Professional or check in a project.
- **Add users**: Enables you to create a consent notices a user must accept before they can create new users or add users from LDAP in P6 Professional.
- **Download data**: Enables you to create a consent notice a user must accept before they export projects, publish project websites, run or schedule reports, or print from P6 Professional.
- **Login page**: Enables you to create a consent notice a user must accept to log into P6 Professional.
- **Visualizer login**: Enables you to create a consent notice a user must accept before they log into P6 Visualizer.

Enable consent notice: Click to enable the consent notice. If this is not checked, users will not see the consent notices you have configured for this consent notice type.

Modify: Opens the Consent Message Editor to enable you to enter and format a consent message.

Print: Enables you to print the consent message.

Copy: Copies the text in the Consent Notice Message field to the clipboard.

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Preview: Enables you to see a preview of the consent notice message as it will be shown to users.

Constraints tab - Check Schedule dialog box

Use the Check Schedule dialog box, Constraints tab to specify the settings to use for analyzing constraints applied to activities in the schedule.

Hard Constraints - Constraints that prevent activities being moved: Mark to analyze the percentage of activities that have constraints applied that will prevent the activity dates being recalculated according to the schedule logic. Hard constraints are Mandatory Start, Start On, Mandatory Finish, and Finish On. Completed activities, WBS Summary activities, Level of Effort activities, and start constraints applied to started activities are not included in this analysis. Specify the target for the acceptable percentage of activities that can have hard constraints.

Soft Constraints - Constraints that do not prevent activities being moved: Mark to analyze the percentage of activities that have constraints applied that will not prevent the activity dates being recalculated according to the schedule logic. Soft constraints are Start On or Before, Start On or After, Finish On or Before, Finish On or After, and As Late As Possible. Completed activities, WBS Summary activities, Level of Effort activities, and start constraints on started activities are not included in this analysis. Specify the target for the acceptable percentage of activities that can have a soft constraint applied.

Contact tab - Users dialog box (P6 Professional Only)

email Address: The selected user's email address. You can type a new email address.

Office Phone: The selected user's office phone number. You can type a new phone number.

- If a user is also a resource, the email address and office phone number you type in the Users dialog box overwrites the email address and office phone number recorded in the Resources window General tab, if that information is different. Likewise, email and phone information you enter in the Resources window overwrites the information in the Users dialog box.

Copy Activity Options dialog box

Use the Copy Activity Options dialog box to specify which information should be copied when you copy an activity.

Resource & Role Assignments: Mark to copy resource and role assignments (including future period assignment values).

Relationships: Mark to copy activity relationships.

Only between copied activities: Mark this checkbox when you want to preserve relationships between copied activities, not relationships to other activities that are not being copied.

Expenses: Mark to copy activity expenses.

Activity Codes: Mark to copy activity code value assignments.

WPs & Docs: Mark to copy work product or document assignments.

Notebook: Mark to copy activity notebooks.

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Steps: Mark to copy activity steps.

Financial Period Data: Mark to copy stored past financial period actual values.

Do not show this dialog again: Mark to indicate that you do not want this dialog box to appear next time you copy an activity or work breakdown structure element.

Copy Baselines dialog box

Use the Copy Baselines dialog box to specify which baselines to copy when copying a project.

Project Name/Baseline Name: The Project baselines that are available.

Project Baseline: A read-only checkbox column that is marked if the baseline is selected as the project baseline. You can select which baseline is the project baseline in the Assign Baselines dialog box.

Copy: Mark this checkbox to select a baseline to be copied. When connected to a P6 Professional database, you can select multiple baselines up to the maximum number of baselines permitted at the Admin Preferences dialog box. When connected to a P6 EPPM database, you can select multiple baselines up to the maximum number of baselines permitted at the Application Settings in P6.

Copy Project Options dialog box

Use the Copy Project Options dialog box to specify which optional project information you want to copy when you create a copy of an existing project.

Risks: When connected to a P6 EPPM database, mark this checkbox to copy P6 risk information to the new project. When connected to a P6 Professional database, mark this checkbox to copy risk information to the new project.

Issues and Thresholds: Mark this checkbox to copy issue and threshold information to the new project.

Reports: Mark this checkbox to copy reports to the new project.

Documents: Mark this checkbox to copy documents to the new project.

Funding Sources: Mark this checkbox to copy funding sources to the new project.

Baselines: Mark this checkbox to copy baselines to the new project.

Summary Data: Mark this checkbox to copy summary data to the new project.

Enable Publication for copied projects: Mark this checkbox to enable the publication option for the new project.

Visualizer Layouts: Mark this checkbox to copy P6 Visualizer layouts saved with the project to the new project.

Do not show this dialog again: Mark to indicate that you do not want this dialog box to appear next time you create a copy of a project.

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Copy Resource Options dialog box

The Copy Resource Options dialog box allows you to specify which information you want to copy when you copy a resource.

You may copy any or all of the following options:

Sub-Resources: Mark to copy all resources contained in the resource you want to copy.

Role Assignments: Mark to copy the resource's role assignments.

Prices: Mark to copy the resource's price information.

Do not show this window again: Mark to indicate that you do not want this dialog box to appear next time you copy a resource.

Copy WBS Options dialog box

Use the Copy WBS Options dialog box to specify which optional WBS information you want to copy when you copy a WBS element.

Notebook: Mark this checkbox to copy notebooks to the new WBS.

WBS Milestones: Mark this checkbox to copy WBS milestones to the new WBS.

WPs & Docs: Mark this checkbox to copy work products and documents to the new WBS.

Activities: Mark this checkbox to copy activities to the new WBS.

Do not show this dialog again: Mark to indicate that you do not want this dialog box to appear next time you copy WBS data.

Cost Account in Use dialog box

Use the Cost Account in Use dialog box to specify how you want to delete a cost account that has current activity assignments or is a project's default cost account.

Select Replacement Account: Choose to delete the selected cost account and reassign its activity or project assignments to a replacement cost account you specify.

Delete Account(s): Choose to delete the selected cost account without reassigning its activity or project assignments.

Cost Accounts dialog box

Use the Cost Accounts dialog box to maintain your organization's cost accounts. You can assign these cost accounts to activities in any project.

Display Options bar: Click to search for a specific cost account, change the cost account display, or print the cost account table.

Cost Account ID column: Lists IDs for cost accounts.

Cost Account Name column: Lists names of cost accounts.

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Cost Account ID field: The selected cost account's ID. You can type a new ID.

Cost Account Name field: The selected cost account's name. You can type a new name.

Cost Account Description: A description of the selected cost account. You can only view the description in this field; to add or edit a description, you must use the HTML editor.

Modify: Click to add or edit the description for the selected cost account in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.

Print: Click to print the displayed description.

Copy: Click to copy the selected text. After copying text, you can paste it into the HTML editor or into another application.

Add: Adds a cost account.

Del./Merge: Deletes the selected cost account. If the cost account is assigned to activities, you can choose to merge the cost account with another one.

Cut: Moves the selected cost account to a new position in the cost account structure. Select a new position, and click Paste.

Copy: Copies the selected cost account to another position in the cost account structure. Select an additional position, and click Paste.

Paste: Pastes a cost account that you have either copied or cut.

Arrows: Change the selected account's position in the cost account structure.

Cost tab - Attribute Details dialog box (P6 Professional Only)

Low Cost Labor/Nonlabor/Expenses/Total: Lists the low estimated costs for labor, nonlabor, and expenses, and total low estimated cost for the selected attribute.

High Cost Labor/Nonlabor/Expenses/Total: Lists the high estimated labor and nonlabor costs, expenses, and total high estimated cost for the selected attribute.

Cost/Size tab - WBS Details dialog box (P6 Professional Only)

Estimated Cost Labor/Nonlabor/Material/Expenses/Total: Lists estimated costs for labor, nonlabor, material, and expenses, and total estimated cost for the selected WBS.

Estimated Units Labor/Nonlabor: For labor and nonlabor, lists estimated units for the selected WBS.

CPP Template dialog box

Use the Export CPP Template dialog box to specify the data to be exported to a CPP file.

Template Name: The name of the template that will show in the Export dialog box.

The following tabs are available:

- Project tab - CPP Template dialog box
- Schedule tab - CPP Template dialog box

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- Schedule Logic tab - CPP Template dialog box
- Schedule Resources tab - CPP Template dialog box
- Schedule EU tab - CPP Template dialog box
- Schedule Calendar Std tab - CPP Template dialog box
- Schedule Calendar Exception tab - CPP Template dialog box

Currencies dialog box (P6 Professional Only)

Use the Currencies dialog box to set up the currencies you want to use for costs. To display this dialog box, choose Admin, Currencies. The top portion of the Currencies dialog box contains the following elements:

Display Options bar: Click to search for a currency or print the list of currencies.

Base: Indicates the currency used to store costs in the database. You cannot mark or clear this checkbox. The base currency can be edited but not deleted. The base currency ID, name, and symbol default to U.S. dollars. The exchange rate for the base currency is always 1.0.

Currency ID: The identifiers for all defined currencies.

Currency Name: The names of all defined currencies.

Currency Symbol: The symbol used to identify each defined currency.

Exchange Rate: The exchange rate between the selected currency and the base currency.

The lower portion of the Currencies dialog box is divided into the following tabs:

- General tab - Currencies dialog box
- Appearance tab - Currencies dialog box

In addition, the following buttons are always available in the Currencies dialog box:

Add: Adds a new currency.

Delete: Deletes the selected currency.

Currency tab - User Preferences dialog box

The Currency tab enables you to specify how you want currency amounts displayed.

Select a currency for viewing monetary values: The currency to use for monetary values. Click  to select a different currency.

Show currency symbol: Mark to display the currency symbol for currency data items.

Show decimal digits: Mark to display decimal digits for currency values.

Curtain Attachment dialog box

Use the Curtain Attachment dialog box to highlight a specific time period in a Gantt Chart. This dialog box contains the following elements:

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Display curtain attachment: Mark or clear the checkbox to display or hide the curtain attachment.

Start Date: Click the Browse button to select a start date for the curtain display.

Finish Date: Click the Browse button to select a finish date for the curtain display.

Color: Click to select a color for the curtain.

Fill Pattern: The fill pattern of the selected curtain's start and finish dates.

OK: Click to accept changes.

Cancel: Click to close the dialog box without saving changes.

Delete: The delete button is available when you are using the dialog box to edit an existing curtain. Click to remove the curtain from the Gantt Chart.

Custom Field Mappings tab - Modify Template or View Template dialog box

Select Subject Area: Choose the area of the product for which you want to define custom field mappings. You can choose Projects, Resources, Activities, or Activity Resource Assignments.

MSP field: Lists the field from Microsoft Project for which you can map to a user defined field in P6 Professional. You cannot edit this field.

P6 Professional field: Double click to choose the user defined field to map to the Microsoft Project field.

Data Date tab - Bar Chart Options dialog box

Data Date Formatting

Style: Select a line style for your data date from the drop down list. The line can be solid, or contain dashes and dots.

Size: Select a value between 1 and 10 pixels to set the thickness of your data date line.

Color: Click to choose a color for your data date line.

Data Limits tab - Admin Preferences dialog box (P6 Professional Only)

The Data Limits tab enables you to specify the maximum number of levels for hierarchical structures. You can also specify the maximum number of baselines and activity codes a project may have.

EPS/WBS tree maximum levels: Specify the maximum number of hierarchy levels for the enterprise project structure (EPS) and work breakdown structures (WBS). Valid values are 1-50.

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OBS tree maximum levels: Specify the maximum number of hierarchy levels for organizational breakdown structures (OBS). Valid values are 1-25.

Resources tree maximum levels: Specify the maximum number of hierarchy levels for the resource pool. Valid values are 1-25.

Role tree maximum levels: Specify the maximum number of hierarchy levels for roles. Valid values are 1-25.

Cost Account tree maximum levels: Specify the maximum number of levels for cost accounts. Valid values are 1-25.

Activity Code tree maximum levels: Specify the maximum number of levels for activity codes. Valid values are 1-25.

Resource Code tree maximum levels: Specify the maximum number of levels for resource codes. Valid values are 1-25.

Project Code tree maximum levels: Specify the maximum number of levels for project codes. Valid values are 1-25.

Assignment Code tree maximum levels: Specify the maximum number of levels for assignment codes. Valid values are 1-25.

Role Code tree maximum levels: Specify the maximum number of levels for role codes. Valid values are 1-25.

Maximum activity codes per project: Specify the maximum number of activity codes for projects. Valid values are 0-500.

Maximum baselines per project: Specify the maximum number of baselines for projects. There is no limit to the number of baselines per project, so you can enter any number in this field.

Maximum baselines copied with project: Specify the maximum number of baselines that can be copied with the project. You can enter a number between 1 and 50 in this field.

Data tab - External Applications dialog box

External Project Name or Identifier: The name of the external project that your project is linking to.

External Data Path, Database Alias or Group Name: If you are linking to a workstation product, enter the path to the project location.

If you are linking with a client server product, enter the database name. If you are linking to a web server, enter the URL address and a group name.

Application Parameter String: Enter any commands or parameters you need to access the external application.

Data tab - Project/Activity Usage Profile Options dialog box

Display

Cost: Choose to display the profile bars/curves in terms of costs.

Units: Choose to display the profile bars/curves in terms of units.

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Display actual and earned value using financial period data: Mark to display past period actual values (rather than actual to date values) stored in financial period intervals for the Actual bar and curve, Planned Value curve, Earned Value curve, and Estimate at Completion curve. When you choose this option, stored past period actuals are distributed evenly, within each financial period, from the financial period start date to the financial period end date, and earned value calculations are based on these stored period quantities.

If you do not choose this option, the profile spreads actual to date values evenly from the actual start to the data date or actual finish date of the activity or assignment (unless you manually enter non-linear values when planning assignments to activities).

Filter for Bars/Curves

Labor: Mark to display labor units or costs, depending on the selected display option, then select the fill pattern for displaying labor information.

Nonlabor: Mark to display nonlabor units or costs, depending on the selected display option, then select the fill pattern for displaying nonlabor information. You can select a new fill pattern.

Material: Mark to display material costs, depending on the selected display option, then select the fill pattern for displaying material information.

Expenses: Mark to display expense costs, then select the fill pattern for displaying expense information. The Expenses checkbox is available only if the selected display option is Cost.

Total: Mark to display total costs (Total = Labor + Nonlabor + Expenses). The Total checkbox is available only if the selected display option is Cost.

Show Bars/Curves

Baseline: Mark to show primary baseline values by date for each time unit in the current layout, or show values cumulatively, as a horizontal curve. Click the Color button to select the color used to display baseline information.

Budgeted or Planned: (Activity Usage Profile only) Mark to show budgeted or planned values by date for each time unit in the current layout, or show values cumulatively, as a horizontal curve. Click the Color button to select the color used to display budgeted or planned values.

Actual: Mark to show actual values by date for each time unit in the current layout, or show values cumulatively, as a horizontal curve. Click the Color button to select the color used to display actual values.

Remaining Early: (Activity Usage Profile and Activity Profile only) Mark to show remaining early values by date for each time unit in the current layout, or show values cumulatively, as a horizontal curve. Click the Color button to select the color used to display remaining early values.

Remaining Late: (Activity Usage Profile and Activity Profile only) Mark to show remaining late values by date for each time unit in the current layout, or show values cumulatively, as a horizontal curve. Click the Color button to select the color used to display remaining late values.

Show Earned Value Curves

Planned Value Cost / Labor Units: Mark to show, as a curve, the portion of the budgeted or planned total cost or units scheduled to be completed as of the project data date.

Earned Value Cost / Labor Units: Mark to show, as a curve, the portion of the budgeted or planned total cost or units actually completed as of the project data date.

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Estimate at Completion Cost (EAC) / Labor Units: Mark to show, as a curve, the estimated cost or units at completion.

Data tab - Resource Usage/Role Profile Options dialog box

Use the Resource Usage/Role Profile Options Data tab to specify the information to include in a resource profile when viewing allocation for projects by resource or role. To specify whether you want to view the resource profile by role or by resource, click the Display Options bar in the left pane, then choose Select View, By Resource or By Role.

Display

At Completion Units: Choose to display the resource profile bars in terms of at completion units for the selected resources.

At Completion Cost: Choose to display the resource profile bars in terms of at completion costs for the selected resources.

Display Actual using Financial Period data: Mark to display past period actuals stored in financial period intervals for the actual bar and curve. When you choose this option, stored financial period actuals are distributed evenly, within each financial period, from the financial period start date to the financial period end date.

If you do not choose this option, the profile spreads actual to date values evenly from the actual start to the data date or actual finish date of the activity or assignment (unless you manually enter non-linear values when planning assignments to activities).

Show

No cumulative curve: Choose to not display the cumulative curve for the selected filters/group names.

Individual cumulative curves: Choose to display a cumulative curve, in the color specified, for each selected resource/role filter/group name.

Total cumulative curve: Choose to display a cumulative curve for the total At Completion Units/Cost for all selected resource/role filter/group names.

Select Pattern/Color

Resource/Role Filter/Group Name: Double-click to select or modify the resource filter in the Filter dialog box for the profile. The resource/role filter or group names will display in the legend for the profile. The bars will be stacked in the order they are listed in the Resource/Role Filter/Group Name column. Use the up and down arrows to change the order.

Pattern: Choose a pattern for the bar of the selected filter/group name.

Color: Choose a color for the bar of the selected filter/group name.

Add: Click to add a new resource filter.

Delete: Click to delete the selected row.

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Data tab - Resource Usage/Role Profile Options dialog box - for regular histograms

Use the Resource Usage/Role Profile Options Data tab for regular histograms to specify the information to include in a resource profile when viewing allocation for projects by resource or by role. To specify whether you want to view the resource profile by role or by resource, in the Resource Explorer window, click the Display Options bar, then choose Select View and the option you want.

Display

Units: Choose to display the resource profile bars in terms of project units.

Cost: Choose to display the resource profile bars in terms of project costs.

Display Actual using Financial Period data: Mark to display past period actuals stored in financial period intervals for the actual bar and curve. When you choose this option, stored financial period actuals are distributed evenly, within each financial period, from the financial period start date to the financial period end date.

If you do not choose this option, the profile spreads actual to date values evenly from the actual start to the data date or actual finish date of the activity or assignment (unless you manually enter non-linear values when planning assignments to activities).

Show Bars/Curves

Budgeted or Planned: Mark to show budgeted or planned values by date for each time unit in the current layout, or show values cumulatively, as a horizontal curve. Click the Color button to select the color used to display budgeted or planned values.

Actual: Mark to show actual values for each time unit in the current layout, or show values cumulatively, as a horizontal curve. Click the Color button to select the color used to display actual values.

Remaining Early: Mark to show remaining early values for each time unit in the current layout, or show values cumulatively, as a horizontal curve. In the Show Remaining Bars As section, select the option and bar color you want to use to show remaining units.

Remaining Late: Mark to show remaining late values for each time unit in the current layout, or show values cumulatively, as a horizontal curve. In the Show Remaining Bars As section, select the option and bar color you want to use to show remaining units.

Show Remaining Bars As

Total Remaining: Choose this option to show remaining values for all projects as a single bar. To select the color used to display total remaining early and late values, click the Color button. The selected color will also display for the remaining early and late bar/curve.

Staffed vs. Unstaffed: (Role view only) Choose this option to use different bar colors to represent remaining values for staffed versus unstaffed projects. To select colors, click each Color button for the early and late values. The left button represents the staffed projects bar/curve color and the right button represents the unstaffed projects bar/curve color.

Open vs. Closed Projects: Choose this option to use different bar colors to represent remaining values for open versus closed status projects. To select colors, click each Color

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button for the early and late values. The left button represents the open project bar/curve color and the right button represents the closed projects bar/curve color.

Additional Data Options

Show Limit: Mark to display the resource's maximum units for each time unit in the current layout. This option is available only if you choose to display Units.

Show Allocation Limit (P6 EPPM Only): Mark to display the resource's planned units for the open projects for each time unit in the current layout, as specified in the Resource Planning Spreadsheet in the Resources section of P6. This option is only available if you choose to display open projects only and choose to display Units. You can view the allocation limit for a single resource or multiple resources.

Show Overallocation: Mark to display overallocated values in the current layout. This option is available only if you choose to display Units and select Show Limit. If you select the option to Display Actual using Financial Period data, the displayed overallocation represents past period actual values.

ShowAvailable Units: Mark to display a horizontal line that indicates the resource's available units. This option is available only if you choose to display All Projects. If you select the option to Display Actual using Financial Period data, the displayed available units represent past period actual values.

Show Overtime: Mark to show the resource's overtime units for each time unit in the current layout. This option is available if you choose to display open projects only.

Database Configuration dialog box

Use the Database Configuration dialog box to add, delete, or edit database configurations.

Add button: Click to add a new database alias to the list

Search field: Type the name of a database alias to find it in the list.

Database Alias list: select the alias to use.

Click Delete to delete the alias.

Click Copy to make a copy of the alias.

Driver Type: Select the driver required to connect to the database.

Database Alias: Enter the alias for the database.

The settings you see depend on the driver type you select.

Microsoft SQL Server / SQL Express settings

Connection String: Enter the connection string for the database.

Enable Project Checker: Select to allow users assigned the Admin Superuser or Project Superuser security profiles to see and run the Project Checker feature from the Tools menu.

Enable SQL Logging: Select to allow the logging of SQL queries for testing and analysis purposes.

For more information about SQL Logging, see: Process for Configuring and Using SQL Monitor with the P6 Professional Visualizer Application (KB501222).

Keystore section

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Use default database keystore: Select to use the default key for the database.

Keystore file: Click ••• **Browse** to select a key file.

Key Name: Select the key to use.

Read Timeout: Enter a number in seconds for the maximum amount of time to wait for a query response from the database. If a response is not received within that time, the connection is closed. The default is 900.

Click Next to see the following settings:

User Name: Enter the public user username.

Password: Enter the public user password.

Public Group ID: Select the public group ID for the database.

Oracle settings

Connection String: Enter the connection string for the database.

Enable Project Checker: Select to allow users assigned the Admin Superuser or Project Superuser security profiles to see and run the Project Checker feature from the Tools menu.

Enable SQL Logging: Select to allow the logging of SQL queries for testing and analysis purposes.

For more information about SQL Logging, see: Process for Configuring and Using SQL Monitor with the P6 Professional Visualizer Application (KB501222).

Keystore section

Use default database keystore: Select to use the default key for the database.

Keystore file: Click ••• **Browse** to select a key file.

Key Name: Select the key to use.

Read Timeout: Enter a number in seconds for the maximum amount of time to wait for a query response from the database. If a response is not received within that time, the connection is closed. The default is 900.

Click Next to see the following settings:

User Name: Enter the public user username.

Password: Enter the public user password.

Public Group ID: Select the public group ID for the database.

P6 Pro Cloud Connect settings

Connection String: Enter the connection string for the database.

Read Timeout: Enter a number in seconds for the maximum amount of time to wait for a query response from the database. If a response is not received within that time, the connection is closed. The default is 900.

Use SAML SSO: Select if your database uses SAML Single Sign On.

Enable local cache: Select to create a local cache database to improve performance and allow you to work offline if your organization permits offline working.

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Enable Project Checker: Select to allow users assigned the Admin Superuser or Project Superuser security profiles to see and run the Project Checker feature from the Tools menu.

P6 Pro Standalone (SQLite) settings

Choose whether to **Add a new standalone database and connection** or **Add a connection to an existing standalone database.**

If you selected to add a new database, click Next to see the following settings:

Login Name: Enter a login name for the user in the new standalone database.

Personal Name: Enter a personal name for the user in the new standalone database.

Enter new password: Enter a password for the user in the new standalone database.

Confirm new password: Enter the password for the user in the new standalone database again.

Base currency section

Abbreviation: The abbreviation for the base currency for the new database.

Name: The name for the base currency for the new database.

Symbol: The symbol for the base currency for the new database.

Click Next to see the following settings:

Login Name: The login name for the user in the new standalone database.

File Name: The path and filename of the new standalone database.

Load sample data: Select this option to populate the new standalone database with sample data. This option is only available if you chose to create a new standalone database.

Enable SQL Logging: Select to allow the logging of SQL queries for testing and analysis purposes.

For more information about SQL Logging, see: Process for Configuring and Using SQL Monitor with the P6 Professional Visualizer Application (KB501222).

Read Timeout: Enter a number in seconds for the maximum amount of time to wait for a query response from the database. If a response is not received within that time, the connection is closed. The default is 900.

If you selected to connect to an existing database, click Next to see the following setting:

File Name: The path and filename of the standalone database to which you want to connect.

Dates and Duration tab of the UN/CEFACT Export Template dialog box

The following fields are repeated in three groupings, for Best Case, Most Likely and Worst Case.

Duration: Select a user defined number field to export as the duration. Alternatively, you can select one of the following fields:

Minimum Duration, caulcuated by Risk Analysis, for the Best Case duration.

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Maximum Duration, caulcuated by Risk Analysis, for the Most Likely duration.

Most Likely Duration, caulcuated by Risk Analysis, for the Worst Case duration.

Early Start Date: Select a user defined Start Date field.

Early Finish Date: Select a user defined Finish Date field.

Late Start Date: Select a user defined Start Date field.

Late Finish Date: Select a user defined Finish Date field.

Dates and Durations tab - Check Schedule dialog box

Use the Check Schedule dialog box, Dates and Durations tab to specify settings to use for analyzing float, large durations, out-of-progress activities, late activities, and the how the current completion state of the schedule compares to the expected completion according to the baseline.

Large Float - Activities with total float greater than: Mark to analyze the percentage of activities calculated by the scheduler to have a float duration greater than the value you specify. Completed, WBS Summary, and Level of Effort activities are not included in this analysis. Specify the target for the acceptable percentage of activities that can have a float duration over the value you specify.

Negative Float - Activities with a total float less than 0: Mark to analyze the percentage of activities calculated by the scheduler to have a float duration of less than zero. These activities are likely to delay the end date of the project if corrective action is not taken. Completed, WBS Summary, and Level of Effort activities are not included in this analysis. Specify the target for the acceptable percentage of activities that can have negative float.

Large Durations - Activities that have a remaining duration greater than: Mark to analyze the percentage of activities that have a remaining duration greater than the value you specify. Completed activities, WBS Summary activities, and Level of Effort activities are not included in this analysis. Specify the target for the acceptable percentage of activities that can have a large remaining duration.

Activities with invalid progress dates: Mark to analyze the percentage of activities with invalid dates. Invalid dates for not started activities are start dates earlier than the data date. Invalid dates for in progress activities are remaining early start dates earlier than the data date or actual start dates later than the data date. Invalid dates for completed activities are actual finish dates later than the data date. Completed activities with an actual finish earlier than the data date, WBS summary activities, and Level of Effort activities are not included in this analysis. Specify the target for the acceptable percentage of activities that can have invalid progress dates.

Late Activities - Activities scheduled to finish later than the project baseline: Mark to analyze the percentage of activities that are scheduled to finish later than the corresponding activity in the project baseline. If an activity has no corresponding activity in the project baseline, it is considered to fail this test if its remaining early finish date is later than its planned finish date. Milestones, WBS Summary activities, and Level of Effort activities are not included in this analysis. Specify the target for the acceptable percentage of activities that can be scheduled to finish later than their baseline finish date or have no corresponding baseline activity.

BEI - Baseline Execution Index: Mark to analyze the number of completed activities in the project against the number of baseline activities calculated to finish before the open project's data date. Not started activities, in progress activities, Milestones, WBS Summary activities,

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and Level of Effort activities in the open project are not included in this analysis. In the project baseline, milestones, WBS Summary activities, Level of Effort activities, and activities with a finish date later than the open project's data date are not included in this analysis. Specify the target for the acceptable ratio of completed activities in the open project compared with baseline activities scheduled to finish before the open project's current data date, as expressed as a percentage.

Dates tab - User Preferences dialog box

The Dates tab enables you to specify how you want dates to display.

Date Format

Month, Day, Year: Choose to view all dates in the following order: month, day, year.

Day, Month, Year: Choose to view all dates in the following order: day, month, year.

Year, Month, Day: Choose to view all dates in the following order: year, month, day.

Time

12 hour: Choose to view all times in a 12-hour format, for example, 3:30 PM.

24 hour: Choose to view all times in a 24-hour format, for example, 15:30

Do not show time: Choose not to view time.

Show minutes: Mark to include minutes in your time settings, for example, 10:15 rather than 10.

Options

4-digit year: Mark to view years as 4-digit numbers.

Month name: Mark to view months as names rather than numbers.

Leading zeroes: Mark to view all months and days as 2-digit numbers.

Separator: The character used to separate a date's day, month, and year. You can select a character.

Sample

Sample: An example of the date format options you select.

Define Resource Shifts dialog box

Use the Define Resource Shifts dialog box to view or modify the work schedule for a shift calendar.

Shifts can be divided into segments. The total shift hours must add up to 24 hours, and each shift segment must have a duration of at least one hour. The start hour must begin and end on the hour, for example, 8:00, rather than 8:30 A.M.

Define Shifts

Shift: Lists a reference number for each segment of a shift.

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Start Hour: Enter the start hour for the selected segment of the shift.

Duration (Hrs): Specifies the duration of each segment of the shift.

Add: Adds a segment to the shift.

Delete: Delete the selected segment of the shift.

Delete Resource dialog box

Use the Delete Resource dialog box to specify how you want to delete a resource.

The selected resource has the following associated data: The selected resource's associated data.

Select Replacement Resource: Choose to delete the selected resource and reassign its associated data to a resource that you specify.

Delete selected resource: Choose to delete the selected resource without reassigning its associated data.

Description tab - Attribute Details dialog box

Description: A description of the selected attribute.

Detail tab - Estimation History dialog box (P6 Professional Only)

Units: The remaining number of units required to complete the WBS element, prior to estimation.

Adjustment: The adjustment percent, if any, applied to the number of units estimated for the WBS element.

Adjusted Units: The estimated amount of effort required to complete the WBS element. (Adjusted Units = Units * Adjustment %)

Details: If the Function Point method was used to calculate the estimate, this section displays the unadjusted function point (UFP) count, final adjusted function point count, adjustment factor (TDI), and average productivity values used for the selected estimate. This section is blank for estimates that use the Prior Experience method.

Details dialog box

Use the Details dialog box to specify which tabs you want to display in the current window and their order.

Available Tabs: Lists tabs that do not appear in the current display.

Display Tabs: Lists tabs that appear in the current display.

 Includes the selected available tab in the display.

 Includes all available tabs in the display.

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 Removes the selected tab from the display.

 Removes all tabs from the display.

 Changes the selected tab's position in the display to the left.

 Changes the selected tab's position in the display to the right.

Apply: Applies your changes without closing this dialog box.

Default: Applies the default tab layout to your current display.

Document Categories tab - Admin Categories dialog box (P6 Professional Only)

Use the Document Categories tab to create, edit, and delete document categories. Document categories enable you to organize and standardize different types of work products and documents.

Display Options bar: Click to search for a specific document category.

Category: Lists different types of document categories, such as purchase orders or project specifications.

Shift up: Moves the selected document category to a higher position in the display. This changes the order in which categories display when you assign a category to a work product or document.

Shift down: Moves the selected document category to a lower position in the display. This changes the order in which categories display when you assign a category to a work product or document.

Document Status tab - Admin Categories dialog box (P6 Professional Only)

Use the Document Status tab to create, edit, and delete document status types. Use document statuses to identify and track the current status of work products and documents within a project.

Display Options bar: Click to search for a specific document status.

Status Code: Lists document status types. To change a status code, double-click the code you want to change.

Add: Adds a document status.

Delete: Deletes the selected document status.

Shift up: Moves the selected document status to a higher position in the display. This changes the order in which statuses display when you assign a status to a work product or document.

Shift down: Moves the selected document status to a lower position in the display. This changes the order in which statuses display when you assign a status to a work product or document.

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Duplicates dialog box

Use the Duplicates dialog box to enter a unique activity ID when renumbering or pasting an activity.

Duplicate Activity ID: Lists the activity ID that when pasted into or renumbered in the existing project would become a duplicate ID.

Activity Name: Lists the name of the activity to be renumbered.

New Activity ID: Type a different activity ID than that listed in Duplicate Activity ID field. If the new ID you type is also a duplicate, you are again prompted to type a unique ID.

Cancel: When pasting activities, cancels the action and does not paste the activities listed in the dialog box. When renumbering activities, does not renumber any activity IDs, including activity IDs that are not duplicates.

E-mail tab - User Preferences dialog box

The email tab enables you to enter your personal email settings.

E-mail Protocol

Email Protocol: Specify the protocol your email program uses.

Mail Server Login

Mail Login Name/Profile Name: Your email user or profile name, depending on your email configuration. You can type a new user or profile name.

Password: Click to change your current mail password.

Mail Configuration

Outgoing Mail Server (SMTP): The SMTP server name or address to use when sending email. You can type a new address.

Security: The security protocol to use for connecting to the SMTP server. P6 Professional supports the use of Secure Sockets Layer (SSL), Transport Layer Security (TLS), or no security protocol.

SMTP Port: The TCP/IP port of the outgoing SMTP server. This field is mandatory.

User Name: The user name of the account to send mail from the mail server. This field is not mandatory. However if you select a user name, you must click the Password button to provide the appropriate password for the account.

User email Address: The return email address for your email messages. If you do not enter an email address, all replies are sent to the same email address from which you send your outgoing messages. You can type a new email address.

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Earned Value tab - Admin Preferences dialog box (P6 Professional Only)

The Earned Value tab enables you to specify default settings for calculating earned value.

Technique for computing performance percent complete

Activity % Complete: Choose to calculate earned value according to current activity completion percentages.

Use WBS Milestones: Choose to calculate earned value by defining milestones at the WBS level and assigning a level of significance or weight to each of them. As progress occurs and you mark each milestone complete, the WBS element's performance percent complete is calculated based on the weight of the milestone.

0/100 % Complete: Choose to calculate earned value as 100 percent only after the activity ends.

50/50% Complete: Choose to calculate earned value as 50 percent after the activity starts and until the activity ends. After the activity ends, the activity's earned value is 100 percent.

Custom% Complete: Choose to calculate earned value as a percentage you specify. This percentage applies after the activity starts and until the activity ends. After the activity ends, the activity's earned value is 100 percent.

Technique for computing Estimate To Complete (ETC)

ETC = remaining cost for activity: Choose to calculate Estimate to Complete (ETC) values as the remaining cost to complete an activity (ETC = remaining duration of activity * applicable resource rates).

ETC = PF * (Budget at Completion – Earned Value Cost), where

PF = 1: Choose to calculate Estimate To Complete (ETC) values as a Performance Factor (PF) of 1 multiplied by Budget At Completion (BAC) less Earned Value Cost.

PF = 1/Cost Performance Index: Choose to calculate Estimate To Complete (ETC) values as a Performance Factor (PF) of 1 divided by the Cost Performance Index (CPI).

PF = 1/ (Cost Performance Index * Schedule Performance Index): Choose to calculate Estimate To Complete (ETC) values as a Performance Factor (PF) of 1 divided by the product of the Cost Performance Index (CPI) and Schedule Performance Index (SPI).

PF =: Choose to calculate Estimate To Complete (ETC) values as a Performance Factor (PF) you specify multiplied by Budget At Completion (BAC) less Earned Value Cost. If you choose this option, type a factor in the PF field.

Earned value calculation

When calculating earned value from a baseline use

Choose to use the baseline's At Completion values and current dates, budgeted or planned values with planned dates, or budgeted or planned values with current dates when calculating earned value from a baseline.

The current dates options use the Start/Finish dates for an activity or resource assignment.

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A preference setting (Project Details, Settings tab) controls, per project, the baseline that is used to calculate earned value: the project baseline or each user's defined primary baseline.

Edit Cell Borders dialog box

Use the Edit Cell Borders dialog box to specify borders for the selected text cell. The Edit Cell Borders dialog box is displayed when you click Borders on the Cell tab of the Properties dialog box.

Left Border: Mark to add a border to the left edge of the selected cell.

Right Border: Mark to add a border to the right edge of the selected cell.

Top Border: Mark to add a border to the top edge of the selected cell.

Bottom Border: Mark to add a border to the bottom edge of the selected cell.

Edit Column dialog box

Use the Edit Column dialog box to customize column titles. You can also set the column width and the alignment (left, centered, or right) of each column's title and contents. The changes you specify apply to the current layout or dialog box only.

Default Title: The original title for the column.

New Title: The current title for the selected column. You can type a new title.

Width: The column's width in pixels. Change the width by choosing a number from 10 to 1000.

Alignment: Choose the alignment for the column title and the contents of the column. Choose Left, Center, or Right.

Default: Applies the default column title to the currently selected column.

Edit Filter dialog box

Use the Edit Filter dialog box to add, edit, and remove filters for information compiled by the selected data source, cell, row, or image. The Edit Filter dialog box is displayed when you click Edit filter on the Data Source, Cell, Row, or Image tab in the Properties dialog box.

Display Options bar: Click to optimize or preview the filter conditions.

Parameter: Click in the top row of the Parameter column to select the logical search operator you want to use to create the filter. In the Where row, click to select from a list of data types you can use to filter information compiled by the selected cell.

The list of available data types reflects the type of information compiled by the selected cell.

Is: Lists each filter's search condition, or comparison operator. To add or change a search condition, click in the Is column.

Value: Lists each filter's search criteria. To add or change a search criteria, click in the Value column. Then, depending on the Parameter selection, type a value, select a value from a list, or click the  to select a value.

Add: Adds a new filter condition.

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Delete: Removes the selected filter condition.

Cut: Cuts a filter condition so you can paste it elsewhere in the hierarchy.

Copy: Copies a filter condition so you can paste it elsewhere in the hierarchy.

Paste: Pastes a filter condition you cut or copied.

Arrow buttons: Click to move the filter condition to another position in the hierarchy.

Edit Font & Color dialog box

Use the Edit Font & Color dialog box to change the color and font used to indicate grouping levels in the current display.

Font: Allows you change the selected grouping's font.

Color: Allows you to change the selected grouping's color.

Edit Font Styles dialog box

Use the Edit Font Styles dialog box to change the default style settings for text in the displayed report.

Styles: Lists names of styles you can apply to the report's text.

Modify: Click to edit the selected style's format settings.

Edit HTML Link dialog box

Use the Edit HTML Link dialog box to add or edit an HTML link for the selected text or image cell. The Edit HTML Link dialog box is displayed when you click HTML links on the Cell or Image tab in the Properties dialog box.

Link Prefix: The Internet address of the Web page the selected cell links to. You can type a new Internet address.

Enable Link Field: Mark to enable the HTML link for the cell.

Disable link if empty value: Mark to disable the cell's HTML link if the field specified in the Link Field does not produce any records in the compiled report.

Link Object: The category of information that contains the field you want to associate with the HTML link. You can select a new category.

Link Field: The name of the field you want to associate with the HTML link. You can select a new field.

Link Suffix: The Internet address of the Web page the cell links to. You can type a new Internet address.

Link Target Frame: If the linked Web page uses frames, this field defines the name of the frame the selected cell links to in the specified Web page.

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Edit Relationship dialog box

Use the Edit Relationship dialog box to edit or remove the selected activity relationship.

Relationship Type: Displays the selected relationship's type. Choose from four types of relationships: FS - finish to start, FF - finish to finish, SS - start to start, and SF - start to finish. You can select a new relationship type.

Lag Days: Displays the selected relationship's lag time, or time modification value. You can type a new lag time.

Delete: Deletes the selected relationship.

Edit Report Timescale dialog box

Use the Timescale dialog box to specify the timeperiod for which you want to run the selected report. If the report includes time distributions, you also use the Timescale dialog box to specify the timescale interval and timescale format options used to display that data.

Timescale Start: The report's start date. To select a new date, click .

To adjust the start date according to a specific time increment, place your cursor at the end of the start date text, and then type + or - followed by the time increment and the appropriate abbreviation. For example, a start date that is 1 month prior to the current date would appear as "CD-1m" where "m" is the abbreviation for month.

Date Interval: If you choose the Duration option to specify a Finish date for the report, this field specifies the time interval used to determine the finish date. For example, if the Duration is 2 and the Date Interval is weeks, the report will include information for a two-week period following the specified start date.

If the report includes time distributed data fields, the Date Interval also determines the time interval used to summarize time-distributed project information.

You can select a new time interval.

Shift Calendar: If you select Shift in the Date Interval field, click the browse button to select the shift calendar to use.

Timescale Finish: The end date for the report. To select a new date, click .

To adjust the finish date according to a specific time increment, place your cursor at the end of the finish date text, and then type + or - followed by the time value and the appropriate abbreviation. For example, a finish date that is 1 month prior to the current date would appear as "CD-1m" where "m" is the abbreviation for month.

Duration: Choose to compile the report for a specific number of time intervals following the report's start date, then in the Duration field, type the number of intervals you want to include in the report.

For example, to generate a report that includes three months of data, beginning with the current date, you would choose Duration, type 3 in the Duration field, and set the Date Interval to Month.

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Date Format

Calendar: Choose to display timescaled data according to the standard calendar year, for example Month/Year.

Fiscal: Choose to display timescaled data according to the fiscal year, for example FM1/FY2000, FM2/FY2000.

Week of the Year: Choose to display the date intervals as a number for each week of the year, consecutively, beginning with January.

Ordinal Dates: Choose to display timescaled data according to ordinal intervals, based on a start date you specify, for example Week #-1 (08/May/00), Week #1 (15/May/00). Type a start date in the Ordinal Start field.

Averaging

Calculate Average: Mark to specify the values you want to use to divide the timescale interval totals.

Divide Interval Totals By: To divide the timescale interval totals by an increment you specify, type it in this field.

Base on Hours Per Timeperiod: To divide the timescale interval totals by automatic increments, based on the date interval selected, mark this checkbox. When you choose this option, the Divide Interval Totals By field displays the division increment based on the division increment specified in User Preferences for the corresponding date interval: 1h for Hour date interval, 2h for Shift date interval, 8h for Day date interval, 40h for week date interval, and so on.

Unit of Measure: Specify the unit of measure for the timescale intervals.

Edit Sort dialog box

Use the Edit Sort dialog box to change sort settings for information compiled by the selected data source.

Sort by Object: Lists categories of information you can use to sort data compiled by the data source. The list of available categories reflects the type of data compiled by the data source. You can select a category.

Sort By Field: Lists names of fields you can use to sort data compiled by the data source. The list of available fields reflects the Sort by Object you select. You can select a field.

Ascending: Choose to sort by ascending value.

Descending: Choose to sort by descending value.

Enterprise Project Structure dialog box

Use the Enterprise Project Structure (EPS) dialog box to define the EPS—the hierarchical structure of your database of projects.

Display Options bar: Click to change the EPS display. You can show or hide EPS details at the bottom of the dialog box, view the EPS as a table or chart, customize the columns in the hierarchy, and change the font and colors of the table or chart.

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EPS Table: Displays EPS elements. To sort the display, click a column label.

EPS ID: Identifies the selected EPS node. You can type a new ID.

EPS Name: Description of the selected EPS node. You can type a new name.

Responsible Manager: Use this field to select an OBS element to associate with the selected level of the EPS.

Add: Adds an EPS element.

Delete: Deletes the selected EPS element.

Cut: Removes the selected element from the EPS.

Copy: Copies the selected element.

Paste: Pastes an EPS element that you have either copied or cut back into the hierarchy.

Arrows: Change the selected element's position in the EPS.

Exception Site List tab - Admin Preferences dialog box (P6 Professional Only)

The Exception Site List tab enables you to specify a list of websites that users can launch when displayed in user defined fields (UDFs), projects websites, or Notebook topics, by double clicking on the website and selecting **Launch** .

For any text field in edit mode, users can right click on the website, then choose to either launch or copy the site.

Checkbox: Marked websites are launchable by users.

Site list: Displays a sortable list of sites you want to allow users to be able to launch. You can edit a website in this list by double clicking on it.

Add: Select to add a website to the list.

Delete: Removes the selected website.

Here are some rules on how to specify websites:

- Website paths cannot contain spaces. You can include **%20** in a path to represent a space. For example: `http://www.magnacorp.com/Primavera%20Applications`
- Wildcards are allowed. For example, you can add `https://*` and `http://*` to allow all sites that begin with these roots to be launchable.
- Here are some examples of entries and how they would be handled:
  Website paths must begin with any of the following:

  `https://` `http://` `ftps://` `ftp://` `mailto:` `telnet://`

  Allowed site: **https://www.magnacorp.com/document**

  This would allow:

  – `https://www.magnacorp.com/document`

  – `https://www.magnacorp.com/document/RiceB/1MCSbdcXKQ`

  but would NOT allow:

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- `http://www.magnacorp.com/document/RiceB/1MCSbdcXKQ`
  because the exception site begins with https://
- `https://www.magnacorp.com/projectnano/document`
  because the allowed site specifies /document after .com.

Allowed site: **https://*.magnacorp.com**

This would allow:

- `https://www.magnacorp.com`
- `https://server.magnacorp.com/user/942374/my-drive`
- `https://apps.magnacorp.com/development/projectnano`

But would not allow:

- `https://magnacorp.com`
  because the template requires there to be something between `https://` and `magnacorp.com`.

A selected item with a wildcard in the site allow list overrides an unselected item if it matches the template specified with the wildcard.

For example:

- Selected: `https://*.magnacorp.com`
- Unselected: `https://apps.magnacorp.com`

In this situation, the website https://apps.`magnacorp.com` will be clickable, because the template including the wildcard * is selected.

Expense Categories tab - Admin Categories dialog box (P6 Professional Only)

Use the Expense Categories tab to create, edit, and delete expense categories. Expense categories enable you to organize and standardize project expenses.

Display Options bar: Click to search for a specific expense category.

Expense Category: Lists expense categories. Use expense categories to categorize and standardize project expenses.

To change an expense category, double-click it.

Add: Adds an expense category.

Delete: Deletes the selected expense category.

Shift up: Moves the selected expense category to a higher position in the display. This changes the order in which categories display when you assign an expense category to an expense.

Shift down: Moves the selected expense category to a lower position in the display. This changes the order in which categories display when you assign an expense category to an expense.

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Expense Columns dialog box

Use the Expense Columns dialog box to specify which columns you want to display under the Expenses tab of the Activity Details. You can also specify the order in which the columns display.

Available Options: Lists columns that do not appear in the current Expenses tab display.

Selected Options: Lists columns that appear in the current Expenses tab display.

 Adds the selected available column to the display.

 Includes all available columns in the display.

 Removes the selected column from the display.

 Removes all columns from the display.

 Moves the selected column's position in the display to the right.

 Moves the selected column's position in the display to the left.

Apply: Applies your changes without closing this dialog box.

Default: Applies the default column display format.

Edit Column: Enables you to change the selected column's title and alignment in the display.

Expenses tab - Attribute Details dialog box (P6 Professional Only)

Expenses table: Lists expense items and additional information for expenses assigned to activities in the selected attribute.

Expenses tab - WBS Details dialog box

Expenses table: Lists expense items and additional information for expenses assigned to activities in the selected WBS.

External Applications dialog box

Use the External Applications dialog box to set up links with external applications. The External Applications dialog box displays the following fields:

Project ID: Select the project that you want to link to an external project.

Application Name: Choose the name of the external application. Each application can be linked once per project.

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External Project Name or Identifier: Type the name of the external project you want to link to your project.

Add: Adds a new external application link.

Delete: Deletes the selected link.

The External Applications dialog box contains the following tabs:

- General tab - External Applications dialog box
- Login tab - External Applications dialog box
- Data tab - External Applications dialog box

Fields dialog box

Use the Fields dialog box to select the fields you want to include in a spreadsheet layout.

AvailableOptions: Lists fields that do not appear in the current spreadsheet layout. These options are grouped by category. To list them alphabetically, click the Available Options title bar and choose Group and Sort By, List.

Selected Options: Lists fields that appear in the spreadsheet.

 Adds the selected field to the spreadsheet.

 Adds all available fields to the spreadsheet.

 Removes the selected field from the spreadsheet.

 Removes all fields from the spreadsheet.

 Changes the selected field's position in the current display.

 Changes the selected field's position in the current display.

Apply: Click to preview your changes without closing this dialog box.

Default: Click to apply the default spreadsheet fields.

EditTitle: Click to modify the selected field's title.

Filter By dialog box

Use the Filter By dialog box to choose the resources to display in the Assign Resources by Role dialog box.

All Resources: Chooses to filter by all resources defined in the enterprise. If resource security is enabled, only current project resources and resources you have access to are displayed.

Current Project's Resources: Choose to filter only by the resources assigned in the open project.

Select Filter Options bar: Click to change the display.

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Select Filter list: Choose a filter to limit the list of resources in the Assign Resources by Role dialog box. When you select a filter, the Assign Resources by Role dialog box displays the roles that meet the filter's criteria, along with all resources that can fulfill those roles.

All Roles Required: Choose to view all roles assigned to the activity.

Staffed Roles: Choose to view roles assigned to the activity that have a corresponding resource assignment.

Unstaffed Roles Required: Choose to view roles assigned to the activity that do not have a corresponding resource assignment.

Unstaffed Roles with Required Proficiency: Choose to view roles assigned to the activity that do not have a corresponding resource assignment and must be filled by a resource with the required proficiency level.

All Roles Required: Choose to view all roles assigned to the activity.

Staffed Roles: Choose to view roles assigned to the activity that have a corresponding resource assignment.

Unstaffed Roles Required: Choose to view roles assigned to the activity that do not have a corresponding resource assignment.

Unstaffed Roles with Required Proficiency: Choose to view roles assigned to the activity that do not have a corresponding resource assignment and must be filled by a resource with the required proficiency level.

Apply: Click to apply your changes without closing this dialog box.

Filter dialog box

Use the Filter dialog box to modify a filter.

Filter Name: The name of the filter. You can type a new name.

Display Options bar: Click to optimize or print the list of filters.

Display all rows: Lists each filter criteria item.

Parameter: Lists the parameter specified for each filter criteria.

Is: Lists the corresponding operator for each filter criteria.

Value: Lists the value for each filter criteria.

Add: Adds a new filter criteria.

Delete: Removes the selected filter criteria.

Cut: Cuts the selected filter criteria so you can move it to another position in the filter.

Copy: Copies the selected filter criteria.

Paste: Pastes a filter criteria.

Arrows: Change the selected filter criteria's position in the filter definition.

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Filter tab - Modify Template dialog box for use with Microsoft Excel files

Use the Filter tab to add, edit, apply, and remove filters from the selected subject area. The filter is a set of instructions that determines which activities to display. Categorize filters into three groups: Default, Global, and User-Defined.

All <Subject Area>: Mark to display all activities.

Show activities that match

All selected filters: When more than one filter is selected, choose to indicate that activities/ projects must meet all selection criteria in each filter.

Any selected filter: When more than one filter is selected, choose to indicate that activities/ projects must meet only one selection criteria in each filter.

Filter: Lists filter names according to filter category. You can select a filter. To sort the display, click the Filter column label.

Select: Mark the appropriate checkbox to apply or remove a filter. To sort the display, click the Select column label.

Add: Adds a filter specification.

Delete: Deletes the selected filter specification.

Copy: Copies the selected filter criteria.

Paste: Pastes a filter criteria.

Modify: Allows you to edit the selected filter. You can only edit user defined filters.

Filters dialog box

Use the Filters dialog box to add, edit, apply, and remove filters for the current display. A filter is a set of instructions that determines which activities or projects display. You can apply a filter at any time to focus on specific areas of a project. For example, you might want to see only critical activities, activities that are underway, or completed activities.

Filters are categorized into four possible groups: Default, Global, Layout, and User-Defined Filters. Filters that are applied to a layout are saved with the layout. You can limit the number of filters in the global category by setting them as layout filters.

All Activities: Mark to display all activities.

Show activities that match

All selected filters: When more than one filter is selected, choose to indicate that activities must meet all selection criteria in each filter.

Any selected filter: When more than one filter is selected, choose to indicate that activities must meet only one selection criteria in each filter.

Filter: Lists filter names according to filter category. You can select a filter. To sort the display, click the Filter column label.

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Select: Mark the appropriate checkbox to apply or remove a filter. To sort the display, click the Select column label.

When applying the selected filter(s)

Replace activities shown in current layout: Choose this option to display only the activities in the current layout that meet the selected filter criteria.

Highlight activities in current layout which match criteria: Choose this option to highlight the activities in the current layout that meet the selected filter criteria.

Apply: Applies the selected filters without closing this dialog box.

New: Creates a global filter.

Delete: Deletes the selected filter. You can only delete global and layout filters.

Copy: Copies the selected filter.

Paste: Pastes a copied filter to the global or layout category.

Modify: Allows you to edit the selected filter. You can only edit global and layout filters.

Make Global: Makes a layout filter a global Filter.

Copy as Layout: Makes a default or global filter available to the currently open layout

Financial Periods of Calendar dialog box (P6 Professional Only)

Use the Financial Periods dialog box to view or define financial periods for a financial period calendar. Users can store a project's period performance (past period actuals) for any predefined period contained in the financial period calendar assigned to the project.

The columns, fields, and buttons contained in the Financial Periods dialog box are described below.

Batch Create Financial Periods

Last Period End Date: Displays the latest period end date contained in the calendar. This field is read-only.

Batch Start Date: Select the date on which you want the financial period batch to start. The module will adjust the date in this field (if necessary) after you create the batch depending on your selections in the Financial Period section.

Batch End Date: Select the date on which you want the financial period batch to end. The module will adjust the date in this field (if necessary) after you create the batch depending on your selections in the Financial Period section.

Financial Period: Select to make each financial period in the batch **Every n Weeks** or **Every n Months** long (where n is the number of weeks or months); or, select **Every Year** to make each period one year long.

Period Ends On: If you selected **Every n Weeks** , choose the day of the week you want each financial period to end on. If you selected **Every n Months** , this field is disabled. (The end date for each monthly period is the last day of the month.) If you selected **Every Year** , select the month you want the financial period batch to end on.

Batch Create: Creates the financial periods based on your selections.

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Period Name: A unique identifier for the period. When you create a new financial period, the name defaults to the start date for the period. Click on the name to edit.

Start Date: The period start date. This field is not editable.

End Date: The period end date. This field is not editable.

Add: Click to open the Select Financial Period Timescale dialog box in which you can specify the start and end date of a new period. When the dialog opens, the default start date is the day after the previous period's end date; the default end date is seven days later.

Footer tab - Page Setup dialog box

Use the Page Setup, Footer tab to create a custom footer for the displayed layout or report.

Divide into section(s): Select the number of sections to divide the footer into.

Include on: Select which pages to apply the footer.

Height: Select the height of the footer, in inches, to display on the selected pages.

Define Footer: Select the subject area for each footer section.

Show Section Divider Lines: Mark to display dividers between each section of the header.

Function Point Estimation - Data and Transactions dialog box (P6 Professional Only)

Use the Function Point Estimation - Data & Transactions dialog box to calculate the Unadjusted Function Point Count (UFP) for the WBS element you are estimating.

Internal Logical File (ILF) - Low/Average/High Complexity: The number of low, average, and high complexity ILFs to be developed under the WBS element you are estimating. You can type a new number for each level of complexity.

External Interface File (EIF) - Low/Average/High Complexity: The number of low, average, and high complexity EIFs to be developed under the WBS element you are estimating. You can type a new number for each level of complexity.

External Input (EI) – Low/Average/High Complexity: The number of low, average, and high complexity EIs to be developed under the WBS element you are estimating. You can type a new number for each level of complexity.

External Output (EO) - Low/Average/High Complexity: The number of low, average, and high complexity EOs to be developed under the WBS element you are estimating. You can type a new number for each level of complexity.

External Inquiry (EQ) - Low/Average/High Complexity: The number of low , average, and high complexity EQs to be developed under the WBS element you are estimating. You can type a new number for each level of complexity.

Clear: Clears all displayed values.

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Function Point Estimation - System Characteristics dialog box (P6 Professional Only)

Use the Function Point Estimation - System Characteristics dialog box to specify values for general system characteristics and to calculate the total degree of influence (TDI) for the WBS element included in the estimate.

System Characteristic table: Lists the 14 General System Characteristics (GSC) used in function point counting and the current value specified for each.

Characteristic Description: A description of the system characteristic that is currently selected.

Value 0-5: Lists the values that can be assigned to each system characteristic. For the selected characteristic, choose a number to indicate the characteristic's degree of influence on the WBS element included in the estimate. 0 indicates no influence. 5 indicates a strong influence. To determine the appropriate value selection, click each value to view its description in the Value Description section.

Value Description: A description of the selected value for the currently selected characteristic.

Function Point Estimation dialog box (P6 Professional Only)

Use the Function Point Estimation dialog box to specify or calculate function point values for the WBS element included in the estimate.

Unadjusted Function Point Count (UFP) Calculate: Click to calculate the UFP by specifying the number and complexity of data function types and transactional function types.

Unadjusted Function Point Count: This field displays the total unadjusted function points. You can type a new number.

Total Degree of Influence (TDI) Characteristics: Click to specify values for general system characteristics and calculate the TDI.

Total Degree of Influence (TDI): This field displays the sum of the degree of influence (DI) values for the WBS element included in the estimate. You can type a new number.

Final Adjusted Function Point Count: The final adjusted function point count calculated from the UFP and TDI values. The Final FP Count is the product of the Unadjusted Function Point Count (UFP) and the Value Adjustment Factor (VAF), where VAF =0.65 + (0.01 * Total Degree of Influence (TDI)).

Average Productivity: The average productivity value for your organization. You can type a new productivity value.

Estimated Units: The estimated amount of effort required to complete the specified WBS. Estimated Units is the product of the Final Adjusted Function Point Count and the Average Productivity value.

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Funding Source in Use dialog box

Use the Funding Source in Use dialog box to specify how you want to delete a funding source that has current activity assignments or is a project's default funding source.

Select replacement funding source: Choose to delete the selected funding source and reassign its activity or project assignments to a replacement funding source you specify.

Delete funding source(s): Choose to delete the selected funding source without reassigning its activity or project assignments.

Funding Sources dialog box

Use the Funding Sources dialog box to set up a funding sources dictionary containing any non-profit, government-allocated, or other funding sources for easy assignment to budget items.

Display Options bar: Click to customize the Funding Sources hierarchy. You can display or hide funding source details, view information in a table or chart format, and change colors or fonts for information in the table or chart.

Funding Source: Lists all available funding sources.

Funding Source Name: Lists the selected funding source.

Funding Source Description: A description of the selected funding source. You can only view the description in this field; to add or edit a description, you must use the HTML editor.

Modify: Click to add or edit the description for the selected funding source in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.

Copy: Click to copy the selected text. After copying text, you can paste it into the HTML editor or into another application.

Print: Click to print the displayed description.

Add: Adds a funding source.

Del. / Merge: Deletes the selected funding source.

Cut: Removes the selected element from the funding source hierarchy. To reinsert the element in a new location, select a new position, and click Paste.

Copy: Copies the selected element. You can select a different position in the hierarchy and click Paste.

Paste: Pastes a funding source element that you have either copied or cut.

Arrows: Change the selected element's position in the hierarchy.

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General tab - Admin Preference dialog box (P6 Professional Only)

The General tab enables you to specify general default options, such as the weekday on which the calendar week begins. You can also specify the character that separates cost account codes to indicate hierarchy levels and the default duration for new activities.

Code Separator: The character that separates cost account and activity codes to indicate hierarchy levels. You can type a new character.

Starting Day of Week: The first day of the week for global, project, and resource calendars. You can select a new weekday.

Finish date filters use start of Current Date, Week, and Month: Determines how to define the timeframe of Current Day, Week, or Month filters that use finish dates. Select this option to define the timeframe based on the beginning of the day, week, or month. Clear this option to define the timeframe based on the end of the day, week, or month.

Activity Duration: The default duration for activities in all projects. You can type a new duration.

Password Policy: The Enable password policy checkbox is marked by default. In accordance with industry standards, the password policy is to authorize a password that is a minimum of 8 characters long, including one alpha and one numeric character. The password policy is recommended, not mandatory, and password limitations are not put into effect until this checkbox is marked. If this checkbox is not marked, passwords can be up to 20 characters in length, according to the original password policy.

General tab - Bar Chart Options dialog box

Show Relationships: (Activity Layouts only) Mark to display relationship lines in the Gantt Chart.

Show Legend: Mark to display a bar legend in the Gantt Chart.

Limit Text Label Characters To: Mark to select a number to specify the maximum amount of characters, including spaces, to display for text labels on individual bars.

Horizontal Lines

Show Major Lines: Mark to display a horizontal line above each summary bar in the Gantt Chart.

Show Minor Lines Every: Mark to display a horizontal line at specific row intervals.

Rows: Type or select the row interval at which you want to display horizontal lines in the Gantt Chart.

Default Size for Notebook Items

Width: Type or select a new width for the notebook items you want to display in the Gantt Chart.

Height: Type or select a new height for the notebook items you want to display in the Gantt Chart.

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General tab - Currencies dialog box (P6 Professional Only)

Currency ID: The identifier for the selected currency. You can type a new ID.

Currency name: The name of the selected currency. You can type a new name.

Currency symbol: The symbol used to identify the selected currency. You can type a new symbol.

Exchange rate: The current exchange rate for the selected currency. You can type a new value.

General tab - Estimation History dialog box (P6 Professional Only)

Estimate Name: The name of the selected estimate.

Method: The method used to perform the selected estimate.

WBS: The code for the WBS element on which the selected estimate was performed.

Resource: The resource code used to filter the WBS element on which the selected estimate was performed, if any.

Total Activities: The total number of activities that qualified for the selected estimate when the estimate was either saved or applied.

Date: The date the selected estimate was saved or last performed.

General tab - External Applications dialog box

Application Name: The name of the external application. Each application can be linked once per project.

Application Executable: The path and filename of the application being linked.

General tab - IPMDAR Template dialog box

Use the General tab of the Template dialog box to specify information about the contractor and general information about project and template.

Template Name: The name of the template that will show in the Select Template dialog box.

Contract Details

Security Marking: The security marking including the security classification.

Distribution Statement: The distribution statement that identifies restrictions on the document's availability for distribution, release, and disclosure.

Reporting Period End Date: The the end date of the reporting period.

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Contractor Name: The name of the contractor working on the project. This may be your organizations's name or the name of another organization.

Contractor ID Code Type: The type of the ID Code for the contractor.

Contractor ID Code: The ID Code used to identify the reporting contractor.

Street Address: The street address for the reporting contractor.

City: The city for the reporting contractor.

State: The state for the reporting contractor.

Country: The country for the reporting contractor.

Zip Code: The zip code or postal code for the reporting contractor.

POC & Contact Details

Name: The name of the person designated as the point of contact for the project.

Title: The title of the person designated as the point of contact for the project.

Telephone Number: The telephone number of the person designated as the point of contact for the project.

Contractor Name: The contractor name.

Contractor Number: The contractor number.

Contractor Type: The contractor type.

Contract Task Name: The name of the task for the contract.

Program Name: The name of the program.

Program Phase: The phase of the program.

EVMS Accepted: Indicates whether the contractor's EVMS has been accepted.

EVMS Accepted Date: The date the contractor's EVMS was accepted.

Source Software

Data - Source Software area

Source Software: The name of the software used to manage the source data.

Software Version: The version of the software used to manage the source data.

Software Company Name: The name of the company who produces the software used to manage the source data.

Software Comments: Comments about the software used to manage the source data.

Export - Source Software area

Source Software: The name of the software used to export the data set.

Software Version: The version of the software used to export the data set.

Software Company Name: The name of the company that produces the software used to export the data set.

Software Comments: Comments about the software used to export the data set.

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General tab - Modify Template or View Template dialog box

Import

Select a currency: Click  to select a currency to use for values in cost fields.

The following options are available for MPX format:

Schedule project after import: Mark to automatically schedule the project in P6 Professional after the import.

Summarize project after import to WBS level: Mark to automatically summarize the project in P6 Professional after the import. Select the level of WBS data to which the project should be summarized.

The following options are available for the XML format:

Import Microsoft Project summary task as WBS summary task: Mark to import a summary task from Microsoft Project as a P6 Professional WBS summary task in addition to the WBS hierarchical element.

Select the Microsoft Project baseline to use for planned/budgeted values: Mark to select a Microsoft Project baseline for planned or budgeted values, with the option to select one of Microsoft's 10 baselines. Selecting 0 indicates the current project baseline.

General tab - Organizational Breakdown Structure dialog box

OBS Name: The selected OBS element's name. You can type a new name.

OBS Description: A description of the selected OBS element. You can only view the description in this field; to add or edit a description, you must use the HTML editor.

Modify: Click to add or edit the description for the selected OBS element in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.

Print: Click to print the displayed description.

Copy: Click to copy the selected text. After copying text, you can paste it into the HTML editor or into another application.

General tab - Project Details dialog box (from Tracking window)

Project ID: The selected project's ID.

Project Name: The selected project's name.

Responsible Manager: The project manager responsible for the completion of the project. This value corresponds to the OBS node assigned to the project.

Project Web site URL: The project's Web site address, if applicable.

Launch: Click to open the project Web site.

Project Status: Indicates the project's status: Active, Inactive, Planned, or What-If.

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Strategic Priority: The project's priority in the strategic plan. This number ranges from 0 to 10,000. The default is 500.

Comparison Baseline: Select the baseline against which the project is compared. This baseline applies only to live data.

General tab - Project Portfolios dialog box

Name: The name of the portfolio.

Available To: The type of user who can access the selected portfolio. All Users means the portfolio is available to all users, Current User means only the current user can access the portfolio, and Shared Users means only the users selected in the User Access tab can access the portfolio.

Description: A brief phrase describing the portfolio.

General tab - Publish Project Web Site dialog box

Web Site Name: The name of the project Web site. This information appears on the splash page.

Web Site Description: The project Web site's description. This information appears on the splash page.

Publish Directory: The local or network location of the open's project's HTML directory.

Last Publish Date: The last date the project Web site was published.

Scheme: The project Web site's scheme.

Edit Scheme: Opens the Web Site Display Properties dialog box so you can customize the appearance of a project Web site.

Automatically launch web site preview after publishing: Mark to preview the project Web site after publishing.

General tab - Roles dialog box

Role ID: The selected role's ID. You can type a new ID.

Role Name: The selected role's name. You can type a new name.

Responsibilities: The selected role's responsibilities. You can only view the description in this field; to add or edit a description, you must use the HTML editor.

Modify: Click to add or edit the description for the selected role in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.

Copy: Click to copy the selected text. After copying text, you can paste it into the HTML editor or into another application.

Print: Click to print the displayed description.

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General tab - Schedule Options dialog box

Ignore relationships to and from other projects: Mark to ignore activity relationships between projects.

- Do not mark this option if you want to preserve activity dates dependent on external relationships to projects that are not in the same database as the project being scheduled.

Make open-ended activities critical: Mark to designate open-ended activities as critical activities when you schedule the projects.

Use Expected Finish Dates: Mark to schedule activity finish dates as the expected finish dates. This option is checked by default.

Schedule automatically when a change affects dates: Mark to calculate the schedule each time a significant change is made to an activity, relationship, or resource. If you clear this checkbox, changes to activities are reflected in the schedule after you calculate the schedule.

Level resources during scheduling: Mark to level resources automatically each time you schedule projects.

Recalculate assignment costs after scheduling: Mark to recalculate resource and role costs after scheduling the open projects. Use this option to calculate the costs of resource and role assignments that are assigned multiple rates.

When scheduling progressed activities use: Specify the type of logic used to schedule activities that are in progress. When you choose Retained Logic, the remaining duration of a progressed activity is not scheduled until all predecessors are complete. When you choose Progress Override, network logic is ignored and the activity can progress without delay. When you choose Actual Dates, backward and forward passes are scheduled using actual dates.

Calculate start-to-start lag from: When a start-to-start relationship exists and the predecessor starts out of sequence, the successor activity is delayed until that expires and all predecessor relationships have been satisfied. You can choose to subtract the lag from the predecessor's actual start date or its internal early start date.

Choose Early Start when the successor's start depends on the amount of work that the predecessor activity accomplishes. The expired lag is calculated as the number of workperiods between the actual start and the data date. The successor's start date is the predecessor's internal early start plus any remaining lag.

Define critical activities as: Choose the method to use to identify critical activities in the project. When more than one project is open, the critical activities are identified based on the setting in the default project.

Choose Total Float less than or equal to if you want to identify your critical activities based on total float. Specify the maximum float time for activities before they are marked critical. You can type a new number and time unit.

Calculate float based on end date of: Choose the method by which to calculate the float period:

Choose Each project: schedules relationships on the backward pass using each project's finish date for open-ended activities, including activities that have an external relationship.

Choose Opened projects: schedules relationships on the backward pass using the latest finish date of all opened projects and external relationship dates to calculate late dates of activities. Float for open-ended activities is calculated using the latest finish date of all opened

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projects, allowing for more float than the Each project option. Each Project's Scheduled Finish date field is calculated as the latest finish date of all opened projects.

Compute Total Float as: Select the method to calculate total float for all activities. Start Float is the difference between the early and late start dates (Start Float = Late Start – Early Start); Finish Float is the difference between the early and late finish dates (Finish Float = Late Finish – Early Finish); and Smallest of Start Float and Finish Float is the most critical float value.

Calendar for scheduling Relationship Lag: Select a calendar to calculate the lag between predecessors and successors for all activities. If you do not select a calendar, Successor Activity Calendar is used to calculate lag. You can calculate lag based on the Predecessor Activity Calendar; calculate lag based on the 24 Hour Calendar that uses continuous work periods; or calculate lag using the Project Default Calendar which is the calendar selected as Default for New Activities on the Defaults tab of Project Details.

- Lag entered in a unit other than hours is converted to hours based on the predecessor activity's calendar.

Default (button): Resets changes to default scheduling settings.

General tab - Update Baseline dialog box

Projects area

When updating project data, include:

Specify the types of project data to update for the baseline. You do not have to select any of the available options.

Project details: Mark to include project data in the updated baseline.

Project UDFs: Mark to update and include project UDFs in the updated baseline.

Project risks, issues and thresholds: Mark to update and include, in the updated baseline, UDFs related to risks, issues, and thresholds. For example, selecting this option causes a UDF that describes an issue triggered by a deviation in a cost variance threshold to be updated and included in the baseline update.

Risk UDFs: Mark to update and include risk UDFs in the updated baseline. This option isolates and updates risk UDFs only.

Issue UDFs: Mark to update and include issue UDFs in the updated baseline. This option isolates and updates issue UDFs only.

Work products and documents: Mark to include, in the updated baseline, data related to products and documents developed as part of the project.

Work products and document UDFs: Mark to update and include UDFs of project-related products and documents in the updated baseline.

WBS UDFs: Mark to update and include WBS UDFs in the updated baseline.

Advanced area

Ignore Last Update Date: Mark to ensure that all selected data types are updated without regard to the last baseline update date.

When this option is off, the baseline update process updates data items only with additions or modifications that have occurred since the last time the baseline was updated. When this

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option is on, the last baseline date is ignored and data items are updated to reflect all additions or modifications that have occurred, even if they preceded the date of the last baseline update. This option is useful when you want to update a data item that you did not include in your last baseline update.

Run Optimized: Mark to optimize the speed of the baseline update. If you select this option and errors occur during the update, errors are not logged.

Log to file: Enter or select a filename to store errors and warnings that occur when updating a baseline.

General tab - Users dialog box (P6 Professional Only)

Login Name: The selected user's login name. You can type a new login name, between 1 and 255 characters.

If P6 Professional is running in LDAP authentication mode, the login name you enter is checked against the LDAP store. If the user is not found, a message displays to notify you that the user cannot be added.

Personal Name: The selected user's name. You can type a new name.

Password: Click to change the selected user's password. To change your own password, select your user name, then click this button. A password must be between 1 and 20 characters.

- If the Enable password policy setting is selected in the Password Policy field of the Admin Preferences dialog box, enter a password that is a minimum of 8 characters long, and that contains one alpha and one numeric character.
- If the Enable password policy setting is not selected, enter a password up to 20 characters long.
- If P6 Professional is running in LDAP authentication mode, the Password button does not appear since password management is handled through the directory server.

Resource ID / Resource Name for Personal Calendar: The selected user's resource name.

Click  to select a resource.

General tab of the UN/CEFACT Export Template dialog box

Use the General tab of the Template dialog box to specify information about the contractor and general information about project and template.

Template Name: The name of the template that will show in the Select Template dialog box.

Contract Details

Contractor Name: The name of the contractor working on the project. This may be your organizations's name or the name of another organization.

Description: A short description of the file.

Business Type: The business type.

ID: The contractor's DUNS, DUNS+4 or CAGE code.

Security: The Security Type Code.

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Schedule: The Schedule Type Code.

Effective Start date: The start date of the XML file.

Effective End date: The end date of the XML file.

Postal Address

Project Location: The location of the project.

Street Address: The street address of the project location.

City: The city of the project location.

State: The state of the project location.

Country: The country of the project location.

Postal Code: The postal code of the project location.

Reporting Hierarchical Structure

Export WBS: Mark this checkbox to export the WBS with the project.

Export OBS: Select the structure to export as the Organizational Breakdown Structure for the project, either the OBS or an Activity Code which represents the OBS.

Global Access tab - Users dialog box (P6 Professional Only)

Global Security Profile: The selected user's security profile. Each security profile has specific access privileges associated with it. You can select another security profile.

Resource Access: The selected user's resource access. Resource security allows the administrator to restrict the selected user's resource access by granting one of the following:

- All Resource Access If the checkbox is marked, the selected user has access to all resources with no restriction. This option disables resource security.
- No Resources If the All Resource Access checkbox is cleared, and the Resource Access field is empty, the selected user does not have access to any resources. This is the default access for new users.
- Resource Nodes (Root Nodes) If the All Resource Access checkbox is cleared, and the Resource Access field has one or more resources, the selected user has access to the assigned resource nodes and all their children. The selected resources becomes the user's root nodes. To change a root node, click

  to launch the Select Resources Access dialog. A user can be assigned to up to five root resource nodes.

Resource security settings are honored the next time the user logs in. Thus, if you modify your own resource security settings, the changes will not take place until you exit the module and login again.

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Global Change dialog box

Use the Global Change dialog box to create, edit, delete, or run global change specifications.

Name: Lists global change specifications. Click to edit the name of the global change.

Available To: Choose to make the selected global change specification global or available only to specified users. Choose All Users to make the global change specification global, available to all users. Choose Current User to make the specification available only to the user currently logged in. New global changes are automatically assigned to Current User. Choose Another User to make the specification available to a selected user.

User: Click and select a user name to make the specification available to this user.

Apply Change: Allows you to preview the selected specification's changes in a report before applying them to the project.

New: Creates a new global change specification.

Delete: Deletes a selected specification.

Modify: Displays the settings for a selected specification.

Copy: Copies a selected specification.

Paste: Adds a copied specification.

Import: Import a specification from a file.

Export: Save specifications as an export file (*.PCF).

Global Change dialog box

Use the Global Change dialog box to create, edit, delete, or run global change specifications.

Name: Lists global change specifications. Click to edit the name of the global change.

Available To: Choose to make the selected global change specification global or available only to specified users. Choose All Users to make the global change specification global, available to all users. Choose Current User to make the specification available only to the user currently logged in. New global changes are automatically assigned to Current User. Choose Another User to make the specification available to a selected user.

User: Click and select a user name to make the specification available to this user.

Apply Change: Allows you to preview the selected specification's changes in a report before applying them to the project.

New: Creates a new global change specification.

Delete: Deletes a selected specification.

Modify: Displays the settings for a selected specification.

Copy: Copies a selected specification.

Paste: Adds a copied specification.

Import: Import a specification from a file.

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Export: Save specifications as an export file (*.PCF).

Global tab - Import Options dialog box

Use this tab to select an import action when the same data exists in the import file and project being updated.

Data Type: The type of global data for import.

Action: Determines what action to take when importing:

Insert New: Retains data in the existing project and adds any new data items. For example, if a new role is added in the XML file, but you do not want to change the existing roles, select this option to add the new role to the existing project.

Keep Existing: Retains data in the existing project and does not overwrite it with the updated data or adds new data if the record does not exist and you have the appropriate security privileges.

Update Existing: Overwrites data in the existing project with updated data and adds new data if the record does not exist.

Do Not Import: Retains data in the existing project and does not import the updated data.

Global tab - Modify Template or View Template dialog box (P6 EPPM Only)

Use this tab to select an import action when the same data exists in the Microsoft Project XML import file and project being updated.

Data Type: The type of global data for import.

Action: Determines what action to take when importing:

Insert New: Retains data in the existing project and adds any new data items. For example, if a new role is added in the XML file, but you do not want to change the existing roles, select this option to add the new role to the existing project.

Keep Existing: Retains data in the existing project and does not overwrite it with the updated data or adds new data if the record does not exist and you have the appropriate security privileges.

Update Existing: Overwrites data in the existing project with updated data and adds new data if the record does not exist.

Do Not Import: Retains data in the existing project and does not import the updated data.

Graph tab - Project/Activity Usage Profile Options dialog box

Vertical Lines

Major: Mark to display vertical lines to indicate major time units in the current layout.

Minor: Mark to display vertical lines to indicate minor time units in the current layout.

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Horizontal Lines

Dotted: Choose to display horizontal lines as dotted lines in the current layout.

Solid: Choose to display horizontal lines as continuous lines in the current layout.

None: Choose to remove horizontal lines from the current layout.

LineColor: Click to change the display color of horizontal lines in the current layout.

Additional Display Options

Show Legend: Mark to display a box containing definitions of each color in the current layout.

3DBars: Mark to display activity usage bars in three dimensions.

Show Values: Mark to display the values of each bar in the histogram.

Background Color: Click to change the current layout's background color.

Calculate Average: Mark to specify the values you want to use to divide the timescale interval totals.

Divide Interval Totals By: To divide the timescale interval totals by an increment you specify, type it in this field.

Base on Hours Per Timeperiod: To divide the timescale interval totals by automatic increments, based on the date interval selected, mark this checkbox.

When connected to a P6 Professional database: When you choose this option, the Divide Interval Totals By field displays the division increment based on the division increment specified in Admin Preferences for the corresponding date interval: 1h for Hour date interval, 2h for Shift date interval, 8h for Day date interval, 40h for week date interval, and so on.

When connected to a P6 EPPM database: When you choose this option, the Divide Interval Totals By field displays the division increment based on the division increment specified in the P6, Application Settings for the corresponding date interval: 1h for Hour date interval, 2h for Shift date interval, 8h for Day date interval, 40h for week date interval, and so on.

Unit of Measure: Specify the unit of measure for the timescale intervals.

Graph tab - Resource Usage/Role Profile Options dialog box

Use the Resource Usage/Role Profile Options Graph tab to specify how information is presented in a resource profile when viewing resource allocation for projects by role or by resource. To specify how you want to view resources in a resource profile, in the Resource Explorer window, click the Display Options bar, then choose Select View and the option you want.

Vertical Lines

Major: Mark to display vertical lines to indicate major time units in the current layout.

Minor: Mark to display vertical lines to indicate minor time units in the current layout.

Horizontal Lines

Dotted: Choose to display horizontal lines as dotted lines in the current layout.

Solid: Choose to display horizontal lines as continuous lines in the current layout.

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None: Choose to remove horizontal lines from the current layout.

LineColor: Click to change the display color of horizontal lines in the current layout.

Additional Display Options

Show Legend: Mark to display definitions of each color in the current layout.

3DBars: Mark to display resource usage bars in three dimensions.

Show Values: Mark to display the values of each bar in the histogram.

Background Color: Click to change the current layout's background color.

Calculate Average: Mark to specify the values you want to use to divide the timescale interval totals.

Divide Interval Totals By: To divide the timescale interval totals by an increment you specify, type it in this field.

Base on Hours Per Timeperiod: To divide the timescale interval totals by automatic increments, based on the date interval selected, mark this checkbox. When you choose this option, the Divide Interval Totals By field displays the division increment based on the division increment specified in User Preferences for the corresponding date interval: 1h for Hour date interval, 2h for Shift date interval, 8h for Day date interval, 40h for week date interval, and so on.

Unit of Measure: Specify the unit of measure for the timescale intervals.

Graph tab - Resource Usage/Role Profile Options dialog box - for stacked histogram

Use the Resource Usage/Role Profile Options Graph tab to specify how information is presented in a stacked histogram resource profile when viewing resource allocation for projects by role or by resource. To specify how you want to view resources/roles in a resource profile, in the Resource Explorer window, click the Display Options bar, then choose Select View and the option you want.

Vertical Lines

Major: Mark to display vertical lines to indicate major time units in the current layout.

Minor: Mark to display vertical lines to indicate minor time units in the current layout.

Horizontal Lines

Dotted: Choose to display horizontal lines as dotted lines in the current layout.

Solid: Choose to display horizontal lines as continuous lines in the current layout.

None: Choose to remove horizontal lines from the current layout.

LineColor: Click to change the display color of horizontal lines in the current layout.

Additional Display Options

3DBars: Mark to display resource usage bars in three dimensions.

Show Values: Mark to display the values of each bar in the histogram.

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Background Color: Click to change the current layout's background color.

Calculate Average: Mark to specify the values you want to use to divide the timescale interval totals.

Divide Interval Totals By: To divide the timescale interval totals by an increment you specify, type it in this field.

Base on Hours Per Timeperiod: To divide the timescale interval totals by automatic increments, based on the date interval selected, mark this checkbox. When you choose this option, the Divide Interval Totals By field displays the division increment based on the division increment specified in User Preferences for the corresponding date interval: 1h for Hour date interval, 2h for Shift date interval, 8h for Day date interval, 40h for week date interval, and so on.

Unit of Measure: Specify the unit of measure for the timescale intervals.

Graphics tab - Publish Project Web Site dialog box

Include in project web site: Mark to include the activity and tracking layouts on the project Web site.

Activity Layouts: Specify the activity layouts you want to include on the project Web site.

Tracking Layouts: Specify the tracking layouts you want to include on the project Web site.

Group and Sort dialog box

Use the Group and Sort dialog box to group and sort items in your current display.

Show Group Totals: Mark to display totals in the grouping bands. Clear the checkbox to hide all totals in the grouping bands.

Show Grand Totals: Mark to show a grand total row at the top of the layout.

Show Summaries Only: Mark to show summarized grouping bands only; details under the grouping bands will be hidden. Clear to show grouping bands with details displayed below each group.

Shrink vertical grouping bands: Mark to decrease the space taken by indenting levels on the hierarchy. Use this feature to allow additional room for the display of data.

Group By: Lists grouping data items for the current display. To select or change a data item, double-click it.

Indent: Automatically marked if the item selected in the Group By column is hierarchical. Each level of the hierarchy is indented.

To Level: Indicates the number of levels to indent when grouping by a hierarchical code.

Group Interval: Indicates the group interval when grouping by fields. For example, group by Remaining Duration. Type 5d in the Group Interval field. The data items are grouped according to the length of their remaining durations — 0.0d to 5.0d, 5.0d to 10.0d, etc. For date fields, choose from Day, Week, Month, Quarter, Year.

Page Break: Mark to indicate that this group should cause a page break when printing this layout.

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Font & Color: Lists each grouping's display color and font. To change a color or font, double-click it.

Hide if empty: Mark to hide group title bands that do not contain data items within the group. Mark if you are grouping by a hierarchical field, such as EPS or WBS, and the project has empty EPS or WBS bands. For example, mark this checkbox if you are grouping by WBS in the Activities window and the project has empty WBS bands. Hiding the empty bands ensures that the rolled up data is accurate.

Sort bands alphabetically: Mark to sort the grouping bands alphabetically rather than their order in their respective hierarchy. This checkbox is disabled for any grouping that is not hierarchical.

Show Title: Mark to display the field name on the grouping band.

Show ID/Code: Mark to display the ID or Code value on the grouping band.

Show Name/Description: Mark to display the Name or Description on the grouping band.

Apply: Applies your changes without closing this dialog box.

Delete: Deletes the selected row's grouping parameters.

Sort: Allows you to specify the sort order of the data items listed within each group.

Default: Applies the default grouping and sorting parameters (by WBS code).

Header tab - Page Setup dialog box

Use the Page Setup, Header tab to create a custom header for the displayed layout or report.

Divide into section(s): Select the number of sections to divide the header into.

Include on: Select which pages to apply the header.

Height: Select the height of the header, in inches, to display on the selected pages.

Define Header: Select the subject area for each header section.

Show Section Divider Lines: Mark to display dividers between each section of the header.

Hours per Time Period dialog box

Use the Hours per Time Period dialog box to define the calendar's default number of hours per timeperiod. For activities and resources to which the calendar is assigned, these values are used as conversion factors when users enter or display units and durations in time increments other than hours.

Hours/Day: The default number of hours per day for activities and resources to which the calendar is assigned. Valid range is 1-24.

Hours/Week: The default number of hours per week for activities and resources to which the calendar is assigned. Valid range is 1-168.

Hours/Month: The default number of hours per month for activities and resources to which the calendar is assigned. Valid range is 1-744.

Hours/Year: The default number of hours per year for activities and resources to which the calendar is assigned. Valid range is 1-8784.

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How - Calculations tab - User Preferences dialog box

When you add or replace an assignment to an activity that already has an existing assignment with manual future period values, the module adheres to your User Preference settings for assignment staffing, as described below.

Replacing a resource assignment

When you replace the resource or role assigned to an activity, any manual future period values entered for that assignment are preserved with the new assignment.

Adding a resource assignment to an activity that has an existing resource assignment

When you add a resource assignment to an activity that already has an existing resource assignment with manual future period values, the module adheres to your setting in the 'When assigning a resource to an existing activity assignment' field. If you choose to 'Always use the new resource's Units/Time and Overtime factor,' the manual future period values of the existing resource assignment may be respread across future period buckets based on the new resource's values. If you choose to 'Always use current assignment's Units/Time and Overtime factor,' unit values for the new resource are spread evenly over future period buckets and the manual future period values for the existing resource assignment are not changed.

Adding a resource assignment to an activity that has an existing role assignment, or vice versa

When you add a resource assignment to an activity that already has an existing role assignment with manual future period values (or vice versa), the module adheres to your setting in the 'When a resource and role share an activity assignment' field. If you choose to 'Always use resource's Price per Unit,' the manual future period values for the existing role assignment may be respread across future period buckets based on the new resource's values. Likewise, if you choose to 'Always use role's Price per Unit,' the manual future period values for the existing resource assignment may be respread across future period buckets based on the new role's values.

ID Lengths tab - Admin Preferences dialog box (P6 Professional Only)

The ID Lengths tab enables you to specify the maximum number of characters for codes, from 1 to 40.

Project ID maximum characters: Specify the maximum number of characters for project IDs.

WBS Code maximum characters: Specify the maximum number of characters for work breakdown structure (WBS) codes.

Resource ID maximum characters: Specify the maximum number of characters for resource IDs.

Activity ID maximum characters: Specify the maximum number of characters for activity IDs.

Cost Account ID maximum characters: Specify the maximum number of characters for cost account codes.

Role ID maximum characters: Specify the maximum number of characters for role IDs.

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Image tab - Properties dialog box

Use the Image tab to define settings for the selected image cell. This includes selecting the image you want to display, specifying the image cell's length and alignment, and adding HTML links. If the selected image cell is part of a data source, you can also apply one or more filters for the image cell.

General Settings

Image alignment: The selected cell's position relative to the report's left and right margins. A cell's alignment may be:

- None – enables you to drag the cell to the appropriate position. If you select None, you can also enter the cell's indent from the left margin in the Left field.
- Left - positions the cell flush against the report's left margin. If you select Left, you cannot specify the cell's indent from the left or right margin.
- Right - positions the cell against the report's right margin. If you select Right, you cannot specify the cell's indent from the left or right margin.
- Center - extends the cell across the entire row. If you select Center, you cannot specify a left or right indent for the cell.

You can select a new alignment.

Left: The cell's indent from the report's left margin, or the numeric distance between the left margin of the report and the left edge of the cell.

If the cell's alignment is Left, type a new number. If the cell's alignment is Right, Center, or None, the left indent is indented for you.

Width: The numeric width the cell occupies between the report's left and right margins.

If the cell's alignment is Left, Right, or None, type a new number. If the cell's alignment is Center, the cell's width is determined for you.

Select image: Click to add or remove an image from the selected image cell.

HTML links: Click to add HTML link settings, if you want the image to contain a link to a Web site.

Edit filter: If the image cell is part of a data source, click to create or edit filters that determine when the selected image cell is displayed in the compiled report. This feature is helpful when you want to associate a graphic with a specific type of information.

Images Manager dialog box

<Enter Section Title Here>

Use the Stored Images dialog box to store images in the database for use by any user. You can store up to 20 images per database.

Thumbnail: A representation of the stored image.

Default: Determines the image which will be used as default when you select Stored Images in Page Setup.

Name: The name of the stored image file.

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Purpose: The purpose of the stored image.

Description: A description of the stored image.

Select: Selects an image to use.

Add: Click to upload a new image to the database.

Delete: Click to delete an image you no longer need.

Funding Sources dialog box

Use the Funding Sources dialog box to set up a funding sources dictionary containing any non-profit, government-allocated, or other funding sources for easy assignment to budget items.

Display Options bar: Click to customize the Funding Sources hierarchy. You can display or hide funding source details, view information in a table or chart format, and change colors or fonts for information in the table or chart.

Funding Source: Lists all available funding sources.

Funding Source Name: Lists the selected funding source.

Funding Source Description: A description of the selected funding source. You can only view the description in this field; to add or edit a description, you must use the HTML editor.

Modify: Click to add or edit the description for the selected funding source in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.

Copy: Click to copy the selected text. After copying text, you can paste it into the HTML editor or into another application.

Print: Click to print the displayed description.

Add: Adds a funding source.

Del. / Merge: Deletes the selected funding source.

Cut: Removes the selected element from the funding source hierarchy. To reinsert the element in a new location, select a new position, and click Paste.

Copy: Copies the selected element. You can select a different position in the hierarchy and click Paste.

Paste: Pastes a funding source element that you have either copied or cut.

Arrows: Change the selected element's position in the hierarchy.

Import Domain Users dialog box (P6 Professional Only)

Use this dialog box to search for and import users into P6 Professional from your LDAP repository. You can add users from the LDAP repository when your global profile has the privilege Provision Users From LDAP. The dialog box allows you to import multiple users at once. Periodically, you can check back to view any user accounts that were modified within the LDAP repository and update the Personal Name, User EMail Address, and Office Phone fields of the users to keep P6 Professional up to date.

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LDAP User Search Criteria: The search criteria you want to use to find specific users in the LDAP repository.

Search: Activates the search based on your search criteria.

Login Name: The system-compliant user login name.

Import: Determines, when selected, whether the user data is imported into P6 Professional from your LDAP repository.

Personal Name: The full name of the user.

User EMail Address: The email address for the user.

Office Phone: The user's telephone number.

Category: The users shown in the search results grouped according to the following categories, which provide an indication of the relative state of the user account in both the LDAP repository and P6 Professional:

- **User does not exist in database**: Shows users who exist in the LDAP repository but not in the P6 Professional database. When you select these users and click Import Users, they are imported as new records in P6 Professional.
- **User Modified**: Shows user accounts that have similar information in both P6 Professional and the LDAP repository, but that also have been modified in the P6 Professional database or LDAP repository. When you select these accounts and click Import Users, the the Personal Name, User EMail Address, and Office Phone fields are synchronized.
- **User records match**: Shows users who have the same information in both P6 Professional and the LDAP repository. The associated Import check box is disabled for each user in this group.

Load LDIP: Opens a dialog box where you can select an .ldif file pre-populated with the LDAP users you want to import into P6 Professional. Use this method to import new P6 Professional users in batches.

Import Users: Imports selected users into your database.

Import Layout As dialog box

Use this dialog box to select where the layout should be imported.

Layout Name: The name of the layout. You can type a new name.

Available to: The category of users who can access the new layout. You can select a different user category.

User: The user to which you want to assign the layout. Click  to select a user.

Project: The Project with which you want to associate the layout. Depending on the user privileges,  is enabled to permit selecting a project with which to save the layout.

Save: Saves the current layout according to the options you specify.

Cancel: Closes this dialog box without saving the current layout.

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Import Options dialog box

Use Import Options dialog box to create a new template or modify an existing template to exchange data between P6 Professional and P6 EPPM or other third-party applications. When importing from P6 EPPM to P6 Professional, you are required to use an import file and an import template. You can create or select and customize an import template in this dialog box.

Template Name: The name for the import template. This field is required and can contain up to 40 characters. You can type in this field to filter templates that match the type text.

The following tabs are available:

- Basic Tab of the Import Options dialog box
- Global tab - Import Options dialog box
- Project tab - Import Options dialog box
- Advanced tab - Import Options dialog box
- Codes tab - Import Options dialog box
- UDFs tab - Import Options dialog box
- Calendars tab - Import Options dialog box
- Resources tab - Import Options dialog box

Import Report dialog box

Use the Import Report dialog box to specify how you want to import a report from another P6 Professional or P6 EPPM application.

Import and create a new report: Choose to import a report as a new report.

Import into the selected report: Choose to import a report and replace the selected report.

Industry tab - Admin Preferences dialog box (P6 Professional Only)

Use this tab to choose the type of industry in which you use this application. The industry you choose causes the application to use terminology and default settings for calculations that most closely align with the selected industry.

Engineering and Construction: Determines the use of terminology and default settings for calculations aligned with the engineering and construction industries.

Government, Aerospace and Defense: Determines the use of terminology and default settings for calculations aligned with government and with aerospace and defense industries.

High-Technology, Manufacturing and Others: Determines the use of terminology and default settings for calculations aligned with high-technology, manufacturing, and other industries.

Utilities, Oil and Gas: Determines the use of terminology and default settings for calculations aligned with the utility, oil, and gas industries.

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IPMDAR Template dialog box

Use the Export IPMDAR Template dialog box to specify the data to be exported to a IPMDAR file.

The following tabs are available:

- General tab - IPMDAR Export Template dialog box
- Project tab - IPMDAR Export Template dialog box
- Activity tab - IPMDAR Export Template dialog box
- Resource tab - IPMDAR Export Template dialog box

Issue History dialog box

Use the Issue History dialog box to view and add comments about the selected issue's history.

Issue History Notes: Displays previous comments about the selected issue, by date and user.

Add to Notes: Use this area to type new information about the selected issue.

Add: Adds new notes to the issue's history.

Issue Navigator dialog box

Use the Issue Navigator dialog box to track the open project's issues. This includes associated activities, resources, and work breakdown structure (WBS) elements. The Issue Navigator dialog box is displayed when you click Issue Navigator on the Tools menu.

Display Options bar: Lists options for changing the issues display.

Issue Navigator table: Lists open issues (and associated details) including project issues, if any.

Tracking: Click to display the selected issue's details with its assigned tracking layout.

Activities: Click to display the selected issue's Activity Details in the Activities window.

WBS: Click to display the selected issue's work breakdown structure (WBS) details in the Work Breakdown Structure window.

Resources: Click to display the selected issue's resource details in the Resources window.

Issue Details: Click to display the selected issue's details in the Project Issues window.

Notify: Sends email about the selected issue.

Job Details tab - Job Services dialog box (P6 Professional Only)

Application User Login Name: Lists the login name for the user running the job.

Last run status: Lists the results of the job; the status message “OK” indicates that the job ran without errors.

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Run Job: Specify a specific date and time or choose to run the job immediately after a previous job number.

Log to file: Mark this checkbox to send details about the run status to an output file. Enter a location for the file or accept the default. Specify whether the log file should be generated as HTML.

Job Options tab - Job Services dialog box (P6 Professional Only)

Use the Job Options tab to list the projects/EPS nodes you want to run the job service for. All projects in the EPS are listed, regardless of the current portfolio you have open.

Assign: Click to select projects/EPS nodes to be included in the job service.

Remove: Click to remove projects/EPS nodes from the job service.

New Data Date: (For Apply Actuals only) Select the date up to which you want to apply the default project's actuals. Click ... to select a new date.

Batch Report: (For Batch Reports only) Click ... to select the batch report you want the job service to run. You must select a batch report to properly add the Batch Reports job service.

Send Report To: (For Batch Reports only) Click to specify where to send the output of the batch report.

Export To: (For Export only) Click ... to specify the name and location for the export file.

Default Project: (For Schedule only) If multiple projects are open, select which projects scheduling options to use when you schedule.

Job Services dialog box (P6 Professional Only)

Use the Job Services dialog box to automatically run any number of jobs on multiple projects/EPS nodes at a specified time. Defining a job service requires the appropriate access rights.

Job #: A reference number associated with each job.

Job Name: Enter a brief description of the job. You can enter 100 characters.

Status: Choose Enabled for jobs that you want to run at a designated date and time; choose Disabled to turn off any job that you do not want to run.

Service Type: Specifies the job type: Apply Actuals, Batch Reports, Export, Schedule, or Summarize. You cannot change the job service type once a project/EPS node is assigned in the Job Options tab.

Last Run: Displays the last date and time that the job was run.

Next Run: Displays the next scheduled date and time for the job.

The following tabs are available:

- Job Details tab - Job Services dialog box
- Job Options tab - Job Services dialog box

In addition, the following buttons are available in the Job Services dialog box:

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Add: Adds a new job service.

Delete: Removes the selected job service.

Job Status dialog box (P6 EPPM Only)

Use the Job Status dialog box to view the status of all ASAP jobs submitted in P6 EPPM. The list of jobs includes those currently pending, those currently running, those delegated for which the summarize service is running and waiting for child records to complete summarizing, those that were canceled, those that completed with errors, and those that have completed or failed that exist in the database. Jobs that complete or fail continue to display until they are removed from the database based on the ASAP Cleanup Rate setting as defined by the P6 Administration Application. The list does not include recurring jobs as defined on the Scheduled Services page in P6. Use P6 to view detailed log files.

Display bar: Displays a menu for viewing a print preview of the dialog box, for displaying the Table Font and Row dialog box, or for filtering the list of jobs to show all jobs or just your jobs.

Job Name: Lists the internal job name stored in the job table.

Job Type: Lists the type of job that was run as a service. When sorted, values are sorted ascending alphabetically, then by submitted date.

Job Status: Lists the status of the associated job. When sorted, values are listed in the following order: Pending, Running, Complete, Failed, Canceled, Delegated, Completed with Errors. Within each job status group, jobs are additionally sorted by submitted date.

Submitted By: Lists the user login name of the user who submitted the job.

Submitted: Lists the date the job was submitted.

Message: Lists the error message if a job failed.

Refresh: Refreshes the list of jobs.

Delete: Deletes the selected job if the status is Pending, Completed, or Failed. Only enabled for the user who submitted the job.

View Log: Launches a web browser to view detailed log files.

> **Note**
>
> You must be able to log into P6 to view log files.

Level Resources dialog box

Use the Level Resources dialog box to level resources for the open project and/or specify your leveling preferences.

Use scheduling options from: If multiple projects are open, select which projects scheduling options to use when you schedule.

Automatically level resources when scheduling: Mark to automatically level resources each time you schedule a project.

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Consider assignments in other projects with priority equal/higher than: Mark to include resource assignments in other projects within the range of the leveling priority you specify when determining if a resource is over-allocated. Assignments in closed projects are considered. For example, if you mark the checkbox and specify a leveling priority of 5 in this field, the leveler considers all projects with a project leveling priority of 1,2,3,4, and 5.

The leveling priority ranges from 1 (highest priority) to 100 (lowest priority). Set a project's leveling priority on the General tab of the Projects Window.

Preserve scheduled early and late dates: Mark to preserve the early and late dates that were calculated during project scheduling.

Recalculate assignment costs after leveling: Mark to recalculate resource and role costs after leveling resources/roles in the projects. Use this option to calculate the costs of resource/role assignments that are assigned multiple rates.

Level all resources: Mark to level all resources.

Level resources only within activity Total Float: Mark to delay activities with resource conflicts only up to their late finish date.

Preserve minimum float when leveling: The amount of float you want to maintain when activities are delayed because of resource conflicts. You can type a new number and time unit.

- When connected to a P6 Professional database: The value you enter in this field is automatically converted to hours, regardless of your user preference settings for duration display (User Preferences, Time Units tab). The value is converted to hours based on hours per timeperiod settings defined in Admin Preferences or in the default project calendar, depending on an administrative preference (Admin Preferences, Time Periods tab).

When connected to a P6 EPPM database: The value you enter in this field is automatically converted to hours, regardless of your user preference settings for duration display (User Preferences, Time Units tab). The value is converted to hours based on hours per timeperiod settings defined in Applications Settings page in P6 or in the default project calendar, depending on an administrative preference (Application Settings in P6).

- If you do not specify a unit when entering a value (for example, you enter 2 rather than 2d), the value is displayed in hours, regardless of your user preference settings for duration display (User Preferences, Time Units tab).

Max percent to over-allocate resources: The maximum percentage by which resource availability can be increased during resource leveling. This increased resource availability is used to level if resources on an activity cannot be leveled after using up the activity's float limit. You can type a new percentage.

Leveling Priorities

Field Name: Lists the fields by which to prioritize resources when leveling. Priorities are used only when more than one activity competes for the same resource at the same time.

Sort Order: The order in which to level resources according to the field names displayed. Double-click the Sort Order field to choose Ascending, Descending, or Hierarchy (option only appears for fields that are hierarchical).

Add: Adds another leveling priority.

Remove: Removes a leveling priority.

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Log to file: Mark to record your leveling results in a log file. Enter the name of the file in which you want to save your leveling results. Specify whether the log file should be generated as HTML. Click  to select a new file.

Level: Levels resources according to the options you specify.

Default: Displays the default leveling settings.

View Log: Displays your leveling results.

Line tab - Properties dialog box

Use the Line tab to define settings for the selected line cell. This includes the line cell's length, alignment, and the number of lines you want to include in the cell.

General Settings

Line alignment: The selected cell's position relative to the report's left and right margins. A cell's alignment may be:

- None - enables you to drag the cell to the appropriate position. If you select None, you can also enter the cell's indent from the left margin in the Left field.
- Left - positions the cell flush against the report's left margin. If you select Left, you cannot specify the cell's indent from the left or right margin.
- Right - positions the cell flush against the report's right margin. If you select Right, you cannot specify the cell's indent from the left or right margin.
- Center - extends the cell across the entire row. If you select Center, you cannot specify a left or right indent for line cell.

You can select a new alignment.

Left: The cell's indent from the report's left margin, or the numeric distance between the left margin of the report and the left edge of the cell.

If the cell's alignment is Left, type a new number. If the selected cell's alignment is Right, Center, or None, the left indent is determined for you.

Width: The numeric distance the selected cell occupies between the report's left and right margins.

If the cell's alignment is Left, Right, or None, type a new number. If the selected cell's alignment is Center, the left indent is determined for you.

Number of lines: The number of lines included in the cell. You can select a new number.

Indent Cell: Mark to indent information reported in the selected cell to indicate hierarchy levels.

Login tab - External Applications dialog box

Prompt for login name and password when logging in: Choose this option if security is an issue. You will be prompted for your login name and password when accessing external information.

Login with the following login name and password: Choose this option if security is not an issue. Type the login name and password for the external application you are connecting to.

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Login to Primavera P6 Professional dialog box

Login names and passwords are case-sensitive. Your login name can be up to 255 characters in length; your password can be up to 20 characters in length.

Login Name: Enter your login name.

Password: Enter your password.

Work Offline: Select this option to work offline with the data cached in your local cache database. Clear this option if you have previously been working offline and want to connect to the CloudConnect database. To see this option, select a Cloud Connect database.

Advanced section

Database: Select a database to connect to.

Language: Select the language in which to display data in menus, dialog boxes, and messages.

Reinitialize local cache: Use this option to discard the existing data in your local cache and download fresh data from the server. This is useful to remove projects you are no longer interested in from the local cache. If you select this option, P6 Professional will take longer to open than normal. To see this option, select a Cloud Connect database.

Clear SSO browser data: Use this option to clear the embedded browser cache used by P6 Professional when connecting to a CloudConnect database with SAML.

Edit database configuration: Click to configure your database.

Main Form tab - Web Site Display Properties dialog box

Item: Select the item you want to customize, or click the item in the Project Web Site sample area.

Color: Specify a color for the selected item.

Location: Specify the location of a graphical element to add to the project Web site.

Font: Specify a font for the selected item.

Size: Select a size for the selected item.

Color: Format the selected item.

B: Apply bold formatting to the selected item.

I: Apply italic formatting to the selected item.

Maintain Baselines dialog box

Use the Maintain Baselines dialog box to create, delete, copy, update, or restore baselines for the open project.

Project ID/Baseline ID: Identifies the ID of the original project on which the baseline was created and all baselines created for that project.

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Project Name/Baseline Name: Identifies the name original project on which the baseline was created and all baselines created for that project.

Data Date: Lists each baseline's data date. Click the column heading to sort the list by this data item.

Date Added: Lists the date each baseline was added. Click the column heading to sort the list by this data item.

Last Update Date: For baselines that have been updated using the Update Baseline utility, this field displays the date and time the selected baseline was last updated. When you create a new baseline from a copy of the current project, this field shows the date and time the baseline was created (until you update the baseline). When you copy a baseline, this field displays the same date and time as the original (copied) baseline. This field is empty when you convert another project as the baseline for the current project, restore a baseline, or upgrade to the current version of the module (until you update the baseline). Click the column heading to sort the list by this data item.

Enable Publication: Mark this checkbox if you want P6 to publish data for this baseline. Click the column heading to sort the list by this data item. This option is available only when you are connected to an EPPM database.

Baseline ID: The ID of the selected baseline.

Baseline Name: The name of the selected baseline.

Baseline Type: Lists the baseline's type. Baseline types are created by the administrator and can be used to categorize baselines. Click the down arrow to select a type.

Data Date: The data date of the selected baseline.

Last Update Date: The date that the selected baseline was most recently updated.

Add: Click to save the current state of the project as a new baseline for the current project or convert another project into a baseline of the current project.

Delete: Deletes the selected baseline.

Copy: Makes a copy of the of the selected baseline while keeping the selected baseline intact. The copied baseline is located under the same project as the selected baseline.

Update: Opens the Update Baseline dialog box. In the dialog, you can select the data you want to automatically update for the selected baseline, then run the Update Baseline utility. Use the Update Baseline utility to update activity and project-level data for an existing baseline.

Restore: Restores the selected baseline as a separate project that you can manually modify.

Margins tab - Page Setup dialog box

Use the Page Setup, Margins tab to set page margins for the displayed layout or report.

Top: The distance between the top edge of the paper and the top edge of the printed layout or report text, not including the header. Type or click the arrows to select a new distance.

Header: The distance between the top edge of the paper and the top edge of the printed layout or report header. Type or click the arrows to select a new distance.

Left: The distance between the left edge of the paper and the left edge of the printed layout or report text. Type or click the arrows to select a new distance.

Sample: Shows how the selected margins will appear on the printed page.

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Right: The distance between the right edge of the paper and the right edge of the printed layout or report text. Type or click the arrows to select a new distance.

Bottom: The distance between the bottom edge of the paper and the bottom edge of the printed layout or report text, not including the footer. Type or click the arrows to select a new distance.

Footer: The distance between the bottom edge of the paper and the bottom edge of the printed layout or report footer. Type or click the arrows to select a new distance.

Merge or Delete WBS Element(s) dialog box

Use the Merge or Delete WBS Element(s) dialog box to confirm that you want to delete a WBS element. Also, if the WBS you are deleting has activities associated with it, choose one of the following options before clicking OK to confirm the delete action.

Delete Element(s): Deletes the selected WBS element and all activities assigned to it.

Merge Element(s): Deletes the selected WBS element and reassigns its activities to the WBS element.

- These two options also appear if the WBS has both activities and planned resource allocations. However, resource allocations cannot be merged. Regardless of the option you choose, the planned resource allocations are deleted. For this reason, when a WBS has planned resource allocations but no activities, these options do not appear.

Merge selected resource with its parent dialog box

Use the Merge selected resource with its parent dialog box to replace the deleted resource with another available resource. When resource security is enabled, you can only view resources you have access to.

Display Options bar: Click to change the resource display.

Resource ID: Lists the ID of each resource in your organization. To sort the display, click the Resource ID column label.

Resource Name: Lists the name of each resource in your organization. To sort the display, click the Resource Name column label.

Primary Role: Lists the primary role, if any, assigned to the resource.

Default Units/Time: Lists the default units/time for each resource in your organization. To sort the display, click the Default Units/Time column label.

Select: Replaces the deleted resource with your selection and closes this dialog box.

Miscellaneous tab of the UN/CEFACT Export Template dialog box

RiskLevelDescription: Select a UDF to set as the Risk Level Description. This UDF represents the risk level for activities.

PriorityRankingNumeric: Select a UDF to set as the Priority Ranking Numeric. This UDF represents the order for activities.

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EarnedValueMethodCode: Select a UDF to set as the Earned Value Method Code. This UDF represents the method for calcuating Earned Value

ScheduleLevelNumeric: Select a UDF to set as the Schedule Level.

MileStoneWeightNumeric: Select a UDF to set as the Milestone Weight.

ControlAccountID: Select a UDF to set as the Control Account ID.

ScheduleLevel: Select a UDF to set as the Schedule Level.

WorkPackageID: Select a UDF to set as the Work Package ID.

PlanningLevelCode: Select a UDF to set as the Planning Level Code.

Modify Global Change dialog box

Use the Modify Global Change dialog box to define changes using If:Then:Else expressions.

Select Subject Area: Choose the subject area to determine what activity information is affected when the global change is run. Choose Activities to select parameters for expressions that can affect all activity information. Choose Activity Resource Assignments to select parameters for expressions that can affect an activity's resource information. Choose Project Expenses to select parameters for expressions that can affect an activity's expense information.

Global Change Name: Type a name to identify the specification.

If: Click the plus or minus sign to show or hide rows in the global change statement.

Parameter: Choose Any or All of the following. When you choose Any of the following, the change is made if any one of the If: statements is satisfied. When you choose All of the following, the change applies only when all the If: statements are satisfied.

Is / Value / High Value: If statements define the conditions used to make changes to project data.

Then / Parameter / Is / Parameter/Value / Operator / Parameter/Value: Define Then statements to specify the changes to make to project data when the If conditions are satisfied.

Else / Parameter / Is / Parameter/Value / Operator / Parameter/Value: Define Else statements to specify the changes to make to project data when the If conditions are not met.

- When you type a value for duration or units in Parameter/Value fields (in Then and Else statements), the value is entered into the database without being converted to hours. So, for example, if you enter 2d, the value stored is 2 days, not 16 hours. If you do not specify a unit when entering a value (for example, you enter 2 rather than 2d), the time unit defaults to the time unit specified in user preferences (User Preferences, Time Units tab).
- When connected to a P6 Professional database: If you are applying a global change to a unit or duration field, the Use the assigned calendar to specify the number of work hours for each time period checkbox (on the Admin Preferences, Time Periods tab) is ignored if set. Because it is ignored, the global change applies the unit or duration value based on the Admin Preferences hours per time period settings.

When connected to a P6 EPPM database: If you are applying a global change to a unit or duration field, the Use the assigned calendar to specify the number of work hours for each time period checkbox (set using the P6, Application Settings) is ignored if set. Because it is ignored, the global change applies the unit or duration value based on the Application Settings hours per time period settings.

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Change: Displays a report showing which data will change. Click Commit Changes to process the changes, or click Cancel changes if you do not want to run the Global Change.

Add: Adds a new line of criteria to the If, Then, or Else statement.

Delete: Deletes the selected line of criteria.

Cut: Removes the selected text.

Copy: Copies the selected text.

Paste: Pastes text that you cut or copied.

Arrow keys: Moves the selected item to a different position in the display.

Modify Import Configuration dialog box

Use the Modify Import Configuration dialog box to select the action to take when importing data that exist in both the import file and the project being updated.

Data Type: Lists each element of your project that could be affected by matching data in the import file. There are three types of data— global, project, and activity.

- Global data types include data that are defined at the enterprise level and are available to all projects across the organization. Examples of global data types are resources and roles.
- Project data types include data that are defined at the project level and are available only to that project. Examples of project data types are work products and documents, WBS, and external relationships.
- Activity data types include data that are defined at the activity level and are available only to that activity. Examples of activity data types are activity relationships and resource assignments. The activity data type is not available when importing XML files; activity-related data is listed under the project data type.

Action: Select the method you want to use when importing each data type according to the following table:

Action	**Result if the record exists in the P6 Professional or P6 EPPM database**	**Result if the record does NOT exist in the P6 Professional or P6 EPPM database**
Do not Import	The record is not imported. No changes are made to the existing record.	The record is not imported.
I **nsert New**	The data associated with the record being imported is copied into a new record and added to the database. No changes are made to the existing record in the P6 Professional or P6 EPPM database.	The record and its associated data are added to the database.
Keep Existing	When **updating** the existing project, no changes are made to either the record or to the data. When **adding** into the existing project, the data associated with the record being imported is copied into a new record and added to the database. No changes are made to the existing record in the P6 Professional or P6 EPPM database.	When **updating** or **adding** into the existing project, the record and its associated data are added to the database.

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Update Existing	When **updating** the existing project, any data associated with the record id is updated. When **adding** into the existing project, the record and its associated data are added to the database.	When **updating** or **adding into** the existing project, the record and its associated data are added to the database.

Modify Resource Curves dialog box

Use the Modify Resource Curves dialog box to edit global resource curves. Edit the Curve Value % to change the resource and cost distribution. Resource usage and costs are distributed evenly during an activity unless you specify nonlinear distribution using curves.

Curve Value %: Type a new value, between 0.0 and 100.0, for each of the 21 increments to create your curve.

Total %: Displays the sum of all percentages listed. This field is calculated and cannot be edited. If the total value is greater than 100%, it appears in red. After you prorate the curve, the total value always equals 100%.

Duration %: The activity's duration is divided into 21 increments from 0 to 100 percent. A bar for each increment indicates the resource use. The bar for 0 percent represents the amount of resource already used when the activity begins (provided that the data date is later than the actual start date of the activity and actuals have been applied - see note below); the bar for 5 percent represents the usage between the start and 5 percent completion. The duration percent values cannot be edited.

Prorate: Adjusts values in the curve window proportionally to retain the curve's shape while making the periodic bars total 100 percent.

Copy From: Click to copy the curve value percentages from an existing curve. The new values overwrite the existing values.

- Resource curves are calculated based on an activity's actual duration as of the project's data date. If an activity has started but the data date is earlier than the actual start of the activity, the bar for 0 percent will show a Duration % of zero until you advance the data date and apply actuals. The resource utilization is accurately depicted in the Resource Usage Profile, however.
- The prorate automatically occurs when you click OK.

Modify Template dialog box for use with Excel files

Use the Modify Template dialog box to select the options used when exporting data for use with Microsoft Excel or other third-party applications.

Template Name: The name of the export template. Enter a name that describes the template or the activities to which the template will typically apply.

Subject Area: The areas of interest selected to export. Select the subject area to define its export specification.

The following tabs are available:

- Columns tab - Modify Template dialog box for use with Microsoft Excel files
- Filter tab - Modify Template dialog box for use with Microsoft Excel files

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- Sort tab - Modify Template dialog box for use with Microsoft Excel files

Default: Applies the default column setting to the template.

Modify Template or View Template dialog box

Use the Modify Template dialog box to select the options used when importing and exporting data for use with Microsoft Project or other third-party applications.

If resource security is enabled, some restrictions apply when importing resource and resource assignments. For details, click the Resource link below.

The following tabs are available:

- General tab - Modify Template dialog box
- WBS tab - Modify Template dialog box
- Global tab - Modify Template dialog box (P6 EPPM Only)
- Project tab - Modify Template dialog box (P6 EPPM Only)
- Activity tab - Modify Template dialog box
- Resource tab - Modify Template dialog box
- Notebooks tab - Modify Template dialog box
- Custom Field Mappings tab - Modify Template dialog box

Module Access tab - Users dialog box (P6 Professional Only)

Product: Lists the product that can be enabled or disabled for each user.

- Project Management: Provides access to P6 Professional.
- Visualizer: Provides access to Visualizer.
- You must mark the applicable checkboxes for all users, including Admin Superusers.

Access: A marked checkbox indicates that the selected user can access the corresponding application.

Monitor Thresholds dialog box

Use the Monitor Thresholds dialog box to monitor all of the open project's thresholds at once.

Use original threshold monitor windows: Choose to monitor all thresholds with their original monitor time windows.

Use new threshold monitor window: Choose to specify a new time window to monitor all thresholds. To select a new time window to monitor, click ... in the From Date and To Date fields, then click Monitor.

From Date: To specify a start date for the new monitor time window, click ... .

To Date: To specify a finish date for the new monitor time window, click ... .

Monitor: Monitors all thresholds according to the options you specify.

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More information about removed fields

The following fields were removed as selections from the Columns dialog box: Review Finish, Review Status, Integrated Project, Estimated Weight.

If you are migrating from P6 Project Management Version 7.0 (or earlier) to P6 Professional and use any of the removed fields as columns in Activity views or as fields in filters or in global change specifications, then be aware that those fields will be automatically deleted, without prompting, upon performance of a specified action, as discussed in the following bulleted items.

- For Activity views that includes a removed field, any of the following actions automatically deletes the removed field from the layout:
  - Opening a layout that contains a removed column
  - Importing a layout that contains a removed column
  - Exporting a layout that contains a removed column
  - Publishing a layout that contains a removed column
  - Opening a layout that uses a removed data type as grouping criteria
  - Importing a layout that uses a removed data type as grouping criteria
  - Exporting a layout that uses a removed data type as grouping criteria
  - Publishing a layout that uses a removed data type as grouping criteria
  - Opening a layout that uses a removed data type as sorting criteria
  - Importing a layout that uses a removed data type as sorting criteria
  - Exporting a layout that uses a removed data type as sorting criteria
  - Publishing a layout that uses a removed data type as sorting criteria
  - Opening a layout that uses a removed data type as filtering criteria
  - Importing a layout that uses a removed data type as filtering criteria
  - Exporting a layout that uses a removed data type as filtering criteria
  - Publishing a layout that uses a removed data type as filtering criteria
  - Opening a layout that uses a removed field as a bar label
  - Importing a layout that uses a removed field as a bar label
  - Exporting a layout that uses a removed field as a bar label
  - Publishing a layout that uses a removed field as a bar label
- For a filter that includes a removed field, any of the following actions automatically deletes the removed field from the list of fields to filter by in the Activities, Resource Assignments, Projects, Resources, Tracking, and Report Editor views:
  - Modifying a filter that uses a removed field
  - Applying a filter that uses a removed field
  - Copying and pasting a filter that uses a removed field
  - Converting a user-defined filter into a global filter
  - Making a filter available to the open layout

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- For a global change specification that includes a removed field, any of the following actions automatically deletes the affected rows from existing global changes specifications but leaves unaffected rows unchanged:
  - Modifying a global change statement that uses a removed field
  - Applying a global change statement that uses a removed field
  - Importing a global change statement that uses a removed field
  - Exporting a global change statement that uses a removed field
  - Copying and pasting a global change statement that uses a removed field

New Tracking Layout dialog box

Use the New Layout dialog box to create a custom tracking layout.

Layout Name: The name of the new layout.

Available t **o:** The users who can access the layout: All Users or the Current User.

Select Display Type

Project Table: Choose to create a Project Table, which displays project data in a row-and-column format.

Project Bar Chart: Choose to create a Project Bar Chart, which displays timescaled project data in horizontal bar format.

Project Gantt/Profile: Choose to create a Project Gantt/Profile, which displays project data in Gantt Chart, spreadsheet and profile formats.

Resource Analysis: Choose to create a Resource Analysis layout, which displays resource allocation for individual projects or total allocation across the enterprise in Gantt chart, spreadsheet, and profile formats.

Notebook tab - Admin Categories dialog box (P6 Professional Only)

Use the Notebook Topics tab to create, edit, and delete notebook topics. You can assign notebook topics to EPS nodes, projects, WBS elements, and activities. Notebooks are typically instructions or descriptions for performing an activity. Examples of notebook topics are Purpose, Entry Criteria, Tools & Techniques, and Exit Criteria.

Display Options bar: Click to search for a specific notebook.

Notebook Topics table: Lists notebooks and enables you to specify at which level of the EPS each notebook can be assigned. To enable notebook assignment at a specific level, mark the checkbox in the corresponding column.

Add: Adds a notebook.

Delete: Deletes the selected notebook.

Shift up: Moves the selected notebook to a higher position in the display.

Shift down: Moves the selected notebook to a lower position in the display.

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Notebook tab - WBS Details dialog box

Select Notebook Topic: Lists notebook topics associated with the selected WBS.

Notebook Description: A description of the selected notebook topic.

Notebooks tab - Modify Template or View Template dialog box

Project, WBS, and Activity notes: Choose the notebook topics you want to use to exchange with Microsoft Project notes. Notes from the import file are imported into the selected notebook topics. Data from the notebook topics are exported to Microsoft Project notes.

- When connected to a P6 EPPM database: Notebooks are defined in P6.

When connected to a P6 Professional database: Notebooks are defined in P6 Professional in Admin Categories (choose Admin, Admin Categories, then click the Notebook Topics tab).

Export all notebook topics to Microsoft Project notes: Mark to export all notebook topics associated with the project, WBS, or activity to the notes field in Microsoft Project. For export, this option overrides the selected notebook topics above.

Notes tab of the UN/CEFACT Export Template dialog box

Note1: The type for the note field.

Content: The activity notebook topic to export as Note1 in the file.

There are five notes fields.

Notify Issue dialog box

Use the Notify Issue dialog box to send email about the selected issue.

email Address: Lists each recipient's email address. To change an email address, double-click the address you want to change, then type the new address.

Name: Lists the name of each email recipient.

Responsibility: Lists the responsibility for each email recipient.

Subject: Displays the selected issue's name.

Contents: Displays the selected issue's details. Type additional details and comments in this field.

Add: Adds a recipient.

Remove: Removes the selected recipient.

Send All: Sends email about the selected issue to all listed recipients.

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Open Layout dialog box

Use the Open Layout dialog box to select and display a different layout.

Layout: Lists the name of each available layout. Depending on user access privileges, current project and view, there are three categories of layouts: global, user, and project. A global layout is available to all users . A user-defined layout is available to the specified user. Project layouts are associated and available with the project. Click the column title to sort the titles alphabetically in ascending or descending order.

Display Type: Lists the layout type. Click the column title to sort the titles alphabetically in ascending or descending order. This field displays only for tracking layouts.

Open: Opens the selected layout.

Apply: Click to preview the layout without closing the dialog box.

Delete: Click to delete the selected layout.

Import: Click to import a layout from another source. Import files with the extension .PLF. A "1" is appended to the layout name when it is imported if a duplicate layout name already exists.

Export: Click to export the layout and save it as a Primavera Layout File format (.PLF) file. You can select multiple layouts at the same time. Each one saves individually using the layout name with a .PLF extension.

- You can use the right click key to copy and paste layouts. However, the option to paste layouts will be disabled in the global or project band if you do not have privileges to create layouts in these bands.
- Project layouts are not available in project and tracking views.

Open Project dialog box

Use the Open Project dialog box to open an existing project. You can select a portfolio to limit the amount of project data you open.

Select Project Portfolio: The currently selected portfolio. Only projects in the selected portfolio are available in the Open Project table. Click  to select a different portfolio. The project data loads into memory as soon as the portfolio is selected.

Display Options bar: Lists options for finding a specific project, print a list of projects, and customize the project display. You can also change columns, filter, font, and colors.

Open Project table: Lists all EPS nodes and the projects in the currently selected portfolio. Project Status lists the state of the project: planned, active, inactive, or what-if. Note that a padlock icon  on top of a folder icon indicates a user has the associated project opened in Exclusive access mode.

Open: Click to open the selected EPS node or projects.

Cancel: Closes this dialog box without opening any EPS nodes or projects.

Users: For each project or EPS node you select, click to view a list of all users who have the selected project(s) open. When you select an EPS node, the list displays users who have any project within the EPS node open.

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Access Mode

Exclusive: Choose to open and edit the selected project, and you alone can edit the open project. When you open a project in Exclusive mode, other users can open it only in Read-Only mode.

Shared: Choose to open and edit the selected project at the same time that other users can open and edit the project in Shared mode. However, if another user has the project open in Exclusive mode, then you can open it only in Read-Only mode.

Read Only: Choose to open a selected project for viewing only.

Options tab - Admin Preferences dialog box (P6 Professional Only)

Specify the interval to summarize and store resource spreads

By calendar: Choose this option if you want to summarize and store activity and resource spreads according to the calendar intervals you specify in the WBS Level and Resource/Role Assignment Level fields. This option is selected by default.

WBS Level: Choose the time interval, such as week or month, for storing summarized activity data.

Resource/Role Assignment Level: Choose the time interval, such as week or month, for storing summarized resource data.

By financial period: Select this option if you want to summarize and store activity and resource data in financial period intervals that correspond to the range of financial periods defined in the Financial Periods dictionary. Choosing this option enables P6 Professional to accurately display all activity and resource data (both actual to date and past period actual) in financial period timescale intervals.

P6 Professional Online Help URL

When you select the Online Help option from the Help menu, the URL that is specified in this section will launch. By default, the P6 Professional Online Help URL field is populated with the version hosted by Oracle, http://docs.oracle.com/cd/E63417_01_01/client_help/. The language that is used for help is determined by the user's language selection under Tools. You can set your own URL location. If the P6 Professional Online Help URL field is blank, the Online Help option on the Help menu is disabled for all users.

The Always launch Online Help for the F1 shortcut key and context-sensitive help option is not selected by default. By default, local help will launch when you use the F1 key and help shortcut icons. If the P6 Professional Online Help URL field is blank, this option is disabled and local help will always launch.

Document Security

Invalid document types: Provide a comma-separated list of file types P6 Professional should not accept for upload of documents. Oracle recommends that at least the default values of .exe, .com, .bat, .cmd, .vbs, .js, and .msi should be entered in this field.

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Cost Spread

Spread cost based on: Choose the method for spreading costs.

Linear Spread: Determines that costs are spread evenly across the time period, regardless of any changes in resource or role rates.

Unit Spread: Determines that cost spreads are calculated to account for periodic changes in resource or role rates.

Options tab - Page Setup dialog box

Use the Page Setup, Options tab to specify date range, content, and pagination options when you print window data or layouts. The available options on this tab vary according to the current view displayed when you select the Page Setup option.

Timescale Start: Click  to select the type of date or a custom date from which data should be included.

Timescale Finish: Click  to select the type of date or a custom date up to which data should be included.

Print

Activity Table: Mark to include the Activity Table on the printed layout.

All Columns: Mark to include all columns on the printed layout.

Grid Lines: Mark to include grid lines on the printed layout.

Gantt Chart: Mark to include the Gantt Chart on the printed layout.

Profile: Mark to include the profile on the printed layout. This option is available when displaying the profile in the current layout.

Spreadsheet: Mark to include the Resource Usage Spreadsheet or the Activity Usage Spreadsheet on the printed layout. This option is available when the Resource Usage or Activity Usage Spreadsheet is visible in the bottom view AND the Gantt Chart is visible in the top view of the current layout.

- While the Gantt Chart and Spreadsheet must both be visible for the Spreadsheet option to appear in Page Setup, you can clear the Gantt Chart option if you do not want to include the Gantt Chart in the print output.

Trace Logic: Mark to include Trace Logic on the printed layout. This option is available when displaying Trace Logic in the bottom view of the Activity Network, in the current layout.

- If you display the Activity Network Diagram on the top part of the layout, Trace logic will print on the following page.

Page Settings

Break Page Every Group: Mark to start a new page each time the group changes in the printed layout. This field is disabled if the layout you are trying to print has page breaks defined by grouping band.

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Organizational Breakdown Structure dialog box

Use the Organizational Breakdown Structure dialog box to create, view, and edit the organizational breakdown structure (OBS). You can also use this dialog box to view a list of users who can access an OBS element's project information.

The following tabs are available:

- General tab - Organizational Breakdown Structure dialog box
- Users tab - Organizational Breakdown Structure dialog box
- Responsibility tab - Organizational Breakdown Structure dialog box

In addition, the following fields and buttons are available in the Organizational Breakdown Structure dialog box:

Display Options bar: Click to change the OBS display. You can display OBS details, the OBS as a chart, customize the columns in the hierarchy, and change the font and colors.

OBS table: Displays OBS elements. To sort the display, click a column label.

Add: Adds an OBS element.

Del./Merge: Deletes the selected OBS element or merges its WBS assignments into the parent OBS element.

Cut: Cuts the selected element so you can move it to a new position in the OBS. Select a new position, and click Paste.

Copy: Copies the selected element so you can add it to another position in the OBS. Select an additional position, and click Paste.

Paste: Pastes an OBS element that you have copied or cut.

Arrows: Change the selected element's position in the OBS.

- You cannot copy an OBS element's work breakdown structure assignments. You can only copy an OBS element's general information.
- The arrow buttons are only available in the hierarchy display and Chart view.
- To expand or collapse OBS hierarchy elements, right-click in the OBS and choose Expand All or Collapse All.

Override Status Updates dialog box

Use the Override Status Updates dialog box to make changes to values in the selected status updates before applying the update to the associated activities.

Activity ID and Name: The ID and name of the activity to which the status update was made.

WBS: The WBS assigned to the activity being updated.

Submitted User: The name of the user that submitted the status update.

Changed Field Name: The name of the fields that were changed during the status update.

Old: The value of the field prior to the status update.

New: Type the new value you want to assign to the field.

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Notify Team Member by Email: Mark this box to send an email to the team member who submitted each update to tell them their update has been rejected.

Page Setup dialog box

The Page Setup dialog box contains the following tabs:

- Page tab - Page Setup dialog box
- Margins tab - Page Setup dialog box
- Header tab - Page Setup dialog box
- Footer tab - Page Setup dialog box
- Options tab - Page Setup dialog box (not available for Reports)

In addition, the following fields and buttons are available in the Page Setup dialog box:

Default: Click to use the default values.

Apply: Click to see your selections without closing this dialog box.

Page tab - Page Setup dialog box

Use the Page Setup, Page tab to specify the page orientation, scaling, and paper size for the layout or report currently displayed.

Orientation

Portrait: Choose to apply a vertical layout to the displayed report.

Landscape: Choose to apply a horizontal layout to the displayed report.

Scaling

Adjust to % normal size: Choose to increase or reduce the printed size of the displayed report according to a percentage of the normal size. Type a percentage or click the arrows to select a new percent.

Fit to Pages) wide by tall: Choose to explicitly set the number of pages wide (the horizontal pages) and the number of pages tall (the vertical pages) for the displayed report. Type or click the arrows to select a new number of pages wide and tall.

Fit timescale to page(s) wide: (option not available for Reports) Choose to compress spacing and set the number of pages wide (the horizontal pages) for the displayed layout. Type or click the arrows to select a new number of pages wide.

Paper Size

Paper size: Select the size of the paper on which you want to print the displayed report. The available sizes correspond to the installed printer, or the printer you select, if more than one is available.

Width: Displays the width of the selected paper size.

Height: Displays the height of the selected paper size.

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Password tab - User Preferences dialog box

The Password tab enables you to change your password.

Password: Click to add or change your application password. Passwords must contain at least one character.

- If P6 Professional is running in LDAP authentication mode, password management is handled through the directory server. You cannot change your password through the module and the Password tab does not appear in the User Preferences dialog box.

Personal Information tab - User Preferences dialog box

The Personal Information tab enables you view the information that is stored about you in P6 Professional.

Forget User Acceptance: Click this button if you want to withdraw your previous agreements to consent notices.

Predecessor Columns dialog box

Use the Predecessor Columns dialog box to specify which columns you want to display under the Predecessors tab of the Activity Details. You can also specify the order in which the columns display.

Available Options: Lists columns that do not appear in the current Predecessors tab display.

Selected Options: Lists columns that appear in the current Predecessors tab display.

 Adds the selected available column to the display.

 Includes all available columns in the display.

 Removes the selected column from the display.

 Removes all columns from the display.

 Moves the selected column's position in the display to the right.

 Moves the selected column's position in the display to the left.

Apply: Applies your changes without closing this dialog box.

Default: Applies the default column display format.

Edit Column: Enables you to change the selected column's title and alignment in the display.

Preview Changes to Project dialog box

Use the Preview Changes to Project dialog box to choose which changes made to a reflection should be merged into the source project.

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Group Changes by:

Subject Area: Shows all changes made to the project by table (activity, codes, documents, issues, etc). Activity IDs will appear several times under the appropriate subject area band.

Activity: Shows all changes made to an activity under an activity band. The Activity ID appears as a band. Any changed areas for that activity appear in the corresponding band. If any changes have been made to a project or WBS, these will also be displayed in their respective banding.

Select All: Marks all check boxes. Note that changes are not actually merged until you press the Merge Changes button.

Clear All: Clears all check boxes. Since all check boxes are selected by default, this option may be used to quickly mark a few check boxes by clearing all check boxes first.

Display: Reflection Differences: Displays a menu that permits you to perform the following operations: copy, select all, find, find next, print preview. expand all, and collapse all.

Status: Identifies the status of the field and includes the following values:

- **Added:** Indicates the field and its corresponding value is present in the reflection, but not in the source project.
- **Updated:** Indicates the field is present in both the reflection and source projects, but its corresponding value is different in either of the projects.
- **Not in Reflection:** Indicates the field is in the source project but is not in the reflection. The field has either been deleted from the reflection or the field has been added to the source project after the reflection was created. Note that merging will not necessarily remove items from the source project that have been deleted from the reflection. If major elements of a project have been deleted from the reflection, you will have to manually delete them from the source project if you do not want to keep the elements in the source project. Elements that are not deleted during a merge include Activities, Resource Assignments, WBS elements, Work Products and Documents, Project Expenses, and Project Issues.
- **Duplicate Record:** Appears if a duplicate threshold or resource assignment record is found.

Field: Identifies the fields that have changed in the reflection.

Value before merging: Identifies data that populates this field in the source project.

Value after merging: Identifies data that populates this field in the reflection.

Prior to merging:

Create a copy of source project (x) as a baseline: Mark this check box to create a baseline to the source project which you can use to rollback the changes you made with this dialog box.

Create a backup file (.xer) of source project (x): Mark this check box to create a XER file which you can use to rollback the changes you made with this dialog box via an XER import.

: Click to choose a location to save the XER file to.

After merging:

Keep reflection (x): Mark this radio button to keep the reflection in the database after merging it with the source project.

Delete reflection (x): Mark this radio button to clean up the database by deleting the reflection after merging it with the source project.

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Replace reflection (x): Mark this radio button to replace the reflection with an updated reflection based on the current data in the source project after the merge.

Print Preview dialog box

Use the Print Preview dialog box to preview the selected report before printing or saving the report.

 Allows you to define the displayed report's header and footer, margins, print size, and page orientation.

Allows you to select the default printer, print size, and page orientation.

 Prints the displayed report.

 Outputs the report to an HTML file and location you specify and automatically launches your default browser to display the report.

 Displays the first page of the displayed report.

 Displays the next page to the left, if multiple pages are printed horizontally.

 Displays the next page to the right, if multiple pages are printed horizontally.

 Displays the previous page back, if multiple pages are printed vertically.

 Displays the next page forward, if multiple pages are printed vertically.

 Displays the last page of the displayed report.

 Magnifies your view of the displayed report.

 Reduces your view of the displayed report.

 Opens Help.

 Closes this dialog box.

Progress Line tab - Bar Chart Options dialog box

Progress Line

Select to show a progress line on the Gantt chart.

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- A progress line provides a visual representation of the variance between selected criteria such as the start or finish dates of activities in the current project versus the baseline project, or the progress of an activity based on its remaining duration or percent complete.

Size: Type or select the value between 1 and 10 points to set the thickness of your progress line.

Color: Click to choose a color for your progress line.

Baseline to use for calculating progress line: Select a baseline to use for your progress line.

Based on difference between current and baseline activity's: Choose this option if you want the progress line drawn based on the difference between current and baseline activity's start or finish dates. From the drop down list, select Finish Date to calculate the progress line based on the variance between activity finish dates in the current project versus the baseline project, or select Start Date to calculate the progress line based on the variance between the baseline start and the current start.

Display the baseline bar when using this option.

By connecting progress points based on activity's: Choose this option if you want the progress line drawn by connecting progress points based on each activity's remaining duration or percent complete. From the drop down list, select % Complete to calculate the progress point based on the activity's percent complete (which is the same as viewing the % Complete bar), or select Remaining Duration to calculate the progress point based on each activity's remaining duration.

For Remaining Duration, the progress line is drawn to activities that have started or that should have started (when the project baseline start is earlier than the current data date) relative to the baseline start and finish dates.

You must display the baseline bar when using this option.

Proj Codes tab - Project Details dialog box (from Tracking window)

Project Code, Code Value, and Code Description: Each project code assigned to the project, along with the corresponding code value and description.

Project Access tab - Users dialog box (P6 Professional Only)

Responsible Manager: Lists the organizational breakdown structure (OBS) element whose project information the selected user can access. A user can only access project information that relates to the specified responsible manager. To sort the display, click the Responsible Manager column label.

Security Profile: Lists the selected user's project profile, or access privileges, for projects assigned to the corresponding responsible manager. Each project profile has specific access privileges associated with it. To change a user's project profile, double-click it. To sort the display, click the Security Profile column label.

Assign: Click to assign the selected user access to an OBS element's project information.

Remove: Click to remove the selected user's access to the selected OBS element's project information.

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Project Checker Dialog Box

Use the Project Checker to evaluate the project data in relation to unique key constraints, foreign key constraints, and P6 Professional business rules. The report checks for problems with unique key constraints, foreign key constraints, and violations of the P6 Professional business rules.

Select Projects

Available Projects: The list of all projects in the database, grouped by EPS.

Add to list: Moves the selected projects to the Selected Projects list.

Remove from list: Removes the selected projects from the Selected Projects list.

Selected Projects: The list of projects against which the project checker will report.

Options

Business Rule Checks: Choose to check for business rule violations, including orphaned and mismatched data.

Foreign Key Checks: Choose to check for missing foreign keys.

Unique Key Checks: Choose to check for violations of unique key rules.

Report

Save Report To: The path and filename to use for saving the report file.

Group By Options: Choose to group the report output according to the options you selected. If you do not select this option, the report will list all check results as a flat list.

Overwrite Existing: Choose to overwrite existing reports in the file location. If you do not select this option, the date and time in reverse notation will be appended to the report file name.

Run Priority Checks Only: Choose to run only Important and Significant checks. If you do not select this option, all checks will be run, including Moderate and Low severity checks.

Report Errors Only: Choose to report only the errors found by the Project Checker. This reduces the length of the report because checks that did not find any errors are not included in the report. If you do not select this option, the report lists all checks that were run, even if the check found no errors.

Project Code Definitions dialog box

Use the Project Code Definitions dialog box to create, edit, and delete project codes. You can use these codes to sort, filter, group, and report on project data across the enterprise.

Display Options bar: Click to search for a specific project code.

Project Code: Lists project codes.

Secure Code: Mark the checkbox for codes you want to define as viewable only to users with the appropriate access rights. Clear the checkbox to make this code and its values visible to all users. Using this feature requires the Edit Secure Codes privilege.

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Project Code Name: The name of the selected project code. You can type a new name.

Max Length: The maximum number of characters the selected code's values may have. Type or click the arrows to select a new number.

Add: Adds a project code.

Delete: Deletes the selected project code.

Shift Up: Moves the selected code to a higher position in the display. This changes the order in which the codes display when you assign a code to a project.

Shift Down: Moves the selected code to a lower position in the display. This changes the order in which the codes display when you assign a code to a project.

Project Codes dialog box

Use the Project Codes dialog box to create, edit, and delete global and project codes and values. Use these codes and values to sort, filter, group, and report activity information.

Select Project Code: The name of the current project code. You can select a different code.

Modify: Allows you to create, modify, or delete project codes.

Display Options bar: Click to search for a specific project code value and change the project codes display.

Code Value: Lists code values for the current project code. To change a value, double-click it. To sort the display, click the Code Value column label.

Code Description: Lists each project code value's description.

Add: Adds a value to the current project code.

Delete: Deletes the selected value from the current project code.

Cut: Cuts the selected code value so you can move it to another position in the list. Select a new position, and click Paste.

Copy: Copies the selected code value so you can quickly create a similar value in another position in the list. Select a new position, and click Paste.

Paste: Pastes a code value you copied or cut.

Arrows: Moves the selected value to a different position in the display. This changes the order in which the values display when you assign a value to an activity.

- A project code value can be associated with one user.

Project Details dialog box (from Tracking window)

Use the Project Details dialog box to view general information about the selected project. To display the Project Details dialog box from the Tracking window, select a project, right-click, then click Project Details.

The Project Details dialog box contains the following tabs:

- General tab - Project Details dialog box (from Tracking window)
- Status tab - Project Details dialog box (from Tracking window)

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- Proj Codes tab - Project Details dialog box (from Tracking window)
- Summary tab - Project Details dialog box (from Tracking window)

Project Manager Delegate dialog box (P6 EPPM Only)

Use the Project Manager Delegate dialog to assign delegate timesheet approvers for your projects and to activate delegation responsibility. You can assign delegates separately from activating the delegated responsibility. For example, if you will always delegate timesheet approval responsibilities for a project to the same person when you are out of the office, you can select that user and click Apply to assign them as a delegate. At a later date, you can mark the checkbox next to the projects for which you want to delegate approval responsibilities and click Apply to activate the delegation responsibilities to the associated users.

Search: Type to search for a project for which you want to delegate approvals responsibility.

Project ID: The ID of the project.

Project Name: The Name of the project.

Delegate: The username of the user to whom approval responsibility will be delegated.

Apply: Click to activate timesheet approval responsibility for the selected projects to the associated users.

Project Portfolios dialog box

Use the Project Portfolios dialog box to view and change general information about the selected portfolio. You can also add and delete portfolios. The top portion of the Project Portfolios dialog box contains information about all available portfolios and lists the following kinds of portfolios:

- *global* portfolios available to all users;
- *multiple user* portfolios available to you and other users;
- *user* portfolios you have created for your own exclusive use.

Portfolios can be:

- *manual* portfolios that include projects added to the portfolio manually;
- *filtered* portfolios that select the projects to include in a portfolio on the basis of criteria you specify. Filtered portfolios must be created in P6.

The lower portion is divided into tabs that display specific information about a selected portfolio. Select each tab name below to read about its features.

- General tab - Project Portfolios dialog box
- Projects tab - Project Portfolios dialog box
- User Access tab - Project Portfolios dialog box

In addition, the following fields and buttons are available in the Project Portfolios dialog box.

Display Options bar: Click to display portfolio details; find a specific portfolio; and change the font, colors, and row height of items in the Project Portfolios dialog box.

Portfolio Name: The name of each available portfolio.

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Add: Click to add a new portfolio.

Delete: Click to delete the selected portfolio.

Cut: Click to cut the selected portfolio so you can move it to another location.

Copy: Click to copy the selected portfolio so you can add it to an additional location.

Paste: Click to paste a portfolio that you have either copied or cut.

Project tab - CPP Template dialog box

Use the Project tab of the Template dialog box to specify the PARSID, date, and revision number of the export.

PARSID: The Project Assessment and Reporting System identifier for the project. This should be an integer between one and four digits.

CPP Status Date: The contractor's "as-of" date of the project.

This is usually the Data Date of the project and should not be more than one day earlier or later than the project Data Date.

Revision: The revision of the project.

$Schema: The JSON schema for the project. You cannot change the value of this field.

Project tab - Import Options dialog box

Use this tab to select an import action when the same data exists in the import file and project being updated. Select Delete to delete those values in the database that are not contained in the file you are importing.

Data Type: The type of project data for import.

Import Action: Determines what action to take when importing:

Keep Existing: Retains data in the existing project and does not overwrite it with the updated data or adds new data if the record does not exist and you have the appropriate security privileges.

Update Existing: Overwrites data in the existing project with updated data and adds new data if the record does not exist.

Do Not Import: Retains data in the existing project and does not import the updated data.

Delete: Determines whether to delete the selected item.

Project tab - IPMDAR Template dialog box

Use the Project tab of the Add/Modify Template dialog box to specify project level codes and user defined fields to be exported to an IPMDAR file.

Template Name: The name of the template that will show in the Select Template dialog box.

Project Codes

Select the project codes to export.

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Project UDFs

Select the project user defined fields to export.

Project tab - Modify Template or View Template dialog box (P6 EPPM Only)

Use this tab to select an import action when the same data exists in the Microsoft Project XML import file and project being updated. Select Delete to delete those values in the database that are not contained in the file you are importing.

Data Type: The type of project data for import.

Import Action: Determines what action to take when importing:

Keep Existing: Retains data in the existing project and does not overwrite it with the updated data or adds new data if the record does not exist and you have the appropriate security privileges.

Update Existing: Overwrites data in the existing project with updated data and adds new data if the record does not exist.

Do Not Import: Retains data in the existing project and does not import the updated data.

Delete: Determines whether to delete the selected item.

Project tab of the UN/CEFACT Export Template dialog box

Use the Project tab of the Template dialog box to specify information about the project.

Contract ID: The contract number.

Reporting Start Date: The effective start date of the XML file.

Reportng End Date: The effective end date of the XML file.

Project Contact

First Name: The first name of the project contact.

Last Name: The last name of the project contact.

Job Title: The project contact's job title.

Email: The project contact's email address.

Phone Number: The project contact's phone number.

Ext: The project contact's phone extension.

Country Code: The project contact's country code.

Project Notes

Note1: The type for the note field.

Content: The project notebook topic to export as Note1 in the file.

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- The project contact is the person who is responsible for overseeing the project, for example the Project Manager.
- There are five notes fields.

Project Tailoring Rationale dialog box (P6 Professional Only)

Use the Project Tailoring Rationale dialog box to view and edit explanations of the open project, such as a history or notable events.

Rationale History: Previous rationales for the open project's features according to date and author.

Rationale Notes: New rationales. You can type in this field.

Add: Closes this dialog box and saves the rationale you entered.

Project Users dialog box

The Project Users dialog box displays a list of users who are currently using the project(s) you have selected in the Open Project dialog box. When you select an EPS node in the Open Project dialog box, the Project Users dialog box displays a list of users who are currently using all projects within the selected EPS node.

Project ID: Lists the ID of the project opened by each user.

Access Level: Lists each user's access type for the project. A user's access type may be Read Only, Shared, or Exclusive.

When connected to a P6 EPPM database: Note that if an asterisk (*) appears next to a Shared access level (Shared*), it means the project is opened in P6.

Login Name: Lists login names for all users who have the project(s) open.

Personal Name: Lists the personal names for all users who have the project(s) open.

Office Phone: Lists the telephone number of each user accessing the open project.

Logon Time: Lists the date and time each user opened the project.

Host Name: Lists the computer name of each user accessing the open project.

Application ID: Lists the ID of the application each user is using to access the open project.

OS User Name: List the operating system user name of each user accessing the open project.

Refresh: Updates the displayed information.

Project/Activity Usage Profile Options dialog box

Use the Project/Activity Usage Profile Options dialog box to view and edit the data in a Project Profile or Activity Usage Profile.

The following tabs are available:

- Data tab - Project/Activity Usage Profile Options dialog box
- Graph tab - Project/Activity Usage Profile Options dialog box

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In addition, the following button is available in the Project/Activity Usage Profile Options dialog box:

Apply: Applies the selected Project/Activity Usage Profile settings without closing this dialog box.

Projects tab - Project Portfolios dialog box

Project: The name of each project in the selected portfolio.

Assign: Click to add projects to the selected portfolio.

Remove: Click to remove projects from the selected portfolio.

Properties dialog box

Use the Properties dialog box to define settings for the selected report component and any report components that contain your selection.

The Properties dialog box contains the following tabs:

- Report tab - Properties dialog box
- Source tab - Properties dialog box
- Row tab - Properties dialog box
- Cell tab - Properties dialog box
- Line tab - Properties dialog box
- Image tab - Properties dialog box

Publish Project Web Site dialog box

Use the Publish Project Web Site dialog box to save the project information you specify as HTML files. You can then publish these files as a Web site on an intranet or the Internet.

The Publish Project Web Site dialog box contains the following tabs:

- General tab - Publish Project Web Site dialog box
- Topics tab - Publish Project Web Site dialog box
- Graphics tab - Publish Project Web Site dialog box
- Reports tab - Publish Project Web Site dialog box

In addition, the following button is available in the Publish Project Web Site dialog box:

Publish: Saves the project information you specify as HTML files.

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Rate Types tab - Admin Preferences dialog box (P6 Professional Only)

The Rate Types tab enables you to provide a title for each of the five available Price/Unit fields. The title should describe what the rate type represents, for example, Government Rate.

Default Title: Lists the five Price/Unit fields available in P6 Professional.

User-defined Title: Edit the user-defined title for each Price/Unit field you want to use. For example, you could rename the Price/Unit 2 field to Commercial Rate.

Recalculate Assignment Costs dialog box

Use the Recalculate Assignment Costs dialog box to update resource and role assignment costs for activities in the open project.

Synchronize Overtime Factor while recalculating cost: Mark to also include the overtime factor for the resource when recalculating cost.

Recalculate: Recalculates resource and role assignment prices.

Reject Status Updates dialog box

Use the Reject Status Updates dialog box to review reject status updates from team members, providing a comment about why the update was rejected, and choosing whether to send an email to notify team members that the status updates have been rejected.

Activity ID and Name: The ID and name of the activity to which the status update was made.

Project: The project of the activity being updated.

WBS: The WBS assigned to the activity being updated.

Submitted User: The name of the user that submitted the status update.

Changed Field Name: The name of the fields that were changed during the status update.

Old: The value of the field prior to the status update.

New: The value of the field selected during the status update.

Reason for Rejection: Enter the reason you are rejecting the update against the relevant fields.

Comments: Type any overall comments you want to make about why you are rejecting the status updates.

Notify Team Member by Email: Mark this box to send an email to the team member who submitted each update to tell them their update has been rejected.

Relationships and Assignments tab - Check Schedule dialog box

Use the Check Schedule dialog box, Relationships and Assignments tab to specify settings to use for analyzing logic, lags, relationships, and cost assignments to activities in the schedule.

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Parameters section

Logic - Activities missing predecessors or successors: Mark to analyze the percentage of activities that have no predecessor or successor. Started activities and start milestones are not required by this analysis to have predecessors. Completed activities and WBS summary activities are not included in this analysis. Specify the target for the acceptable percentage of activities that can have no predecessor or successor.

Negative Lags - Relationships with a lag duration of less than 0: Mark to analyze the percentage of relationships with a lag duration less than zero. Relationships between completed activities are not included in this analysis. Specify the target for the acceptable percentage of relationships that can have negative lag.

Positive Lags - Relationships with a positive lag duration: Mark to analyze the percentage of relationships with positive lag applied. Relationships between completed activities are not included in this analysis. Specify the target for the acceptable percentage of relationships that can have lag.

Long Lags - Relationships with a lag duration greater than:Mark to analyze the percentage of relationships with a lag duration greater than the value you specify. You can specify the value in minutes, hours, days, weeks, months, or years but the duration will be converted to hours according to the Hours per Time Period settings. Relationships between completed activities are not included in this analysis. Specify the target for the acceptable percentage of relationships that can have a lag duration over the value you specify.

Relationship Types - The majority of relationships should be Finish to Start: Mark to analyze relationship types. Relationships between completed activities are not included in this analysis. Specify the target for the acceptable percentage of relationships that must have a relationship type of Finish to Start.

Out of Sequence - Activities which are completed or in-progress before predecessor: Mark to analyze the percentage of activities that are out of sequence in relation to their predecessors. Specify the target for the percentage of activities that is acceptable to have started or be in progress before their predecessor is completed.

Resource / Cost - Activities that do not have an expense or a resource assigned: Mark to analyze the percentage of activities that have not been assigned at least one resource, role, or expenses. These activities might contribute to the miscalculation of project costs. An activity will be considered to pass this test if at least one resource, role, or expense has been assigned, regardless of whether any costs have been assigned to the resources or expenses. Milestones, WBS Summary activities, and Level of Effort activities are not included in this analysis. Specify the target for the acceptable percentage of activities that can have no resources or expenses assigned.

Dangling Activities section

Dangling Start - Activities with start dates that are not driven by predecessors: Mark to identify activities with start dates that are not driven by the activity's predecessors, including activities with only finish-to-finish or start-to-finish relationships with their predecessors. If an activity's start date is not driven by its predecessors that activity can cause inaccuracies in the schedule and critical path calculation as well as affecting the calculations of milestones and completion dates. Specify the target for the percentage of activities for which it is acceptable that their start date is not driven by a predecessor activity.

Ignore in-progress activities for dangling start activities: Mark to disregard activities that are in progress when checking for activities with start dates not driven by their predecessors.

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Dangling Finish - Activities with finish dates that do not drive successorts: Mark to identify activities with finish dates that do not drive the activity's successors. If an activity's finish date does not drive its successors that activity can cause inaccuracies in the schedule and critical path calculation as well as affecting the calculations of milestones and completion dates. Specify the target for the percentage of activities for which it is acceptable that their finish date does not drive successor activities.

Ignore activities with soft constraints: Mark to disregard activities with soft constraints when checking for activities with finish dates that do not drive successors. Soft constraints are Start On, Start On or After, Start On or Before, Finish On, Finish On or After, Finish On or Before, and As Late As Possible

Ignore activities with hard constraints: Mark to disregard activities with hard constraints when checking for activities with finish dates that do not drive successors. Hard constraints are: Mandatory Start and Mandatory Finish.

Renumber Activity IDs dialog box

Use the Renumber Activity IDs dialog box to specify how to create activity IDs when you copy and paste an activity.

This dialog box does not appear when you copy a project.

Increment Activity ID Based on Selected Activities: Select to increment activity IDs using the increment value you specify. For example, if the increment value is set to 10 and you select to copy activity ID AF567, the activity ID increments to AF577 when it is pasted. However, if an activity ID of AF567 already exists, then the pasted activity ID increments to AF587.

Auto-Number: Select to renumber activity IDs using the criteria you specify. For example, if the copied activity ID is AF567 and the increment level is set to 50, the Prefix is set to KK, and the Suffix is 400, then the pasted activity ID is KK400. However, if an activity ID of KK400 or an activity ID of KKxxx, where xxx is higher than 400, already exists, then the activity ID becomes the next available KKxxx number.

Replace Beginning Characters: Select to replace the beginning characters of the copied activity IDs with the characters specified in the Replace With text field. Type the number of beginning characters to be replaced in the Number of Characters text field. For example, suppose you type 2 in the Number of Characters text field and JY in the Replace with text field. You then select to copy the activity ID AF567. When pasted, that activity ID changes to JY567, unless that activity ID already exists. If that activity ID already exists, then the Duplicates dialog box appears and you type another activity ID.

Do not show this dialog again: Mark to indicate that you do not want this dialog box to appear next time you copy an activity or work breakdown structure element.

Renumber Activity IDs dialog box

Use the Renumber Activity IDs dialog box to specify how to renumber selected activity IDs in the current project and, if applicable, to renumber the same activity IDs in all applicable baselines for this project. The selected activities can be renumbered based on values you specify.

Increment Activity Based on Selected Activities: Select to increment activity IDs using the increment value you specify. For example, suppose you select activity IDs AB100, AB130, AB150, AB160, and AB180. If you type 100 in the Increment Value text field, the selected activity IDs are renumbered AB200, AB230, AB250, AB260, and AB280.

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- Increment Activity Based on Selected Activities renumbers selected activity IDs in the order from largest to smallest. So in the example above, activity ID AB180 is first renumbered to AB280, then AB160 is renumbered to AB260, and so on. If P6 Professional detects that it would renumber a selected activity ID to an activity ID that already exists, exclusive of those you selected, then the Duplicates dialog box appears. You use that dialog box to enter another activity ID.

Auto-Number: Select to renumber activity IDs using the criteria you specify. For example, suppose you select activity IDs AB100, AB130, AB150, AB160, and AB180. If you type AB in the Prefix text field, 100 in the Suffix text field, and 10 in the Increment Value text field, the selected activity IDs are renumbered AB100, AB110, AB120, AB130, and AB140.

- Auto-Number renumbers selected activity IDs based on the sort order of activities in the activity table. The first activity in the sort order is renumbered using the values you type in the Prefix and Suffix text fields. The remaining selected activities are renumbered using the same suffix and prefix, and they are incremented using the value you type in the Increment Value text field. If P6 Professional detects that it would renumber a selected activity ID to an activity ID that already exists, exclusive of those you selected, then the Duplicates dialog box appears. You use that dialog box to enter another activity ID.

Replace Beginning Characters: Select to replace the beginning characters of the selected activity IDs with the characters specified in the Replace With text field. Type the number of beginning characters to be replaced in the Number of Characters text field. For example, suppose you select activity IDs AB100, AB130, AB150, AB160, and AB180. If you type 3 in the Number of Characters text field and CD5 in the Replace with text field, the selected activity IDs are renumbered to CD500, CD530, CD550, CD560, and CD580.

- If P6 Professional detects that it would renumber a selected activity ID to an activity ID that already exists, exclusive of those you selected, then the Duplicates dialog box appears. You use that dialog box to enter another activity ID.

Renumber Selected Activities in Baselines: Mark to renumber the selected activity IDs in all applicable baselines for this project. (P6 Professional does not renumber activities in baselines where duplicate activity IDs would be created.) Be aware that if you clear this checkbox, all renumbered activities are disconnected from the baselines and are treated as new activities.

When this checkbox is marked, P6 Professional searches for baselines where duplicate activity IDs would be created. If it finds none, then the current project and its associated baselines are renumbered, and the baseline renumbering is committed to the database with no chance for you to undo the renumbering. If P6 Professional identifies baselines where duplicate activity IDs would be created, then P6 Professional lists those baselines and presents you with a yes or no choice (in the Baseline Duplicates dialog box) whether to continue renumbering.

- This checkbox is disabled if no baselines exist for the project.
- If you do not mark the Renumber Selected Activities in Baselines checkbox, you can subsequently update the baselines to reflect the new activity IDs, but you need to be aware of the following: Because the renumbered activities are treated as new activities by the update baseline tool, you must select the Add New Activities and Activity Data (Except Actuals) and the Delete from Baseline Any Activities No Longer in the Current Project options in the Update Baseline dialog box to add the new renumbered activities to the baseline and to remove the original activities. Doing this updates the baseline with the renumbered activities, but the activities will have the current data in the baseline, rather than the original activity data.

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Replace selected resources with dialog box

Use the Replace selected resources with dialog box to replace the selected resource for an activity.

Display Options bar: Lists options for changing resource columns, filters, grouping and sorting, font, and colors.

Resource ID: Lists the ID of each resource in your organization.

Resource Name: Lists the name of each resource in your organization.

Primary Role: Indicates the primary role assigned to a resource.

Default Units/Time: Lists the default units/time for each resource in your organization.

Select: Applies your selection and closes this dialog box.

Clear: Removes the selected resource from your current activity, or issue.

- If resource security is enabled, you can only view resources from under the resource root node you have access to or from current project resources.

Replace selected role(s) with dialog box

Use the Replace selected role(s) with dialog box to replace an existing role assignment.

Display Options bar: Click to change the roles display.

Role ID: Lists role IDs. To sort the display, click the Role ID column label.

Role Name: Lists each role's name. To sort the display, click the Role Name column label.

Select: Assigns the selected role.

Clear: Clears the role assignment.

Report Groups dialog box

Use the Report Groups dialog box to define report groups for organizing your global and project reports.

Display Options Bar: Click to search for a specific report group or change the report groups display.

Report Group: Lists names of report groups. To change a report group name, double-click it. To sort the list, click the Report Group column label.

Add: Adds a report group.

Delete: Deletes the selected report group.

Cut: Cuts the selected report group so you can move and paste it to a new position in the report group outline.

Copy: Copies the selected report group so you can copy it to an additional position in the report group outline.

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Paste: Pastes a report group that you have either copied or cut.

Arrows: Change the selected report group's position in the report group outline.

- The arrow buttons are available only in the outline display.
- The maximum number of report group levels is unlimited. You can have any number of report groups in each level.

Report Preferences dialog box (P6 EPPM Only)

Use the Report Preferences dialog box to define three default sets of headers, footers, and custom labels for reports.

These settings apply to all projects and can be viewed by all users, but you must have Add/Edit/Delete Global Reports global privilege, as defined in P6, to edit these settings.

First Set: Choose to define a header, footer, or custom text label for reports.

Second Set: Choose to define a second header, footer, or custom text label for reports.

Third Set: Choose to define a third header, footer, or custom text label for reports.

Header Label 1, 2, or 3: The custom text that will be inserted into any report containing a Header Label 1, Header Label 2, or Header Label 3 global variable text cell, when printed.

You can type new header text.

Footer Label 1, 2, or 3: The custom text that will be inserted into any report containing a Footer Label 1, Footer Label 2, or Footer Label 3 global variable text cell, when printed.

You can type new footer text.

Custom Label 1, 2, or 3: The custom text that will be inserted into any report containing a Custom Label 1, Custom Label 2, or Custom Label 3 global variable text cell, when printed.

You can type new custom text.

Report tab - Properties dialog box

Use the Report tab to define general properties for the displayed report. This includes the report's title, background color or image, text styles, timescale and reporting interval, and page setup options such as orientation, margins, headers and footers.

General Settings

Title: The report's title. You can type a new title.

The compiled report does not automatically include the report's title.

Background image: Adds a background image to the report.

Report font styles: Displays style settings for text in the report. You can edit the settings.

Page setup: Enables you to define the report's: margins, header, footer, orientation, print scale, and the size of the paper on which you want to print the report.

Timescale options: Enables you to specify the timeperiod for which you want to compile and report project information and the interval you want to use to compile time-distributed report data.

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Viewing Options

Measurement units: The unit of measurement used to define the report's layout options. This includes the width and height of cells and rows. The ruler at the top of the Report Canvas displays this unit of measurement. From the Measurement Units list, select a new unit of measurement.

Width: The width of the Report Canvas area used to position report components. You can change the width.

Reports tab - Admin Preferences dialog box (P6 Professional Only)

The Reports tab enables you to define three default sets of headers, footers, and custom labels for reports.

First Set: Choose to define a header, footer, or custom text label for reports.

Second Set: Choose to define a second header, footer, or custom text label for reports.

Third Set: Choose to define a third header, footer, or custom text label for reports.

Header Label 1, 2, or 3: The custom text that will be inserted into any report containing a Header Label 1, Header Label 2, or Header Label 3 global variable text cell, when printed.

You can type new header text.

Footer Label 1, 2, or 3: The custom text that will be inserted into any report containing a Footer Label 1, Footer Label 2, or Footer Label 3 global variable text cell, when printed.

You can type new footer text.

Custom Label 1, 2, or 3: The custom text that will be inserted into any report containing a Custom Label 1, Custom Label 2, or Custom Label 3 global variable text cell, when printed.

You can type new custom text.

Reports tab - Publish Project Web Site dialog box

Include in project web site: Mark to include reports on the project Web site.

Report Name: Specify the reports you want to include on the project Web site.

Resource Analysis tab - User Preferences dialog box

The Resource Analysis tab enables you to specify which projects are included in remaining value calculations and which dates and time interval are used to calculate time-distributed data for resource spreadsheets and profiles.

All Projects

All closed projects (except what-if projects): When electing to show remaining values for open versus closed projects, choose this option to include data for all closed projects other

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than what-if projects. Live data displays for open projects and stored summary data for closed projects.

All closed projects with leveling priority equal/higher than: When electing to show remaining values for open versus closed projects, choose this option to include data for all closed projects with a specific leveling priority.

Opened projects only: Choose this option when you want to include data for open projects only.

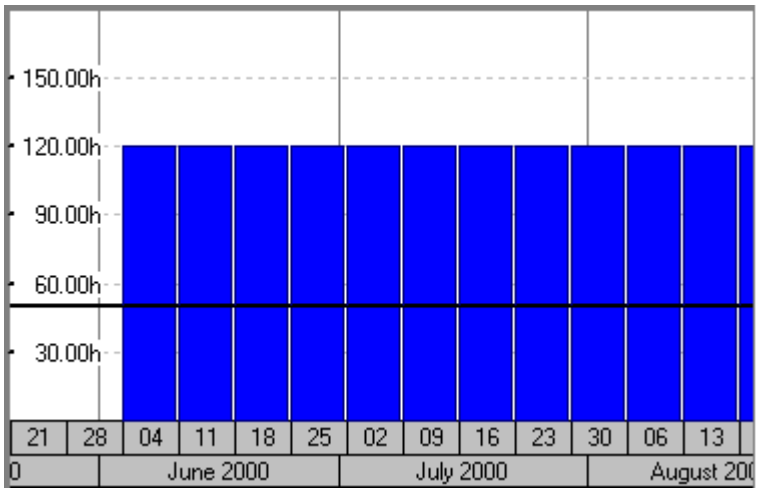
Time-Distributed Data

Remaining Early dates: When electing to show remaining values, choose this option to calculate values based on remaining start/finish dates.

Forecast dates: When electing to show remaining values, choose this option to calculate values based on forecast start/finish dates.

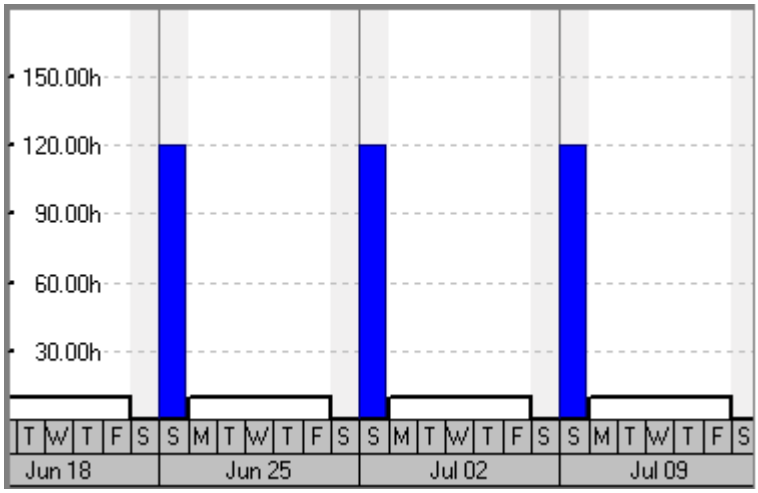
Interval for time-distributed resource calculations: Choose the time interval, such as day or week, that you want to use when storing live resource allocation information. Note that, if the layout's timescale interval is set lower than this interval, the calculated amount displays in the first timescale increment. For example, if you set the calculation interval to week and set the layout's timescale interval to day, the total for the week displays on the first day. Refer to the following graphics.

This graphic shows both the timescale and calculation intervals set to week.



This graphic shows the same data, but the timescale interval is set to day and the calculation interval is set to week.

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Display the Role Limit based on

Role limits are calculated and displayed in charts and spreadsheets (such as the Resource Usage Profile and Resource Usage Spreadsheet) based on the option you select below:

Custom role limit: Choose this option if you want to calculate role limits using the custom limits defined for each role in the Roles dictionary. You should only choose this option if role limits have been defined; if you select this option when role limits have not been defined, all roles will have a calculated role limit of zero.

Calculated primary resource's limit: Choose this option if you want to calculate role limits using the limits defined for each role's primary resource. This option is selected by default.

Exclude inactive resources: If you choose to display the role limit calculated according to the primary resources' limits, choose this option if you want to calculate the limit using only active resources.

Resource Assignment Columns dialog box

Use the Resource Assignment Columns dialog box to specify which columns you want to display under the Resources tab of the Activity Details. You can also specify the order in which the columns display.

Available Options: Lists columns that do not appear in the current Resources tab display.

Selected Options: Lists columns that appear in the current Resources tab display.

 Includes the selected available column in the display.

 Includes all available columns in the display.

 Removes the selected column from the display.

 Removes all columns from the display.

 Moves the selected column's position in the display to the right.

 Moves the selected column's position in the display to the left.

Apply: Applies your changes without closing this dialog box.

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Default: Applies the default column display format.

Edit Column: Allows you to change the selected column's title and alignment in the display.

Resource Assignment tab of Update Options - Update Baseline dialog box

When updating resource assignment data, include:

Choose to update existing resource/role assignment data and/or add new resource/role assignments. Choose to update the budgeted or planned and/or actual units and cost for the resource/role assignments.

Update existing resource and role assignments: Mark to update all resource assignment data such as UDF's Resource Codes, cost account, dates, and durations.

The following options are enabled only when a check mark is displayed in the Updating existing resource and role assignments check box.

Budgeted units and cost: Mark to include budgeted or planned units and costs related to existing resource and role assignments.

Actual units and cost: Mark to include actual units and costs related to existing resource and role assignments.

Add new resource and role assignments: Mark to include new resource and role assignments in the baseline.

Budgeted units and cost: Mark to include budgeted or planned units and costs related to new resource and role assignments.

Actual units and cost: Mark to include actual units and costs related to new resource and role assignments.

Activity resource assignment UDFs: Mark to include updated UDFs related to resource assignments for activities.

Activity resource assignment codes: Mark to include updated UDFs related to resource assignments for activities.

Resource Code Definitions and Role Code Definitions dialog boxes

Use the Resource Code Definitions dialog box to create, edit, and delete resource codes. You can use these codes to sort, filter, group, and report resource information in all projects. Use the Role Code Definitions dialog box to create, edit, and delete role codes. You can use these codes to sort, filter, group, and report role information in all projects.

Display Options Bar: Click to search for a specific code.

Resource Code or **Role Code:** Lists resource codes or role codes.

Secure Code: Mark the checkbox for codes you want to define as viewable only to users with the appropriate access rights. Clear the checkbox to make this code and its values visible to all users. Using this feature requires the Add and Delete Secure Codes privilege.

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Resource Code Name or **Role Code Name:** The name of the selected resource code or role code. You can type a new name.

Max Length: The maximum number of characters the selected code's values may have. Type or click the arrows to select a new number.

Add: Adds a code.

Delete: Deletes the selected code.

Shift Up: Moves the selected code to a higher position in the display. This changes the order in which the codes display when you assign a code to a resource or role.

Shift Down: Moves the selected code to a lower position in the display. This changes the order in which the codes display when you assign a code to a resource or role.

Resource Codes or Role Codes dialog box

Use the Resource Codes dialog box to create, edit, and delete resource codes. Use the Role Codes dialog box to create, edit, and delete role codes. You can use these codes to sort, filter, group, and report on project data across the enterprise.

Select Resource Code: The name of the current resource code. You can select a different code.

Select Role Code: The name of the current role code. You can select a different code.

Modify: Allows you to create, modify, or delete codes.

Display Options Bar: Click to search for a specific code value and change the codes display.

Code Value: Lists code values for the current code. To change a value, double-click it. To sort the display, click the Resource Code Value or Role Code Value column label.

Code Description: Lists each code value's description.

Add: Adds a value to the current code.

Delete: Deletes the selected value from the current code.

Cut: Cuts the selected code value so you can delete it or move it to another position in the list. Select a new position, then click Paste.

Copy: Copies the selected code value so you can quickly create a similar value in another position in the list. Select a new position, then click Paste.

Paste: Pastes a code value you have copied or cut.

Arrows: Moves the selected value to a different position in the display. This changes the order in which the values display when you assign a value to an activity.

- To expand or collapse individual elements of the code hierarchy, right-click in the hierarchy and choose Expand All or Collapse All.

Resource Curves dialog box

Use the Resource Curves dialog box to add, delete, or modify resource curves. Curves are used to allocate resources and costs over the duration of an activity.

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Display Options bar: Click to search for a specific curve or to preview how the dialog box will print.

Resource Curve Name: Lists the default and global resource curves. The ten default curves cannot be edited.

Add: Click to add a global resource curve. You are prompted to select one of the existing curves from which to copy the curve value percentages. You can add an unlimited number of global resource curves.

Delete: Click to delete a global resource curve. You cannot delete default curves.

Modify: Click to change curve value percentages for global resource curves. You cannot modify default curves.

Resource Shifts dialog box

Use the Resource Shifts dialog box to define shift calendars for resources.

Display options bar: Displays global shifts.

Shift Name: Lists shift calendar names.

Add: Click to add the name of a new shift calendar.

Delete: Delete the selected shift calendar.

Modify: Click to view or modify the work schedule for the selected shift calendar.

Resource tab - IPMDAR Template dialog box

Use the General tab of the Template dialog box to specify information about the contractor and general information about project and template.

Template Name: The name of the template that will show in the Select Template dialog box.

Resource Comments: Select the resource to export as resource comments.

Resource Codes

Select the resource codes to export.

Resource UDFs

Select the resource user defined fields to export.

Resource tab - Modify Template or View Template dialog box

Import

Choose the Microsoft Project field to import as the Resource ID: Choose whether you want to import the Resource Initials or the Resource Name from Microsoft Project to the Resource ID field in P6 Professional.

If you select **Resource Initials/Name** , only one resource is imported if multiple resources in Microsoft Project use the same initials/name.

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- If you are importing from a Microsoft Project .MPX file, this behavior can be modified by taking one of the following actions:
  - Choose the Add new resource option under If a resource already exists. Choosing the Add new resource option causes the system to append a hyphen followed by a sequential number to the Resource ID when it is imported.

  Or

  - Edit the Microsoft Project file and ensure that all Resource Initials/Names are unique with respect to the Resource ID length limit.

When P6 Professional is connected to a P6 Professional database, if you select Resource Name, up to the first 20 characters of the name are imported (based on your setting in the Admin Preferences, ID Lengths tab in P6 Professional). When connected to a P6 EPPM database, if you select Resource Name, up to the first 20 characters of the name are imported (based on your setting in the Application Settings in P6). If multiple resources in Microsoft Project use the same characters up to the specified ID Length, only one resource is imported. This behavior is affected by the options you choose under **If a resource already exists** . See the note above for additional information.

If resource security is enabled, some restrictions apply when importing resources.

If a resource already exists: Choose the method for importing resources that already exist in P6 Professional.

Keep existing resource - Retains the resource in the existing project and does not overwrite it with the resource from the import file.

Update existing resource - Overwrites the resource in the existing project with the resource from the import file.

Add new resource - Retains the resource in the existing project and adds a new resource for the resource in the import file. The system creates a Resource ID for the new resource by appending a hyphen followed by a sequential number to the Resource ID when it is imported.

If a resource does not exist: Mark Add New Resource if you want to add resources and their assignments from the import file to the existing project. This option only affects resources that do not currently exist in P6 Professional.

Import under resource: Click  to select the resource under which to place all resources from the import file that do not currently exist in P6 Professional. If resource security is enabled, and a resource you do not have privilege to access is selected, new resources will be added under the resource root node and resource security settings will be ignored.

Resource Usage/Role Profile Options dialog box

Use the Resource Usage/Role Profile Options dialog box to format the displayed Resource Usage/Role Profile. The profile options available depend on what you choose in the Display Options bar: resource vs. role; all projects vs. open projects, etc.

The Resource Usage/Role Profile Options dialog box contains the following tabs:

- Data tab - Resource Usage/Role Profile Options dialog box - for regular histograms
- Graph tab - Resource Usage/Role Profile Options dialog box

In addition, the following buttons are available in the Resource Usage/Role Profile Options dialog box:

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Apply: Applies the selected Resource Usage/Role Profile settings without closing this dialog box.

Preferences: Opens the Resource Analysis tab in the User Preferences dialog box so you can set preferences for the Resource Usage/Role Profile.

Resource Usage/Role Profile Options dialog box - for stacked histogram

Use the Resource Usage/Role Profile Options dialog box to format the displayed Resource Usage/Role Profile. The profile options available enable you to display a stacked histogram that uses different colors and patterns to represent multiple resource usage.

The following tabs are available:

- Data tab - Resource Usage/Role Profile Options dialog box
- Graph tab - Resource Usage/Role Profile Options dialog box - for stacked histogram

In addition, the following buttons are available in the Resource Usage/Role Profile Options dialog box:

Apply: Applies the selected Resource Usage/Role Profile settings without closing this dialog box.

Preferences: Opens the Resource Analysis tab in the User Preferences dialog box so you can set preferences for the Resource Usage/Role Profile.

Resources tab - Attribute Details dialog box

Resource table: Lists IDs and names of resources assigned to activities and/or roles in the selected attribute.

Resources tab - Import Options dialog box

Use this tab to map incoming resources to resource roles and to specify a resource node to import all incoming resource data present in the XML file.

Basic Action section:

Resources: Determines how resources are imported.

Insert New: Retains data in the existing project and adds any new data items.

Keep Existing: Retains data in the existing project and does not overwrite it with the updated data or adds new data if the record does not exist and you have the appropriate security privileges.

Update Existing: Overwrites data in the existing project with updated data and adds new data if the record does not exist.

Do Not Import: Retains data in the existing project and does not import the updated data.

Advanced Actions section:

Import Resources Under: Determines where the resource is imported.

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ID: Displays the Resource ID grouped by New and Saved. Data that is new in the XML file will be appear under New and data already saved in an the existing template will appear under Saved.

Name: Displays the name of the resource.

Type: Displays the type of resource.

New Name: Use this field to map an incoming resource to the one present in the database or rename an incoming resource's ID before import.

Resources tab - Roles dialog box

Resource: Lists IDs and names of resources assigned the selected role. To sort the display, click the Resource Code column label.

Proficiency: Lists each resource's skill level for the selected role.

Primary Role: Indicates the primary role assigned to the selected resource. To sort the display, click the Primary Role column.

Assign: Assigns the selected role to a resource.

Remove: Removes the selected resource from the selected role.

Resources tab - WBS Details dialog box

Resource table: Lists IDs and names of resources assigned to activities and/or roles in the selected WBS.

Responsibility tab - Organizational Breakdown Structure dialog box (P6 Professional Only)

Project ID/WBS Code: Lists the project ID/WBS code for which the selected OBS element is responsible.

Project Name/WBS Name: Lists the project name/WBS name for which the selected OBS element is responsible.

- All projects/WBS elements for which the OBS element is responsible are listed, regardless of the current portfolio you have open.

Risk Categories tab - Admin Categories dialog box (P6 Professional Only)

Use the Risk Categories tab to create, edit, and delete risk categories and hierarchies. You can use risk categories to categorize and standardize risks across projects.

Display Options bar: Click to search for a specific risk category.

Risk Category: Lists risk categories. To change a risk category, double-click it.

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Add: Adds a risk category.

Delete: Deletes the selected element.

Cut: Removes the selected element from the hierarchy

Copy: Copies the selected element.

Paste: Pastes the element that you have either copied or cut back into the hierarchy.

Arrows: Change the selected element's position in the hierarchy. This changes the order in which risk categories display when you assign a category to a risk.

Role in Use dialog box

Use the Role in Use dialog box to specify how you want to delete a role that is assigned to resources and/or activities.

Select Replacement Role: Choose to delete the selected role and reassign its resource and activity assignments to a replacement role you specify.

Delete Role(s): Choose to delete the selected role without reassigning its resource or activity assignments.

Roles dialog box

Use the Roles dialog box to add, edit, and delete roles. You can also use the Roles dialog box to assign roles to resources, define up to five price/unit rates for each role, and specify role availability over time.

The Roles dialog box contains the following tabs:

- General tab - Roles dialog box
- Assign Resources dialog box
- Units and Prices tab - Roles dialog box
- Codes tab - Roles dialog box

In addition, the following fields and buttons are available in the Roles dialog box:

Display Options bar: Click to search for a specific role or change your roles display.

Role ID: Lists role IDs. To sort the display, click the Role ID column label.

Role Name: Lists each role's name. To sort the display, click the Role Name column label.

Add: Adds a role.

Del./Merge: Deletes the selected role.

Cut: Cuts the selected role so you can delete it or move it to another position in the list. Select a new position, and click Paste.

Copy: Copies the selected role so you can quickly create a similar role in another position in the list. Select an additional position, and click Paste.

Paste: Pastes the role you copied or cut.

Arrows: Moves the selected role to a different position in the display.

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Roles tab - Attribute Details dialog box

Roles table: Lists IDs and names for roles assigned to activities in the selected attribute.

Roles tab - WBS Details dialog box

Roles table: Lists IDs and names for roles assigned to activities in the selected WBS.

Row tab - Properties dialog box

Use the Row tab to define settings for the selected row. This includes the row's height and background color. If the selected row is part of a data source, you can apply one or more filters to specify the information you want to compile for this row in the report.

General Settings

Height: The numeric height of the selected row according to the current unit of measurement. You can type a new number. To preview the row's height in the compiled version of the report, click Print Preview.

Color: Enables you to change the selected row's background color.

Edit filter: Enables you to create or edit filters for information compiled by the selected row.

- The Edit Filter button is available only if the selected row is part of a data source.

Run Batch dialog box

Use this dialog box to compile and print the selected report batch.

Batch Report: Lists the available batch reports.

Run Report dialog box

Use the Run Report dialog box to compile and print the selected report. You can also use this dialog box to compile and Email a report, and to compile a report and create a WP & Docs record for the report.

Print Preview

Choose to preview the selected report before printing it.

Directly to Printer

Choose to compile and print the selected report.

When connected to a P6 Professional database: If you are running the report batch through the Oracle Job Service, the report is sent to the default printer set on the job service machine.

Email Attachment

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Choose to generate the report and attach it to an Email. Creates an .htm file, and the file name corresponds to the report name.

HTML File

Choose to compile and save the selected report as an HTML file.

ASCII Text File

Choose to compile and save the selected report as a delimited text file (.txt).

Field Delimiter

If you choose ASCII Text File, select the character used to separate categories of information that you save in delimited text format (.txt).

Text Qualifier

If you choose ASCII Text File, select the character used to separate categories of information that you save in delimited text format (.txt), if the information contains the field delimiter you specify.

Output file

If you choose HTML File or ASCII Text File, click  to specify the file location and name where you want to save the report. The default output file name corresponds to the report name.

When connected to a P6 EPPM database: If you choose Store report in Work Products and Documents for this project, below, select a network location or some other publicly accessible location.

View file when done

Mark this checkbox to automatically open the report in your default browser, for an HTML file, or your default text viewer, for an ASCII text file.

When connected to a P6 Professional database: If you are setting up more than one job service for report batches, specify a different directory or filename so existing files are not overwritten.

Store report in Work Products and Documents for this project (P6 EPPM Only)

Choose to create a WP & Docs record for this report. The name of the resulting WP & Docs record corresponds to the name in the Output file field. The state of this field is not saved on exit (always cleared by default on launch). Also, this field is disabled if multiple projects are open.

Your comments about the selected report.

When connected to a P6 EPPM database: If you choose Store report in Work Products and Documents for this project, the content in the Notes field is copied to the Description for the WP & Docs record.

If you choose Email Attachment, the content in this field is copied to the body of the Email.

Run Report dialog box - for selected report batch

Use the Run Report dialog box to compile and print the selected report batch. You can also use this dialog box to compile and Email a report batch, and to compile a report batch and create a WP & Docs record for the report batch.

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Directly to Printer: Choose to compile and print the selected report batch.

When connected to a P6 Professional database: If you are running the report batch through the Oracle Job Service, the report is sent to the default printer set on the job service machine.

Email Attachment: Choose to generate the report and attach it to an Email. An .htm file is created, and the file name corresponds to the report name.

HTML Files: Choose to compile and save the selected report batch as HTML files. These files need to be manually copied to a Web server.

ASCII Text Files: Choose to compile and save the selected report batch as delimited text files (.txt).

Field Delimiter: If you choose ASCII Text Files, select the character used to separate categories of information that you save in delimited text format (.txt).

Text Qualifier: If you choose ASCII Text Files, select the character used to separate categories of information that you save in delimited text format (.txt), if the information contains the field delimiter you specify.

Output file: If you choose HTML File or ASCII Text File, click  to specify the file location and name where you want to save the report batch. The default output file name corresponds to the batch report name.

When connected to a P6 EPPM database: If you choose Store report in Work Products and Documents for this project, below, select a network location or some other publicly accessible location.

When connected to a P6 Professional database: If you are setting up more than one job service for report batches, specify a different directory or filename so existing files are not overwritten.

Store report in Work Products and Documents for this project (P6 EPPM Only): Choose to create a WP & Docs record for this report batch. The name of the resulting WP & Docs record corresponds to the name in the Output file field. The state of this field is not saved on exit (always cleared by default on launch). Also, this field is disabled if multiple projects are open.

User's Notes: Your comments about the selected report batch. If you choose Store report in Work Products and Documents for this project, the content in the User's Notes field is copied to the Description for the WP & Docs record. If you choose Email Attachment, the content in this field is copied to the body of the Email.

Save Layout As dialog box

Use the Save Layout As dialog box to save a custom display format for the Resource Assignments, Work Breakdown Structure, Activities or Tracking views.

Layout Name: The name of the layout. You can type a new name.

Available to: The category of users who can access the new layout. You can select a different user category.

User: The user to which you want to assign the layout. Click  to select a user.

Project: The Project with which you want to associate the layout. Depending on the user privileges,  is enabled to permit selecting a project with which to save the layout.

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Save: Saves the current layout according to the options you specify.

Cancel: Closes this dialog box without saving the current layout.

- The User field is available only if the selected Available to category is Another User.
- Applied filters are saved with the layout.
- Applied User Defined filters become available as Global filters when a layout is saved to All Users.
- Project layouts are associated and available with the project. Save layouts as project layouts when you would like to limit the number of layouts in the global section or allow the layout to be exported with the project.

Save Layout dialog box

Use the Save Layout dialog box to save a custom display format for the Resource Assignments, Work Breakdown Structure, Activities or Tracking views.

Layout Name: The name of the layout. You can type a new name.

Available to: The category of users who can access the new layout. You can select a different user category.

User: The user to which you want to assign the layout. Click  to select a user.

Project: The Project with which you want to associate the layout. Depending on the user privileges,  is enabled to permit selecting a project with which to save the layout.

Save: Saves the current layout according to the options you specify.

Cancel: Closes this dialog box without saving the current layout.

- The User field is available only if the selected Available to category is Another User.
- Applied filters are saved with the layout.
- Applied User Defined filters become available as Global filters when a layout is saved to All Users.
- Project layouts are associated and available with the project. Save layouts as project layouts when you would like to limit the number of layouts in the global section or allow the layout to be exported with the project.

Schedule Calendar Exception tab - CPP Template dialog box

The Schedule Calendar Exception tab of the Template dialog box shows the mappings for fields storing data relating to the exceptions to Calendars used in the projects. All mappings on this tab are populated by P6 Professional and cannot be edited.

Field Name: The CPP field name.

Locked: Determines whether the CPP field mapping is fixed to the listed P6 Professional field. If a CPP field mapping is not locked, you can map it to a code, UDF, or notebook topic.

Mapping: The P6 Professional field, code, UDF, or notebook topic mapped to the corresponding CPP field.

Description: The US Department of Energy's description of the corresponding CPP field.

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Schedule Calendar Std tab - CPP Template dialog box

The Schedule Calendar Std tab of the Template dialog box shows the mappings for fields storing data relating to Calendars used in the project. All mappings on this tab are populated by P6 Professional and cannot be edited.

Field Name: The CPP field name.

Locked: Determines whether the CPP field mapping is fixed to the listed P6 Professional field. If a CPP field mapping is not locked, you can map it to a code, UDF, or notebook topic.

Mapping: The P6 Professional field, code, UDF, or notebook topic mapped to the corresponding CPP field.

Description: The US Department of Energy's description of the corresponding CPP field.

Schedule dialog box

Use the Schedule dialog box to specify your scheduling preferences and/or schedule the open project.

Project(s) to schedule: The number of projects to be scheduled.

All projects use their own data date: Select this option to have each project scheduled according to the current data date specified for the project.

Apply selected data date to all opened projects: Select this option to schedule all open projects with the same data date. Click  to select a data date to apply.

Earliest Project Forecast Start Date: Lists the earliest project forecast start date of all open projects. A forecast start date is shown if you manually changed the start date of a project by dragging the project bar to a new timeframe in Tracking layouts.

Set Data Date and Project Planned Start to Project Forecast Start during scheduling: Mark this checkbox to use the forecast date instead of the project's planned date and current data date when scheduling the projects.

Log to file: Mark to record your scheduling results in a log file. Enter a filename and location for the log file. Click  to specify a new filename and location. Specify whether the log file should be generated as HTML. Specify whether the log should overwrite any existing file with the name and location selected, or add the log to the end of the existing file. You cannot add the log to the end of the existing file if you choose to generate the file as HTML.

Cancel: Ends the action without saving changes.

Schedule: Schedules the open projects according to the options you specify.

View Log: Displays your scheduling results.

Help: Opens P6 Professional Help for this dialog box.

Options: Opens the Schedule Options dialog box in which you can specify general and advanced scheduling options.

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Schedule EU tab - CPP Template dialog box

Use the Schedule EU tab of the Template dialog box to specify the mappings for fields storing data relating to task EU data.

Field Name: The CPP field name.

Locked: Determines whether the CPP field mapping is fixed to the listed P6 Professional field. If a CPP field mapping is not locked, you can map it to a code, UDF, or notebook topic.

Mapping: The P6 Professional field, code, UDF, or notebook topic mapped to the corresponding CPP field.

Description: The US Department of Energy's description of the corresponding CPP field.

Schedule Logic tab - CPP Template dialog box

The Schedule Logic tab of the Template dialog box shows the mappings for fields storing data relating to relationships in the project. All mappings on this tab are populated by P6 Professional and cannot be edited.

Field Name: The CPP field name.

Locked: Determines whether the CPP field mapping is fixed to the listed P6 Professional field. If a CPP field mapping is not locked, you can map it to a code, UDF, or notebook topic.

Mapping: The P6 Professional field, code, UDF, or notebook topic mapped to the corresponding CPP field.

Description: The US Department of Energy's description of the corresponding CPP field.

Schedule Options dialog box

The Schedule Options dialog box is displayed when you open a project or set of projects for scheduling. This dialog box contains the following tabs:

Use scheduling options from: If multiple projects are open, select which projects scheduling options to use when you schedule.

- General tab - Schedule Options dialog box
- Advanced tab - Schedule Options dialog box

Default: Displays and/or applies the default scheduling settings.

Schedule Resources tab - CPP Template dialog box

Use the Schedule Resource tab of the Template dialog box to specify the mappings for fields storing data relating to resources assigned to the project.

Field Name: The CPP field name.

Locked: Determines whether the CPP field mapping is fixed to the listed P6 Professional field. If a CPP field mapping is not locked, you can map it to a code, UDF, or notebook topic.

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Mapping: The P6 Professional field, code, UDF, or notebook topic mapped to the corresponding CPP field.

Description: The US Department of Energy's description of the corresponding CPP field.

Schedule tab - CPP Template dialog box

Use the Schedule tab of the Template dialog box to specify the mappings for fields storing data relating to the project and its WBS nodes.

Field Name: The CPP field name.

Locked: Determines whether the CPP field mapping is fixed to the listed P6 Professional field. If a CPP field mapping is not locked, you can map it to a code, UDF, or notebook topic.

Mapping: The P6 Professional field, code, UDF, or notebook topic mapped to the corresponding CPP field.

Description: The US Department of Energy's description of the corresponding CPP field.

Security Profiles dialog box (P6 Professional Only)

Depending on your user access permissions, you can use the Security Profiles dialog box to create, edit, and delete security profiles, or user access types.

Global Profiles: Choose to add, edit, or delete security profiles for application-wide features.

Project Profiles: Choose to add, edit, or delete security profiles for project information only.

Display Options bar: Click to search for a specific profile.

Profile Name: Lists security profiles for the current profile type. To change a profile name, double-click the name.

Default: Indicates the default profile for the current profile type. Mark the appropriate Default checkbox to specify a default profile.

Privilege: Lists available privileges for the current profile type.

Has Privilege: Indicates the selected profile's privileges. Mark the appropriate Has Privilege checkbox to grant a privilege to the selected profile.

Add: Adds a global or a project profile, depending on the current profile type.

Delete: Deletes the selected profile.

Select a Portfolio dialog box

Display Options bar: Click to change your portfolio display. You can change the table font, color, and row height or expand/collapse all bands.

Portfolio Name: Lists all portfolios the user has access to.

OK: Click to select the highlighted portfolio. You cannot select a band.

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Display: Choose to display only the EPS bands for the projects in the selected portfolio (to improve performance) or all EPS bands. When you choose to display EPS bands only for projects in current Portfolio, all parent EPS nodes of projects in the portfolio load, not just the first parent.

Select Activities by Attribute dialog box (P6 Professional Only)

Use the Select Activities by Attribute dialog box to specify which of the activities for a selected attribute you want to include in your project plan.

Display Options bar: Click to change the activities display.

Activity table: Lists activities in the selected attribute. A checkmark indicates that the activity is selected.

Select Activities by WBS dialog box

Use the Select Activities by WBS dialog box to specify which of the activities for a selected WBS you want to include in your project plan.

Display Options bar: Click to change the activities display.

Activity table: Lists activities in the selected WBS. A checkmark indicates that the activity is selected.

Select Activity Calendar dialog box

Use the Select Activity Calendar dialog box to select the calendar an activity should use in the project.

Display Options bar: Click to change the list of calendars to global or project and change the table font and color settings.

Search: Type a calendar name to display a filtered list of names beginning with the letters typed.

Calendar Name: The name of each calendar defined for the selected display type.

Default: Identifies the default global calendar. Applies only to global calendars.

Select: Selects the highlighted item and closes the dialog box.

Select Activity Code Value dialog box

Use the Select Activity Code Value dialog box to select a value for the activity code assigned to an activity. You can also use this dialog box to create and assign a new activity code value.

- The title of this dialog box reflects the name of the activity code for which you are selecting a value. For example, if you are selecting a value for an activity code named Location Code, the title of this dialog box is Select Location Code.

Display Options bar: Lists options for changing the activity code value display.

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Search: Type an activity code value to display a filtered list of codes that begin with this value.

Activity Code Value: Lists activity code values for the current activity code.

Description: Lists each activity code value's description.

Select: Assigns the selected activity code value to the activity.

New: Click to create a new activity code value. You can then assign the new value to a selected activity code. This icon is disabled if no code band is selected or if you do not have security to edit the type of activity code (global, EPS, or project).

Select Activity dialog box

Use the Select Activity dialog box to associate an activity with an issue or an expense.

Display Options bar: Lists options for changing the activities display. You can change the columns, filtering, grouping and sorting, font, and colors.

Search: Type an Activity ID or name to display a filtered list of activities that begin with this value.

Select Activity table: Lists the ID, name, and status of activities in the open project. To sort the display, click a column label.

Select: Associates the selected activity with the issue or expense.

Clear: Removes an activity assignment from an issue or expense.

Select Activity Layouts to Publish dialog box

Use the Select Activity Layouts to Publish dialog box to specify the activity layouts to publish to the project Web site.

Display Options bar: Enables you to filter, the contents of the dialog box, as well as specify fonts and colors.

Activity View Name: Lists the activity layouts available to publish.

Select: Click to add the selected activity layouts to the project Web site.

Select Baseline dialog box

Use the Select Baseline dialog box to select a baseline when prompted. The dialog box might be called Select Project Baseline, Select Primary Baseline, Select Secondary Baseline, or Select Tertiary Baseline however the functionality of the dialog box is the same in all cases.

Display Options bar: Click to change the baseline projects display. You can change columns, font, and colors.

Baseline table: Lists baselines and related information. To sort the display, click a column label.

Select: Selects the highlighted baseline.

Clear: Clears the baseline assignment.

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Select Batch dialog box (P6 Professional Only)

Use the Select Batch dialog box to choose the batch report to run for the job service. Only one batch report can be selected.

Batch Report table: Lists the existing project and global batch reports.

OK: Assigns the selected batch report to the job service. You can only assign one batch report. Add a separate job service for each batch report you want to run.

- Only batch reports that already exist will appear. Create batch reports by choosing Tools, Reports, Batch Reports.
- If no projects are selected in the Job Options tab, this list only contains existing global batch reports.

Select Calendar To Copy From dialog box

Use the dialog Select Calendar To Copy From box to copy the settings from the selected global, project, or shared resource calendar when creating a new calendar. You can then customize this calendar to meet specific needs.

Display Options bar: Click to change the calendars display.

Calendar Name: Lists calendar names for the current calendar type. To sort the display, click the Calendar Name column label.

Default: If your current display is Global Calendars, indicates the default global calendar. To sort the display, click the Default column label.

Select: Copies the selected calendar.

Select CBS dialog box (P6 EPPM Only)

Use the Select CBS dialog box to assign a CBS (cost breakdown structure) code to project activities. CBS codes are created in Primavera Unifier for the linked project's cost sheet.

Search: Type a CBS code or name to display a filtered list of exact matches.

Display Options bar: Lists options for changing or printing the list of CBS codes.

CBS: Lists each CBS code created in Primavera Unifier for the linked project's cost sheet.

Description: Lists the description of each CBS code created in Primavera Unifier for the linked project's cost sheet.

Select: Applies your selection and closes the dialog box.

Select Code dialog box

Use the Select Code dialog box to select a value to assign to the filter.

Display Options bar: Click to change the display.

Code: Lists the available code value choices.

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Code Description: Lists a description of each code value.

Select: Assigns the selected code value to the filter.

Select Cost Account dialog box

Use the Select Cost Account dialog box to specify the cost account for resource assignments to activities and project expenses in the open project.

Display Options bar: Lists options for changing or printing the cost accounts display.

Cost Account ID: Lists existing cost account IDs. To sort the display by cost account ID, click the Cost Account ID column label.

Cost Account Name: Lists names of existing cost accounts. To sort the display by cost account name, click the Cost Account Name column label.

Select: Applies your selection and closes this dialog box.

Clear: Removes the cost account from your current expense item or resource assignment.

Select Currency dialog box

Use the Select Currency dialog box to select the currency in which you want to view all cost values.

Display Options bar: Click to change the currency display.

Search: Type a currency ID or currency name to display a filtered list of currencies whose ID or name begins with this value.

Currency ID: The ID for each available currency type.

Currency Name: The name of each available currency type.

- Only a user with Admin Superuser privileges can define the available view currency types.
- When you enter values in cost fields, they are always displayed in the view currency.

Select Curve dialog box

Use the Select Curve dialog box to choose the resource curve you want to assign to a resource or role assignment.

Display Options bar: Click to change the display.

Resource Curve Name: Lists all defined default and global resource curves. Select the curve you want to assign.

Select: Click to assign the selected curve to your resource or role assignment.

Clear: Click to remove the selected curve from your resource or role assignment.

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Select Default Cost Account dialog box

Use the Select Default Cost Account dialog box to specify the default cost account for resource assignments to activities and project expenses in the open project.

Display Options bar: Lists options for changing or printing the cost accounts display.

Search: Type a cost account ID or name to display a filtered list of accounts whose ID or name begins with this value.

Cost Account ID: Lists existing cost account IDs.

Cost Account Name: Lists names of existing cost accounts.

Close: Closes the dialog box without saving any changes.

Select: Applies your selection and close this dialog box.

Clear: Removes the default cost account assignment from the project.

Select Default Project Calendar dialog box

Use the Select Default Project Calendar dialog box to assign a global or project calendar.

Display Options bar: Lists options for changing the calendars display.

Search: Type a calendar name to display a filtered list of names beginning with the letters typed.

Calendar Name: Lists names of project or global calendars, depending on your current display. To sort the display, click the Calendar Name column label.

Default: If your current display is Global Calendars, indicates the default global calendar. To sort the display, click the Default column label.

Select: Assigns the selected calendar to the selected project.

Clear: Removes the selected calendar from the selected project.

Select Document Category dialog box

Use the Select Document Category dialog box to assign a document category to the selected work product or document. Document categories are created through the Administrative Categories feature.

Display Options bar: Click to change the document categories display.

Search: Type a category to display a filtered list of categories whose beginning with the letters typed.

Category: Lists document categories. To sort the display, click the Category column label.

Select: Assigns the selected document category to the selected work product or document.

Clear: Removes the selected document category from the selected work product or document.

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Select EPS dialog box

Use the Select EPS dialog box to select the EPS node that contains the projects you want to include in time-distributed resource/role assignment, summary resource assignment, and summary role assignment reports.

Display Options bar: Click to change the EPS table display.

EPS table: Lists the ID and name for existing EPS elements. To sort the display, click a column label.

Select: Selects the highlighted EPS node.

Select EPS to add into dialog box

Use the Select EPS to add into dialog box to select the EPS node to which you want to add the new project.

Display Options bar: Click to change the EPS/project table display.

EPS/Project table: Lists the ID, name, and additional information about existing EPS elements. To sort the display, click a column label.

Select: Adds the new project to the selected EPS element.

Select Expense Category dialog box

Use the Select Expense Category dialog box to assign an expense category to the selected expense item. Expense categories allow you to group expenses into categories predefined by your project administrator for accounting purposes.

Display Options bar: Click to change the expense categories font and colors.

Expense Category: Lists expense categories. To sort the display, click the Expense Category column label.

Select: Assigns the selected expense category to the selected expense.

Clear: Removes the selected expense category from the selected expense item.

Select Financial Period dialog box

Use the Select Financial Period dialog box to select a financial period for storing period performance or to select a range of financial periods to make available for display as columns.

Period Name: Displays the name of each defined period in the Financial Period dictionary.

Start Date: Displays the start date of each period.

End Date: Displays the end date of each period.

- You can only select one financial period at a time.
- You can skip periods when storing period performance for a project; however, past period actual values will not be spread after the gap in periods.

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Select Financial Period Timescale Dialog Box (P6 Professional Only)

Use the Select Financial Period Timescale dialog box to select start and end dates for a single financial period.

Start Date: Type the start date for the financial period, or click  to select a date.

End Date: Type the end date for the financial period, or click  to select a date.

- Start and end dates cannot overlap the dates of existing financial periods.
- The start and end dates can be the same date.

Select Folder dialog box

Select the drive and folder where you want to save the project as HTML files and then click OK.

Select Identified By dialog box (P6 Professional Only)

Use the Select Identified By dialog box to select the resource who identified the risk.

Display Options bar: Lists options for changing resource columns, filters, grouping and sorting, font, and colors.

Resource ID: Lists the ID of each resource in your organization.

Resource Name: Lists the name of each resource in your organization.

Resource Type: Indicates the resource type assigned to a resource.

Unit of Measure: Lists the unit of measure assigned to a material resource.

Primary Role: Indicates the primary role assigned to a resource.

Default Units/Time: Lists the default units/time for each resource in your organization.

Select: Applies your selection and closes this dialog box.

Clear: Removes the selected resource from the current risk.

If resource security is enabled, you can only select resources from under the resource root node you have access to or from current project resources.

Select Image dialog box

Depending on your current selection, you can use the Select Image dialog box to add an image, or graphic, to the displayed report as either a background image or in an image cell. You can also specify how you want to reference the image if you compile the report to an HTML file.

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Stretch Image: For an image in an image cell only, mark to expand the displayed image to the size of the selected image cell.

Relative Image Path: When compiling the report to an HTML file, type the file location and name where you want to save a copy of the image's file.

Reference image instead: When compiling the report to an HTML file, mark to reference, rather than copy the image file you specify.

Relative Image Path: If you select Reference image instead, type the location and name of the image file you want to reference.

Clear: Removes the displayed image from the displayed report.

Load: Selects and adds an image to the displayed report.

Select Layouts to Publish dialog box

Use the Select Layouts to Publish dialog box to select activity layouts or tracking layouts to publish to the Web.

Layout Name: Lists a descriptive name of the layout.

User: Lists a username associated with the layout.

Select: Selects the layout to publish.

Select Owner dialog box (P6 EPPM Only)

Use the Select Owner dialog box to specify the P6 Professional user responsible for the activity.

An Activity Owner who has Contributor module access, the appropriate OBS project access, and security privileges (assigned in P6) can use P6 to update the activity.

To verify OBS access before selecting an owner, you can customize the Select Owner dialog box to add the OBS Assignments column. To customize columns, choose View, Columns or click the Display Options bar above the Search field.

Login Name: Lists login names for users.

Personal Name: Lists each user's name.

Global Profile: Lists each user's security profile for application-wide features.

Resource: Lists the resource ID/name assigned to each user.

Select Primary Resource dialog box

Use the Select Primary Resource dialog box to select the primary resource for an activity.

Display Options bar: Lists options for changing resource columns, filters, grouping and sorting, font, and colors.

Search: Type a resource ID or name to display a filtered list of resources whose ID or name begins with this value.

Resource ID: Lists the ID of each resource in your organization.

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Resource Name: Lists the name of each resource in your organization.

Primary Role: Indicates the primary role assigned to a resource.

Default Units/Time: Lists the default units/time for each resource in your organization.

Select: Applies your selection and closes this dialog box.

Clear: Removes the selected resource from your current activity.

- If resource security is enabled, you can only select resources from under the resource root node you have access to or from current project resources.

Select Project Category Value dialog box

When P6 Professional is connected to a P6 EPPM database, use the Select Project Category Value dialog box to specify the open project's value for a category you define in P6. When P6 Professional is connected to a P6 Professional database, use the Select Project Category Value dialog box to specify the open project's value for a category you define in the Admin Categories dialog box.

Value:

When connected to a P6 EPPM database: Lists project category values you define in P6.

When connected to a P6 Professional database: Lists project category values you define in the Admin Categories dialog box.

Select a project value from the Value column list.

Select: Assigns the selected value to the open project.

Clear: Removes the selected project category from the open project.

Select Project Code dialog box

Use the Select Project Code dialog box to select the project code to filter by in the Project Codes dialog box.

Display Options bar: Click to change the display.

Project Code: Lists the available project codes.

Select: Assigns the selected code to the filter.

Select Project dialog box

Use the Select Project dialog box to select a project when prompted.

Display Options bar: Click to change the projects table display.

Projects table: Lists projects and related information. To sort the display, click a column label.

Select: Selects the highlighted project.

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Select Recipient dialog box

Use the Select Recipient dialog box to specify how you want to add an Email recipient.

Select recipient from a dialog: Choose to select an Email recipient from a list of OBS members, resources, or P6 Professional users.

Manually add a new recipient: Choose to type the Email address of an additional recipient.

Select Replacement Calendar dialog box

Use the Select Replacement Calendar dialog box to select the calendar to which you want to reassign a deleted calendar's assignments.

Display Options bar: Click to change your calendars display.

Calendar Name: Lists global, project, or shared resource calendars, depending on your current calendar display type. To sort the display, click the Calendar Name column label.

Default: If your current display is Global Calendars, indicates the default global calendar. To sort the display, click the Default column label.

Select: Reassigns the deleted calendar's assignments to the selected calendar.

Select Replacement Cost Account dialog box

When you want to delete a cost account that is the project default cost account or has activity assignments, use the Select Replacement Cost Account dialog box to specify which cost account you want to substitute for the cost account you are deleting.

Display Options bar: Click to change the fonts or colors in the dialog box.

Cost Account ID: Lists cost account IDs. To sort the display, click the Cost Account ID column label.

Cost Account Name: Lists each cost account's name. To sort the display, click the Cost Account Name column label.

Select: Reassigns the deleted cost account's assignments to the selected cost account.

Select Replacement Funding Source dialog box

Use the Select Replacement Funding Source dialog box to select the funding source to which you want to reassign a deleted funding source's assignments.

Display Options bar: Click to change the font or colors in this dialog box.

Funding Source: Lists the funding sources defined for the enterprise.

Select: Reassigns the deleted funding source's assignments to the selected funding source.

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Select Replacement Role dialog box

Use the Select Replacement Role dialog box to select another role to replace the deleted role.

Display Options bar: Click to change the role display.

Role ID: Lists the ID of each role in your organization. To sort the display, click the Role ID column label.

Role Name: Lists the name of each role in your organization. To sort the display, click the Role Name column label.

Select: Applies your selection and closes this dialog box.

Select Report Group dialog box

Use the Select Report Group dialog box to add the selected report to a report group.

Display Options bar: Click to change the report groups display.

Search: Type a report group to display a filtered list of groups beginning with this value.

Report Group: Lists names of report groups. To sort the display, click the Report Group column label.

Select: Adds the report to the selected report group.

Clear: Removes the report from the selected report group.

Select Reports dialog box

Use the Select Reports dialog box to specify reports to publish.

Display Options bar: Enables you to filter, group and sort the contents of the dialog box, as well as specify available fonts and colors.

Report Name: Lists the reports available to publish.

Select: Click to add the selected reports to the project Web site.

Select Resource Access dialog box

Use this dialog box to enable resource security for the current user. By assigning a resource in the hierarchy to the current user, you give the user access only to that resource and all of its children.

Display Options bar: Lists options for changing resource columns, filters, grouping and sorting, font, and colors.

Select Resource table: Lists your organization's resource hierarchy. To sort the display, click a column label.

Select: Applies your selection and closes this dialog box.

Clear: Clears the selected user's resource access field.

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- You can assign only one resource node to a user.

Select Resource Calendar dialog box

Use the Select Resource Calendar dialog box to assign a calendar to the selected resource.

Display Options bar: Click to change the calendar display.

Search: Type a calendar name to display a filtered list of names that begin with this value.

Calendar Name: Lists global or shared resource calendar names, depending on your current display. To sort the display, click the Calendar Name column label.

Default: If your current display is Global Calendars, indicates the default global calendar. To sort the display, click the Default column label.

Select: Assigns the selected calendar to the selected resource.

Select Resource Code and Select Role Code dialog boxes

Use the Select Resource Code dialog box to select the resource code to filter by in the Resource Codes dialog box. Use the Select Role Code dialog box to select the role code to filter by in the Role Codes dialog box.

Display Options bar: Click to change the display.

Resource Code or **Role Code:** Lists the available resource codes or role codes.

Select: Assigns the selected code to the filter.

Select Resource Curve To Copy From dialog box

Use the Select Resource Curve To Copy From dialog box to choose an existing resource curve on which to base your new curve.

Display Options bar: Click to change the display or preview how the dialog box will print.

Resource Curve Name: Lists all defined default and global resource curves. Select the curve whose percentages you want to copy for your new resource curve.

Select: Click to copy the selected curve's percentages to your new resource curve.

Select Resource dialog box

When P6 Professional is connected to a P6 EPPM database, use the Select Resource dialog box to assign a resource to an issue, to a user, or to a personal resource calendar. When P6 Professional is connected to a P6 Professional database, use the Select Resource dialog box to assign a resource to an issue, to a user, or to a personal resource calendar. Also use this dialog box to select the resource under which to place all resources from a Microsoft Project file during import.

If resource security is enabled, you can select resources only from under your resource root node or from current project resources.

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Display Options bar: Lists options for changing resource columns, filters, grouping and sorting, font, and colors.

Select Resource table: Lists your organization's resource hierarchy. To sort the display, click a column label.

Select: Applies your selection and closes this dialog box.

Close:

When connected to a P6 EPPM database: Removes the selected resource from the current activity, issue, or user.

When connected to a P6 Professional database: Removes the selected resource from the current activity, issue, or user.

(This option does not display during the Microsoft Project import.)

Select Resources dialog box

Use the Select Resources dialog box to select specific resources for a leveling run.

Display Options bar: Click to change fonts and colors in this dialog box.

Level: Mark the checkbox beside each resource that you want to include in the leveling run. Clear the checkbox beside a resource if you do not want to include it in the leveling run.

Resource Code: Displays the resource name.

Max Units/Time: Shows the number of units the resource is available during each workperiod.

Select All: Click to select all resources in the list for the leveling run.

Clear All: Click to clear all of the checkboxes in the Level column.

Select Responsible Manager dialog box

Use the Select Responsible Manager dialog box to assign an OBS member to be responsible for a WBS element, threshold or issue.

Display Options bar: Lists options for changing the organizational breakdown structure (OBS) display.

Search: Type an OBS name to display a filtered list of names beginning with the letters typed.

OBS Name: Lists the organizational breakdown structure (OBS). To sort the display, click the OBS Name column label.

Select: Applies your selection and closes this dialog box.

Select Risk Category dialog box (P6 Professional Only)

Use the Select Risk Category dialog box to assign a risk category to the selected risk.

Display Options bar: Lists options for changing the table font and colors.

Risk Category: Lists risk categories. The project administrator defines risk categories in the Admin Categories dialog box. To sort the display, click the Risk Category column label.

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Select: Assigns the selected risk category to the selected risk.

Clear: Removes the selected risk category from your current risk item.

Select Risk Owner dialog box (P6 Professional Only)

Use the Select Risk Owner dialog box to select a resource to be owner of a risk.

Display Options bar: Lists options for changing resource columns, filters, grouping and sorting, font, and colors.

Search: Type a resource ID or name to display a filtered list of resources whose ID or name begins with this value.

Resource ID: Lists the ID of each resource in your organization.

Resource Name: Lists the name of each resource in your organization.

Resource Type: Indicates the resource type assigned to a resource.

Unit of Measure: Lists the unit of measure assigned to a material resource.

Primary Role: Indicates the primary role assigned to a resource.

Default Units/Time: Lists the default units/time for each resource in your organization.

Select: Applies your selection and closes this dialog box.

Clear: Removes the selected resource from the current risk.

If resource security is enabled, you can only select resources from under the resource root node you have access to or from current project resources.

Select Shift dialog box

Use the Select Shift dialog box to select a shift for a timescaled layout when you choose a Day/Shift date interval for displaying profile or spreadsheet data.

Display Options bar: Click to change the shifts display.

Search: Type a shift name to display a filtered list of shifts beginning with the letters typed.

Shift Name: Lists each available shift.

Select: Click to select the highlighted shift.

Clear: Click to clear your shift selections.

Select startup filters

1. Choose Edit, User Preferences.
2. Click the Startup Filters tab.
3. Select the appropriate option for each data element listed. You can choose to view data for your current projects only or all data in the enterprise.
   - Startup filters are available for Oracle and SQL Server installations. Startup filters are disabled for stand-alone installations.

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Select Threshold Parameter dialog box

Use the Select Threshold Parameter dialog box to define the selected threshold's parameter, or type. You can specify a threshold parameter when you add a threshold and when you add an issue.

Display Options bar: Lists option for changing the table font and colors.

Threshold Parameter: Lists available parameters, or types of thresholds. To sort the display, click the Threshold Parameter column label.

Select: Applies the selected parameter to the selected threshold.

Clear: Removes the selected parameter from the selected threshold.

Select Timesheet Approval Manager dialog box (P6 EPPM Only)

For resources who use timesheets to report activity progress, use this dialog box to specify the person responsible for approving their timesheets.

Display Options bar: Click to change the timesheet approval manager display.

Login Name: Lists login names for users.

Personal Name: Lists each user's name.

Global Profile: Lists each user's security profile for application-wide features.

Resource: Lists the resource ID/name assigned to each user.

Select: Assigns the selected user.

Clear: Removes the selected user as the resource's timesheet approval manager.

Select Tracking Layout dialog box

Use the Select Tracking Layout dialog box to assign a tracking layout to a threshold or an issue. When you assign a tracking layout to a threshold or issue and use the Issue Navigator, you can more quickly open and track the issue using the specified layout.

Display Options bar: Lists option for changing the table font and colors.

Tracking Layout: Lists the names of existing tracking layouts. To sort the display, click the Tracking Layout column label.

Display Type: Lists each tracking layout's display type. To sort the display, click the Display Type column label.

Select: Assigns the selected tracking layout to the selected threshold or issue.

Clear: Removes the selected tracking layout from the selected threshold or issue.

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Select Tracking Layouts to Publish dialog box

Use the Select Tracking Layouts to Publish dialog box to specify Tracking layouts to publish on the project Web site.

Display Options bar: Enables you to specify fonts and colors.

Tracking Layout: Lists the Tracking layouts available to publish.

Display Type: Lists each tracking layout's display type. To sort the display, click the Display Type column label.

Select: Click to add the selected Tracking layouts to the project Web site.

Select Unifier Data Mapping dialog box (P6 EPPM Only)

Use the Select Unifier Data Mapping dialog box to specify the data mapping defined for the selected schedule sheet.

Display Options bar: Lists options for changing or printing the data mappings display.

Search: Type a data mapping name to display a filtered list of data mappings whose name begins with this value.

Name: Lists Primavera Unifier data mapping names.

Close: Close this dialog box without saving any changes.

Select: Applies your selection and closes this dialog box.

Select Unifier Project dialog box (P6 EPPM Only)

Use the Select Unifier Project dialog box to specify the Unifier project name to link with the open project.

Display Options bar: Lists options for changing or printing the project name display.

Search: Type a project number or name to display a filtered list of projects whose number or name begins with this value.

Project Number: Lists Primavera Unifier projects' number.

Project Name: Lists Primavera Unifier projects' name.

Close: Close this dialog box without saving any changes.

Select: Applies your selection and closes this dialog box.

Select Unifier Schedule Sheet dialog box (P6 EPPM Only)

Use the Select Unifier Schedule Sheet dialog box to specify the Primavera Unifier schedule sheet for the selected project.

Display Options bar: Lists options for changing or printing the schedule sheet display.

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Search: Type a schedule sheet title to display a filtered list of schedule sheets whose title begins with this value.

Title: Lists Primavera Unifier schedule sheets' title.

Master: Lists if a Primavera Unifier schedule sheet's is a master schedule.

Close: Close this dialog box without saving any changes.

Select: Applies your selection and closes this dialog box.

Select Unit of Measure dialog box

The Select Unit of Measure dialog box displays a list of all valid units of measure that are available to all material resources.

A unit of measure describes the quantity of a particular resource. Labor resources are often measured in units of time, such as hours or days; materials can be measured in cubic or linear feet, or perhaps in tons or kilos; items used one-by-one can be measured individually (EA) or as shipped: a box, a case, a pallet. Money is generally measured in monetary units, such as dollars or yen.

Search: Enter your search criteria in the Search field to search through a long list of available Units of Measure.

- The Unit of Measure field is only available when a resource is designated as a Material Resource.
- Overtime fields, generally designated for Labor and Nonlabor will be cleared and disabled when Unit of Measure is selected.

Select User dialog box

Use this dialog box to select a user.

The columns and controls you see depend on the route you took to get here.

Display Options bar: Click to change the users display.

Login Name: Lists login names for users.

Personal Name: Lists each user's name.

User Name: Lists each user's username.

Global Profile: Lists each user's security profile for application-wide features.

Resource: Lists the resource ID/name assigned to each user.

 or **Select:** Assigns the selected user.

: Removes the assignment of the user.

- To sort the display, click a column label.

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Select View Currency dialog box

Use the Select View Currency dialog box to select the currency in which you want to view all cost values. This dialog box is displayed when you click  in the Currency tab in the User Preferences dialog box.

Display Options bar: Click to change the currency display.

Currency ID: The ID for each currency type available.

Currency Name: The name for each currency type available.

- Only a user with Admin Superuser privileges can define the available view currency types.
- When you enter values in cost fields, they are always displayed in the view currency.

Select WBS Category Value dialog box

When P6 Professional is connected to a P6 EPPM database, use the Select WBS Category Value dialog box to define the selected WBS element's value for a WBS category you define using P6. When P6 Professional is connected to a P6 Professional database, use the Select WBS Category Value dialog box to define the selected WBS element's value for a WBS category you define in the Admin Categories dialog box.

Display Options bar: Lists options for changing the table font and colors.

Value:

When connected to a P6 EPPM database: Lists WBS category values you define using P6.

When connected to a P6 Professional database: Lists WBS category values you define in the Admin Categories dialog box. To sort the display, click the Value column label.

Select: Assigns the selected category value to the selected WBS element.

Clear: Removes the selected category from the selected WBS element.

Select WBS dialog box

Use the Select WBS dialog box to assign a work breakdown structure (WBS) element to an activity, threshold or issue. Also use the Select WBS dialog box to specify the WBS element to which you want to add a project's WBS.

Display Options bar: Lists options for changing the WBS display.

Search: Type a WBS code or name to display a filtered list of items that begin with the letters you enter.

WBS Code: Lists each WBS element in the open project.

WBS Name: Lists the name of each WBS element in the open project.

Responsible Manager: Lists the responsible manager for each WBS element in the open project.

Select: Applies your selection and closes this dialog box.

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Select WBS to Add into dialog box

Use the Select WBS to add into dialog to select the WBS node to which you want to add the new project.

Display Options bar: Click to change the WBS table display.

WBS table: Lists the ID, name, and additional information about existing WBS elements. To sort the display, click a column label.

Select: Adds the new project to the selected WBS element.

Set Default Project dialog box

When you open multiple projects, use this dialog box to specify which project to open by default, which project's settings to use when you schedule or level, and which project to use by default when you add new information to the database.

Project ID: Lists a brief unique description of a project.

Project: Lists the project description.

Data Date: Lists the data date for the project.

Default: Mark the checkbox to designate one project as the default project to use when you open multiple projects. This project opens automatically the next time you open this group of projects.

When connected to a P6 Professional database: It also uses this project's scheduling and leveling settings for calculating the schedule (manually or via the Job Services feature) and it becomes the default destination for new items such as activities or issues unless you group the layout by WBS and select a different project before adding new items.

When connected to a P6 EPPM database: It also uses this project's scheduling and leveling settings for calculating the schedule and it becomes the default destination for new items such as activities or issues unless you group the layout by WBS and select a different project before adding new items.

Sight Lines tab - Bar Chart Options dialog box

Horizontal Lines

ShowMajorLines: Mark to display a horizontal line above each summary bar in the Gantt Chart.

Style: Select a line style for the horizontal lines from the drop down list. The line can be solid, or contain dashes and dots.

ShowMinorLinesEvery: Mark to display a horizontal line at specific row intervals.

Style: Select a line style for the horizontal lines from the drop down list. The line can be solid, or contain dashes and dots.

Rows: Type or select the row interval at which you want to display horizontal lines in the Gantt Chart.

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Vertical Lines

ShowMajorLines: Mark to specify the number of intervals to display the major vertical lines, and to select a date interval to use to display the major vertical sight lines.

Style: Select a line style for the vertical lines from the drop down list. The line can be solid, or contain dashes and dots.

Start: Select a date for the sight lines to be drawn from, according to the date interval selected.

ShowMinorLinesEvery: Mark to specify the number of intervals to display the minor vertical lines, and to select the date interval to use to display the minor vertical sight lines.

Style: Select a line style for the vertical lines from the drop down list. The line can be solid, or contain dashes and dots.

Start: Select a date for the sight lines to be drawn from, according to the date interval selected.

Sort dialog box

Use the Sort dialog box to control the order of items in a window or layout.

Field Name: Lists sorting data types, in order, for the current window or layout.

Sort Order: The corresponding field's sort order: Ascending, Descending, or Hierarchical. Double-click this field to select a sort order.

Add: Adds a sorting data type.

Delete: Deletes the selected sorting data type.

Move Up: Moves the selected data type higher the list. Data is sorted by the data type at the top of the list first, then by each successive data type moving down the list in order.

Move Down: Moves the selected data type lower in the list.

Sort tab - Modify Template dialog box for use with Microsoft Excel files

Use the Sort dialog box to control the order of items in the export spreadsheet file.

Field Name: Lists sorting data types, in order, for the selected subject area. To select or change a data type, double-click the data type you want to change.

Sort Order: The corresponding field's sort order: Ascending, Descending, or Hierarchical. Double-click this field to select a sort order.

Add: Adds a sorting data type.

Delete: Deletes the selected sorting data type.

Source tab - Properties dialog box

Use the Source tab to select a data source and to specify or edit the settings that determine how you want to group or sort information reported for the data source. If the data source

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reports hierarchical information, you can choose if you want to organize compiled information according to the hierarchy and specify the number of hierarchy levels you want to include in the compiled report.

General Settings

Loop through: The category of information the data source reports. You can select a new data source.

- If you are embedding a data source within an existing data source, the Loop Through field is available only if the selected data source contains additional, lower-levels of information.

Group by: The data type used to group, or categorize, information reported by the selected data source. The list of available data types corresponds to the data source you select. You can select a new data type.

Page break options: Options that control pagination of the data reported for a data source. Available settings are:

- No Page Breaks – inserts a page break only after the current page is full.
- Break After Every Record - inserts a page break after each record produced by the data source and any data sources it may contain.
- Break After Recordset - inserts a page break after each series of records compiled for the data source and any data sources it may contain.

You can select a new setting.

Max level: The number of hierarchy levels included in the report. Type or click the arrows to select a new number. Select 0 to include all hierarchy levels.

- The Max Level field is available only if the selected data source reports hierarchical information.

Organize hierarchically: Mark to report information compiled by the selected data source in hierarchy order.

- The Organize Hierarchically checkbox is available only if the selected data source reports hierarchical information.

Hide if empty: Mark to exclude the selected data source's report components from the compiled report if the data source does not produce any records.

Hide record if no children: If the selected data source contains embedded data sources, mark to exclude parent data source records from the compiled report if its child data sources do not produce any records.

Edit filter: Click to create or edit filters for information reported by the data source.

Sort

Sort: Lists sorting data types, in sort order, for the data source. You can select a data type.

Add: Click to add a sorting data type to the data source.

Delete: Click to delete the selected sorting data type from the data source.

Modify: Click to edit the selected, sorting data type for the selected data source.

Move Up in List: Click to move the selected sorting data type higher in the sort order hierarchy.

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Move Down in List: Click to move the selected sorting data type lower in the sort order hierarchy.

Splash tab - Web Site Display Properties dialog box

Item: Select the item you want to customize, or click the item in the sample area.

Color: Specify a color for the selected item.

Location: Specify the location of a graphical element to add to the splash page.

Font: Specify a font for the selected item.

Size: Select a size for the selected item.

Color: Format the selected item.

B: Apply bold formatting to the selected item.

I: Apply italic formatting to the selected item.

Spreadsheet Options dialog box

Use the Spreadsheet Options dialog box in the Activity Usage Spreadsheet and Resource Usage Spreadsheet to display the timescale based on an average value you specify.

Calculate Average: Mark to specify the values you want to use to divide the timescale interval totals.

Divide Interval Totals By: To divide the timescale interval totals by an increment you specify, type it in this field.

Base on Hours Per Timeperiod: To divide the timescale interval totals by automatic increments, based on the date interval selected, mark this checkbox. When you choose this option, the Divide Interval Totals By field displays the division increment based on the division increment specified in User Preferences for the corresponding date interval: 1h for Hour date interval, 2h for Shift date interval, 8h for Day date interval, 40h for week date interval, and so on.

Unit of Measure: Specify the unit of measure for the timescale intervals.

Startup Filters tab - User Preferences dialog box

The Startup Filters tab enables you to choose the data filters you want to run when starting the module. These filters can reduce the time it takes for your projects to open.

Startup Filters

Current project data only: Select this option to view resources, roles, OBS elements, activity codes, and/or cost accounts used in the projects you open.

View all data (No Filter): Select this option to view all resources, roles, OBS elements, activity codes, and/or cost accounts in the enterprise.

Resource and role summaries: Select this option to load resource summary data when you start P6 Professional and connect to a P6 Professional or a P6 EPPM database. Clear this option to load resource summary data on demand.

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Selecting this option also uses resource and role summary data during project summarization when connected to a P6 Professional database.

Large text data fields: Select this option to load data in large text data fields, for example notebook topics and feedback to and from resources when you start P6 Professional and connect to a P6 Professional or a P6 EPPM database. This option is switched on by default and Oracle recommends you don't switch it off unless you experience significant delays when opening large projects.

Open Project Data

Restrict Projects and Tracking views to summary data: Select this option to view summary data for open projects in the Projects and Tracking views. When multiple large projects are open, viewing live data for open projects in the Projects and Tracking views might affect the performance of P6 Professional. In these circumstances, you can choose to view restrict the view to showing only summary data for open projects.

Status of User Acceptance tab - Admin Preferences dialog box (P6 Professional Only)

Use the User Acceptance tab to see a list of users who have accepted, rejected, and not yet replied to consent notices.

Consent Notice Type: Select the type of consent notice to audit.

Personal Name: The name of the user.

Status: Shows whether the user has Accepted, Rejected, or Not Responded to this consent notice type.

Modified Date: Shows the date that the user Accepted or Rejected this consent notice type.

User Email Address: The email address for the user.

Office Phone: The phone number for the user.

Email: Enables you to send an email to the selected users who have rejected this consent notice type.

Print: Prints the user acceptance grid.

Forget All User Acceptance: Sets the acceptance status for all users to Not Responded for this consent notice type.

Status tab - Project Details dialog box (from Tracking window)

Schedule Dates

Project Planned Start: The start date of the project.

Must Finish By: A date constraint placed on the project end date.

When you add a must finish by date, the calendar defaults to the date and time of the project's finish date. When the Finish is blank, the calendar defaults to the current system date and time.

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When you edit the must finish by date, the calendar defaults to the date and time currently in the Must Finish By field.

Actual Start: The actual start date of the project, if the project has started.

Data Date: The date used as the starting point to calculate the schedule.

Early Finish: The earliest calculated date when the project can finish.

Actual Finish: The actual finish date of the project, if the project has finished—all activities in the project have actual finish dates.

Anticipated Dates

Anticipated Start: The user-defined date the project is expected to start; used during the project planning stage, and set at the WBS, EPS, or project level.

Anticipated Finish: The user-defined date the project is expected to finish; used during the project planning stage, and set at the WBS, EPS, or project level.

Status Updates dialog box (P6 EPPM only)

Use the Status Updates Dialog Box to review status updates your team members made to their assigned activities. On this page you can filter data to show pending, held, and rejected status updates and group the project list by project, resource, or whether a review is required. You can scroll to view multiple status update cards and can scroll within a card to see the fields that have been changed during the update. You can select one or more cards to approve, reject, hold, or override the status update.

Search: Type part or all of a project name or ID to filter the list of projects or a resource name or ID to filter the list of resources.

Group By: Choose to group the list by Projects, Resources, or Review type.

Project List: Select the projects for which you want to review status updates and shows the number of pending, held, and rejected updates for each project.

Pending: Choose to filter the card list to status updates in pending state.

Held: Choose to filter the card list to status updates in held state.

Rejected: Choose to filter the card list to status updates in rejected state.

Refresh: Click to refresh the list of status updates.

Approve: Applies the data from the selected status updates to the associated activities.

Reject: Opens the Reject Status Updates dialog box.

Hold: Sets the status of all selected updates to Held. This button is only available in Pending view.

Remove Hold: Sets the status of all selected updates to Pending. This button is only available in Held view.

Override: Opens the Override Status Updates dialog box.

Select All: Selects all cards in the list.

Clear All: Deselects all cards in the list.

Search: Type to filter the list of cards.

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Status Cards

Activity ID and Name: The ID and name of the activity to which the status update was made.

Send Email: Click to send an email about the status update.

Discussions: Click to start, read, and add to discussions about the status update.

Reviewers: Click to see whether the status update can be approved by any one of the assigned reviewers, or must be approved by all assigned reviewers before it is accepted. You can also see the list of assigned reviewers, the reviewers who are required to take action on the status update, and the reviewers who have already approved the status update.

More...: Click to see the Submitted Date, Held Date, Rejected Date, Activity codes and their values, and UDFs and their values for the status update. The Held Date is available only if the status update has been put on hold. The Rejected Date field is available only in the Rejected view.

Project: The project of the activity being updated.

WBS: The WBS assigned to the activity being updated.

Submitted User: The name of the user that submitted the status update.

Changed Field Name: The name of the fields that were changed during the status update.

Old: The value of the field prior to the status update.

New: The value of the field selected during the status update.

Store Period Performance dialog box

Use the Store Period Performance dialog box to store past period actuals for a project. You can select to store period performance for any open project.

Project ID: The project's unique identifier. This field is read-only.

Project Name: The name of the project. This field is read-only.

Selected: Unmark the checkbox for each project you do not want to store period performance for.

Financial Period Calendar: The name of the Financial Period Calendar assigned to the project. This field is read-only.

Financial Period: Double-click to open the Select Financial Period dialog in which you can select a predefined financial period.

Data Date: The current data date of the project. This field is read-only.

Store Now: Click to store period performance for the selected projects.

Successor Columns dialog box

Use the Successor Columns dialog box to specify which columns you want to display under the Successors tab of the Activity Details. You can also specify the order in which the columns display.

Available Options: Lists columns that do not appear in the current Successors tab display.

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Selected Options: Lists columns that appear in the current Successors tab display.

 Adds the selected available column to the display.

 Includes all available columns in the display.

 Removes the selected column from the display.

 Removes all columns from the display.

 Moves the selected column's position in the display to the right.

 Moves the selected column's position in the display to the left.

Apply: Applies your changes without closing this dialog box.

Default: Applies the default column display format.

Edit Column: Allows you to change the selected column's title and alignment in the display.

Summary tab - Project Details dialog box (from Tracking window)

Contains Summary Data Only (P6 Professional Only): When marked, indicates that the project is only a placeholder for summarized Microsoft Project data.

Last Summarized On: The date the project was last summarized.

Summarized to WBS Level: The level of WBS data to which project data have been summarized.

Project Baseline: The baseline used to summarize data.

Summarize Projects Based On: Indicates if summarized data is based on project-level or activity-level resource assignments. Typically, the High Level Resource Planning option is used for future projects that are currently planning only high-level resource allocation requirements, or for projects that are underway, but do not have resources assigned at a detailed activity-level. The Detail Activity Resource Assignments option is typically used for in-progress projects for reviewing detailed activity-level summarized data, for example, for earned value reporting.

Table Font and Row dialog box

Use the Table Font and Row dialog box to change the appearance of text, color, and the height of rows in your display. This dialog box is displayed when you click the Layout or Display Options bar and choose Table Font and Row. The options available depend on the window or dialog box from which you choose this command.

Background/Font and Color

Font: Enables you to change the font for the rows.

Color: Enables you to change the color for the rows.

Row Height: The size of the row. Type or select a new value.

Show Icons: Indicates you want to show the symbols that identify different types of information in the display.

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Group Rows

Level: Each level in the hierarchy of information displayed on your screen.

Font & Color: The font and color for the group rows. Double-click the Font & Color column to change the font and color for the group rows.

Row Height

Keep Current Row Heights: Indicates you want to use the current row heights.

Optimize height by row content: Indicates you want each row's height determined by its content. If you choose this option, type or select the maximum number of lines that should be included in each row.

Select height for all rows: A value you specify that is used for all row heights.

Show Icons: Indicates you want to show the symbols that identify different types of information in the display.

Apply: Applies your changes without closing this dialog box.

Default: Applies the default table, font, and row settings.

Tailor Attributes dialog box

Use the Tailor Attributes dialog box to specify which activities you want to include in your project plan according to attribute.

Display Options bar: Click to change the attributes display.

Attributes table: Lists attributes assigned to activities in your project plan. A checkmark indicates a selected attribute.

Select: Includes activities with the selected attribute.

Remove: Excludes activities with the selected attribute.

Details: Displays detailed project information about the selected attribute.

Activities: Displays the selected attribute's assigned activities.

Rationale: Allows you to enter a rationale for your attribute selections.

Text Attachment dialog box

Use the Text Attachment dialog box to create formatted text and insert it in a layout. This dialog box contains the following elements:

Font: Click to select the font and font style of the text attachment.

OK: Click to accept changes.

Cancel: Click to close the dialog box without saving changes.

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Time Periods tab - Admin Preferences dialog box (P6 Professional Only)

Hours per Time Period

P6 Professional calculates and stores time unit values in hourly increments. However, through User Preferences, each user can choose to display time unit values as hours, days, weeks, months, or years. When a user displays units and durations in increments other than hours, P6 Professional converts the data based on the Hours per Time Period settings. Conversely, if a user enters time units in increments other than hours, the Hours per Time Period settings are used to convert these input values to hours for database calculation and storage.

As an administrator, you can globally specify the conversion factors on this tab, or you can mark the 'Use assigned calendar to specify the number of work hours for each time period' checkbox. If your organization typically plans and manages projects in time units other than hours, and your resources and activities require different hours per time period settings, you should mark this checkbox, then specify the hours per time period for all defined calendars (choose Enterprise, Calendars).

Use assigned calendar to specify the number of work hours for each time period: Clear this checkbox if you want to always use the Hours per Time Period settings you specify on this tab to convert and store units and durations in the database.

Mark this checkbox to ignore the Hours per Time Period settings on this tab. When you mark this checkbox, P6 Professional converts and stores units and durations using the Hours per Time Period settings defined in each activity's or resource's assigned calendar. Using a task-dependent activity as an example, the module converts units and durations for the activity using the settings defined in the activity's assigned calendar.

Time Period Abbreviations

For each time period increment, specify the abbreviation you want to use when displaying time unit values.

Time Unit tab - User Preferences dialog box

The Time Units tab enables you to define the timescale and format you want to use when displaying small- and large-scale time units. This affects how tracking layouts, activity durations, and resource prices, availability, and work efforts display.

Units Format

Unit of Time: Choose to change the time unit used to display work efforts, and resource prices and availability.

Sub-unit: Mark to display sub-units in the next smaller time increment.

Decimals: The number of decimal places to display in the time unit value. You can select a number.

Show Unit Label: Mark to display the time unit abbreviation with the time value.

Example: An example of the time unit used to display work efforts, and resource prices and availability.

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Durations Format

Unit of Time: Choose to change the time unit used to display activity duration values.

Sub-unit: Mark to display sub-units in the next smaller time increment.

Decimals: The number of decimal places to display in the activity duration value. You can select a number.

Show Duration Label: Mark to display the time unit abbreviation with the duration value.

Example: An example of the time unit used to display activity duration values.

Units/Time Format

Show as a percentage: Choose to display resource units/time as a percentage.

Show as units/duration: Choose to display resource units/time as units per duration.

Timescale dialog box

Use the Timescale dialog box to specify the timescale you want to display in the current Gantt Chart, profile, or spreadsheet layout.

Timescale Format

Two Lines: Choose to display two time units on the timescale.

Three Lines: Choose to display three time units on the timescale. **Timescale Start:** The date from which you want to display project information. Click  to select a new date.

Font & Color: The font style, size, and color settings for the timescale and column headings. Click to format the font and background color. Click the Default Font button to change the timescale font and color to its original settings.

Date Format

Show Primary Dates: Choose or mark to select the type, date interval, and shift calendar to display for the timescale.

Type: Select Calendar to display date intervals according to the standard calendar. Select Fiscal to display the date intervals according to the fiscal periods. Select Week of Year to display the date intervals as a number for each week of the year, consecutively, beginning with January.

DateInterval: The current layout's timescale. Select Year/Quarter, Year/Month, Quarter/Month, Year/Financial Period, Quarter/Financial Period, Month/Financial Period, Week/Financial Period, Month/Week, Week/Day1, Week/Day2, Day/Shift, or Day/Hour.

Shift Calendar: If you select Day/Shift as the date interval, click  to select the corresponding shift.

Show Ordinal Dates: Choose or mark to set and display the date intervals as sequential numbers, beginning from the ordinal start date specified. Ordinal dates that precede the ordinal start date display a negative number.

Ordinal Start: Specify a start date for the ordinal dates.

Ordinal Date Interval: Specify the interval to display for ordinal dates in the timescale.

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Apply: Click to apply your changes without closing this dialog box.

Timesheet Notes dialog box (P6 EPPM only)

Use this dialog to read and add notes to a timesheet.

Add Notes: Type the notes you want to make against the timesheet.

Add: Click to add your notes to the timesheet notes history.

Save: Click to save your changes and close the dialog box.

Timesheets dialog box (P6 EPPM Only)

Use the Timesheets dialog box to view, approve and reject timesheets submitted by resources. You can also send email to the resource who submitted a timesheet, and select delegates for approving timesheets.

Approving As: Select whether you will be approving timesheets as a Project Manager, Resource Manager, Project Manager delegate, or Resource Manager delegate.

Action Required: Click to see only the timesheets awaiting your action. This button is only available if the Timesheet approval level in P6 EPPM is set to either "One approval level - Resource manager approval required" or "Two approval levels - Project and Resource managers' approval required".

All Timesheets: Click to see all timesheets to which you have access. This button is only available if the Timesheet approval level in P6 EPPM is set to either "One approval level - Resource manager approval required" or "Two approval levels - Project and Resource managers' approval required".

Refresh: Click to refresh the view.

Side Dock

Time Period list: Select whether you want to view timesheets submitted in the Last Week, Last 2 Weeks, Last Month, Last 2 Months, Last 6 Months, Current Date, Current Week, Current Month, or for a Custom Date. If you choose Custom Date, you can specify the date range using the Start Date and Finish Date pickers.

Start Date: If you chose to view timesheets for a Custom Date, select the start of the date range you want to view.

Finish Date: If you chose to view timesheets for a Custom Date, select the finish of the date range you want to view.

Status

Use these options to filter the list of timesheets shown.

Select All: Click to show timesheets of all statuses.

Approved: Click to show timesheets that have already been approved. This option is only visible if the All Timesheets button is selected.

Rejected: Click to show timesheets that have been rejected by a timesheet approver. This option is only visible if the All Timesheets button is selected.

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Submitted: Click to show timesheets that have been submitted but not yet assessed by an approver.

Resubmitted: Click to show timesheets that were previously rejected by an approver and have been resubmitted by the resource.

Active: Click to show timesheets that are active and have not yet been submitted. This option is only visible if the All Timesheets button is selected.

PM Approved: Click to show timesheets that have been approved by a Project Manager. This option is only visible if the All Timesheets button is selected.

Apply: Click to apply the status filters to the timesheets list.

Timesheet Area

Delegate: Click to assign either a Project Manager delegate or Resource Manager delegate.

Approve: Click to approve the selected timesheets.

Reject: Click to reject the selected timesheets.

Customize: Click to customize the columns visible in the timesheet list.

Email: Click to send an email about the selected timesheet to the resource that submitted the timesheet. This option is only available if the user associated with the resource has an email address configured in P6 EPPM.

Group By: Select to group the timesheet list by Resource, Last Reviewer, Status, Submitted Date, Timesheet Period, or Reviewed Date. You can also select not to group the timesheet list.

Expand All: When the timesheet list is grouped, click to expand all groupings.

Collapse All: When the timesheet list is grouped, click to collapse all groupings.

Search: Search the timesheet list by data in any of the displayed columns.

Timesheet Notes History: Click to view or add notes associated with the timesheet on the corresponding row.

Approve: Click to approve the timesheet on the corresponding row.

Reject: Click to reject the timesheet on the corresponding row.

Details Dock

Group By: Click to group the rows in the timesheet details by Project, WBS, or Role. You can also choose not to group the rows.

Customize: Click to customize the columns visible in the timesheet details.

Timescale: Click to change the timescale of the timesheet details. Choose from Week/Day, Month/Week, Quarter/Month, Year/Month, or Year/Quarter.

Top Down Estimation dialog box (P6 Professional Only)

Use the Top Down Estimation dialog box to apply labor, nonlabor, and/or material resource units to WBS nodes using estimated weights.

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Resource Units to Estimate

Estimate Labor: Choose this option to estimate labor resource units.

Estimate Nonlabor: Choose this option to estimate nonlabor resource units.

Activities to Estimate

WBS: The name of the WBS element on which to perform the estimate. To estimate the entire project, select the root WBS element.

Total Activities: The number of activities included under the specified WBS element.

Resource: The name of the resource whose assigned activities you want to estimate for the specified WBS element.

Current Units: The current number of units assigned to the specified resource.

Estimation Method

Prior Experience: Choose this option to perform top-down estimation based on prior experience.

Estimated Units: The estimated amount of effort required to complete the WBS elements.

Function Point: Choose this option to develop top-down estimation using function points.

Function Points: Click to launch the Function Point Estimation dialog box. Use the Function Point Estimation dialog box to specify or calculate function point values for the WBS element included in the estimate.

Apply adjustment: Select this option to apply an adjustment percentage to the estimate. Type the adjustment percentage you want to use.

Adjusted Units: The estimated amount of effort required to complete the WBS element with an adjustment percentage. (Adjusted Units = Units * Adjustment %)

Close: Click to exit the Top Down Estimation dialog box without change.

Apply: Click to apply the top-down estimation.

Save As: Click to save the estimate without applying it.

History: Click to view detailed information about and/or apply a previously saved top-down estimate.

Topics tab - Publish Project Web Site dialog box

Detailed Activity Information: Mark to include general activity information for the open project's activities. This includes activity ID, activity name, activity type, duration type, work breakdown structure (WBS) assignment.

Assigned Resources: Mark to include resource IDs for resources assigned to activities in the open project.

Assigned Roles: Mark to include roles assigned to activities in the open project.

Assigned Work Products and Documents: Mark to include work product and document assignments to activities and WBS elements in the open project.

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Issues: Mark to include issues assigned in the open project.

Risks (P6 Professional Only): Mark to include risks assigned in the open project.

Activity Codes: Mark to include activity codes defined for the open project.

Project Financial Data: Mark to include financial data defined for the open project such as budget or funding information.

Trace Logic Options dialog box

Use the Trace Logic Options dialog box to specify the number of predecessor and successor levels you want to display for the selected activity.

Number of predecessor levels: Click the arrow buttons to specify the number of predecessor levels to display.

Number of successor levels: Click the arrow buttons to specify the number of successor levels to display.

Apply: Applies your changes without closing this dialog box.

UDFs tab - Import Options dialog box

Use this tab to use, remove, or rename user defined fields present in the XML file.

Basic Action section:

User Defined Fields: Determines how user defined fields are imported.

Insert New: Retains data in the existing project and adds any new data items.

Keep Existing: Retains data in the existing project and does not overwrite it with the updated data or adds new data if the record does not exist and you have the appropriate security privileges.

Update Existing: Overwrites data in the existing project with updated data and adds new data if the record does not exist.

Do Not Import: Retains data in the existing project and does not import the updated data.

Advanced Actions section:

Select subject area: Determines the area of the product for which you want to define UDFs.

Name: Displays the name of the UDF in hierarchical form grouped by New and Saved. Data that is new in the XML file will appear under New and data already saved in an the existing template will appear under Saved.

Data Type: Displays the data type of a UDF.

Action: Determines if the UDF is used or removed.

New Name: The new name for the UDF.

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UN/CEFACT Export Template dialog box

Use the Export UN/CEFACT Template dialog box to specify the data to be exported to a UN/CEFACT file.

The following tabs are available:

- General tab of the UN/CEFACT Export Template dialog box
- Project tab of the UN/CEFACT Export Template dialog box
- Activity tab of the UN/CEFACT Export Template dialog box

Units and Prices tab - Roles dialog box

Use the Units and Prices tab to specify up to five Price/Unit rates and the maximum units/time for the selected role. After you assign a role to an activity, you can select which rate you want to use to calculate cost.

Calculate costs from units: Mark this checkbox to indicate that any new assignments for this role will have its costs recalculated whenever any quantity changes occur.

Effective Date: You can set varying limits and prices over time by specifying the effective start date for each change.

Max Units/Time: The number of units available during each workperiod (hour, day, week, or month) of the specified timeframe; you can enter a percentage, or a numeric value followed by the appropriate time unit (such as 8h)and/or duration unit (such as 8h/d), depending on your user preference setting for time and duration units.

Rate Type: Displays the five available rate types.

Price/Unit: Double-click the cell, then type the role's monetary price per unit. For example, type 25h (for $25 per hour). You can only enter units in hours, days, weeks, months, or years.

Add: Click to add a new effective date row to the table.

Delete: Click to delete the selected effective date row from the table.

When connected to a P6 Professional database:

You can view the abbreviations your system administrator defined for these units in the Admin Preferences, Time Periods tab.

When connected to a P6 EPPM database: You can view the abbreviations your system administrator defined for these units in P6.

Units of Measure tab - Admin Categories dialog box (P6 Professional Only)

Use the Units of Measure tab to define the units of measure for material resources.

Display Options bar: Click to search for a specific unit of measure abbreviation or description.

Units of Measure table: Lists units of measure abbreviations and descriptions.

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Add: Adds a unit of measure abbreviation and description.

Delete: Deletes the selected unit of measure abbreviation and description.

Shift up: Moves the selected unit of measure to a higher position in the display. This changes the order in which the abbreviations display when you assign a unit of measure to an activity.

Shift down: Moves the selected unit of measure to a lower position in the display. This changes the order in which the abbreviations display when you assign a unit of measure to an activity.

Update Baseline dialog box

Use the Update Baseline dialog box to update project- and activity-level data types for the baseline you selected in the Maintain Baselines dialog box.

The dialog box includes these tabs:

- General tab - Update Baseline dialog box
- Activities tab - Update Baseline dialog box
- Activity tab of Update Options - Update Baseline dialog box
- Resource Assignment tab of Update Options - Update Baseline dialog box

Default: Click to reset all the options to their defaults.

Preview: Click to open the Preview Changes dialog box.

Update: Click to update the selected baseline's data with new, modified, or deleted data from the current project.

Update Baseline Options dialog box

Use the Update Baseline Options dialog box to specify the types of activity and resource/role assignment data to update when you update a baseline.

When updating activity data, include:

Specify the types of activity data you want to update and include the updated baseline.

General activity information: Mark to include general information related to each activity accounted for in the baseline. This data includes the activity name, activity type, duration type, percent complete type, status, calendar, and primary resource.

Activity code assignments: Mark to include project, global and EPS assignments.

Relationships: Mark to update and include relationships within a project and with external projects.

WBS assignments: Mark to include activities assigned to a WBS.

Steps: Mark to include new steps and changes to previous steps.

Step UDFs: Mark to include updated UDFs assigned to steps.

Expenses: Mark to include existing expenses and to adds new expenses to activities.

Expense UDFs: Mark to include updated expense UDFs.

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Risk assignments (P6 Professional Only): Mark to include risks associated with activities.

Activity notebooks: Mark to include notebooks assigned to activities.

Constraints: Mark to include updated constraints.

Dates, duration, and data date: Mark to include Original or Planned Duration, Remaining Duration, Actual start/finish, Anticipated start/finish, Remaining start/finish, Start/finish, Early start/finish, Remaining late start/finish, Late start/finish, Suspend/resume dates and Data Date.

Planned units and cost for activities without resource assignments: Mark to include planned costs per unit for activities without assigned resources.

Actual units and cost for activities without resource assignments: Mark to include actual costs per unit for activities without assigned resources.

Activity UDFs: Mark to include updated UDFs assigned to activities.

When updating resource assignment data, include:

Choose to update existing resource/role assignment data and/or add new resource/role assignments. Choose to update the budgeted or planned and/or actual units and cost for the resource/role assignments.

Update existing resource and role assignments: Mark to update all resource assignment data such as UDF's Resource Codes, cost account, dates, and durations.

The following options are enabled only when a check mark is displayed in the Updating existing resource and role assignments check box.

Planned or Budgeted units and cost: Mark to include budgeted or planned units and costs related to existing resource and role assignments.

Actuals for units and cost: Mark to include actual units and costs related to existing resource and role assignments.

Add new resource and role assignments: Mark to include new resource and role assignments in the baseline.

Planned or Budgeted units and cost: Mark to include budgeted or planned units and costs related to new resource and role assignments.

Actuals for units and cost: Mark to include actual units and costs related to new resource and role assignments.

Activity Resource Assignment UDFs: Mark to include updated UDFs related to resource assignments for activities.

OK: Click to return to the Update Baseline dialog box.

Update Progress dialog box

Use the Update Progress dialog box to update the durations and actual values of the selected activities.

Current Data Date: Displays the current data date.

New Data Date: Select a new data date if the one show is not correct.

When using progress spotlight update progress for: Choose to update all of the highlighted activities that appear in the Gantt Chart or to update only selected activities.

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When actuals are applied from timesheets, calculate activity remaining durations: Specify whether to recalculate the remaining duration based on the activity duration type or to always recalculate. If you choose to always recalculate, all activities are treated as Fixed Units and Fixed Units/Time.

Apply: Calculates and applies progress as follows and changes Current Data date to the New Data Date you specify.

- sets Actual Start to Project Planned Start, if the Project Planned Start is earlier than the new data date
- calculates Remaining Duration (Early Finish – new Data Date) and Actual Duration (Original Duration – Remaining Duration)
- calculates Actual Units (Units Percent Complete * At Complete Units)
- sets Actual Finish to Planned Finish, if Planned Finish is earlier than the new data date

Projects tab - Project Portfolios dialog box

Project: The name of each project in the selected portfolio.

Assign: Click to add projects to the selected portfolio.

Remove: Click to remove projects from the selected portfolio.

Columns dialog box

Use the Columns dialog box to specify which columns you want to display and their order.

Search: Type to search for a column by name.

Available Options: Lists columns that do not appear in the current display.

Selected Options: Lists columns that appear in the current display.

 Includes the selected available column in the display.

 Includes all available columns in the display.

 Removes the selected column from the display.

 Removes all columns from the display.

 or **Move Up**: Changes the selected column's position in the display to the left.

 or **Move Down**: Changes the selected column's position in the display to the right.

Apply: Applies your changes without closing this dialog box.

Copy From: (Activities window only) Copies column selections from a layout you select.

Default: Applies the default column layout to your current display.

Edit Column: Allows you to edit the selected column's title and choose its alignment in the display.

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User Defined Fields dialog box

Use the User Defined Fields dialog box to add an unlimited number of custom fields and values to the project database. Some examples of user defined fields are purchase order numbers, delivery dates, drawing numbers, profit, variances, and revised budgets.

Select Subject Area: Select the area of the product where you want to use this field, such as projects or resources.

Title: Enter a name for the user defined field.

Data Type: Specify whether the values associated with the user defined field are numbers, text, or dates. The data type you select determines the type of data you can specify for the item. For example, if you select Start or End Date as the data type, you can only enter dates as values for the field.

Add: Click to add a new user defined field.

Delete: Click to delete the selected user defined field.

User Preferences dialog box

Use the User Preferences dialog box to specify your settings and preferences which include how to display time, date, and currency information. You can also set options to send Email, specify startup options, and change your password.

This dialog box is divided into the following tabs:

- Time Unit tab - User Preferences dialog box
- Dates tab - User Preferences dialog box
- Currency tab - User Preferences dialog box
- Email tab - User Preferences dialog box
- Assistance tab - User Preferences dialog box
- Application tab - User Preferences dialog box
- Password tab - User Preferences dialog box
- Resource Analysis tab - User Preferences dialog box
- Calculations tab - User Preferences dialog box
- Startup Filters tab - User Preferences dialog box

Users dialog box (P6 Professional Only)

If your security privileges enable you to edit users, use this dialog box to add and remove users, assign global and project profiles to users, and enable or disable access to projects and listed modules.

Based on your resource security settings, this dialog box displays users assigned to resources to which you have access. Use this dialog box to manage resource security for each user on the Global Access tab.

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You can also use this dialog box to display the number of users assigned access to each listed module.

Display Options bar: Click to change the Users table display.

Users table: Lists login names and additional information for users.

Add: Adds a user.

- If P6 Professional is running in LDAP authentication mode, when you click Add, a dialog box appears that you use to search for and import users into P6 Professional from your LDAP repository.

If resource security is enabled, the new user automatically gets no access to resources. Click the Global Access tab to change the user's resource access settings. **Delete:** Deletes the selected user.

Count: Displays the Count dialog box, which lists the number of users assigned access to each listed module. It also provides the user name of each user assigned access to each module.

The Users Dialog box also contains the following tabs:

- General tab - Users dialog box
- Contact tab - Users dialog box
- Global Access tab - Users dialog box
- Project Access tab - Users dialog box
- Module Access tab - Users dialog box

Users tab - Organizational Breakdown Structure dialog box

Login Name: Lists login names of users who can access the selected OBS element's project information.

Project Security Profile: Lists each user's security profile, or access type, for the selected OBS element's project information.

WBS Category tab - Admin Categories dialog box (P6 Professional Only)

Use the WBS Category tab to define a custom work breakdown structure (WBS) category and category values. The WBS Category tab displays the current name of the custom WBS category.

WBS Category: The name of the current work breakdown structure (WBS) category. You can type a new name.

Display Options bar: Click to search for a specific WBS category value.

Category Value: Lists values for the custom WBS category. To change a category value, double-click it.

Add: Adds a WBS category value to the displayed category.

Delete: Deletes the selected WBS category value from the displayed WBS category.

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Shift up: Moves the selected WBS category value to a higher position in the display. This changes the order in which WBS category values display when you assign a value to a work breakdown structure element.

Shift down: Moves the selected WBS category value to a lower position in the display. This changes the order in which WBS category values display when you assign a value to a work breakdown structure element.

WBS Details dialog box

Use the WBS Details dialog box to view detailed information about a selected WBS element before including it in your project plan.

The following tabs are available in the WBS Details dialog box:

- Notebook tab - WBS Details dialog box
- Attributes tab - WBS Details dialog box
- Resources tab - WBS Details dialog box
- Roles tab - WBS Details dialog box
- Expenses tab - WBS Details dialog box
- WPs & Docs tab - WBS Details dialog box
- Cost/Size tab - WBS Details dialog box
- WBS Milestone tab - WBS Details dialog box

WBS Milestone tab - WBS Details dialog box

WBS Milestone table: Lists the name and weight of milestones associated with the selected WBS.

General tab - Modify Template or View Template dialog box

Import

Select a currency: Click  to select a currency to use for values in cost fields.

The following options are available for MPX format:

Schedule project after import: Mark to automatically schedule the project in P6 Professional after the import.

Summarize project after import to WBS level: Mark to automatically summarize the project in P6 Professional after the import. Select the level of WBS data to which the project should be summarized.

The following options are available for the XML format:

Import Microsoft Project summary task as WBS summary task: Mark to import a summary task from Microsoft Project as a P6 Professional WBS summary task in addition to the WBS hierarchical element.

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Select the Microsoft Project baseline to use for planned/budgeted values: Mark to select a Microsoft Project baseline for planned or budgeted values, with the option to select one of Microsoft's 10 baselines. Selecting 0 indicates the current project baseline.

Web Site Display Properties dialog box

Use the Web Site Display Properties dialog box to customize the appearance of a project Web site.

Scheme: Lists the project Web site schemes you defined.

Save As: Click to save the current settings as a project Web site scheme. Type a new name to create a new scheme.

Delete: Click to delete a project Web site scheme.

The Web Site Display Properties dialog box contains two tabs:

- Splash tab - Web Site Display Properties dialog box
- Main Form tab - Web Site Display Properties dialog box

Welcome dialog box

Use the Welcome dialog box to open a project or create a new project.

Select Project Portfolio: The currently selected portfolio. Click Select to select a different portfolio. The portfolio you select determines the projects that are available if you choose to open an existing project.

Create New: Starts the Create a New Project wizard for adding a new project. The new project is added to the current portfolio. If you have not been assigned the security privilege required to create projects for at least one OBS element, or if you do not have edit rights for the currently selected portfolio, this option is disabled.

Open Existing: Displays the Open Project dialog box for selecting an existing project to open. The Open Project dialog box only displays projects that are included in the currently selected portfolio in the Select Project Portfolio field.

Open Last: Opens the last project you used. The button is disabled if the current portfolio does not contain any projects that you opened last.

Do not show this window again: Mark if you do not want the Welcome dialog box to appear each time you start up. The last project you used at startup automatically opens. To turn this option back on, choose Edit, User Preferences, then click Application and mark the Show the Welcome Dialog at Startup checkbox.

Work Product and Document Details dialog box

Use the Work Product and Document Details dialog box to view details about and/or open the selected work product or document. To edit work product and document details, choose Project, Work Products and Documents and display WP & Doc Details.

Title: The name of the selected work product or document.

Ref. No.: The selected work product or document's reference or catalog number.

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Author: The name of the person who created the selected work product or document.

Version: The selected work product or document's version number.

Revision Date: The date of the selected work product or document's last update.

Document Category: The category assigned to the work product or document in the Work Products and Documents window. Document categories are defined in P6 when P6 Professional is connected to a P6 EPPM database and in Admin Categories when connected to a P6 Professional database.

Status: The status of the selected work product or document, for example, not started, in progress, or on hold. Work Product and Document status designations are defined in P6 when P6 Professional is connected to a P6 EPPM database and in Admin Categories when connected to a P6 Professional database.

Private Location: The selected work product or document's private filename. Only P6 Professional users can view this filename.

Public Location: The selected work product or document's public filename. All project participants can view this filename.

Launch: Opens the selected work product or document's public file in its native application.

Description: A narrative description of the selected work product or document.

Notes (P6 EPPM Only)

- If the selected work product or document has been added via a P6 installation with a configured content repository, the detail fields are read-only and the document cannot be opened from P6 Professional.
- As a prerequisite for adding documents to a content repository, the system administrator must use P6 to configure the P6 server URL.

WPs & Docs tab - Attribute Details dialog box

WPs & Docs table: Lists titles and reference numbers for work products and documents assigned to activities in the selected attribute.

WPs & Docs tab - WBS Details dialog box

WPs & Docs table: Lists titles and reference numbers for work products and documents assigned to activities in the selected WBS.

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Popups

P6 Integration API

The P6 Integration API is a Java-based API and server that enables developers to create client code that can seamlessly access project management functionality.

Accounting Variance ($)

An Accounting Variance threshold value is expressed as a monetary value. An issue is generated if the Accounting Variance (the difference between the activity's budgeted or planned cost according to the schedule and the actual cost of performing the activity) falls beyond the threshold values.

Accounting Variance is calculated as Accounting Variance = Planned Value Cost - Actual Cost.

A negative value indicates that actual costs have exceeded the scheduled costs. A positive value indicates that actual costs have not reached the scheduled costs.

If the lower threshold value is 0, an issue is generated as soon as actual costs are greater than scheduled costs.

Active

The project is currently underway.

Actual Cost

Actual Cost is the actual total cost incurred on the activity as of the project data date. Computed as Actual Cost = Actual Labor Cost + Actual Nonlabor Cost + Actual Material Cost + Actual Expense Cost. Actual Cost is the same as the Actual Total Cost.

Admin superuser

A global profile that gives a user read/write privileges for application-wide information and features. This information includes all projects, resources, cost accounts, and users. An Admin superuser always has access to all resources. If resource security is enabled, resource access settings will be ignored.

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As late as possible constraint

A restriction you impose on an activity or work unit with positive float that allows it to start as late as possible without delaying its successors. This constraint sets the early dates as late as possible without affecting successor activities.

Assign a day of the week to a date

The DayOfWeek function returns the day of the week (Monday, Tuesday, and so on) to the specified date field, such as the Start or Finish.

Function: DayOfWeek(Parameter)

Example	Explanation
Then: User_text1=DayOfWeek(Start)	Stores the day of week corresponding to the start date in the User_text1 user field.

Backward pass

The calculation of late dates of activities in a project. The backward pass begins with the latest early finish date of the last activity, or the imposed project finish date if one exists, and works backward to the first activity in the project. The late start and finish dates of each activity calculate based on durations, constraints, and relationships.

Baseline

A snapshot of a project plan. This "snapshot" provides a target against which you can track a project's cost, schedule, and performance.

Bucket

A bucket is another term for " timeperiod." You can view, enter, and edit activity and assignment data in various buckets, such as daily, weekly, monthly, quarterly, yearly, and financial period. The term "bucket" is generally used in reference to P6 Professional's future period bucket planning feature, which enables you to manually enter and edit assignment data for some activities in future period buckets.

Budget At Completion (BAC)

Budget At Completion is the budgeted or planned total cost through activity completion. Computed as Budget At Completion = Budgeted or Planned Labor Cost + Budgeted or Planned Nonlabor Cost + Budgeted or Planned Material Cost + Budgeted or Planned Expense Cost. It is the same as the BL Total Cost.

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Cost % of Budget (%)

Cost % of Budget threshold value is expressed as a percentage. An issue is generated if the ratio of the activity's actual cost to its budgeted cost (actual cost / budgeted cost * 100) falls beyond the threshold values.

Actual cost is the same as Total Actual Cost, and original cost is the same as Budget at Completion (BAC).

The Cost % of Budget will reach 100 percent when the actual cost reaches the budgeted cost. The Cost % of Budget may be greater than 100 percent.

Cost % of Planned (%)

Cost % of Planned threshold value is expressed as a percentage. An issue is generated if the ratio of the activity's actual cost to its planned cost (actual cost / planned cost * 100) falls beyond the threshold values.

Actual cost is the same as Total Actual Cost, and planned cost is the same as Budget at Completion (BAC).

The Cost % of Planned will reach 100 percent when the actual cost reaches the planned cost. The Cost % of Planned may be greater than 100 percent.

Cost Performance Index

Cost Performance Index (CPI) = Earned Value Cost / Actual Cost

Cost Performance Index (CPI) (ratio)

Cost Performance Index (CPI) (ratio)

A Cost Performance Index (CPI) threshold value is expressed as a ratio. An issue is generated if the CPI falls beyond the threshold values.

The Cost Performance Index is calculated as CPI = Earned Value Cost / Actual Cost . A value less than 1 indicates that actual costs have exceeded the value of work performed.

If the lower threshold value is 1, an issue is generated whenever the actual costs exceed the value of the work performed.

Cost Variance (CV) ($)

A Cost Variance (CV) threshold value is expressed as a monetary value. An issue is generated if the CV (the difference between the activity's earned value and the actual cost of performing the activity) falls beyond the threshold values.

Cost Variance is calculated as CV = Earned Value Cost - Actual Cost. A negative value indicates that actual costs have exceeded the value of work performed, which may be considered a cost overrun.

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If the lower threshold value is 0, an issue is generated as soon as actual cost of the work is greater than the value of the work. A larger negative value for the threshold indicates that a certain amount of cost overrun may be tolerated before an issue is generated.

Cost Variance Index (CVI) (ratio)

A Cost Variance Index (CVI) threshold value is expressed as a ratio. An issue is generated if the CVI (the ratio of the cost variance to the earned value of work performed) falls beyond the threshold values.

The Cost Variance Index is calculated as CVI = Cost Variance (CV) / Earned Value Cost.

A value less than 0 indicates that actual costs have exceeded the value of work performed.

If the lower threshold value is 0, an issue is generated whenever the actual costs exceed the value of the work performed.

Critical path

The critical path is a series of activities that determines a project's completion time. The duration of the activities on the critical path controls the duration of the entire project; a delay to any of these activities will delay the finish date of the entire project. Critical activities are defined by either the total float or the longest path in the project network.

Critical Path Method (CPM) scheduling

The method by which activity durations and the relationships between activities are used to mathematically calculate a schedule for the entire project. CPM focuses your attention on the critical path of activities that affect the completion date for the project or an intermediate deadline.

Early dates, the earliest possible dates each activity can start and finish, and late dates, the latest possible dates each activity can start and finish without delaying the project finish or an intermediate deadline (constraint) are also calculated.

Current Project Resources

Current project resources are resources that belong to any of the following categories:

- Assigned to an activity in the currently open project(s)
- When connected to a P6 Professional database: Assigned to a risk in the currently open Project(s)
- Assigned to an issue in the currently open project(s)

Data date

The date to use as the starting point for schedule calculations. Change the data date to the current date when you record progress.

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Data Source

A category of information.

The data source component in the Report Editor corresponds to the subject area you select when you use the wizard to create a report. Examples of data sources are activities, cost accounts, expense categories, and work breakdown structure (WBS).

Driving resource

A resource that determines the duration of the activity to which it is assigned. P6 Professional automatically calculates the activity duration based on the quantity to complete and the units per timeperiod of the driving resource.

Defining resources as driving, by marking the Drive Activity Dates by Default checkbox for new resource assignments in the Projects window, Project Details, Resources tab, only establishes its default status; you can change it for any specific assignment.

If an activity has more than one driving resource, the resource that takes the longest to complete determines the duration of the activity.

Duration % of Original (%)

A Duration % of Original threshold value is expressed as a percentage. An issue is generated if the ratio of the activity's actual duration to its original duration (actual duration / original duration * 100) falls beyond the threshold values.

The ratio of actual duration to original duration may be greater than 100.

Duration % of Planned (%)

A Duration % of Planned threshold value is expressed as a percentage. An issue is generated if the ratio of the activity's actual duration to its planned duration (actual duration / planned duration * 100) falls beyond the threshold values.

The ratio of actual duration to planned duration may be greater than 100.

Earned Value Cost

Earned Value Cost is the portion of the budgeted or planned total cost of the activity that is actually completed as of the project data date. Computed as Earned Value Cost = Budget at Completion * Performance % Complete. The method for computing the performance percent complete depends on the earned-value technique selected for the activity's WBS.

Else: statement

Specifies what changes should be made to project data when the If conditions are not met in a Global change specification.

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EPS (Enterprise Project Structure)

The hierarchical structure of your database of projects.

Use the EPS to perform top-down budgeting, manage multiple projects, implement coding standards, and maintain security throughout the enterprise.

EPS node

A level above a project in the EPS hierarchy.

Estimate at Completion

The estimated cost at completion for the activity. Computed as the actual total cost plus the estimate-to-complete cost; Estimate at Completion = Actual Cost + Estimate to Complete. Note that the method for computing Estimate to Complete depends on the earned-value technique selected for the activity's WBS.

Estimate to Complete (ETC)

Estimate to Complete

The estimated cost to complete the activity. Computed as either the remaining total cost for the activity (Remaining Total Cost), or as PF * (Budget at Completion - Earned Value Cost), depending on the earned-value technique selected for the activity's WBS.

Example: Determining Resource Availability

If the selected resource is one person, a reasonable value may be 8 hours (units) per day (duration). In this case, the Max Units/Time would be 8.00h/ d, or 8 hours of work per day. Similarly, if the selected resource is a department with 5 people, then the Max Units/Time may be 40.00h/ d. This means that 5 people can perform 40 hours of work per day, rather than 1 person performing 8 hours of work per day.

Example: Importing Relationships to External Projects

This example demonstrates how the import actions and the Delete option affect the import of relationships that are linked to activities in external projects.

Update Existing: Update Existing is the default action for the Relationships to External Projects data type. This option looks for matches between the external relationships in the XER file (the export file) and the database. If a match is found, the relationship (e.g., lag value) is updated in the database. If a match is not found, the external relationship from the XER file is added to the database.

Keep Existing: This option looks for matches between the external relationships in the XER file and the database. If a match is found, no changes are made to the external relationship in the

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database. If a match is not found, the external relationship from the XER file is added to the database.

Do Not Import: This option ignores external relationships in the XER file.

Insert New: This option acts the same as Keep Existing unless the Activities data type import action is set to Insert New. When both Relationships to External Projects and Activities are set to Insert New, the external relationships for the new activities in the database mirror the external relationships in the XER file.

Delete: This option looks for matches between the external relationships in the XER file and the database. If an external relationship is found in the database that does not exist in the XER file, the relationship is removed from the database.

Exclusive

A user with Exclusive access to a project can open and exclusively edit the open project. Only one user at a time can have Exclusive access to a project. When you open a project in Exclusive mode, other users can open it only in Read-Only mode.

Extensible Markup Language (XML)

Extensible Markup Language, also spelled eXtensible Markup Language (XML), is a simple and flexible text format based on Standard Generalized Markup Language (SGML) and standardized by the World Wide Web Consortium (W3C®). Unlike HyperText Markup Language (HTML), which is limited to a finite set of elements denoted by tags, XML is a meta-language, a tagging language that defines other languages, offering flexibility for the design of unique elements that serve specific purposes, such as tags that enable translation between file formats, including translation between P6 Professional project data and Excel spreadsheet formats. For detailed information about the XML standard, see https://www.w3.org/XML/.

Extract data from the left side of a value

The LeftString function extracts a specified number of characters from a text field, beginning with the first character of the value. The following example changes the name of an activity.

Function: LeftString(Parameter,#)

Example	Explanation	Old value	New value
If: Activity Name = System Design	Selects activities named System Design.		
Then: Activity Name = LeftString(Activity Name,6)	Extracts six characters, beginning with the first character in the Activity Name field.	System Design	System

Extract data from the right side of a value

The RightString function extracts a specified number of characters from a text field, beginning with the last character of the value. The following example changes an activity name.

Function: RightString(Parameter,#)

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Example	Explanation	Old value	New value
If: Activity Name = System Design	Selects activities named System Design.		
Then: Activity Name = RightString(Activity Name,6)	Extracts six characters, beginning with the last character in the Activity Name field.	System Design	Design

Extract mid-string characters

The SubString function extracts from a text field starting at a specified position (defined using the first #) and continuing for a specified number of characters (defined with the second #).

Function: SubString(Parameter,#,#)

Example	Explanation	Old value	New value
If: Activity ID = AADRAW000	Selects activity AADRAW000		
Then: Activity ID = SubString(Activity ID,4,3)	Extracts three characters, beginning with the fourth.	AADRAW000	RAW

Field Delimiter

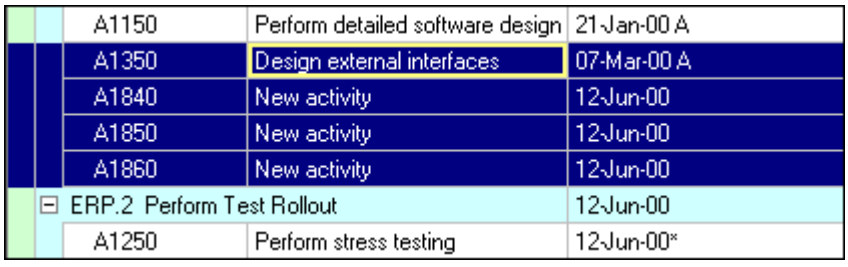
In a delimited text file, the character used to separate fields, or categories of information.

Field Separator

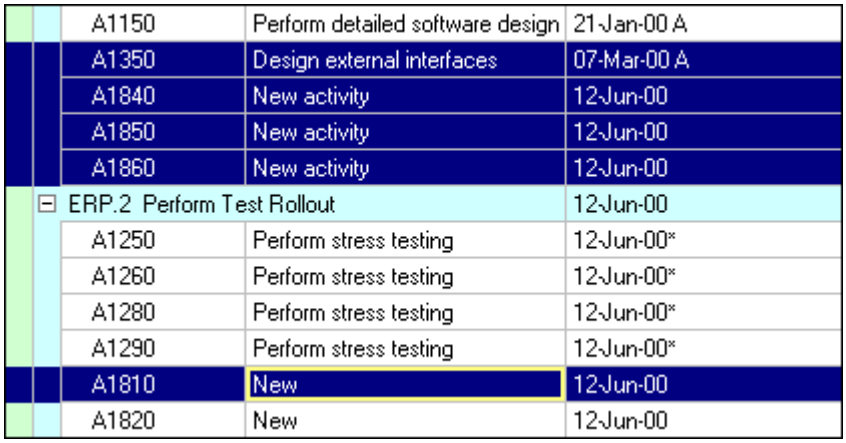
In a delimited text file, the character used to separate fields or categories of information.

Fill Down Function Example

Using the Fill Down function, you can quickly copy the activity name Design external interfaces from activity A1350 to activities A1840, A1850, and A1860.



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A1150	Perform detailed software design	21-Jan-00 A
A1350	Design external interfaces	07-Mar-00 A
A1840	New activity	12-Jun-00
A1850	New activity	12-Jun-00
A1860	New activity	12-Jun-00
ERP.2 Perform Test Rollout		12-Jun-00
A1250	Perform stress testing	12-Jun-00*
A1260	Perform stress testing	12-Jun-00*
A1280	Perform stress testing	12-Jun-00*
A1290	Perform stress testing	12-Jun-00*
A1810	New	12-Jun-00
A1820	New	12-Jun-00

Finish Date Variance (days)

A Finish Date Variance threshold value is a specified number of days. An issue is generated if the difference between the activity's baseline and current finish dates (calculated as BL Finish - Finish Date) falls beyond the threshold values. If no baseline is defined, the current project is used as the primary baseline.

A negative value for Finish Date Variance indicates that the current finish date is later than the primary baseline finish date.

Finish milestone activity

A finish milestone activity marks the end of a major stage in the project. Since a finish milestone activity does not have a duration, it is sometimes referred to as a "zero duration activity."

A finish milestone may have a primary resource and expenses associated with it, but cannot have resource assignments, role assignments, or time-based costs such as labor. You can assign work products and documents to a finish milestone. When you create relationships to milestones, the default relationship type is finish-to-start.

Finish on constraint

A restriction you place on an activity by imposing a finish date. The finish on constraint can delay an early finish or accelerate a late finish to satisfy the imposed date.

Finish on or after constraint

A restriction you impose on an activity that limits the earliest time it can complete. The finish on or after constraint reduces float to coordinate parallel activities, ensuring that the finish of an activity is not scheduled before the specified date. It is usually applied to activities that have few predecessors that must finish before the next phase of a project.

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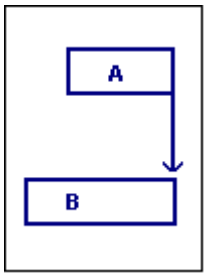
Finish on or before constraint

A restriction you impose on an activity that limits the latest time it can be finished. The finish on or before constraint affects only late dates. Use this constraint to ensure that the late finish date of an activity is not later than the date you impose.

Finish to finish relationship

Finish to finish (FF) relationship

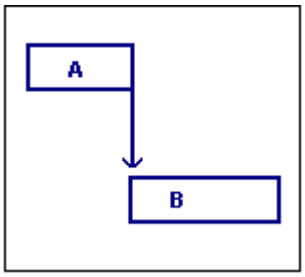
A relationship in which the finish of a successor activity depends on the finish of its predecessor activity.



Finish to start relationship

Finish to start (FS) relationship

A relationship in which the start of a successor activity depends on the completion of its predecessor activity. This is the default activity relationship.



Forward pass

The calculation of early dates for a project. The forward pass starts at the beginning of the project and continues to the end to calculate the earliest start and finish dates for each activity.

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Free Float (days)

A Free Float threshold value is a specified number of days. An issue is generated if an activity's free float (the amount of time the activity can be delayed without delaying the early start of any successor activity) falls beyond the threshold values.

Free Float threshold monitoring can only be applied at the activity level, not at the WBS level.

FTP (File Transfer Protocol)

A method for transferring HTML documents to a World Wide Web server. An FTP program defines how a local computer communicates with a remote computer and enables you to transfer files between these computers.

Global Reports

Global reports are not project-specific. You can run a global report for any project.

Group

Organizing project data by a common attribute. Each group of activities is listed under a colored band.

HTML (HyperText Markup Language)

A platform-independent language which allows documents created in a variety of environments to be placed on a single server and accessed through a browser. HTML documents are indicated by an . HTM or .HTML extension.

If: statement

Defines conditions under which certain changes should be made to project data. When the If statement is true, the changes specified in the Then statement are applied. When the If statement is not true, the changes in the Else statement are applied, providing an Else statement has been defined.

Importing Options -- Projects

If resource security is enabled (you have limited or no resource access), the following restrictions apply when importing activity resource assignments:

- If Project Import option is Create New Project, Update Existing, Replace Existing or Add into Existing Project:

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  - If Global Resource option is set to Do Not Import: For new resources, no activity resource assignment data is imported. For existing resources, the Activity Resource Assignments project option determines how the data is imported.
  - If Global Resource option is set to Keep Existing, Update Existing, or Insert New: For new resources, activity resource assignment data is imported only if you have limited or all resource access (but not "no resource access"). And those resources are imported only if they are in your resource node. For existing resources, the Activity Resource Assignments project option determines how the data is imported.

- If Project Import option is Ignore this Project:
  - No activity resource assignment data is imported.

If you have no resource access, you cannot import activity resource assignments if the resource does not exist in the resource dictionary.

Importing Options -- Resources

If resource security is enabled (you have limited or no resource access), the following restrictions apply when importing resources:

A) Limited resource access:

	Keep Existing	Update Existing	Insert New	Do Not Import
New resource See Note.	The resource is added as a child under your root resource node.	The resource is added as a child under your root resource node.	The resource is added as a child under your root resource node.	
Existing resource (under your root node)		The resource data is updated.	The resource is added as a child under your root resource node. Resource ID is appended by "-1". (For example, if the Resource ID is "Labor", the new Resource ID will be "Labor-1")	
Existing resource (outside your root node)				

Inactive

Work on the project has ceased or is placed on hold.

Lag

An offset or delay from an activity to its successor. Lag can be positive or negative and it is based on the calendar of the successor activity.

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Level of effort activity

A level of effort activity's duration is dependent on its predecessor and/or successor activities. Level of effort activities cannot have constraints assigned to them. Level of effort activities are not included when leveling resources.

Use level of effort activities for on-going tasks that depend on other activities. For example, you could assign level of effort activities for clerical work, a security guard, or even some aspects of project management.

A level of effort activity is similar to but different from a hammock activity.

- A level of effort activity uses its assigned calendar to summarize its dates. Hammocks are not scheduled using their own calendar.
- Any type of relationship can be assigned to a level of effort activity. Only a start-to-start and finish-to-finish relationship can be assigned to a hammock activity.
- A level of effort activity's duration is calculated from the earliest early start of its predecessors/successors (linked to the start end of the level of effort activity) to the latest early finish of its predecessors/successors (linked to the finish end of the level of effort activity). A hammock activity's duration is calculated from the earliest early start of its predecessors to the latest early finish of its successor activities.

Mandatory finish constraint

A restriction you impose on an activity that sets its early and late finish dates equal to the date you specify. The mandatory finish date is used regardless of its effect on network logic. This constraint affects the late dates for all activities that lead to the constrained activity and all early dates for the activities that lead from the constrained activity.

- When mandatory constraints are placed on calendar nonworktime, the early and late dates are not set equal to each other. The early date is moved forward to the next valid worktime and the late date is moved back (earlier) to the first valid worktime. This can cause negative float in the schedule.

Mandatory start constraint

A restriction you impose on an activity that sets its early and late start dates equal to the date you specify. The mandatory early start date is used regardless of its effect on network logic. A mandatory early start date could affect the late dates for all activities that lead to the constrained activity and all early dates for the activities that lead from the constrained activity.

- When mandatory constraints are placed on calendar nonworktime, the early and late dates are not set equal to each other. The early date is moved forward to the next valid worktime and the late date is moved back (earlier) to the first valid worktime. This can cause negative float in the schedule.

Manual future period buckets

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Manual future period buckets/values

A manual future period bucket is a future period resource or role assignment bucket, or time period, that contains a value that was manually entered or edited in the Resource Usage Spreadsheet (in the Resource Assignments or Activities windows).Typically, a resource or role assignment to an activity that has a manually-entered value in a future period bucket is referred to as an assignment with "manual future period buckets" or "manual future period values."

Microsoft Project Importing Options -- Resources

If resource security is enabled (you have limited or no resource access), the following restrictions apply when importing resources from a Microsoft Project file:

A) Limited resource access

If the resource to be imported already exists in the resource dictionary:	Keep Existing	Update Existing	Add New Resource
Existing resource you have access to (under your root node)		Resource data is updated.	The resource is added as a child under the resource you selected for Import Under Resource field.* In order to keep resources unique in the resource dictionary, the Resource ID is appended by "-1". (For example, if the Resource ID is "Labor", the new Resource ID will be "Labor-1")
Existing resource you do not have access to (outside your root node)			

More Detail: Administrative categories (P6 Professional Only)

Use the following tabs to establish the following default categories and values:

Baseline Types: Create, edit, and delete baseline types. Use these categories to standardize and categorize baselines, and to help benchmark performance across projects.

Expense Categories: Create, edit, and delete expense categories. Use these categories to standardize and categorize project expenses, and organize and maintain expense information.

WBS Category: Create a WBS category and create, edit, and delete WBS category values. Use this category to standardize and categorize WBS elements.

Document Categories: Create, edit, and delete categories for work products and documents. Use these categories to standardize and categorize work products and documents, and organize and maintain work product and document information.

Document Status: Create, edit, and delete document status types. Use these status types to identify the current status of work products and documents within a project.

Risk Categories: Create, edit, and delete risk categories.

Notebook Topics: Create, edit, and delete notebook topics. Use notebook topics to organize related notes about an activity.

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Units of Measure: Add, delete, and organize units of measure.

More Detail: Set Resource Analysis Preferences

You can set user preferences to specify which projects to include and which dates and interval you want to use to calculate values for a resource profile.

1. To display the Resource Analysis tab, click it.
2. If you chose the Show Remaining Bars As, Total Remaining option, to specify which closed projects you want to include, if any, select an option in the All Projects section.
3. To specify which dates you want to use to calculate remaining values, in the Time-Distributed Data section, select a date option.
4. To specify the interval you want to use for live spread data calculations, in the Interval for Time Distributed Resource Calculations field, select an option.
    - For the most efficient forecast of summary data, We recommend that you select the same interval as specified for the timescale in the profile/spreadsheet.

More Detail: Specifying a bar's timescale

Depending on whether an activity, project, or tracking layout is displayed, the options vary for specifying the timeperiod represented by a Gantt Chart bar. Some timeperiods are available for all three layout types. In activity layouts the bars represent dates for an activity; in project layouts, bars represent EPS node or project elements; in tracking layouts, depending on the current view, bars may represent an EPS node, project, or WBS element.

Project and Tracking layout bars

Actual Bar: Represents the Actual Start Date to Actual Finish Date.

Baseline Bar: Represents the baseline's Planned Start Date to the baseline's Planned Finish Date. For closed projects, the dates are derived from the project baseline. For open projects, the dates are derived from the primary baseline.

Current Bar: Represents the Start Date to Finish Date.

Forecast Bar: Represents the Project Planned Start Date to Planned Finish Date.

Performance % Complete Bar: Represents the Performance Percent Complete.

Remain Bar: Represents the Remaining Start Date to Remaining Finish Date.

- The Performance % Complete bar will not display for negative values.

Activity layout bars

% Complete Bar: Represents the percent complete of the activity.

Actual Bar: Represents the Actual Start Date to Actual Finish Date

Current Bar: Represents the Start Date to Finish Date.

Early Bar: Represents the activity's Early Start Date to Early Finish Date.

Float Bar: Represents the activity's Remaining Finish Date to Late Finish Date where the remaining date is before the late date.

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Late Bar: Represents the activity's Late Start Date to Late Finish Date.

Neg Float Bar: Represents the activity's Remaining Finish Date to Late Finish Date where the remaining date is after the late date.

Performance % Complete Bar: Represents the Performance Percent Complete.

Plan Bar: Represents the activity's Planned Start Date to Planned Finish Date.

Primary Baseline Bar: Represents the primary baseline's Project Planned Start Date to the primary baseline's Planned Finish Date.

Project Baseline Bar: Represents the project baseline's Project Planned Start Date to the project baseline's Planned Finish Date.

Remain Bar: Represents the Remaining Start Date to Remaining Finish Date.

Secondary Baseline Bar: Represents the second baseline's Project Planned Start Date to the second baseline's Planned Finish Date.

Tertiary Baseline Bar: Represents the third baseline's Project Planned Start Date to the third baseline's Planned Finish Date.

User Dates: Represents the activity's user start and end dates as defined in the activity columns.

- The % Complete bar will not display for negative values.

More Detail: Specifying a date interval format

Calendar: Displays time intervals according to the standard calendar year, for example Month/Year.

Fiscal: Displays time intervals according to the fiscal year, for example FM1/FY2004, FM2/FY2004.

Week of Year: Displays the date intervals as a number for each week of the year, consecutively, beginning with January.

Ordinal Dates: Displays time intervals according to ordinal intervals, based on a start date you specify. If you choose this option, also select a standard date or a custom date.

More Detail: Specifying activity box field widths

A field's width value is specified as a percentage of the total box width. In organizing the fields within the activity box, The Activity Network will attempt to fit as many fields as possible in the first row of the activity box until the combined width of fields are equal to or exceed 100(%). Then it will attempt to fit the remaining fields on the second row of the activity box, continuing on in this fashion until all of the fields listed in the table are displayed in the activity box. Therefore, to display a field on a separate row, increase its width value such that it will no longer fit on its current row with the previous field.

For example, if you want to fit three fields in the same row, you can specify field widths of 33%, 33%, and 34%. If you want to fit the first field on its own row and the second and third fields on a single row, you can specify field widths of 68%, 33%, and 34%.

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OBS (organizational breakdown structure)

An OBS is a hierarchical arrangement of a project's management structure. User access and privileges to nodes and projects within the enterprise projects structure (EPS) hierarchy are implemented via a responsible manager defined in the enterprise-wide OBS hierarchy.

Oracle Contractor

Oracle Contractor helps you plan and control your project schedule in a single-user environment. Use Oracle Contractor to plan the activities that will complete the project, track project progress, and determine how quickly the project can be completed.

The application supports work breakdown structures (WBS), user-defined fields and codes, and critical-path-method (CPM) scheduling.

Oracle Contractor also enables you to

- Create dictionaries for resources, calendars, codes, user-defined fields, and cost accounts
- Quickly update project progress and schedule projects
- Track project expenses
- Compare project baselines
- Use a Report wizard to create customized reports to extract any data from the database.

Out-of-sequence progress

Work completed for an activity before it is scheduled to occur. In a conventional relationship, an activity that starts before its predecessor completes shows out-of-sequence progress.

Overview: Adding weights to steps

Weighted steps enable you to track the progress of an activity based on the number of steps completed. To calculate weighted steps you must first mark the Activity Percent Complete Based on Activity Steps checkbox for the project you want to use (this checkbox is located on the Calculations tab in the Project details view). Then, for each activity containing weighted steps, set the percent complete type to Physical.

When you add a step to an activity that already has steps defined, the default weight for the new step is 1, providing no steps have been marked Completed, and no steps have a Step % Complete of 100%. If some of the steps for the activity have already been completed, the default weight for the new step is 0.

Overview: Changing the global code separator

The global code separator is the character that separates cost account and activity codes to indicate hierarchy levels. The global code separator is used to indicate work breakdown structure (WBS) hierarchy levels if you do not specify a code separator for a project.

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Overview: Creating a document status

You can create status types that you can assign to documents in any project. A document's status helps you determine which documents are approved work products and documents, standards, and deliverables, and if they can be assigned to activities or work breakdown structure elements.

Overview: Creating a log of tasks

You can record internal function calls, or the actions you perform, in an ERRORS.LOG file. This file is created in the user's My Documents folder.

Overview: Defining activity percent complete types

You can calculate percent complete according to activity duration, activity units, or according to a physical percent complete that you enter manually for each activity.

Overview: Entering a physical percent complete for activities

A percent complete that is entered manually by the user instead of being calculated by the module is known as a "physical" percent complete.

The default method is to calculate percent complete according to activity duration.

Overview: Removing roles from resources in the Resources window

You can remove a role from a resource in the Resources window, or you can remove a role from a resource in the Roles dialog box.

Overview: Removing roles from resources in the Roles dialog box

You can remove a role from a resource in the Resources window, or you can remove a role from a resource in the Roles dialog box.

Overview: Updating activity steps

The Physical percent complete for the activity calculates each time you mark or clear a Completed checkbox, edit the Step % Complete, change the weight of a step, or add or remove steps from the activity. To calculate the percent complete, select Physical as the percent complete type.

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Page Header and Footer

In a compiled report, the page header appears at the top of every page, after the report's standard header. The page footer appears at the bottom of every page, before the report's standard footer.

Parent Cost Account

A cost account that contains other, lower level cost accounts.

Parent Data Source

A data source that contains other, embedded data sources.

When compiling a report with embedded data sources, a single record for the parent data source compiles, then records for all embedded data sources that match the compiled parent record compile. This process repeats for each additional record compiled for the parent data source.

Parent Element

A WBS or OBS element that contains other, lower level elements.

Parent Resource

A resource that contains other, lower level resources.

Performance Factor (PF)

User-defined performance factor, (PF), for computing earned-value estimate-to-complete (ETC). ETC is computed as either ETC = PF * (Budget at Completion - Earned Value Cost) or as the remaining total cost for the activity. This choice can be made for each WBS.

Planned

The project is in the planning phase. Work has not yet begun.

Planned Value Cost

Planned Value Cost is the portion of the budgeted or planned total cost of the activity that is scheduled to be completed as of the project data date, according to the baseline. Computed as Planned Value Cost = Individual resource Budget At Completion * (Data Date of current project - Baseline Assignment Start Date) / (Baseline Assignment Finish Date - Baseline Assignment Start Date). The Planned Value Cost of an activity is the sum of the Planned Value Cost of

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each individual resource assignment on the activity. If an activity has a resource or role assignment with manually-defined future period bucket values, Planned Value Cost is calculated using the manual assignment values.

If an activity has no resources, its Planned Value Cost is calculated as the Budget At Completion * Schedule % Complete [(Data date - Baseline Start) / (Planned Finish - Baseline Start)]. The Schedule % Complete specifies how much of the activity's original or planned duration has been completed so far.

Planned Value Labor Units

Planned Value Labor Units Scheduled is the portion of the baseline Labor Units that is scheduled to be completed as of the project data date. For activities without resource assignments, and for activity resource assignments that do not have resource curves, computed as baseline Labor Units * Schedule % Complete. For activity resource assignments that do have resource curves, the curve distribution is additionally factored into the calculation. The Schedule % Complete specifies how much of the activity's baseline duration has been completed so far. The baseline Labor Units is taken from the baseline.

Predecessor

An activity that must occur before another activity. A predecessor activity controls the start or finish date of its successors. An activity can have multiple predecessors, each with a different relationship to it.

Project

A project constitutes a plan for creating a product or service.

A project has a start and finish date and consists of some or all of the following: activities, resource assignments, a work breakdown structure (WBS), an organizational breakdown structure (OBS), calendars, relationships, baselines, expenses, risks, issues, thresholds, and project-specific codes, reports, and work products and documents.

Project Complexity

A project's complexity value can be between 0 and 100. If the project complexity value equals 0, P6 Professional uses the low estimate for each activity. If the project complexity value equals 100, P6 Professional uses the high estimate for each activity. For project complexity values between 0 and 100, P6 Professional calculates an intermediate value between the low and high estimates for each activity. The value calculated using the project complexity factor is then copied into the budgeted or planned labor/ nonlabor units and expense costs for each activity.

Project Reports

Project reports are specific to the open project only. You cannot run a project report for any other project.

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Project superuser

A project profile that gives a user read/write privileges for all project/ OBS specific information and features.

Read Only

A user with Read Only access to a project can view the project, but cannot change any of the project's information.

Report Canvas

The Report Canvas is the main component of the Report Editor window. Use it to add, edit, and position report components.

Report cells

You can include three types of cells in a report.

- Text cells can contain either custom text that you specify; variable report data, such as a page number or date; the title of a database field; or the actual content of a database field.
- Line cells contain a horizontal line whose size you can specify.
- Image cells contain a graphic that you specify.

Report Header and Footer

In a compiled report, the report header appears before the report's details and on the first page of the report only. The report footer appears after the report's details and on the last page of the report only.

Resource dependent activity

Resources assigned to this type of activity are scheduled to work according to the resources' calendars rather than the activity's calendar. The activity's duration is determined by the availability of resources to work on the activity.

Use resource dependent activities when multiple resources assigned to the same activity can work independently.

Resource Security

Resource security allows the administrator to restrict a user's resource access. To enable resource security, the administrator assigns the user to a node in the resource hierarchy. Then, the user has access only to the selected resource node and all of its children.

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Root Element

The highest level element in an enterprise project structure (EPS), organizational breakdown structure (OBS), or a work breakdown structure (WBS).

Root Node

If user security is enabled, your root node is the resource node in the resource hierarchy that you are assigned to. In other words, it is the highest level of resource you have access to. If you delete your root node you automatically get no access to any resources.

Schedule Performance Index

Schedule Performance Index (SPI) = Earned Value Cost / Planned Value Cost

Schedule Performance Index (SPI) (ratio)

Schedule Performance Index (SPI) (ratio)

A Schedule Performance Index (SPI) threshold value is expressed as a ratio. An issue is generated if the Schedule Performance Index (the ratio of the earned value of work performed to the cost of work that was scheduled) falls beyond the threshold values.

The Schedule Performance Index is calculated as SPI = Earned Value Cost / Planned Value Cost. A value less than 1 indicates that less work was actually performed than was scheduled.

If the threshold value is 1, an issue is generated whenever the value of the work performed falls below the expected cost of performing that work, according to the schedule.

Schedule Variance (SV) ($)

A Schedule Variance (SV) threshold value is expressed as a monetary value. An issue is generated if the Schedule Variance (the difference between the activity's earned value and the work scheduled to be performed) falls beyond the threshold values.

Schedule Variance is calculated as SV = Earned Value Cost – Planned Value Cost. A negative value indicates that less work was actually performed than was scheduled. The activity may be considered behind schedule.

If the lower threshold value is 0, an issue is generated as soon as the earned value of the work performed is equal to or less than the amount of work that was supposed to be performed, according to the schedule. A larger negative value for a Schedule Variance threshold indicates that an activity may be behind schedule by that amount before an issue is generated.

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Schedule Variance Index (SVI) (ratio)

A Schedule Variance Index (SVI) threshold value is expressed as a ratio. An issue is generated if the Schedule Variance Index (the ratio of the schedule variance to the planned value) falls beyond the threshold values.

The Schedule Variance Index is calculated as SVI = Schedule Variance (SV) / Planned Value Cost. A value less than 0 indicates that the value of the work performed is less than what was scheduled.

If the threshold value is 0, an issue is generated whenever the value of the work performed falls below the expected cost of performing that work, according to the schedule.

Secure code

A global or EPS-level activity code that is accessible only to certain users. If an EPS-level or global activity code is marked as a secure code in the Activity Code Definitions dialog box, the user will need the appropriate access rights to view, edit, delete and assign this code and its values.

Shared

A user with Shared access to a project can open and edit the project at the same time that other users can open and edit the project in Shared mode. However, if another user has the project open in Exclusive mode, then you can open it only in Read-Only mode.

Sheet names

When exporting data to an XLSX file, each subject area is exported to a separate worksheet in Excel. You should not modify the sheet names. To import successfully, P6 Professional must recognize the sheet names. The following table displays the subject area and its sheet name in Excel.

Subject Area	Sheet Name
Activities	TASK
Activity Relationships	TASKPRED
Expenses	PROJCOST
Resources	RSRC
Resource Assignments	TASKRSRC

Start Date Variance (days)

A Start Date Variance threshold value is a specified number of days. An issue is generated if the difference between the activity's baseline and current start dates (calculated as BL Start - Start Date) falls beyond the threshold values.

A negative value for Start Date Variance indicates that the current start date is later than the primary baseline start date.

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Start milestone activity

A start milestone activity marks the beginning of a major stage in the project. Since a start milestone activity does not have a duration, it is sometimes referred to as a "zero duration activity."

A start milestone may have a primary resource and expenses associated with it, but cannot have resource assignments, role assignments, or time-based costs such as labor. You can assign work products or documents to a start milestone. When you create relationships to milestones, the default relationship type is finish-to-start.

Start on constraint

A restriction you place on an activity by imposing a start date. The start on constraint can delay an early start or accelerate a late start to satisfy the imposed date. Unlike the mandatory start constraint, which can violate the network logic, this constraint protects it.

Start on or after constraint

A restriction you impose on an activity that limits the earliest time it can begin. When calculating a schedule, the start on or after constraint is used in the forward pass only if the calculated early start date will be earlier than the imposed date. This constraint affects only early dates. The early start date of an activity with a start on or after constraint cannot be earlier than the imposed date, although the network logic may cause the early start to occur later.

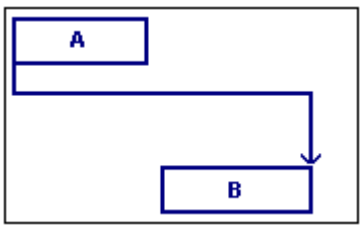
Start on or before constraint

A restriction you impose on an activity that limits the latest date it can start. When calculating a schedule, the start on or before constraint is used in the backward pass only if the calculated late start date will be later than the imposed date. This constraint may decrease total float. It only affects late dates.

Start to finish relationship

Start to finish (SF) relationship

A relationship between activities in which a successor activity cannot complete until its predecessor activity starts.

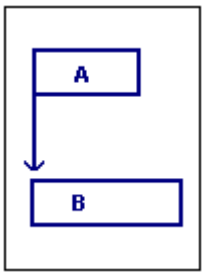


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Start to start relationship

Start to start (SS) relationship

A relationship between activities in which the start of a successor activity depends on the start of its predecessor.



Successor

An activity that must occur after another activity. An activity can have multiple successors, each with a different relationship to it.

Supported Baseline Fields

When exporting to Excel, you can export the following baseline fields:

BL Project Completed Activities	BL Project Duration	BL Project Expense Cost	BL Project Finish	BL Project In-Progress Activities
BL Project Labor Cost	BL Project Labor Units	BL Project Material Cost	BL Project Nonlabor Cost	BL Project Nonlabor Units
BL Project Not-Started Activities	BL Project Start	BL Project Total Cost	BL1 Completed Activities	BL1 Duration
BL1 Expense Cost	BL1 Finish	BL1 In-Progress Activities	BL1 Labor Cost	BL1 Labor Units
BL1 Material Cost	BL1 Nonlabor Cost	BL1 Nonlabor Units	BL1 Not-Started Activities	BL1 Start
BL1 Total Cost	BL2 Finish	BL2 Start	BL3 Finish	BL3 Start
Variance - BL Project Duration	Variance - BL Project Expense Cost	Variance - BL Project Finish Date	Variance - BL Project Labor Cost	Variance - BL Project Labor Units
Variance - BL Project Material Cost	Variance - BL Project Nonlabor Cost	Variance - BL Project Nonlabor Units	Variance - BL Project Start Date	Variance - BL Project Total Cost
Variance - BL1 Duration	Variance - BL1 Expense Cost	Variance - BL1 Finish Date	Variance - BL1 Labor Cost	Variance - BL1 Labor Units
Variance - BL1 Material Cost	Variance - BL1 Nonlabor Cost	Variance - BL1 Nonlabor Units	Variance - BL1 Start Date	Variance - BL1 Total Cost

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Task dependent activity

For a task dependent activity, assigned resources schedule according to the activity's calendar rather than according to their designated resource calendars.

Use task dependent activities when multiple resources assigned to the same activity need to work together.

Text Qualifier

If you import or export information that contains the field delimiter you specify, this character separates fields or categories of information. For example, if you select comma (,) as the field delimiter and single quotes (') as the text qualifier, 'Smith, Bob', 55.00, 123-4567 imports/exports as three categories of information, not four.

Then: statement

Initiates a change to the project data. When an If: statement is true, the changes specified in the Then: statement are applied.

Thresholds

Use thresholds as a project management technique. You can create a threshold by selecting a parameter, such as start date variance; setting lower and upper values for the threshold; and applying the threshold to a specific work breakdown structure (WBS) element, or area, of your project plan.

When you define a threshold for a WBS element, you can specify the level of detail by which you want to monitor the WBS element. You can monitor the threshold at the activity level, and you can monitor the threshold at the WBS level. If you monitor a threshold at the activity level, issues are generated for each activity that violates the threshold. If you monitor a threshold at the WBS level, each activity contained in the specified WBS element is tested, and then all issues are summarized to the WBS element, rather than each activity.

After you define a threshold, you can monitor it to identify any issues associated with it. For example, you may set a threshold using the Total Float parameter. If the lower threshold value is 1d and the upper threshold value is 10d, an issue is generated for any activities that have a total float less than or equal to 1d or more than or equal to 10d. You can assign a person to be responsible for issues generated by the threshold. You can also specify threshold tracking layouts and assign priority levels to thresholds. A threshold's tracking layout assignment identifies the tracking layout that best displays the threshold problem area.

Total Float (days)

A Total Float threshold value is a specified number of days. An issue is generated if an activity's total float (the amount of time the activity can be delayed without risking a delay to the project finish date) falls beyond the threshold values.

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Unique fields

In Microsoft Excel, the unique fields are used as identifiers for activity data in the XLSX export file. The following table displays the unique fields exported with each subject area. These fields should not be removed from the export file.

Subject Area	Unique field
Activities	Activity ID
Activity Relationships	Successor
	Predecessor
	Relationship Type
Expenses	Activity ID
	Expense Item
Resource Assignments	Activity ID
	Resource ID
	Role ID
	Cost Account ID

Variance at Completion (VAC) ($)

A Variance at Completion (VAC) threshold value is expressed as a monetary value. An issue is generated if the Variance At Completion (the budgeted or planned total cost - latest total cost estimate) falls beyond the threshold values.

Variance At Completion may also be expressed as VAC = Budget at Completion (BAC) - Estimate At Completion (EAC).

A negative value indicates an estimated total cost overrun. If the threshold value is 0, an issue is generated as soon as the latest estimate for total cost exceeds the budgeted or planned total cost. A larger negative value for a Variance At Completion threshold indicates that a certain amount of estimated total cost overrun may be tolerated before an issue is generated.

WBS (work breakdown structure)

The hierarchy of work that must be accomplished to complete the project, which defines the product to be produced. The WBS is structured in levels of work detail, beginning with the product itself, and then is separated into identifiable work elements.

WBS summary activity

Use a WBS summary activity to summarize a WBS level. The WBS summary activity aggregates a group of activities that share a common WBS level. For example, all activities whose WBS codes start with A (A.1, A.1.1, A.1.1.2, A.2, A.3 and so forth) can be part of one WBS activity whose WBS code is A. At a lower level, all activities whose WBS codes start with A.1 (A.1, A.1.1, A.1.1.2 and so forth) can be part of a WBS activity whose WBS code is A.1.

The dates calculated on a WBS summary activity are based on the earliest start date of the activities in the group and the latest finish date of these activities. Relationships assigned

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directly to the WBS summary activity are not considered during scheduling or leveling. The WBS summary activity duration is calculated based on its assigned calendar.

What-If

The project is being analyzed before establishing a more permanent schedule.

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Details Windows - post drop downs

Activities tab - Risks Details (P6 Professional Only)

Use the Activities tab to assign activities to a risk or to delete activity risk assignments.

Project: The Project ID of the activity assignment.

Activity ID: The Activity ID of the activity assignment.

Activity Name: The Activity Name of the activity assignment.

Start: The current start date of the activity.

Finish: The current finish date of the activity.

Assign: Click to assign activities to the selected risk.

Remove: Click to remove activities from the selected risk.

Activities Window

Use the Activities window to add, view, edit, and delete activities for the open projects. You can divide the Activities window into top and bottom layout views, and you can customize these layouts and how activities are displayed.

To display the Activities window, do one of the following:

- Click  on the Project toolbar.
- On the Project menu, choose Activities.

Refer to the following sections of this topic for information and links to concepts and tasks about working with activities and activity layouts in the Activities window:

- Working in the Activities window
- Activity concepts
- Activity tasks
- Adding activities and defining general activity information
- Working with activity relationships
- Working with activity resource and role assignments
- Working with activity steps
- Working with activity expenses
- Working with activity notebooks
- Working with activity code assignments

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- Working with work product and document assignments
- Working with past period actuals
- Updating activity progress
- Working with risks
- Activity layout concepts and tasks
- Available activity layouts
- General layout tasks
- Filtering activities
- Grouping and sorting activities
- Working with Activity Details
- Working with the Activity Table
- Working with the Gantt Chart
- Working with the Activity Network
- Working with the Activity and Resource Usage Profiles
- Working with the Activity and Resource Usage Spreadsheets
- Working with Trace Logic

Working in the Activities window:

When working in the Activities window, you can:

- Use the Edit menu on the Menu bar or use the Edit toolbar to add, delete, cut, copy, paste, link, renumber, or dissolve activities, and to undo an action.
- Use the Edit menu on the Menu bar or use the Assign toolbar, Activity Details, or shortcut (right-click) menu to assign resources, roles, activity codes, predecessors, successors, and activity step templates to activities.
- Use the Layout Options bar, the View menu on the Menu bar, the Top Layout toolbar, and Bottom Layout toolbar to choose the layouts you want to display in the window.
- Use the Layout Options bar, the View menu on the Menu bar, or the Layout toolbar to customize activity layouts and how activities are displayed in the window. For example, you can customize columns of the Activity Table; group, sort, and filter activities; specify a timescale; customize Gantt Chart bars and Activity Network boxes; and more.
- Use Activity Details or the Activity Table to define general and detailed information for each activity. To show or hide Activity Details, click the Layout Options bar, then choose Activity Details, or click  on the Bottom Layout toolbar.
- Compare projects against each other or against their baselines in an additional activities view alongside the original. You can configure the layout of the two views independently of each other.

Activity concepts

The following topics describe activity-related concepts. These concepts apply to data you define for activities (for example, activity steps or activity types), data you assign to activities (for example, activity codes or resources), and data or features that impact activity data (for example, scheduling projects and leveling resources).

- Activities

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- Activity codes and values
- Activity dates
- Activity steps
- Activity step templates
- Activity types
- Adding relationships between activities
- Baselines
- Calendars
- Earned Value
- Expenses
- Filtering data
- Future period bucket planning
- Grouping activities by field
- Grouping activities by WBS path
- Grouping by hierarchy
- Leveling resources
- Progress Spotlight
- Relationships
- Resources
- Risks
- Roles
- Scheduling projects
- Sorting
- Store Period Performance
- Summarizing activity data
- Updating progress
- Work Breakdown Structure
- Work Products and Documents

Activity tasks

You can perform all of the following tasks in the Activities window. These tasks are organized by subject area or purpose, and are not all inclusive.

Adding activities and defining general activity information

- Add activities in the Activity Table
- Add activities in the Activity Network
- Adding activities using a wizard
- Assign a calendar to an activity
- Change an activity's work breakdown structure assignment

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- Copy and paste activities in the Activity Network
- Copy and paste activities in the Activity Table
- Cut and paste activities in the Activity Network
- Cut and paste activities in the Activity Table
- Renumber activity IDs in the Activity Table
- Define activity duration types
- Define activity percent complete types
- Define activity types
- Define general activity information
- Define milestones
- Delete an activity
- When connected to a P6 EPPM database: Designating an activity owner
- Dissolve an activity
- Enter activity constraints
- Enter activity durations
- Enter activity start and finish dates
- View activity float values
- View activity summaries

Working with activity relationships

- Add predecessor relationships
- Add successor relationships
- Change predecessor relationships
- Change successor relationships
- Create relationships in the Activity Network
- Create relationships in the Gantt Chart
- Delete relationships in the Activity Network
- Delete relationships in the Gantt Chart
- Edit relationships in the Activity Network
- Edit relationships in the Gantt Chart
- Remove predecessor relationships
- Remove successor relationships
- View activity relationships in Activity Details
- View activity relationships in the Activity Network
- View activity relationships in the Gantt Chart
- View activity relationships in Trace logic

Working with activity resource and role assignments

- Assign a rate type to a resource assignment

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- Assign resources to activities
- Assign resources to activities by role
- Associate a primary resource with an activity
- Change the resource's role assignments for an activity
- Choose the rate source for an assignment
- Create a future period bucket planning layout
- Enter cost information for resource assignments
- Enter unit information for resource assignments
- Manually enter future period assignment values
- Remove resources from activities
- Replace resources assigned to activities

Working with activity steps

- Add steps to activities
- Add weights to steps
- Assign activity step templates to activities
- When connected to a P6 Professional database: Convert steps into an activity step template
- Remove steps from activities
- Update activity steps

Working with activity expenses

- Add expenses from the Activities window
- Assign expense categories from the Activities window
- Delete expenses from the Activities window

Working with activity notebooks

- Assign notebooks to activities
- Remove notebooks from activities

Working with activity code assignments

- Assign activity codes and values to activities
- Change activity code value assignments
- Remove activity codes and values from activities

Working with work product and document assignments

- Assign work products and documents to an activity from the Activities window
- Display work product and document details in the Activities window
- Open a work product or document from the Activities window
- Remove work product and document assignments from the Activities window

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Working with past period actuals

- Edit past period actual data
- View past period actual data in spreadsheets

Working with risks

- Assigning a risk to an activity
- Removing risk assignments from activities

Updating activity progress

- Enter a physical percent complete for activities
- Highlight activities for updating
- Remove progress from an activity
- Suspend or resume an activity's progress
- Update progress for individual activities

Activity layout concepts and tasks

The following concepts and tasks relate to the layouts you can display and customize in the Activities window.

Available activity layouts

You can display the following layouts in the Activities window:

- The Activity Table
- The Gantt Chart
- Activity Details (bottom layout only)
- Activity Network (top layout only)
- The Resource Usage Profile (bottom layout only)
- The Activity Usage Profile (bottom layout only)
- The Activity Usage Spreadsheet
- The Resource Usage Spreadsheet (bottom layout only)
- Trace Logic (bottom layout only)

General Layout Tasks

- Change a layout's timescale format
- Change the display timeperiod for a timescaled layout
- Create a new activity layout
- Delete a layout
- Expand or contract the visible area of a timescaled layout
- Exporting and Importing Layouts
- Open a layout
- Save a layout as a project layout

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- Save a layout in the Activities or Resource Assignments window
- Zoom in and out of a timescaled layout
- Add line numbers

Filtering activities

- Apply a filter
- Change a Gantt Chart bar's filter
- Combine filters
- Create a filter
- Create a lookahead filter
- Default filter criteria
- Delete filters
- Remove filters

Grouping and sorting activities

- Collapse or expand grouped data
- Display summary data when grouping
- Format grouping bands
- Group activities by field
- Group activities by hierarchy
- Group activities by WBS path
- Remove activity groupings
- Show a grand total
- Show field titles in grouping bands
- Show or hide empty title bands
- Sort activities

Working with Activity Details

- Change expenses tab columns.
- Change Predecessors tab columns
- Change Resources tab columns
- Change Successors tab columns
- Customize Activity Details
- View activity relationships in Activity Details

Working with the Activity Table

- Add activities in the Activity Table
- Change activity information in the Activity Table
- Change Activity Table font, color, and row height
- Change group row fonts and colors

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- Copy and paste activities in the Activity Table
- Customize activity column titles
- Cut and paste activities in the Activity Table
- Define Activity Table columns
- Quickly enter the same text in multiple table rows
- Sort activity information in the Activity Table

Working with the Gantt Chart

- Add a bar to the Gantt Chart
- Add a curtain attachment in a Gantt Chart
- Add a text attachment to a Gantt Chart
- Apply a Progress Line to the Gantt Chart
- Apply Gantt Chart settings from another layout
- Attach notebook items to bars in a Gantt Chart
- Change a bar in the Gantt Chart
- Change a Gantt Chart bar's filter - under Gantt Chart
- Change a Gantt Chart bar's label - under Gantt Chart
- Change a Gantt Chart bar's settings
- Change a Gantt Chart bar's style - under Gantt Chart
- Change a Gantt Chart bar's timescale - under Gantt Chart
- Change an activity's duration in the Gantt Chart
- Change an activity's start and finish dates in the Gantt Chart
- Change the background lines in the Gantt Chart
- Create relationships in the Gantt Chart
- Delete a bar from the Gantt Chart
- Delete a curtain attachment from a Gantt Chart
- Delete relationships in the Gantt Chart
- Display all curtain attachments in the Gantt Chart
- Display the Gantt Chart
- Edit relationships in the Gantt Chart
- Hide a curtain attachment in a Gantt Chart
- Hide all curtain attachments in the Gantt Chart
- Move around a Gantt Chart
- Move to a specific activity in the Gantt Chart
- Position a bar in the Gantt Chart
- Remove a text attachment from a Gantt Chart
- Show or hide relationship lines in the Gantt Chart
- Show or hide the Gantt Chart legend

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- View activity relationships in the Gantt Chart

Working with the Activity Network

- Add activities in the Activity Network
- Apply Activity Network settings from another layout
- Change activity box fonts and colors
- Copy and paste activities in the Activity Network
- Create relationships in the Activity Network
- Customize the activity box layout
- Customize the Activity Network layout
- Cut and paste activities in the Activity Network
- Delete relationships in the Activity Network
- Display the Activity Network
- Edit relationships in the Activity Network
- Move around in the Activity Network
- Reorganize the Activity Network layout
- Save and Open an Activity Network Layout
- Select the activity box layout
- View Activity Network Activity Details
- View activity relationships in the Activity Network

Working with the Activity and Resource Usage Profiles

- Define the Activity Usage Profile
- Define the Resource Usage Profile
- Display the Activity Usage Profile
- Display the Resource Usage Profile
- Filter activities according to the Resource Usage Profile
- Show or hide overtime information in the Resource Usage Profile
- Show or hide resource availability in the Resource Usage Profile
- Show or hide resource limits in the Resource Usage Profile
- Show or hide resource overallocation in the Resource Usage Profile
- Show or hide the profile legend
- View a profile of resource allocation across all projects
- View a profile of resource allocation for a specific project

Working with the Activity and Resource Usage Spreadsheets

- Copy and paste resource spreadsheet data to Microsoft Excel
- Customize Activity Usage Spreadsheet columns
- Customize Resource Usage Spreadsheet columns

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- Display roles in the Resource Usage Spreadsheet
- Display the Activity Usage Spreadsheet
- Display the Resource Usage Spreadsheet
- Filter activities according to the Resource Usage Spreadsheet
- Group and sort Resource Usage Spreadsheet columns in the Activities window
- Resize the panes of the Resource Usage Spreadsheet
- Select Activity Usage Spreadsheet fields
- Select Resource Usage Spreadsheet fields
- View a spreadsheet of resource allocation across all projects
- View a spreadsheet of resource allocation for a specific project
- View a spreadsheet of resource overallocation across all projects
- View past period actual data in spreadsheets

Working with Trace Logic

- Display Trace Logic
- Move around in Trace Logic
- Set Trace Logic preferences
- View activity relationships in Trace logic

Activity Details

Use the Activity Details to view and edit detailed information about the selected activity. The Activity Details appear in the Activities window.

The following tabs are available:

- General tab - Activity Details
- Status tab - Activity Details
- Resources tab - Activity Details
- Predecessors tab - Activity Details
- Successors tab - Activity Details
- Codes tab - Activity Details
- Tasks tab - Activity Details
- Discussion tab - Activity Details
- Notebook tab - Activity Details
- Steps tab - Activity Details
- Feedback tab - Activity Details
- WPS & Docs tab - Activity Details
- Expenses tab - Activity Details
- Summary tab - Activity Details
- Relationships tab - Activity Details

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- When connected to a P6 Professional database: Risks tab - Activity Details
- UDFs tab - Activity Details

Activity Details appear on several tabs. To specify which tabs you want to display and their order, click the Display Options bar, then choose Bottom Layout Options, or right-click in the Activity Details tab area and choose Customize Activity Details. In addition, the following fields and buttons are available at the top of each tab:

Previous  : Displays information about the previous activity.

Next  : Displays information about the next activity.

Activity: The selected activity's ID. You can type a new ID.

Activity Name: The selected activity's name. You can type a new name.

Project: The ID for the selected activity's project.

Activity tab - Project Expense Details

Use this tab to specify the selected expense item's activity assignment and accrual type. You can also view the item's activity assignment according to work breakdown structure (WBS) element, activity status, and activity start and finish dates.

Activity Name: The name of the activity that incurs the selected expense. To select an activity, click  .

WBS: The code for the WBS element that contains the selected expense's assigned activity.

Accrual Type: The rate at which the selected expense accrues, either as a lump sum at the activity's start or finish date, or uniformly over the duration of the activity. To select a type, click the down arrow.

Activity Status: The status of the activity that incurs the selected expense.

Activity Start: The start date or expected start date for the activity that incurs the selected expense.

Activity Finish: The finish date or expected finish date for the activity that incurs the selected expense.

Primary Resource: The primary resource for the activity that incurs the selected expense.

Add Data Source button

Click this button to add a data source.

Add Image Cell button

Click this button to add an image cell.

Add Row button

Click this button to add a row.

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Add Text Cell button

Click this button to add a text cell.

Assignments tab - Work Product and Document Details

WBS Code: Lists codes for work breakdown structure (WBS) elements to which the selected work product or document is assigned. To remove a work product or document assignment, select the assignment you want to remove, then click Remove. To sort the display, click the WBS Code column label.

Activity ID: Lists IDs for activities to which the selected work product or document is assigned. To sort the display, click the Activity ID column label.

Activity Name: Lists the names of activities to which the selected work product or document is assigned. To sort the display, click the Activity Name column label.

Assign: Assigns the selected work product or document to a WBS element or activity.

Remove: Removes the selected work product or document assignment.

Budget Log tab - Project Details

Use this tab to view or modify budget information for the current project/node.

Original Budget: Enter an estimate of the total budgeted or planned amount you require for this project, including all funding contributions.

Current Budget: Shows the sum of the original budget plus approved budgets.

Proposed Budget: Shows the sum of the original budget plus approved and pending budgets.

Budget Change Log: Enables you to track changes to the original budget.

Date: Shows the date the budget change request was made.

Amount: Record the amount of money required by this change request.

Responsible: Enter the name of the person responsible for the change.

Status: Shows the current status of the change: pending, approved, or not approved. The status for each budget change affects the totals shown in the Current Budget and Proposed Budget fields.

Reason: Enter an optional reason for the budget change request.

Change Number: Number associated with the change request. Useful for reporting or tracking changes to the original budget.

Budget Log tab - WBS Details

Original Budget: Enter an estimate of the total amount you require for this project in the Original Budget field, including all funding contributions.

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Current Budget: Shows the sum of the original budget plus approved budgets. (calculated field)

Proposed Budget: Shows the sum of the original budget plus approved and pending budgets. (calculated field)

Budget Change Log: Enables you to track changes to the original budget.

Date: Shows the date the budget change request was made.

Amount: Record the amount of money required by this change request.

Responsible: Enter the name of the person responsible for the change.

Status: Shows the current status of the change: pending, approved, or not approved. The status for each budget change affects the totals shown in the Current Budget and Proposed Budget fields.

Reason: Enter a reason for the budget change request (optional).

Change Number: Number associated with the change request. Useful for reporting or tracking changes to the original budget.

Budget Summary tab - Project Details

Use this tab to view summary budget information for projects and EPS nodes. All fields on this tab are calculated from values entered in the Budget Log and Spending Plan tab as follows:

Budget

Current Budget: Original budget plus approved budgets.

Unallocated Budget: Current budget minus distributed current budget.

Distributed Current Budget: Sum of current budget values.

Variance

Current Variance: Current budget minus the total spending plan.

Spending Plan

Total Spending Plan: Sum of the monthly spending plan.

Undistributed Current Variance: Total spending plan minus the total spending plan tally.

Total Spending Plan Tally: Sum of the monthly spending tally.

Benefit Plan

Total Benefit Plan: Sum of the monthly benefit plan.

Total Benefit Plan Tally: Sum of the monthly benefit plan tally.

Budget Summary tab - WBS Details

All fields on this tab are calculated from values entered in the Budget Log and Spending Plan tab as follows:

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Budget

Current Budget: Original budget plus approved budgets.

Unallocated Budget: Current budget minus distributed current budget.

Distributed Current Budget: Sum of current budget values.

Current Variance: Current budget minus the total spending plan.

Spending Plan

Total Spending Plan: Sum of the monthly spending plan.

Undistributed Current Variance: Total spending plan minus the total spending plan tally.

Total Spending Plan Tally: Sum of the monthly spending tally.

Benefit Plan

Total Benefit Plan: Sum of the monthly benefit plan.

Total Benefit Plan Tally: Sum of the monthly benefit plan tally.

Calculations tab - Project Details

Use this tab to specify how to calculate cost and estimate resource use when you update activities in the selected project.

Activities

Default Price/Unit for activities without resource or role Price/Units: The project's default cost of work for activities with no resources or roles. Activities may have labor/ nonlabor units with no assigned resources/roles or resources/roles that do not have prices. In such cases, this setting is used to calculate the cost for activities. To change the default price, type a new amount, followed by a forward slash (/) and time unit.

Activity percent complete based on activity steps: Mark to base percent complete on activity steps when using the physical percent complete type.

Link Planned or Budget and At Completion for not started activities: When this option is checked, Budgeted or Planned, Remaining, and At Completion values are set to equal for not started activities. If you want to baseline, or hold constant, the Budgeted or Planned values in your project plan while recording updates to Remaining or At Completion values, unmark the checkbox to turn off this option. When this option is off, Budgeted or Planned values for a Not Started activity are retained when you update its Remaining or At Completion values.

Reset Planned or Original Duration and Units to Remaining: Choose this option to recalculate the Planned duration and dates based on the At Completion duration and Remaining dates and recalculate Planned units based on the At Completion units for activities and assignments. If an activity does not have actual costs, the Planned Cost, At Completion Cost, and Estimate to Complete are equal.

Reset Remaining Duration and Units to Planned or Original: Choose this option to recalculate the At Completion duration and Remaining dates based on the Planned duration and dates, and recalculate At Completion units based on the Planned units on activities and assignments. If an activity does not have actual costs, the Planned Cost, At Completion Cost, and Estimate to Complete are equal.

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Resource Assignments

When updating Actual Units or Cost

Add Actual to Remaining: Choose to calculate a new At Complete as the sum of the actual and remaining units or costs.

At Complete = Actual (units or costs) + Remaining (units or costs)

When working with a cost-plus contract, use this option to determine the true At Complete. Actual units and costs are normally calculated using this option.

Subtract Actual from At Completion: Choose to calculate the remaining units or costs as the difference between the At Complete and Actual units or costs.

Remaining (units or costs) = At complete (units or costs) - Actual (units or costs)

When working with a fixed-price contract that must be accomplished within a fixed budget, use this option. This approach tracks the amount remaining before you exceed the budget.

Recalculate Actual Units and Cost when duration % complete changes: Mark to estimate actual units and costs as

Actual (units or costs) = budgeted or planned (units or costs) * Duration % Complete

If an activity does not have any resource assignments, Actual units or costs are calculated using the activity's budgeted or planned units or costs.

P6 Professional performs these calculations whenever you update the Duration % complete.

Values you specify override the module's calculated values. If you do not mark the checkbox, the module does not estimate actuals and the actual fields remain blank unless you specify values.

- To calculate costs using this option, you must mark Calculate costs from units on the Details tab of Resource Details.
- Choosing this option will recalculate actual units and costs only for fixed duration activities (Fixed Duration & Units/Time, Fixed Duration & Units).
- This setting enables P6 Professional to calculate only the actual units or costs when Duration % complete is updated. Duration % complete will not be calculated if you update the actual units or costs.
- If a curve is assigned to a resource assignment, the resource assignment's Actual (units or costs) = % of the curve area (based on the Duration % Complete) * Budgeted or Planned (units or costs). The assignment's Actual (units or costs) will roll up to the activity.
- When connected to a P6 Professional database: To enable this option, the user must have the project privilege Edit Project Details except Costs/Financials. Choose Admin, Security Profiles to check the project privilege.

When connected to a P6 EPPM database: You must have the appropriate project privilege as defined in P6 to enable this option.

Update units when costs change on resource assignments: Mark this checkbox for P6 Professional to recalculate units when costs are updated for the assignment. Cost changes, such as modifying the remaining cost for activities, cause P6 Professional to recalculate units.

Link actual to date and actual this period units and costs: Mark this checkbox for P6 Professional to recalculate actual or actual this period units and costs when one of these values is updated. P6 Professional marks this option by default. This option must be marked if you plan to store period performance or edit past period actuals for a project.

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Cause tab - Risks Details (P6 Professional Only)

Use the Cause tab to record causes of the selected risk.

Cause: A description of the cause of the selected risk. You can type a maximum of 4000 characters directly in this field.

Codes tab - Activity Details

Use the Codes tab to add and remove activity code value assignments for the selected activity.

Activity Code: Lists the selected activity's assigned activity codes.

Code Value: Lists the activity code values assigned to the selected activity. To change an activity code value, double-click it.

Description: Describes each activity code value.

Assign: Assigns an activity code and value to the selected activity.

Remove: Removes the selected activity code and value from the selected activity.

Codes tab - Assignment Details

Assignment Code: Lists any assigned assignment codes.

Code Value: Lists the values for the assigned code.

Code Description: Lists a description for each code.

Assign: Click to assign a value to the assignment for a selected assignment code.

Remove: Click to remove a selected assignment code from the assignment.

Codes tab - Project Details

Use this tab to assign project code values to the project. Add project codes and values using the Enterprise, Project Codes command.

Project Code: Displays project codes for the selected project.

Code Value: Displays the project code value currently assigned to the project for the project code.

Code Description: Displays the project code value description. When P6 Professional is connected to a P6 Professional database, you can modify value descriptions in the Project Codes dialog box.

Assign: Enables you to assign a value to the project for a selected project code.

Remove: Removes the selected project code from the project.

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Codes tab - Assignment Details

Assignment Code: Lists any assigned assignment codes.

Code Value: Lists the values for the assigned code.

Code Description: Lists a description for each code.

Assign: Click to assign a value to the assignment for a selected assignment code.

Remove: Click to remove a selected assignment code from the assignment.

Costs tab - Project Expense Details

Use this tab to specify cost amounts for the selected expense item, including Budgeted or Planned units, price/unit, budgeted or planned cost, actual cost, and remaining cost. You can also indicate if you want P6 Professional to automatically calculate an expense item's actual cost according to activity completion percentage.

Budgeted or Planned Units: The expected number of units the selected expense's activity will use. You can type a new number.

Actual Units: The actual number of units the expense's activity used. You can type a new amount.

Remaining Units: The remaining number of units the expense's activity will use (budgeted or planned cost - actual cost).

Before actual expenses are incurred, remaining units should be the same as budgeted or planned units. While the activity is in progress, the remaining units should be updated to reflect the estimated remaining units required for the expense. After the expense is completed, the remaining units should be zero.

You can type a new amount.

At Completion Units: The total number of units used for the selected expense when the associated activity is completed. The at completion units equals the actual units plus the remaining units.

Price/Unit: The selected expense's cost per unit. You can type a new cost.

Unit of Measure: The value used to quantify (or measure) the expense. Examples include yards, cubic feet, and number of items. You can enter a new value.

Budgeted or Planned Cost: The budgeted or planned cost of the selected expense (budgeted or planned units * price/unit). You can type a new amount.

Actual Cost: The actual cost of the selected expense. You can type a new amount.

Remaining Cost: The remaining cost for the selected expense (budgeted or planned cost - actual cost).

Before actual expenses are incurred, remaining cost should be the same as budgeted or planned cost. While the activity is in progress, the remaining cost should be updated to reflect the estimated remaining cost required for the expense. After the expense is completed, the remaining cost should be zero.

You can type a new amount.

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At Completion Cost: The total cost for the selected expense when the associated activity is completed. The at completion cost equals the actual cost plus the remaining cost.

Expense % Complete: P6 Professional calculates the expense's percent complete based on the actual and remaining costs for the expense.

Expense % Complete = Actual expense cost / (Actual expense cost + Remaining expense cost)

Auto Compute Actuals: To automatically compute actual and remaining units for the expense based on the budgeted or planned cost and the activity's schedule percent complete, mark this checkbox.

If you mark the Auto Compute Actuals checkbox, P6 Professional automatically updates the actual/remaining units when project actuals are applied. This setting assumes that all work for the activity proceeds according to plan.

Dates tab - Project Details

Use this tab to view or modify dates for the selected project.

Schedule Dates

Project Planned Start: The start date of the project.

Must Finish By: A date constraint placed on the project end date.

When you add a must finish by date, the calendar defaults to the date and time of the project's finish date. When the Finish is blank, the calendar defaults to the current system date and time.

When you edit the must finish by date, the calendar defaults to the date and time currently in the Must Finish By field.

Data Date: The date used as the starting point to calculate the schedule.

Finish: The latest early finish date calculated when P6 Professional last scheduled the project.

Actual Start: The actual start date of the project, if the project has started.

Actual Finish: The actual finish date of the project, if the project has finished—all activities in the project have actual finish dates.

Anticipated Dates

Anticipated Start: The user-defined date the project is expected to start; used during the project planning stage, and set at the WBS, EPS, or project level.

Anticipated Finish: The user-defined date the project is expected to finish; used during the project planning stage, and set at the WBS, EPS, or project level.

Defaults tab - Project Details

Use this tab to specify the selected project's default settings.

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Defaults for New Activities

Duration Type: The default duration type for activities in the project. You can select a new duration type. If you change the default duration type, P6 Professional only applies the default duration type to new activities. Changing this setting does not affect existing activities.

Percent Complete Type: The default percent complete type for activities in the project. You can select a new default percent complete type. If you change the default percent complete type, P6 Professional only applies the default percent complete type to new activities. Changing this setting does not affect existing activities.

Activity Type: The default activity type for activities in the project. You can select a new default activity type. If you change the default activity type, P6 Professional applies the default activity type only to new activities. Changing this setting does not affect existing activities. If you add a new project, the default is set to Task Dependent.

Cost Account: The default cost account for resource assignments to activities and project expenses in the project. Click  to select a new default cost account.

Calendar: The default calendar for activities in the project. Click  to select a new default calendar. If you change the default calendar for new activities, P6 Professional only applies the default calendar to new activities. Changing this setting does not affect existing activities.

Auto-numbering Defaults

Activity ID Prefix: The prefix to use for IDs when manually adding new activities to a project.

Activity ID Suffix: The suffix to use for IDs when manually adding new activities to a project.

Increment: The increment used for IDs when manually adding new activities to a project.

Increment Activity ID Based on Selected Activity: Mark to increment IDs based on the selected activity when manually adding an activity to the project. For example, if the increment is set to 10 and you select activity AB150, if you add a new activity, its ID will be AB160. Or, if you select activity AB155, and add a new activity, the new activity's ID will be AB165.

Description tab - Project Expense Details

Use this tab to enter a description of the selected expense item.

Expense Description: A description of the selected expense. You can only view the description in this field; to add or edit a description, you must use the HTML editor.

Modify: Click to add or edit the description for the selected expense in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.

Copy: Click to copy the selected text. After copying text, you can paste it into the HTML editor or into another application.

Print: Click to print the displayed description.

Description tab - Risks Details (P6 Professional Only)

Use the Description tab to record a description of the selected risk.

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Description: A description of the selected risk. You can type a maximum of 4000 characters directly in this field.

Description tab - Work Product and Document Details

Description: A description of the selected work product or document. You can only view the description in this field; to add or edit a description, you must use the HTML editor.

Modify: Click to add or edit the description for the selected work product or document in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.

Copy: Click to copy the selected text. After copying text, you can paste it into the HTML editor or into another application.

Print: Click to print the displayed description.

Note (P6 EPPM Only)

- If the selected work product or document has been added via a P6 installation with a configured content repository, the detail fields are read-only and the document cannot be opened from P6 Professional.

Details tab - Project Issue Details

Use the General tab to define general information for the selected issue, including the issue's name and the manager within the OBS structure who is responsible for addressing the issue. You can also assign a priority level, status, and tracking layout to the issue.

Issue Name: The name of the selected issue. You can type a new name.

Responsible Manager: The manager within the OBS structure who is responsible for the selected issue. Click ... to select a responsible manager.

Tracking Layout: The name of the tracking layout that best displays the selected issue. Click ... to select a predefined tracking layout. To define new tracking layouts, choose Enterprise, Tracking.

Date Identified: The date the selected issue was identified. The current system date is used when you add the issue. You can click ... to select a new date.

Identified By: The name of the person who identified the selected issue. If this field displays "Monitor," the threshold monitor identified the selected issue.

Status: The selected issue's status. You can select a new status.

Priority: The selected issue's priority level. You can select a new priority level.

Resolution Date: The date the selected issue was resolved. Use this field in conjunction with the Date Identified to track how long it took to resolve the issue.

Details tab - Project Threshold Details

Use the Details tab to define the timeframe during which you want to monitor the thresholds and to view threshold issues.

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Monitor Time Window

From Date: The beginning of the timeframe used to monitor the selected threshold. To specify a date, click ....

To Date: The end of the timeframe used to monitor the selected threshold. To specify a date, click ....

Threshold Issues

Issue: If the selected threshold has been monitored, lists the issues that have been identified.

Status: Lists each issue's status.

Priority: Lists each issue's priority level.

Resolution Date: Lists the date that the issue was resolved.

Go To: Displays details about the selected issue in the Project Issues window.

Delete: Deletes the selected issue.

Details tab - Resource Details

Resource Type

Labor: Choose to indicate that the selected resource performs labor.

Nonlabor: Choose to indicate that the selected resource does not perform labor.

Material: Choose to measure the selected resource in units other than time.

Unit of Measure: Select a unit of measure to use for the selected material resource.

Currency and Overtime

Currency: The currency associated with the resource's costs. By default, this field displays the view currency selected in User Preferences when the resource was added. Click ... to select a different currency.

Overtime Allowed: Mark to indicate that the selected resource can log overtime hours for assigned activities.

Overtime Factor: The multiplication factor used to calculate the selected resource's overtime price (standard price * overtime factor = overtime price). You can type a new factor. Overtime factors must be between 0 and 10.

Profile

Calendar: The name of the selected resource's assigned calendar. Click ... to assign a new shared resource calendar.

Create Personal Calendar: Click to create and assign a personal resource calendar for the selected resource. This button is disabled if the selected resource is already assigned a personal resource calendar or if you do not have the Add/Edit/Delete Resource Calendars global privilege. When connected to a P6 EPPM database, this privilege is defined using P6.

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Default Units/Time: The units/time applied to all new resources. You can type a new units/time. If you change the default units/time, existing resource assignments are not affected.

Auto Compute Actuals: Mark this checkbox to automatically calculate the selected resource's actual quantity of work according to project plan.

Calculate costs from units: Mark this checkbox to indicate that any new assignments for this resource will have its costs recalculated whenever any quantity changes occur.

Discussion tab - Activity Details

When connected to a P6 EPPM database: If your team members are using P6 Team Member Web or P6 for iOS app, use the Discussion tab to communicate with them about an activity. You can ask questions, respond to questions, and post general information that is specific to an activity. The messages to and from team members are saved with the activities and can be referred back to at a later time.

When connected to a P6 Professional database: Use the discussion tab to communicate about an activity. You can ask questions, respond to questions, and post general information that is specific to an activity. The messages to and from users are saved with the activities and can be referred back to at a later time.

Show: Determines how the messages are displayed. You can display all the messages sent and received, only the messages sent by you, or only the messages sent from other users, those using P6 Professional or those using P6 Team Member Web or P6 for iOS app when you are connected to a P6 EPPM database.

Sort: Determines the order in which the messages are displayed. You can sort by newest to oldest or oldest to newest.

Comments: Displays messages about the selected activity. All of the activity's resources can view these comments. To add messages, enter them in the text box. Only users with the Add/Edit Activities Except Relationships privilege can post a comment.

Text box: Type your message into the text box. Each comment has a 4000 character length maximum.

Post: Adds your message from the text box to the Comments field.

Display_WBS_details

Right-click and select WBS Details.

Earned Value tab - WBS Details

Technique for computing performance percent complete

Activity percent complete: Calculates earned value according to current activity completion percentages.

Use resource curves/future period buckets: Mark to override the Activity Percent Complete type for activities that have a resource curve assigned to, or manually-entered future period bucket values defined for, at least one of the resource assignments. If a curve is assigned,

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Units Percent Complete is always multiplied by the Budget at Completion to calculate Earned Value.

WBS milestones percent complete: Calculates earned value according to weighted milestones you define on the WBS Milestones tab. Enter a number in the Weight cell indicating the significance of this milestone relative to the others listed. As each milestone completes, the WBS element's percent complete is calculated based on the weight of the completed milestone in relation to the remaining milestones.

0/100: Calculates earned value as 100% only after the activity ends. Until the activity is complete, calculate earned value as 0.

50/50: Calculates earned value as 50% after the activity starts and until the activity ends. After the activity ends, the activity's earned value is 100%.

Custom percent complete: Calculates earned value as a percentage you specify. This percentage applies after the activity starts and until the activity ends. After the activity ends, the activity's earned value is 100%.

Technique for computing Estimate to Complete (ETC)

ETC = remaining cost for activity: Calculates Estimate to Complete (ETC) values as the remaining cost to complete an activity (ETC = remaining duration of activity * applicable resource rates).

ETC = PF * (Budget at Completion –Earned Value), where:

PF=1: Calculates Estimate to Complete (ETC) values as Budget At Completion (BAC) less Earned Value Cost.

PF=1/Cost Performance Index: Calculates Estimate to Complete (ETC) values according to a Performance Factor (PF) of 1 divided by the Cost Performance Index (CPI).

PF=1/(Cost Performance Index * Schedule Performance Index): Calculates Estimate To Complete (ETC) values according to a Performance Factor (PF) of 1 divided by the product of the Cost Performance Index (CPI) and Schedule Performance Index (SPI).

PF=: Calculates Estimate To Complete (ETC) values according to a Performance Factor (PF) you specify. The Performance Factor (PF) used to calculate Estimate To Complete (ETC) values. You can type a new factor.

Effect tab - Risks Details (P6 Professional Only)

Use the Effect tab to record a description of the effects of the selected risk.

Effect: A description of the effect of the selected risk. You can type a maximum of 4000 characters directly in this field.

Expenses tab - Activity Details

Use the Expenses tab to add, edit, and remove expense assignments for the selected activity.

You can change the columns that display under the Expenses tab. To change the displayed columns, right-click the Expenses table, then choose Customize Expense Columns.

Expense Item: Lists the selected activity's expenses. To change an expense, double-click it.

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Cost Account: List the Cost Account to which this expense item is assigned. To change the Cost Account, double-click it.

Expense Category: Lists each expense's assigned expense categories for the selected activity. To change an expense category, double-click it.

Accrual Type: Lists accrual type for the selected activity's expenses. The accrual type determines how the expense is distributed: at the start of the activity (front-loaded), the end of the activity (back-loaded), or uniformly across the activity (linear). To change an expense's accrual type, double-click it.

Budgeted or Planned Cost: Lists the expected total cost for each of the selected activity's expenses. To change an expense's budgeted or planned cost, double-click it.

Actual Cost: Lists the actual cost for each of the selected activity's expenses. To change an expense's actual cost, double-click it.

Remaining Cost: Lists the remaining cost for each of the selected activity's expenses. (Remaining Cost = Budgeted or Planned Cost - Actual Cost) To change an expense's remaining cost, double-click it.

At Completion Cost: Lists the at completion cost for each of the selected activity's expenses. (At Completion Cost = Remaining Cost + Actual Cost) To change an expense's at complete cost, double-click it.

Vendor: Lists the business or organization to which each of the selected activity's expenses are payable. To change a vendor, double-click it.

Auto Compute Actuals: Indicates if an expense's actual cost is automatically calculated according to the selected activity's completion percentage. To auto compute an expense, mark the appropriate checkbox.

Add: Adds an expense to the selected activity.

Delete: Deletes the selected expense.

Exporting and Importing Layouts

Exporting a layout

1. In the Project menu, choose Activities, or Resource Assignments, or WBS to open the respective layout. Or, choose Enterprise, Projects to open a project layout.
2. Choose View, Layout, Open. You can also click the Layout Options bar and choose Layout, Open. You are prompted you to save the current layout.
3. Highlight the layout you would like to export.
4. Click Export. Browse to the location where to save the . plf file.
5. Click Save.

Importing a layout

1. In the Project menu, choose Activities, or Resource Assignments, or WBS to open the respective layout. Or, choose Enterprise, Projects to open a project layout.
2. Choose View, Layout, Open. You can also click the Layout Options bar and choose Layout, Open. You are prompted you to save the current layout.
3. Click Import. The application responds by prompting you to choose a . plf file.

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4. In the Import Layout As dialog box, type an appropriate name for the layout.
5. In the Available To field, select a user category. Depending on your privileges, you will be able to choose All Users, Another User, Current User, or Project.
   - If you selected Another User, in the User field, click  to specify a user. The Select User dialog box displays.
   - If you selected Project, in the Project field, click  to specify a project. The Select Project dialog box displays.
6. Click Save.

Feedback tab - Activity Details

Using Activity Details, you can collaborate on activities by entering activity-specific messages or feedback for other users to view; all users who can access the activity can view your feedback and provide their own feedback that you can view.

Notes to Resources: Displays comments about the selected activity aimed at the resources assigned to the activity. All of the activity's resources can view these comments. To add comments, enter them in the text box.

Add: Adds your comments to the Notes to Resources field.

Feedback from Resources: Displays comments about the selected activity from the activity's resources.

New: When a resource for this activity adds or revises notes, the New checkbox is marked. After reviewing the notes, clear the checkbox to indicate that you have reviewed the resource's feedback so that you will be notified of subsequent new feedback.

Add: Adds comments from the text box to the Feedback from Resources field.

Files tab - Work Product and Document Details

Private Location: The selected work product or document's private file location. Only P6 Professional users can view this file. Click  to select a new private file location.

Launch: Opens the selected work product or document's private file and its associated application.

Public Location: The selected work product or document's publicly-accessible file location. All project participants can view this file. Click  to select a new public file location.

Launch: Opens the selected work product or document's public file and its associated application.

Notes (P6 EPPM Only)

- If the selected work product or document has been added via a P6 installation with a configured content repository, the detail fields are read-only and the document cannot be opened from P6 Professional.

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Budget Log tab - WBS Details

Original Budget: Enter an estimate of the total amount you require for this project in the Original Budget field, including all funding contributions.

Current Budget: Shows the sum of the original budget plus approved budgets. (calculated field)

Proposed Budget: Shows the sum of the original budget plus approved and pending budgets. (calculated field)

Budget Change Log: Enables you to track changes to the original budget.

Date: Shows the date the budget change request was made.

Amount: Record the amount of money required by this change request.

Responsible: Enter the name of the person responsible for the change.

Status: Shows the current status of the change: pending, approved, or not approved. The status for each budget change affects the totals shown in the Current Budget and Proposed Budget fields.

Reason: Enter a reason for the budget change request (optional).

Change Number: Number associated with the change request. Useful for reporting or tracking changes to the original budget.

Funding tab - Project Details

Use this tab to view or assign the nonprofit, government-allocated, or other funding sources available for the selected node/project.

When P6 Professional is connected to a P6 Professional database: To define funding sources, choose Enterprise, Funding Sources.

Funding Source: List of assigned funding sources for the selected node/project. Click Add to assign a funding source.

Amount: Enter the amount of money allocated to the current project/node by each fund.

Fund Share: Enter the percentage of the total fund that is allocated to the current project/node.

General tab - Activity Details

Use the General tab to define general information for the selected activity, including the activity's duration type, activity type, percent complete type, priority level, assigned work breakdown structure (WBS) element, and cost account.

Activity Type: The selected activity's type, or how the activity's schedule is calculated. An activity's type can be Task Dependent, Resource Dependent, Level of Effort, Start Milestone, Finish Milestone, or WBS Summary.

A Task Dependent activity is scheduled according to the activity's calendar rather than calendars of assigned resources.

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A Resource Dependent activity is scheduled according to the calendars of assigned resources. This activity type is used when several resources are assigned to the same activity, but may work separately.

A Level of Effort activity has a duration which is determined by its dependent activities. Administration-type activities are typically Level of Effort.

A Start/Finish Milestone is a zero-duration activity with no resources, marking a significant project event.

A WBS summary activity has a duration which is determined by a group of activities that share a common WBS level. Resources that drive activity dates cannot be assigned to WBS summary activities.

You can select a new type.

Duration Type: The basis for estimating the selected activity's completion time. An activity's duration type can be Fixed Units/Time, Fixed Duration & Units/Time, Fixed Units, or Fixed Duration & Units.

For Fixed Units/Time, the resource units per time are constant when the activity duration or units are changed. This type is used when an activity has fixed resources with fixed productivity output per timeperiod. You most often choose this duration type when you are using resource dependent activities.

For Fixed Duration & Units/Time, the activity duration is constant and the units are changed. This type is used when the activity is to be completed within a fixed timeperiod regardless of the resources assigned. You most often choose this duration type when you are using task dependent activities.

For Fixed Units, the activity units are constant when the duration or resource units per time are changed. This type is used when the total amount of work is fixed, and increasing the resources can decrease the activity duration. You most often choose this duration type when you are using resource dependent activities.

For Fixed Duration & Units, the activity duration is constant and the units/time are changed. This type is used when the activity is to be completed within a fixed timeperiod and the total amount of work is fixed. You most often choose this duration type when you are using task dependent activities.

You can select a new duration type.

% Complete Type: The way in which the percent complete for the selected activity is determined

An activity's percent complete type can be Units, Duration, or Physical.

For Duration, the selected activity's Activity % Complete is tied to its Duration % Complete. For Units, the selected activity's Activity % Complete is tied to its Units % Complete. For Physical, you may enter the selected activity's Activity % Complete in the Physical % field on the Status tab.

Activity Calendar: The selected activity's calendar. To select a new calendar, click .

WBS: The selected activity's assigned work breakdown structure (WBS) element. To assign a new WBS element to the selected activity, click .

Responsible Manager: The name of the organizational breakdown structure (OBS) element assigned to the selected activity's WBS element.

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Primary Resource: The name of the selected activity's primary resource. The primary resource is the person responsible for the overall work on the activity. To select a new primary resource, click .

General tab - Project Details

Use this tab to view or modify general information for the selected project or node.

EPS ID/Project ID: The node/project identifier. You can type a new unique ID in this field or directly in the ID cell within the hierarchy display.

EPS Name/Project Name: The node/project name. You can type a new name in this field or directly in the name cell within the hierarchy display.

Status: The status of the selected project (not applicable for EPS nodes). Use status to identify active or inactive projects. You can also select What If status for analysis before establishing a more permanent project schedule, or Planned status for use during the project planning phase.

Responsible Manager: The node's/project's assigned organizational breakdown structure (OBS) element. A responsible manager is required for each level of the EPS. You can edit this name or click  to select a different OBS element.

Project Leveling Priority: A user-defined rank of the project among other projects used during leveling. P6 Professional uses this number to determine which assignments from other projects to consider within the leveling run. For example, if you specify 5 in the Consider Assignments in Other Projects With Priority Equal/Higher Than field of the Level Resources dialog box, P6 Professional considers all projects with a project leveling priority of 1, 2, 3, 4, and 5.

Enter a value from 1 (highest priority) to 100 (lowest priority).

Check Out Status: Indicates whether a project is being used remotely. This feature enables version-control of projects. You can also change the status of the project to "checked in" or "checked out". For example, if a project was checked out, no changes were made, and you would like to work with the project from the live database without having to import the project, change the status to "checked in."

Checked Out By: The name of the user that checked out the project. This field is blank when the Check Out Status is Checked In.

Date Checked Out: The date and time the user checked out the project. This field is blank when the Check Out Status is Checked In.

Project Web Site URL: The project's Web site address, if applicable.

Launch: Launches the Web site specified in the Project Web Site URL field.

General tab - Project Expense Details

Expense Item: The name of the selected expense. You can type a new name.

Expense Category: The selected expense's category. To select a category, click . The project administrator defines expense categories in P6 when P6 Professional is connected to a P6 EPPM database and in the Admin Categories dialog box when connected to a P6 Professional database.

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Vendor: The name of the business or organization to which the selected expense is payable. You can type a new name.

Cost Account: The cost account assigned to the activity that incurs the selected expense. To select a cost account, click ....

Document Number: The purchase order or invoice number for the selected expense. You can type a new document number.

General tab - Project Issue Details

Use the General tab to define general information for the selected issue, including the issue's name and the manager within the OBS structure who is responsible for addressing the issue. You can also assign a priority level, status, and tracking layout to the issue.

Issue Name: The name of the selected issue. You can type a new name.

Responsible Manager: The manager within the OBS structure who is responsible for the selected issue. Click ... to select a responsible manager.

Tracking Layout: The name of the tracking layout that best displays the selected issue. Click ... to select a predefined tracking layout. To define new tracking layouts, choose Enterprise, Tracking.

Date Identified: The date the selected issue was identified. The current system date is used when you add the issue. You can click ... to select a new date.

Identified By: The name of the person who identified the selected issue. If this field displays "Monitor," the threshold monitor identified the selected issue.

Status: The selected issue's status. You can select a new status.

Priority: The selected issue's priority level. You can select a new priority level.

Resolution Date: The date the selected issue was resolved. Use this field in conjunction with the Date Identified to track how long it took to resolve the issue.

General tab - Project Threshold Details

Threshold Parameter: The specific parameter, or condition, that will be monitored. To select a parameter, click ....

Lower Threshold: The selected threshold's lower numeric value. Type a value.

Upper Threshold: The selected threshold's upper numeric value. Type a value.

WBS to Monitor: The code for the work breakdown structure (WBS) element to which the selected threshold applies. To select a WBS element, click ....

Detail to Monitor: The level at which you want to monitor the selected threshold: WBS or activity. To select a monitor level, click the down arrow.

Responsible Manager: The manager within the organizational breakdown structure (OBS) who is responsible for the selected threshold's issues. To select a responsible manager, click ....

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Tracking Layout: The tracking layout that will be used to display the selected threshold's issues. To select a tracking layout, click ....

Status: The selected threshold's status. To select a status, click the down arrow.

Issue Priority: The priority level for issues generated by the selected threshold. To select a priority level, click the down arrow.

General tab - Resource Assignments Details

Resource: The resource assignment for the activity. Click ... to select a different resource.

Role: The role assignment for the activity. Click ... to select a different role.

Activity Name: The name of the activity to which the resource/role is assigned.

Cost Account: The cost account associated with the resource/role assignment. Click ... to select a different cost account.

Price/Unit: The selected resource/role assignment's cost per unit.

Rate Type: Determines which price/unit is set on the resource/role assignment. You can choose a new rate type.

Primary Resource: Mark to indicate the selected resource assignment is the primary resource for the activity.

General tab - Resource Details

Resource ID: The selected resource's ID. You can type a new ID.

Resource Name: The selected resource's name. You can type a new name.

Employee ID: The selected resource's employee identification number, such as an internal ID number or social security number. You can type a new ID number.

Title: The selected resource's job title. You can type a new title.

email Address: The selected resource's email address. You can type a new email address.

Office Phone: The selected resource's office phone number. You can type a new phone number.

Active: Mark this checkbox to make the resource available for assignment; clear it to indicate an inactive status or unavailability.

General tab - Risks Details (P6 Professional Only)

Use the General tab to record basic information for the selected risk, including the risk's name, status, type, owner, and identification date. This tab also displays dates for when the selected risk may start and finish, as well as the potential cost the risk may impose.

ID: The unique identifier of the selected risk. You can type a new ID.

Name: The name of the selected risk. You can type a new name.

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Category: The name for the selected risk's category. Click  to select a new category.

Type: The kind of risk, threat or opportunity. A threat will have a negative impact on your project, while an opportunity will have a perceived benefit to the project.

Owner: The resource that has ownership of the risk. Click  to select a new owner.

Status: The current state of the selected risk's status. You can select a new status.

- **Proposed**: The risk is identified and awaits approval.
- **Open**: The risk is approved as a valid risk to the project.
- **Active**: The risk is currently impacting the project.
- **Rejected (Closed)**: The risk is not seen as a valid risk to the project and therefore will not be tracked and managed by the project manager. The data for this risk cannot be modified once it is closed.
- **Managed (Closed)**: The risk occurred and was successfully managed by the project team and is no longer an active risk. The data for this risk cannot be modified once it is closed.
- **Impacted (Closed)**: The risk occurred, impacted the project and is no longer an active risk. The data for this risk cannot be modified once it is closed.

Exposure Start: The earliest start date of all activities to which the risk is assigned. If no activities are assigned to the risk, the Project Start date is shown.

Exposure Finish: The latest finish date of all activities to which the risk is assigned. If no activities are assigned to the risk, the Project Finish date is shown. If there is no Project Finish date, the Project Schedule Finish data is shown. If there is no Project Schedule Finish date, then the Project Must Finish On date is shown. If there is no Project Must Finish On date, then the Project Start date is shown.

Pre-Response Exposure Cost: The potential cost of the risk. The value for the Post-Response Exposure Cost field is based on values selected for the Probability and Cost fields, located under the Pre-Response section on the Risks, Impact tab, and on cost figures associated with the activities assigned to the risk or to the project, if no risk assignments have been made.

The following discussion explains how the application calculates exposure cost. The discussion refers to both the Pre- and Post-Response Exposure Cost fields generically as Exposure Cost fields because both are calculated using the same equation.

The value for the Exposure Cost field is based on the values selected for the Probability and Cost fields, located on the Risks, Impact tab, and on cost figures associated with the activities assigned to the risk or to the project, if no risk assignments have been made.

The application calculates the Exposure Cost value using this equation: Exposure Cost = Planned/Budgeted Total Cost * (Probability Midpoint * Cost Midpoint).

The Planned/Budgeted Total Cost is the sum of the Planned/Budgeted Cost values for each activity assigned to the risk (or the planned project cost, if no activities are assigned to the risk).

The Probability Midpoint is the midpoint of the Probability field value for the selected risk. The Cost Midpoint is the midpoint of the Cost field value for the selected risk. The way each is calculated is discussed below.

The equation for the calculation of Probability Midpoint and Cost Midpoint varies, depending on which values are selected for the Probability and Cost fields:

- **When using a value between highest and lowest:**

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  - When a value of High (50% to 70%), Medium (30% to 50%), or Low (10% to 30%) is selected for the Probability field, then the Probability Midpoint is calculated using this equation: Probability Midpoint = (lower range for selected value + higher range of selected value)/2. So if the Probability value is Medium (30% to 50%), then the Probability Midpoint is calculated as follows: (30+50)/2 = 40%.
  - When a value of High (20% to 40%), Medium (10% to 20%), or Low (1% to 10%) is selected for the Cost field, then the Cost Midpoint is calculated using the same equation as Probability Midpoint. So if the Cost value is Medium (10% to 20%), then the midpoint is calculated as follows: (10 + 20)/2 = 15%

- **For highest values:**
  - When the value Very High (70% or higher) is selected for the Probability field, then the Probability Midpoint is calculated as the midpoint between the lower value and 100%. So the Probability Midpoint for the value Very High (70% or higher) midpoint is calculated as follows: (70 + 100)/2 = 85%.
  - When the value Very High (40% or higher) is selected for the Cost field, then the Cost Midpoint is calculated using this equation: ((the lower range for the selected value * 2) + the high range for the selected value)/2. So the Cost Midpoint for the value Very High (40% or higher) is calculated as follows: ((40 * 2) + 100)/2 = 90%.
- **For lowest values:**
  - When the value Very Low (<=10%) is selected for the Probability field, then the Probability Midpoint is calculated as the midpoint between zero and the upper value. So the Probability Midpoint for the value Very Low is calculated as follows: (0 + 10)/2 = 5%.
  - When the value Very Low (Up to 1%) is selected for the Cost field, then the Cost Midpoint is calculated as the midpoint between zero and the upper value. So the Cost Midpoint for the value Very Low is calculated as follows: (0 + 1)/2 = .005%.

So if the Planned/Budgeted Total Cost is $700,689.00, and the Probability Midpoint is Medium (40%), and the Cost Midpoint is Very High (90%), then the Exposure Cost would be calculated as follows: $700,689.00 * (.4 * .9) = $252,248.00.

Post-Response Exposure Cost: The potential cost of the risk based on the response to the risk. The value for the Post-Response Exposure Cost field is based on values selected for the Probability and Cost fields, located under the Post-Response section on the Risks, Impact tab, and on cost figures associated with the activities assigned to the risk or to the project, if no risk assignments have been made. The equation for calculating Post-Response Exposure Cost is the same as used to calculate Pre-Response Exposure Cost. For more details, see the previous description for Pre-Response Exposure Cost, above.

Identified Date: The date the selected risk was identified. Click  to select a new date.

Identified By: The resource who identified the risk. Click  to select a new resource.

General tab - WBS Details

General

WBS Code: The selected WBS element's code. You can type a new code.

WBS Name: The selected WBS element's name. You can type a new name.

Status: The selected WBS element's status. You can select a new status.

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Responsible Manager: The selected WBS element's assigned, organizational breakdown structure (OBS) element. Click ... to select a new OBS element.

Anticipated Dates

Anticipated Start: The user-defined date the project is expected to start; used during the project planning stage, and set at the WBS, EPS, or project level.

Anticipated Finish: The user-defined date the project is expected to finish; used during the project planning stage, and set at the WBS, EPS, or project level.

General tab - Work Product and Document Details

Title: The selected work product or document's name. You can type a new name.

Version: The selected work product or document's version number. You can type a new number.

Revision Date: The date of the selected work product or document's last update. Click ... to select a new date.

Document Category: A classification used to organize various document types. For example, you could create document categories for purchase orders, specification documents, or change orders.

Author: The person who created the selected work product or document. You can type a new name.

Reference No.: The selected work product or document's reference or catalog number. You can type a new number.

Status: The selected work product or document's status for the open project. You can select a status.

Deliverable: Mark this checkbox to indicate that the work product or document is a project deliverable.

Note (P6 EPPM Only)

- If the selected work product or document has been added via a P6 installation with a configured content repository, the detail fields are read-only and the document cannot be opened from P6 Professional.

Impact tab - Risks Details (P6 Professional Only)

Use the Impact tab to enter pre-response, response and post-response information, and to view calculated pre- and post-response scores.

Select values in the Pre-Response section to characterize the potential risk in terms of its likelihood of occurring (Probability field), its impact on the schedule (Schedule field), and its impact on cost (Cost field). Together the Schedule and Cost fields are called the impact fields. The application uses the values from the probability and impact fields to calculate a Score, also shown on this tab.

If you choose to respond to a risk you can use the fields in the Response and Post-Response sections. Using the Response fields enables the Post-Response fields. The fields in the Post-

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Response section mirror those in the Pre-Response section, but they are used to measure the significance of the risk based on the response.

Pre-Response section

Probability: The probability of the risk occurring.

- **<None>** (Clears a previous selection, if any.)
- **1 - Very High (70% or higher)**
- **2 - High (50% to 70%)**
- **3 - Medium (30% to 50%)**
- **4 - Low (10% to 30%)**
- **5 - Very Low (Up to 10%)**
- **6 - N (Negligible)**

Schedule: The impact on the schedule if the risk occurs.

- **<None>** (Clears a previous selection, if any.)
- **1 - Very High (20% or higher)**
- **2 - High (10% to 20%)**
- **3 - Medium (5% to 10%)**
- **4 - Low (1% to 5%)**
- **5 - Very Low (Up to 1%)**
- **6 - N (Negligible)**

Cost: The monetary impact on the project if the risk occurs.

- **<None>** (Clears a previous selection, if any.)
- **1 - Very High (40% or higher)**
- **2 - High (20% to 40%)**
- **3 - Medium (10% to 20%)**
- **4 - Low (1% to 10%)**
- **5 - Very Low (Up to 1%)**
- **6 - N (Negligible)**

Score: The overall risk score based on the values you select for three fields: Probability, Cost, and Schedule. Two of these fields, Cost and Schedule, are known as the impact fields.

The Probability field and each impact field have these possible values: Very High, High, Medium, Low, Very Low, and Negligible. The application uses the highest value selected for the Cost and Schedule fields as the overall impact value. The application determines the Score by plotting the overall impact value with the value entered for Probability, as shown in the table below.

For example, if you enter the value Low for Cost and the value Medium for Schedule, the application uses Medium, the highest of the two, as the overall impact value. The application then uses the table below to determine the Score value by plotting the overall impact and Probability values. The columns in the table represent the overall impact values (Negligible through Very High), while the rows represent the Probability values (Very High through Negligible). The application determines the Score as the number that corresponds to the intersection of the applicable Impact column and Probability row. So, to continue our example,

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if you entered a value of High for Probability, the Score would display as 14, the number shown where the Impact Medium column intersects the Probability High row.

	Impact Negligible	Impact Very Low	Impact Low	Impact Medium	Impact High	Impact Very High
Probability Very High	0	5	9	18	36	72
Probability High	0	4	7	14	28	56
Probability Medium	0	3	5	10	20	40
Probability Low	0	2	3	6	12	24
Probability Very Low	0	1	1	2	4	8
Probability Negligible	0	0	0	0	0	0

Response section

Response Type: The action to take in response to the score for the risk. If the risk is a threat, the values are Accept, Avoid, Reduce, or Transfer. If the risk is an opportunity, the list of values are Enhance, Exploit, Facilitate, and Reject. Selecting <None> clears a previous selection, if any.

Response Description: The description of the response.

Post-Response section

Probability: The probability of the risk occurring.

- **<None>** (Clears a previous selection, if any.)
- **1 - Very High (70% or higher)**
- **2 - High (50% to 70%)**
- **3 - Medium (30% to 50%)**
- **4 - Low (10% to 30%)**
- **5 - Very Low (Up to 10%)**
- **6 - N (Negligible)**

Schedule: The impact on the schedule if the risk occurs.

- **<None>** (Clears a previous selection, if any.)
- **1 - Very High (20% or higher)**
- **2 - High (10% to 20%)**
- **3 - Medium (5% to 10%)**
- **4 - Low (1% to 5%)**
- **5 - Very Low (Up to 1%)**
- **6 - N (Negligible)**

Cost: The monetary impact on the project if the risk occurs.

- **<None>** (Clears a previous selection, if any.)

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- **1 - Very High (40% or higher)**
- **2 - High (20% to 40%)**
- **3 - Medium (10% to 20%)**
- **4 - Low (1% to 10%)**
- **5 - Very Low (Up to 1%)**
- **6 - N (Negligible)**

Score: The overall risk score based on the values you select for these three fields in the Post-Response section: Probability, Cost, and Schedule. Two of these fields, Cost and Schedule, are known as the impact fields. For more details, see the previous description for Score, above.

Importing Options -- Projects

If resource security is enabled (you have limited or no resource access), the following restrictions apply when importing activity resource assignments:

- If Project Import option is Create New Project, Update Existing, Replace Existing or Add into Existing Project:
  - If Global Resource option is set to Do Not Import: For new resources, no activity resource assignment data is imported. For existing resources, the Activity Resource Assignments project option determines how the data is imported.
  - If Global Resource option is set to Keep Existing, Update Existing, or Insert New: For new resources, activity resource assignment data is imported only if you have limited or all resource access (but not "no resource access"). And those resources are imported only if they are in your resource node. For existing resources, the Activity Resource Assignments project option determines how the data is imported.
- If Project Import option is Ignore this Project:
  - No activity resource assignment data is imported.

If you have no resource access, you cannot import activity resource assignments if the resource does not exist in the resource dictionary.

Integration tab - Project Details (P6 EPPM Only)

Use this tab to configure integrations with applications via Primavera Gateway, for example Primavera Unifier.

Application: The application to integrate with P6 Professional.

Deployment: Select the deployment.

Actions: The actions associated with the deployment.

Line Cell button

Click this button to add a line cell.

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New Report button

Click this button to create a new report. You are prompted to verify that you want to delete the current report components.

Notebook tab - Activity Details

Use the Notebook tab to define the selected activity's notes.

Notebook Topic: Any note categories or topics for the selected activity. You can select a note topic. Note topics are predefined by the project administrator.

Notebook Description: A description of the selected note. The title of this section changes to match the currently selected Notebook Topic. You can only view notes in this field; to add or edit notes, you must use the HTML editor.

Modify: Click to add or edit notes for the selected notebook topic in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks. This button is enabled only when a notebook topic is assigned to the selected activity.

Copy: Click to copy the selected text. After copying text, you can paste it into the HTML editor or into another application. This button is enabled only when a notebook topic is assigned to the selected activity.

Print: Click to print the displayed note. This button is enabled only when a notebook topic is assigned to the selected activity.

Add: Assigns a notebook topic to the selected activity.

Delete: Removes the selected notebook topic from the selected activity.

Notebook tab - Project Details

Use this tab to view or modify project details, such as the project's purpose, core requirements, tools or techniques, or any other project-specific information.

Notebook Topic: A list of topics assigned to the selected node/project. Notebook topics (or categories) are defined in P6 when P6 Professional is connected to a P6 EPPM database and in the Notebook Topics tab of the Admin Categories dialog box when connected to a P6 Professional database. Mark the checkboxes to make a topic accessible to projects, EPS nodes, WBS elements, and/or activities. To assign a topic, click Add, select a topic, and then click Assign.

Detail: Project-specific details for the selected topic. The title of the Detail area is the notebook topic name. You can only view the notes in this field; to add or edit notes, you must use the HTML editor.

Modify: Click to add or edit the notes for the selected notebook topic in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks. This button is enabled only when a notebook topic is assigned to the selected project.

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Copy: Click to copy the selected text. After copying text, you can paste it into the HTML editor or into another application. This button is enabled only when a notebook topic is assigned to the selected project.

Print: Click to print the displayed notes. This button is enabled only when a notebook topic is assigned to the selected project.

Notebook tab - WBS Details

Notebook Topic: A list of topics assigned to the selected WBS element. Notebook topics (or categories) are defined in P6 when P6 Professional is connected to a P6 EPPM database and in the Notebook Topics tab of the Admin Categories dialog box when connected to a P6 Professional database. Mark the checkboxes to make a topic accessible to projects, EPS nodes, WBS elements, and/or activities. To assign a topic, click Add, select a topic, and then click Assign.

Description: WBS-specific details for the selected topic. You can only view the description in this field; to add or edit a description, you must use the HTML editor.

Modify: Click to add or edit the description for the selected WBS element in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks. This button is enabled only when a notebook topic is assigned to the selected WBS element.

Copy: Click to copy the selected text. After copying text, you can paste it into the HTML editor or into another application. This button is enabled only when a notebook topic is assigned to the selected WBS element.

Print: Click to print the displayed description. This button is enabled only when a notebook topic is assigned to the selected WBS element.

Notes tab - Project Issue Details

Use the Notes tab to record a description of the selected issue.

Issue Notes: A description of the selected issue. You can only view the description in this field; to add or edit a description, you must use the HTML editor.

Modify: Click to add or edit the description for the selected issue in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.

Copy: Click to copy the selected text. After copying text, you can paste it into the HTML editor or into another application.

Print: Click to print the displayed description.

Notes tab - Resource Details

Resource Notes: Displays notes related to the selected resource. You can only view notes in this field; to add or edit notes, you must use the HTML editor.

Modify: Click to add or edit notes for the selected resource in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.

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Copy: Click to copy the selected text. After copying text, you can paste it into the HTML editor or into another application.

Print: Click to print the displayed description.

Notes tab - Risks Details (P6 Professional Only)

Use the Notes tab to record notes relating to the selected risk.

Notes: Notes pertaining to the selected risk. You can type a maximum of 4000 characters directly in this field.

Planning Resources tab - Project Details (P6 EPPM Only)

Use this tab to view planning resources assigned to the selected project in P6. This data is read-only in P6 Professional.

Resource: The resources assigned to the selected WBS.

Role ID: The ID of the assigned role.

Role: The name of the assigned role.

WBS: The WBS level of the resource assignment.

Committed: Committed indicates that the resource assignment is stable and unlikely to change. When calculating availability, the program considers only assignments that are marked as committed. Uncommitted allocation units are not shown in this view.

Start: The start date of the resource assignment.

Finish: The finish date of the resource assignment.

Life of Project: Indicates that the resource assignment's duration extends throughout the project.

Allocation: Resource allocation units for the selected resource assignment. Only committed resources' allocation units are displayed in this view.

Status Code: You can classify resource or role assignments using a set of status codes. Status codes enable you to categorize resource or role assignments based on certain criteria that is meaningful to you.

For example, you might choose to categorize role assignments by staffing status. In this case, you might use status codes, such as draft, filled, and submitted. You can then associate role assignment with a specific status, such as filled.

The status codes you can assign are created and integrated through the P6 Integration API.

Planning Resources tab - WBS Details (P6 EPPM Only)

Use this tab to view planning resources assigned to the selected WBS in P6. This data is read-only in P6 Professional.

Resource: The resources assigned to the selected WBS.

Role ID: The ID of the assigned role.

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Role: The name of the assigned role.

Committed: Committed indicates that the resource assignment is stable and unlikely to change. When calculating availability, the program considers only assignments that are marked as committed. Uncommitted allocation units are not shown in this view.

Start: The start date of the resource assignment.

Finish: The finish date of the resource assignment.

Life of Project: Indicates that the resource assignment's duration extends throughout the project.

Allocation: Resource allocation units for the selected resource assignment. Only committed resources' allocation units are displayed in this view.

Status Code: You can classify resource or role assignments using a set of status codes. Status codes enable you to categorize resource or role assignments based on certain criteria that is meaningful to you.

For example, you might choose to categorize role assignments by staffing status. In this case, you might use status codes, such as draft, filled, and submitted. You can then associate role assignment with a specific status, such as filled.

The status codes you can assign are created and integrated through the P6 Integration API.

Planning tab - Resource Assignments Details

Budgeted or Planned Units: The expected number of units the selected resource/role assignment will use for the activity.

Budgeted or Planned Units/Time: The expected number of units the resource/role assignment is available during the workperiod.

Original or Planned Duration: The planned working time for the resource/role assignment on the activity.

Actual Units: The actual number of units worked by the resource/role on this activity.

Remaining Early Units: The remaining units of work to be performed by this resource/role assignment on this activity.

Remaining Units/Time: The units per time at which the resource/role will be performing work on the remaining portion of the activity.

Remaining Duration: The remaining working time for the resource/role assignment on the activity.

Predecessors tab - Activity Details

Use the Predecessors tab to add, edit, and remove predecessor relationships for the selected activity.

You can change the columns that display under the Predecessors tab. To change the displayed columns, right-click in the Predecessors table, then choose Customize Predecessor Columns.

Project ID: Identifies the project.

WBS: Lists WBS codes for the selected activity's predecessors.

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Activity ID: Lists activity IDs for the selected activity's predecessors.

Activity Name: Lists names of the selected activity's predecessors.

Relationship Type: Lists each predecessor's relationship type for the selected activity. To change a relationship type, double-click it. The following relationship types are available: finish to start, finish to finish, start to start, and start to finish.

Lag: Lists the lag time value associated with each of the selected activity's predecessor relationships. To change a lag time value, double-click it.

Activity Status: Lists the status of each of the selected activity's predecessors.

Primary Resource: Lists the primary resource for each of the selected activity's predecessors. The primary resource is the person responsible for the overall work on the activity.

Assign: Adds a predecessor to the selected activity.

Remove: Removes the selected predecessor from the selected activity.

Go To: Displays the selected predecessor activity's information.

- To sort the display, click a column label.

Primavera Unifier tab - Project Details (P6 EPPM Only)

Use this tab to link a P6 Professional project with a Primavera Unifier project and schedule sheet or summary sheet and to select the mapping definition that will be used during the update.

Schedule Sheet Integration Section

Allow this project to link with a Primavera Unifier Project: Mark to link the open project with a Primavera Unifier project.

Project Name: The name of the Primavera Unifier project. To select a project, click ... .

Schedule Sheet: The name of the Primavera Unifier schedule sheet for the selected project. To select a schedule sheet, click ... .

Data Mapping: The name of the data mapping defined for the selected schedule sheet. To select a data mapping, click ... .

Delete from Primavera Unifier any activities no longer in the P6 Schedule: Mark to enable P6 to remove deleted activities.

Only send activities with CBS codes assigned: Mark to only send P6 Professional activities with CBS codes assigned to Primavera Unifier. If you mark this option, relationships will not be sent to the Schedule Sheet.

Summary Sheet Integration Section

Schedule Type: The type of schedule data to send to Primavera Unifier.

- If you choose **Cost** , costs and units will be sent from P6 Professional to Unifier. Primavera Unifier will not calculate costs.
- If you choose **Duration** , CBS dates and durations will be sent from P6 Professional and cost spreads will be calculated in Primavera Unifier based on the CBS dates and durations.

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- If you choose **Resource** , CBS dates and durations as well as expense costs will be sent from P6 Professional and costs will be calculated in Primavera Unifier based on Resource unit loading.

Synchronize WBS Hierarchy: Mark to specify that the WBS hierarchy should be sent to Primavera Unifier. If you do not send WBS hierarchy data to Unifier, only summary and spread data will be sent.

- If you select **Complete** , the entire WBS hierarchy is synchronized with Primavera Unifier.
- If you select **Levels** , you must enter the number of levels of the WBS hierarchy to synchronize.
- If you select **Partial** , only those WBS nodes which you select by marking the **Integrated WBS** field in the WBS view will be synchronized.

Levels: Set the number of WBS levels to synchronize.

Print Preview button

Click this button to preview the report on screen before printing.

Progress Reporter tab - Resource Details (P6 EPPM Only)

Login

User Login: The selected resource's login name for P6 Progress Reporter.

Timesheet

Uses timesheets: Mark to indicate that the selected resource uses a timesheet to report work hours in P6 Progress Reporter.

Timesheet Approval Manager: The name of the user who approves the selected resource's timesheets. Specify a user who has the global security privilege to approve timesheets and who has module access enabled, as defined in P6, for P6 or P6 Professional. Click  to select.

Project Details

Use the Project Details to view and edit detailed information about the selected project. The Project Details appear in the Projects window.

These are the available tabs:

- General tab - Project Details
- Dates tab - Project Details
- Notebook tab - Project Details
- Budget Log tab - Project Details
- Spending Plan tab - Project Details
- Budget Summary tab - Project Details
- Funding tab - Project Details

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- Codes tab - Project Details
- Defaults tab - Project Details
- Resources tab - Project Details
- Settings tab - Project Details
- Calculations tab - Project Details
- When connected to a P6 EPPM database: Planning Resources tab - Project Details
- UDFs tab - Project Details

Project Expense Details

Use Project Expense Details to view and edit detailed information about the selected expense item. Project Expense Details appear in the Project Expenses window.

The following tabs are available:

- General tab - Project Expense Details
- Activity tab - Project Expense Details
- Costs tab - Project Expense Details
- Description tab - Project Expense Details

Project Expenses window

Use the Project Expenses window to add, edit, and delete expense items for activities in the open project.

To display the Project Expenses window, do one of the following:

- Click  on the Project toolbar.
- On the Project menu, choose Expenses.

When working in the Project Expenses window, you can:

- Use the Edit menu on the Menu bar, the Edit toolbar, or shortcut (right-click) menu to add, delete, cut, copy, and paste expenses.
- Use the Display Options bar, the View menu on the Menu bar, or the Layout toolbar to customize the expense table. You can customize the columns that display in the expense table, and you can group and sort expenses.
- Use Project Expense Details or the expense table to define general and detailed information for each expense. To show or hide Expense Details, click  on the Bottom Layout toolbar, or choose View, Show on Bottom, Details.

Related Concepts

- Expenses
- Activities

Related Tasks

You can perform all of the following tasks in the Project Expenses window:

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- Add expenses
- Assign an expense category
- Change an expense's activity assignment
- Copy and paste expenses
- Cut and paste expenses
- Delete expenses
- Enter cost information for expenses
- Specify an accrual type for an expense

Project Explorer window

The Project Explorer window, which lists the EPS structure, displays in the upper left pane of the Tracking window. A + sign before an item indicates it contains additional levels of detail. Click the + sign to open additional levels; when all levels for an item are open, the + changes to a minus sign. Click the – sign next to an item to close the detail levels below it.

- To change the display options in the Project Explorer window, click the Display Options bar.
- To display data in the current layout for a project element, click the project element in the Project Explorer window. Live data is displayed for open projects. Closed projects display summarizer data in the current layout, if the summarizer was run for the project. If the summarizer has not been run, no data displays.

Project Issue Details

Use the Project Issue Details to view and edit detailed information about the selected issue. The Project Issue Details appear in the Project Issues window.

The following tabs are available:

- General tab - Project Issue Details
- Details tab - Project Issue Details
- Notes tab - Project Issue Details

Project Issues window

Use the Project Issues window to add, edit, and delete issues for the open project and to send Email notifications about issues. You can customize the columns that display in the issue table, and you can group, sort, and filter issues.

To display the Project Issues window, do one of the following:

- Click  on the Project toolbar.
- On the Project menu, choose Issues.

When working in the Project Issues window, you can:

- Use the Edit menu on the Menu bar or the Edit toolbar to add, delete, cut, copy, and paste issues.

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- Use the Display Options bar, the View menu on the Menu bar, or the Layout toolbar to customize the issue table.
- On the Edit toolbar, click  to display and add comments about the selected issue's history, and click  to select who you want to notify about the selected issue and send an Email.
- Use Project Issue Details or the issue table to define general and detailed information for each issue. To show or hide Issue Details, click  on the Bottom Layout toolbar.

Related Concepts

- Issues

Related Tasks

You can perform all of the following tasks in the Project Issues window:

- Add an issue
- Assign a tracking layout to an issue
- Assign an issue to a resource
- Assign an issue to an activity
- Change an issue's status
- Delete an issue
- Send Email about an issue
- Track the duration of an issue
- View or add to an issue's history

Project Threshold Details

Use the Project Threshold Details to view or modify information about the selected thresholds. The Project Threshold Details appear in the Project Thresholds window.

These are the available tabs:

- General tab - Project Threshold Details
- Details tab - Project Threshold Details

Project Thresholds window

Use the Project Thresholds window to create, view, edit, and monitor thresholds for the open project. You can monitor a threshold at the work breakdown structure (WBS) level or the activity level to identify issues. You can customize the columns that display in the threshold table, and you can group, sort, and filter thresholds.

To display the Project Thresholds window, do one of the following:

- Click  on the Project toolbar.
- On the Project menu, choose Thresholds.

When working in the Project Thresholds window, you can:

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- Use the Edit menu on the Menu bar or the Edit toolbar to add, delete, cut, copy, and paste thresholds.
- Use the Display Options bar, the View menu on the Menu bar, or the Layout toolbar to customize the threshold table.
- On the Edit toolbar, click  to monitor the selected threshold to identify issues.
- Use Project Threshold Details or the threshold table to define general and detailed information for each threshold. To show or hide Threshold Details, click  on the Bottom Layout toolbar.

Related Concepts

- Thresholds
- Threshold parameter definitions

Related Tasks

You can perform all of the following tasks in the Project Thresholds window:

- Add a threshold
- Assign a tracking layout to a threshold
- Delete a threshold
- Delete a threshold issue
- Disable or enable a threshold
- Monitor a threshold
- View threshold issue details

Projects window

When P6 Professional is connected to a P6 Professional database, use the Projects window to set up the EPS (Enterprise Project Structure), add new projects, and manage multiple projects.

When P6 Professional is connected to a P6 EPPM database, use the Projects window to work with the EPS (Enterprise Project Structure), add new projects, and manage multiple projects.

You can divide the Projects window into top and bottom layout views, and you can customize these layouts and how projects are displayed.

To display the Projects window, do one of the following:

- Click  on the Project toolbar.
- On the Enterprise menu, choose Projects.

Refer to the following sections of this topic for information and links to concepts and tasks about working with projects in the Projects window:

- Working in the Projects window
- Project concepts
- Project tasks

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Working in the Projects window:

When working in the Projects window, you can:

- Use the Edit menu on the Menu bar, the Edit toolbar, or shortcut (right-click) menu to add, delete, cut, copy, and paste projects.
- Use the Layout Options bar, View menu on the Menu bar, and Top Layout toolbar to choose the layouts you want to display in the top layout. In the top layout, you can display the Project Table, a project chart view, or a project Gantt Chart.
- Use the Layout Options bar, the View menu on the Menu bar, or the Layout toolbar to customize layouts and how projects are displayed in the window. For example, you can customize columns of the Project Table; group, sort, and filter projects; specify a timescale; customize Gantt Chart bars; and more.
- Use Project Details or the Project Table to define general and detailed information for each activity. To show or hide Project Details, click  on the Bottom Layout toolbar.
- Use a shortcut (right-click) menu to summarize projects, and create and work with reflection projects.

Project concepts

The following topics describe project-related concepts. These concepts apply to data you define for projects (for example, activities or WBS elements), data you assign to activities (for project codes), and data or features that impact project data (for example, scheduling projects). These concepts do not necessarily apply to the Projects window, but they do apply to projects in general.

- Activities
- Baselines
- Calendars
- Comparison Reporting Overview
- Defining project details
- Earned Value
- Establishing budgets
- Enterprise Project Structure overview
- Expenses
- Importing and exporting projects
- Issues
- Managing projects using the EPS
- Managing remote projects
- Portfolios
- Project codes and values
- Projects
- When connected to a P6 Professional database: Risks
- Rolling up data with the summary service
- Scheduling projects

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- Store Period Performance
- Thresholds
- Updating progress
- Updating the schedule
- When connected to a P6 EPPM database: Using Reflection projects and Activity Owner features to collect and review activity status
- Using the data date
- Viewing summary project information
- Work Breakdown Structure
- Work Products and Documents

Project tasks

You can perform all of the following tasks in the Projects window. These tasks do not include project-related tasks that you can perform outside of the Projects window, such as assigning baselines to projects and scheduling projects.

- Add a project to the EPS hierarchy
- Assign funding sources
- Assign project codes and values
- Change a project ID
- Change a project name
- Change a project's status
- Change the data date
- Change the project leveling priority
- Close a project
- Compare budgets and variances
- Copy and paste a project
- Copy an EPS node or project
- Create a project
- Create a Reflection
- Define a what-if project
- Delete a project
- When connected to a P6 Professional database: Delete an EPS node or project
- Enter budget changes
- Enter monthly spending amounts
- Enter project dates
- Establish budgets
- Merging a Reflection with the Source project
- Open a project
- Printing a reflection difference report

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- Set a project's summarization options
- Set activity ID options
- Set project resource options
- Set the default price for activities
- Set the default rate type for resource assignments
- Set the float time for identifying critical activities
- Set the project default activity calendar
- Set the project default activity duration type
- Set the project default activity percent complete type
- Set the project default activity type
- Set the project default cost account
- Specify a fiscal start month
- Summarize project data
- View budget and spending plan totals
- View the check-out status of a project

Recalculating assignment costs

When changes are made to resource or role cost information, you are prompted to recalculate assignment costs, so that the correct values display for activity costs in all open projects. The Recalculate Assignment Costs command ensures that project costs reflect any updated price/unit values on activities.

For example, you should recalculate assignment costs if you change a resource's or role's price/unit and the resource/role is assigned to activities, or if a resource/role has multiple prices and the activity dates change, since the activity cost calculation is based upon the activity start date. In some cases you will be prompted to recalculate costs. You can also choose Tools, Recalculate Assignment Costs, provided you have access rights to View Resource and Role Costs/Financials, which is set at the project level. When P6 Professional is connected to a P6 EPPM database, the appropriate privilege is defined in P6.

Relationships tab - Activity Details

Use this tab to view and manage predecessors and successors from a single Activity Details tab. To enlarge either the Predecessor or Successor area, drag the split bar separating the right and left panes. The Predecessor area functions identically to the Predecessor tab, and the Successor area functions identically to the Successor tab. The data stored on the Relationships tab is synchronized with that on the Predecessors and Successors tabs.

Predecessors

Project ID: Identifies the project.

WBS: Lists WBS codes for the selected activity's predecessors.

Activity ID: Lists activity IDs for the selected activity's predecessors.

Activity Name: Lists names of the selected activity's predecessors.

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Relationship Type: Lists each predecessor's relationship type for the selected activity. To change a relationship type, double-click it. The following relationship types are available: finish to start, finish to finish, start to start, and start to finish.

Lag: Lists the lag time value associated with each of the selected activity's predecessor relationships. To change a lag time value, double-click it.

Activity Status: Lists the status of each of the selected activity's predecessors.

Primary Resource: Lists the primary resource for each of the selected activity's predecessors. The primary resource is the person responsible for the overall work on the activity.

Assign: Adds a predecessor to the selected activity.

Remove: Removes the selected predecessor from the selected activity.

Go To: Displays the selected predecessor activity's information.

- To sort the display, click a column label.

Successors

Project ID: Identifies the project.

WBS: Lists WBS codes for the selected activity's successors.

Activity ID: Lists activity IDs for the selected activity's successors.

Activity Name: Lists activity names of the selected activity's successors.

Relationship Type: Lists each successor's relationship type for the selected activity. The following relationship types are available: finish to start, finish to finish, start to start, and start to finish. To change a relationship type, double-click it.

Lag: Lists the lag time value associated with each of the selected activity's successor dependencies. To change a lag time value, double-click it.

Activity Status: Lists the status of each of the selected activity's successors.

Primary Resource: Lists the primary resource for each of the selected activity's successors.

Assign: Adds a successor to the selected activity.

Remove: Removes the selected successor from the selected activity.

Go To: Displays the selected successor activity's information.

- To sort the display, click a column label.

Report Component Properties button

Select a report component, then click this button to view or edit its properties. Properties are characteristics of a report component, such as type and field for a text cell, sort and group options for a data source, and height for a row.

Report Wizard button

Select this button to run the Report Wizard. Before the wizard opens, you are prompted to verify that you want to delete the current report components.

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Reports window

Use the Reports window to create, edit, run, and delete global and project reports. You can also use the Reports window to import and export reports, enabling you to share reports between different project management databases.

To display the Reports window, do one of the following:

- Click  on the Enterprise toolbar.
- On the Tools menu, choose Reports, Reports.

Refer to the following sections of this topic for information and links to concepts and tasks about working with reports in the Reports window:

- Working in the Reports window
- Report concepts
- Report tasks

Working in the Reports window:

When working in the Reports window, you can:

- Use the Reports toolbar to perform most report-related tasks, such as running reports or report batches, importing and exporting reports, creating or modifying reports with the Report Wizard, modifying reports with the Report Editor, and managing report groups and batches.
- Use the Tools menu on the Menu bar to manage report groups and batches, and to create or modify reports using the Report Wizard.
- Use the shortcut (right-click) menu to run the selected report, run a batch report, import and export reports, modify the selected report with the Report Editor, set display options for the window, and cut, copy, and paste reports.
- Use the Display Options bar, View menu on the Menu bar, or the Layout toolbar to group, sort, and filter reports.

Report concepts

- Report Editor
- Report Editor window
- Reporting features
- Report Wizard
- Data sources in reports

Report tasks

You can perform all of the following tasks from the Reports window. These tasks are divided into general tasks, which you can perform in the Reports window or Report Wizard, and advanced tasks, which you can perform in the Report Editor.

General report tasks

- Add a report to a report batch

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- Add a report to a report group
- Add comments when running a report
- Copy a report
- Create a new report with the Report Wizard
- Create a report batch
- Create a report group
- Delete a report
- Delete a report batch
- Delete report groups
- Edit a report group
- Export a report
- Format numbers in reports
- Preview a report
- Print a report
- Print a report batch
- Remove a report from a report batch
- Remove a report from a report group

Report Editor tasks

- Add a background image to a report
- Add a border to a text cell
- Add a custom text cell to a report
- Add a data source to a report
- Add a field data or field title cell to a report
- Add a line cell to a report
- Add a report title
- Add a row to a report
- Add a variable cell to a report
- Add an embedded data source to a report
- Add an image cell to a report
- Add comments to reports
- Add HTML links to a text cell
- Add HTML links to an image cell
- Change report margins
- Change text cell color
- Change the sort order of report records
- Copy a data source
- Copy a row

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- Copy and paste cells
- Cut and paste a data source
- Cut and paste a row
- Cut and paste cells
- Define a report header and footer
- Define default text styles for reports
- Define HTML print settings for an image cell
- Define layout options for a data source
- Define page setup options for a report
- Delete a data source filter
- Delete a data source from a report
- Delete a data source that contains embedded data sources
- Delete a line cell from a report
- Delete a row filter
- Delete a row from a report
- Delete a text cell filter
- Delete an image cell from a report
- Disable HTML links in a text cell
- Disable HTML links in image cells
- Filter a data source
- Filter a report row
- Filter a text cell
- Format text in a text cell
- Indicate hierarchy levels in reports
- Remove a background image from a report
- Remove borders from a text cell
- Show time distributions in a report
- Sort report records
- Specify a timeperiod for a report
- Specify image cell width and position in a row
- Specify line cell width and position in a row
- Specify text cell width and alignment in a row

Resource Assignments Details

Use the Resource Assignments Details to view and edit detailed information about the selected resource assignment. The Resource Assignments Details appear in the Resource Assignments window.

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These are the available tabs:

- General tab - Resource Assignments Details
- Planning tab - Resource Assignments Details
- UDFs tab - Resource Assignments Details

Resource Assignments window

Use the Resource Assignments window to view all resource assignments for all currently opened projects. You can also display resource cost and quantity information in a spreadsheet. You can group, sort, and filter resource assignments, customize columns, and open and save resource assignment layouts.

To display the Resource Assignments window, do one of the following:

- Click  on the Project toolbar.
- On the Project menu, choose Resource Assignments.

Refer to the following sections of this topic for information and links to concepts and tasks about working with assignments in the Resource Assignments window:

- Working in the Resource Assignments window
- Resource assignment concepts
- Resource assignment tasks

Working in the Resource Assignments window

When working in the Resource Assignments window, you can:

- Use the Resource Usage Spreadsheet to display resource usage over time. You can display spreadsheet fields for budgeted or planned, actual, or remaining values, or you can customize the spreadsheet fields. If you have the appropriate security privilege, you can manually enter/edit values for budgeted or planned and remaining (early) units. To show or hide the Resource Usage Spreadsheet, click the Layout Options bar, then choose Resource Usage Spreadsheet, or click  on the Top Layout toolbar.
- Use the Layout Options bar, View menu on the Menu bar, or the Layout toolbar to customize resource assignment layouts. For example, you can customize columns of the assignment table or Resource Usage Spreadsheet; group, sort, and filter assignments; and specify a timescale.
- Use Resource Assignments Details to view or define properties for the selected resource assignment. To show or hide Assignment Details, click the Layout Options bar, then choose Assignment Details, or click  on the Bottom Layout toolbar.
- Use the shortcut (right-click) menu to copy or delete assignments, to fill data down or across, and to customize the display.

When filling data down or across, consider the following:

- The cell that you want to copy data from must be editable.
- You cannot fill down when:
  - The cells are greyed out and not editable
  - Multiple fields are added to the view

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  - Any other field is present on the view apart from Budgeted or Remaining early units
  - Timescale date interval is selected as Day/Hour or Day/shift
  - Only Ordinal dates is selected in Timescale.
  - Timescale is set to Financial periods
- You cannot fill across when:
  - The cells are greyed out and not editable
  - Any field is selected apart from apart from Budgeted or Remaining early units.
  - You select remaining units for a Completed Activity and either:
    * An assignment has an Actual Finish but the Activity does not - all Remaining buckets will be uneditable for that assignment ONLY
    * An activity has an Actual Finish then all of its assignments will have an Actual Finish - thus all Remaining buckets will be uneditable for all assignments
  - Timescale date interval is selected as Day/Hour or Day/shift
  - Only Ordinal dates is selected in Timescale.
  - Timescale is set to Financial periods.

Resource assignment concepts

- Activities
- Calculating cost when using multiple resource rates
- Calendars
- Future period bucket planning
- Leveling resources
- Recalculating assignment costs
- Resource curves
- Resources
- Roles
- The Resource Usage Spreadsheet

Resource assignment tasks

You can perform most tasks related to resource and role assignments in the Activities window. For example, you can assign resources and roles to activities in the Activities window and define details for each assignment on the Resources tab of Activity Details.

You can use the Resource Assignments window to view resource allocations across all open projects and customize the display of assignments according to your preferences. In Assignment Details, you can change the resource or role assigned to an activity, assign cost accounts to assignments, identify an assignment's primary resource, select the rate type for assignments, edit budgeted or planned, actual, and remaining unit values, and edit original or planned and remaining durations.

You can also perform the following tasks:

- Assign a curve to a resource or role assignment
- Create a future period bucket planning layout

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- Customize Resource Usage Spreadsheet columns
- Display the Resource Usage Spreadsheet
- Group and sort Resource Usage Spreadsheet columns in the Resource Assignments window
- Manually enter future period assignment values
- Remove a curve from a resource or role assignment
- Resize the panes of the Resource Usage Spreadsheet
- Save a layout in the Activities or Resource Assignments window
- Select Resource Usage Spreadsheet fields
- View a spreadsheet of resource allocation for a specific project

Resource Details

Use Resource Details to view and edit detailed information about the selected resource. The Resource Details appear in the Resources window.

The following tabs are available:

- General tab - Resource Details
- Codes tab - Resource Details
- Details tab - Resource Details
- Units & Prices tab - Resource Details
- Roles tab - Resource Details
- Notes tab - Resource Details
- When connected to a P6 EPPM database: Progress Reporter tab - Resource Details
- UDFs tab - Resource Details

Resources tab - Activity Details

Use the Resources tab to add, edit, and remove resource assignments for the selected activity, including each resource's budgeted or planned and actual hours for the activity and the role assignment for the activity. You can also define the activity's primary resource and change the rate type used for the resource or role assignment. The rate type determines which price/unit is used to calculate costs for resource and role assignments.

You can change the columns that display under the Resources tab. To change the displayed columns, right-click in the Resources table, then choose Customize Resource Columns.

Resource table: All resources assigned to the selected activity. To sort the display, click a column label.

Add Resource: Assigns a resource to the selected activity.

Add Role: Assigns a role to the selected activity.

Assign By Role: Assigns a resource to the selected activity according to role.

Remove: Removes the selected resource or role from the selected activity.

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Resources tab - Project Details

Use this tab to specify the project's resource default rate type for new assignments and whether resources can be assigned to the same activity more than once.

Assignment Defaults

Click  to select the default rate type for new resource and role assignments in the project. The rate type determines which price/unit is set on the assignment. For resources, the list corresponds to the rate types defined in the Rate Types tab in the Admin Preferences dialog box when P6 Professional is connected to a P6 Professional database and in the Application Settings in P6 when connected to a P6 EPPM database. For roles, the list corresponds to the rate types defined in the Prices tab of the Roles dialog box. This setting does not affect existing assignments.

Drive activity dates by default: Mark to allow the assignment finish dates to roll up to the activity finish dates for new resource and role assignments. Clear to allow the resource/role dates to be independent of the activity dates. P6 Professional marks this option by default.

Resource Assignments

Resources can be assigned to the same activity more than once: Mark to allow the same resource to be assigned to an activity more than once.

Resources window

Use the Resources window to maintain both your organization's resource hierarchy and individual resource information. You can assign resources to activities and roles in any project. If resource security is enabled, you can only view resources you have access to.

In the Resources window, you can view the resource hierarchy as a table or as a chart, and easily move resources around in the hierarchy.

To display the Resources window, do one of the following:

- Click  on the Enterprise toolbar.
- On the Enterprise menu, choose Resources.

Refer to the following sections of this topic for information and links to concepts and tasks about working with resources in the Resources window:

- Working in the Resources window
- Resource concepts
- Resource tasks

Working in the Resources window:

When working in the Resources window, you can:

- Use the Edit toolbar, the Edit menu on the Menu bar, or shortcut (right-click) menu to add, delete, cut, copy, or paste resources. From the Edit toolbar and menu, you can also undo your last action.

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- Use the Display Options bar, the View menu on the Menu bar, or the Top Layout toolbar to show or hide a table view or chart view in the window.
- Use the Display Options bar, the View menu on the Menu bar, or the Layout toolbar to customize the table or chart. You can customize columns, fonts, and colors, and you can group, sort, and filter resources.
- Use Resource Details or columns in the resource table to view or define properties for the selected resource. To show or hide Resource Details, click the Display Options bar, then choose Details, or click  on the Bottom Layout toolbar.
- Use the arrows on the Move toolbar to move the selected resource around in the hierarchy.

Resource concepts

- Activities
- Adding resources using a wizard
- Calculating cost when using multiple resource rates
- Calendars
- Future period bucket planning
- Importing and exporting resources and roles
- Leveling resources
- Recalculating assignment costs
- Resource codes
- Resource curves
- Introduction to Resource Security
- Resources
- Roles

Resource tasks

You can perform all of the following tasks in the Resources window:

- Add a resource
- Assign shared resource calendars to resources
- Assign resource codes and values
- Assign roles to resources from the Resources window
- Copy and paste a resource
- Cut and paste a resource
- Delete a resource
- Display resource details
- Edit resource information
- Enter comments about resources
- Enter multiple resource prices over time
- Remove roles from resources in the Resources window
- Specify how resources report hours

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- Specify the resource type for resources
- Specify the unit of measure for material resources
- View resources

Risks Details (P6 Professional Only)

Use the Risks Details to view and edit detailed information about the selected risk. You can also use the Risks Details to define a risk's impact, to select a response, and to define new impacts based on the response. The Risks Details appear in the Risks view.

The available tabs are:

- General tab - Risks Details
- Impact tab - Risks Details
- Activities tab - Risks Details
- Description tab - Risks Details
- Cause tab - Risks Details
- Effect tab - Risks Details
- Notes tab - Risks Details
- UDFs tab - Risks Details

Risks tab - Activity Details (P6 Professional Only)

Use the Risks tab to assign risks to activities or to remove risk assignments from activities.

Risk ID: The unique identifier of the risk or risks assigned to this activity.

Risk Name: The name of the risk or risks assigned to this activity.

Risk Category: The name for the selected risk's category.

Risk Type: The kind of risk, threat or opportunity. A threat will have a negative impact on your project, while an opportunity will have a perceived benefit to the project.

Risk Status: The current state of the selected risk's status.

- **Proposed**: The risk is identified and awaits approval.
- **Open**: The risk is approved as a valid risk to the project.
- **Active**: The risk is currently impacting the project.
- **Rejected (Closed)**: The risk is not seen as a valid risk to the project and therefore will not be tracked and managed by the project manager. The data for this risk cannot be modified once it is closed.
- **Managed (Closed)**: The risk occurred and was successfully managed by the project team and is no longer an active risk. The data for this risk cannot be modified once it is closed.
- **Impacted (Closed)**: The risk occurred, impacted the project and is no longer an active risk. The data for this risk cannot be modified once it is closed.

Risk Owner: The resource that has ownership of the selected risk.

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Exposure Start: The earliest start date of all activities to which the risk is assigned. If no activities are assigned to the risk, the Project Start date is shown.

Exposure Finish: The latest finish date of all activities to which the risk is assigned. If no activities are assigned to the risk, the Project Finish date is shown. If there is no Project Finish date, the Project Schedule Finish data is shown. If there is no Project Schedule Finish date, then the Project Must Finish On date is shown. If there is no Project Must Finish On date, then the Project Start date is shown.

Identified By: The resource who identified the risk.

Identified On: The date the risk was identified.

Description: A description of the risk.

Project: The name of the project with activities associated with this risk.

Assign: Click to assign a risk to the selected activity.

Remove: Click to remove risk from the activity.

Risks view (P6 Professional Only)

Use the Risks view to add, edit, and delete risks for the open project. You can also assign risks to activities, define risk impact, select a response, and define new impacts based on the response. You can customize the columns that display in the risk table, and you can group, sort, and filter risks.

To display the Risks view, do one of the following:

- Click  on the Project toolbar.
- On the Project menu, choose Risks.

When working in the Risks view, you can:

- Use the Edit menu or Edit toolbar to add, delete, cut, copy, and paste risks.
- Use the Display Options bar, View menu, or Layout toolbar to customize the risk table.
- Use Risk Details or the risk table to define general and detailed information for each risk. To show or hide Risk Details, click  on the Bottom Layout toolbar.

Related Concepts

- Risks

Related Tasks

You can perform all of the following tasks in the Risks view:

- Creating Risks
- Assigning a risk to an activity
- Responding to a risk
- Deleting a risk
- Modifying a risk
- Removing risk assignments from activities

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Roles tab - Resource Details

Role ID: Lists an identification code for the role.

Role Name: Lists the name of the role.

Proficiency: Lists the selected resource's skill level for each assigned role.

Primary Role: Mark the checkbox to indicate that this is the resource's main role. Clear this checkbox if this is a secondary role for this resource.

Assign: Assigns a role to the selected resource.

Remove: Removes the selected role from the selected resource.

Settings tab - Project Details

Use this tab to view and specify summarization information and project-level settings for the project. The fields on the Settings tab instruct P6 Professional how to summarize data for the EPS node or project when you use the Summary service to perform summary calculations automatically at scheduled intervals or on demand. The Settings tab also includes the settings for the first month of the fiscal calendar, the character for separating code fields for the WBS hierarchy, and defining the critical activities.

Summarized Data

Contains Summarized Data Only (P6 Professional Only): Mark this checkbox if you want P6 Professional to maintain only summarized data (no individual activities) for this project. This enables an organization to keep summary-level data for projects managed externally from the P6 Professional database, and allows the P6 Professional Summary service to summarize data from external Microsoft Project .MPD format files and import this data into the P6 Professional database for summary-level tracking and reporting.

Last Summarized On: Non-editable date field that displays the last time data was summarized.

Summarize to WBS Level: Maximum summary WBS levels stored in the database.

Publication

Enable Publication: Mark this checkbox if you want P6 to publish data for this project. Published data is used for reports run in P6 and to generate unit and cost spreads and calculated data on certain pages in P6.

Publishing Priority: Use this field to adjust the relative importance one project has to others when multiple projects are submitted to the service queue at the same time. P6 will add priority 1 projects to the queue, followed by 2, then 3, and so on up to 100. The default priority is 50.

Last Published On: Non-editable date field that displays the last time data was published for this project.

Publish resource and role data based on: **High level resource planning**: Choose to show data associated with the committed assignments configured on the Planning page of the Resources section on all pages of P6 using published data. **Detailed activity resource assignments**: Choose to show data associated with assignments made at the activity level on all pages of P6 using published data.

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Project Settings

Character for Separating Code Fields for the WBS Tree: The character that separates codes for work breakdown structure elements to indicate hierarchy levels. You can type a new character.

Fiscal Year Begins on the 1st Day Of: The month the project's fiscal year begins. You can select a new month.

Baseline for earned value calculation: Choose to calculate earned value using the project baseline or your primary baseline (as defined in the Assign Baselines dialog box).

Critical Activities

Define critical activities

Total Float less than or equal to: Choose to identify your critical activities based on total float. Specify the maximum float time for activities before they are marked critical. You can type a new number and time unit.

Longest Path: Choose Longest Path if you want to identify your critical activities based on the longest path in the project network.

If your project uses multiple calendars, defining critical activities based on the longest path in the project provides an alternative to viewing critical activities based on float. Defining float in a multicalendar project is more complicated, since P6 Professional bases float calculations on calendar definitions, including workperiods, holidays, and exceptions. Using float to identify critical activities may prove misleading, since some activities have large float values due to their calendar assignments but are still critical to the completion of the project.

In a multicalendar project, P6 Professional calculates the longest path by identifying the activities that have an early finish equal to the latest calculated early finish for the project. P6 Professional identifies all driving relationships for these activities and traces them back to the project start date.

Spending Plan tab - Project Details

Use this tab to view or record spending information for the project.

Date: Shows spending information by month for the project. The date range spans three months before a project starts to four years after the project start date.

Spending Plan: Specifies how much will be spent on a per monthly basis.

Spending Plan Tally: When an EPS node is selected, this field contains summarized spending information from the projects below it.

Undistributed Current Variance: Equals the spending plan monthly value minus the spending plan tally monthly value.

Benefit Plan: Shows a profit portion of the monthly amount; benefit values are usually entered at the end of a project.

Benefit Plan Tally: When an EPS node is selected, this field contains summarized benefit plan information from the projects below it.

Benefit Variance: Equals the benefit plan tally monthly value minus the benefit plan monthly value.

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Spending Plan tab - WBS Details

Date: Shows spending information by month for the project. The date range spans three months before a project starts to four years after the project start date.

Spending Plan: Specifies how much will be spent on a per monthly basis.

Spending Plan Tally: When an EPS node is selected, this field contains summarized spending information from the projects below it. (calculated field)

Undistributed Current Variance: Equals the spending plan monthly value minus the spending plan tally monthly value.

Benefit Plan: Shows a profit portion of the monthly amount; benefit values are usually entered at the end of a project.

Benefit Plan Tally: When an EPS node is selected, this field contains summarized benefit plan information from the projects below it. (calculated field)

Benefit Variance: Equals the benefit plan tally monthly value minus the benefit plan monthly value.

Status tab - Activity Details

Use the Status tab to define the selected activity's duration, constraint, start and finish dates, labor and nonlabor units and costs, and material costs. You can also use the Status tab to view the selected activity's float, actuals, and completion percentages.

Duration

Original or Planned: Original or Planned: The expected number of work periods required to complete the selected activity. You can type a new time value and unit.

Actual: The actual number of workperiods spent on the selected activity. If the selected activity is complete, type a new number.

Remaining: The remaining number of workperiods needed to complete the selected activity. If the selected activity is in progress, type a new number.

At Complete: An estimate of the duration at completion time for the selected activity. (At Complete Duration = Actual Duration + Remaining Duration). If the selected activity is in progress, type a new at complete estimate.

Total Float: The amount of time the selected activity can be delayed, without delaying the project's finish date.

Free Float: The amount of time the selected activity can be delayed, without delaying the immediate successor activities.

Status

Started: Mark to indicate that the selected activity has started. The field beside this checkbox displays the activity's project planned start date. If the selected activity has started or is complete, this field displays the activity's actual start date. To select a start date, click ... .

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Finished: Mark to indicate that the selected activity is complete. The field beside this checkbox displays the activity's remaining finish date. If the selected activity is complete, this field displays the activity's actual finish date. To select the actual finish date, click .

Exp Finish: The date the activity's primary resource expects the activity to end. Only the primary resource can edit this date.

When you add an Expected Finish date, the calendar defaults to the date and time of the activity's Early Finish date.

When you edit an Expected Finish date, the calendar defaults to the date and time that is currently in the Exp Finish field.

%: If the selected activity's percent complete type is set to Duration, the selected activity's duration percent complete is calculated from the Original or Planned and remaining duration.

If the selected activity's percent complete type is set to Units, this field displays the selected activity's unit percent complete, as calculated from the actual and remaining units.

If the selected activity's percent complete type is set to Physical, this field displays the selected activity's physical percent complete, which is manually entered.

If the selected activity's percent complete type is set to Scope, this field displays the selected activity's scope percent complete, which is calculated in Oracle Primavera Cloud. You cannot edit the activity's percent complete value if the percent complete type is set to Scope.

Scope % (P6 EPPM only): The percent complete for the activity if the percent complete type is set to scope. Scope % is calculated in Oracle Primavera Cloud when P6 EPPM is integrated with Oracle Primavera Cloud for scope management.

Suspend: Enter the date on which the activity's progress stopped.

Resume: Enter the date on which the suspended activity's progress resumed.

Primary Constraint

Primary: The selected activity's primary constraint type: start on or after, start on or before, finish on, finish on or after, finish on or before, as late as possible, mandatory start, or mandatory finish. You can select a new type.

Date: The selected activity's constraint date. Click  to select a new date.

Secondary Constraint

Secondary: The selected activity's secondary constraint type. This list is filtered based on the value you select in the Primary field. You can select a new type.

Date: The selected activity's constraint date. Click  to select a new date.

(Non)Labor Units/(Non)Labor Cost/Material Cost

Budgeted or Planned: The expected number of labor or nonlabor units or cost, or material cost the selected activity will use, depending on your current display. You can type a new budgeted or planned value.

Actual: The actual number of labor or nonlabor units or cost, or material cost the selected activity has used, depending on your current display. If the selected activity has started, type a new actual value for units. You can enter actual cost on an activity that has not yet started.

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Remaining: The remaining number of labor or nonlabor units or cost, or material cost the selected activity will use, depending on your current display. If the selected activity is in progress, type a new remaining value.

At Complete: An estimate of the labor or nonlabor units or cost, or material cost at the completion of the selected activity (At Complete Units(or Cost) = Actual Units(or Cost) + Remaining Units(or Cost)). If the selected activity is in progress, type a new At Complete estimate.

Steps tab - Activity Details

Use the Steps tab to define the selected activity's steps or procedures.

Step Name: Lists the selected activity's steps or procedures in chronological order. You can select a step.

Completed: Indicates the selected activity's completed steps. To indicate that a step is complete, mark the appropriate checkbox.

Step Description: Displays the name of the selected step and the step's description. You can only view the step description in this field; to add or edit a description, you must use the HTML editor.

Modify: Click to add or edit the description for the selected step in an HTML editor. In the editor, you can format text, insert pictures and tables, copy and paste information from other document files (while retaining formatting), and add hyperlinks.

Copy: Click to copy the selected text. After copying text, you can paste it into the HTML editor or into another application.

Print: Click to print the displayed description.

Add: Adds a step after the selected step.

Add from template: Adds steps from user-defined activity step templates.

Delete: Deletes the selected step.

 Moves the selected step to an earlier stage in the selected activity.

 Moves the selected step to a later stage in the selected activity.

To add these additional columns, right click on the Steps tab and choose Customize Steps Columns.

Step % Complete: Enter the percent complete for the selected step. This field indicates progress on the step. Step % Complete is used to calculate the activity percent complete when you mark Activity Percent Complete Based on Activity Steps checkbox in the Calculations tab in the Projects window.

Step Weight: Type a value for the weight of the step. The higher the value you enter, the more importance is attached to that step in the activity.

Step Weight Percent: Based on the total weight for all steps in the activity, P6 Professional calculates and displays the percent for each step. This column is 0 percent for nonweighted steps. The step weight percent value is calculated based on the step weights assigned to the activity. For example, assume an activity has four steps: step 1 has a weight of 2, and steps 2, 3, and 4 each have a weight of 1. Step 1 would have a calculated Step Weight Percent of 40 and steps 2, 3, and 4 would each have a calculated Step Weight Percent of 20.

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User Defined Field columns: If you are the activity's primary resource, you can add or modify additional information about the step, such as start and finish dates, cost or other text. Define user fields in Enterprise, User Defined Fields. Right-click in the columns area and choose Columns to select the user field columns **.**

Successors tab - Activity Details

Use the Successors tab to add, edit, and remove successor relationships for the selected activity.

You can change the columns that display under the Successors tab. To change the displayed columns, right-click in the Successors table, then choose Customize Successor Columns.

Project ID: Identifies the project.

WBS: Lists WBS codes for the selected activity's successors.

Activity ID: Lists activity IDs for the selected activity's successors.

Activity Name: Lists activity names of the selected activity's successors.

Relationship Type: Lists each successor's relationship type for the selected activity. The following relationship types are available: finish to start, finish to finish, start to start, and start to finish. To change a relationship type, double-click it.

Lag: Lists the lag time value associated with each of the selected activity's successor dependencies. To change a lag time value, double-click it.

Activity Status: Lists the status of each of the selected activity's successors.

Primary Resource: Lists the primary resource for each of the selected activity's successors.

Assign: Adds a successor to the selected activity.

Remove: Removes the selected successor from the selected activity.

Go To: Displays the selected successor activity's information.

Summary tab - Activity Details

Use the Summary tab to view summary information for the selected activity, including the activity's budgeted or planned, actual, and remaining units and costs.

Display Units: Choose to view summary details about the selected activity's budgeted or planned , actual, remaining, percent complete, at completion, and complete variance units for labor, nonlabor, and duration.

Display Cost: Choose to view summary details about the selected activity's budgeted or planned , actual, remaining, percent complete, at completion, and complete variance costs for labor, nonlabor, material, expenses, and total.

Display Dates: Choose to view summary details about the selected activity's current, original or planned, actual, remaining, early, late, and baseline start, and finish dates.

Tasks tab - Activity Details (P6 EPPM Only)

Use the Tasks tab to view the selected activities tasks in the Oracle Primavera Cloud Tasks app. This information cannot be edited in P6 Professional.

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Task ID: Shows the ID of the task.

Start Date: Shows the date the task started or is due to start. If the task is not completed, the start date is calculated as the due date minus the duration. If the task is completed, the start date is calculated as the completed date minus the duration.

Flag: Shows whether the task is marked as important in Oracle Primavera Cloud.

Overdue: Shows whether the task is overdue.

Status Completion: Shows the status of the activity and task.

Status Dates: Shows whether the task has dates outside the start and finish dates of the activity.

Use Only Work Days: Shows whether the Start Date and Due Date are calculated allowing for non-work days in the calendar.

Task Name: Shows the name of the task.

Completed Date: Shows the date the task was completed.

Company: Shows the company associated with the task.

Duration: Shows the duration of the task.

Due Date: Shows the date the task is due to be completed.

Status: Shows the status of the task.

Team Member tab - Project Details (P6 EPPM only)

Overview

Screen Elements

> **Tip**
>
> Tips

Getting Here

Tracking window

Use the Tracking window for monitoring a project's progress using different types of layouts. You can use the standard layouts, or create your own customized tracking layouts.

To display the Tracking window, do one of the following:

- Click  on the Enterprise toolbar.
- On the Enterprise menu, choose Tracking.

Refer to the following sections of this topic for information and links to concepts and tasks about working with reports in the Reports window:

- Working in the Tracking window

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- Tracking concepts
- Tracking tasks
  - General tracking layout tasks
  - Project Table tasks
  - Project Bar Chart tasks
  - Project Gantt/Profile tasks
  - Resource Analysis tasks
  - Working with the Gantt Chart
  - Working with Profile and Spreadsheet

Working in the Tracking window

The Tracking window is divided into two or more panes, depending on the type of layout displayed. The upper left pane, or Project Explorer window, always contains information about the available projects, and the upper right pane, or Top Layout window, always displays the current layout and layout options. Depending on the type of layout you open, the left and right panes may be split horizontally to display additional panes on the lower half of the window. These include the Resource Explorer window on the lower left and the Bottom Layout window on the lower right.

Use the Display Options bar that appears above each pane, or window, to customize the layout. The options available from the Display Options bar correspond to the type of layout displayed in the pane. From the Display Options bar in the Top Layout window, you can show or hide the left columns, Top Layout window, or Bottom Layout window.

To open a layout, click  in the Layout Name field in the Top Layout window (upper right pane). To save a layout, click the Display Options bar in the Top Layout window, then choose Layout, Save or Save As.

Tracking concepts

- Tracking
- Tracking layouts
- Types of tracking layouts
- Project Bar Charts
- Project Table layouts
- Project Gantt/Profiles
- Resource Analysis layouts
- Resource Explorer window
- Using Resource Analysis forecasting to dynamically level resources

Tracking tasks

General tracking layout tasks

- Change the display timeperiod for a timescaled tracking layout
- Change the table font, color, and row height used in a tracking layout
- Collapse all information in a tracking layout

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- Define columns for a tracking layout
- Delete a tracking layout
- Expand all information in a tracking layout
- Expand or contract the visible area of a timescaled tracking layout
- Export a tracking layout
- Filter a tracking layout
- Group and sort a tracking layout using custom settings
- Group and sort a tracking layout using standard settings
- Hide or show the bottom window in a tracking layout
- Hide or show the left columns in a tracking layout
- Hide or show the top window in a tracking layout
- Import a tracking layout
- Modify a column's title, width, and alignment
- Open a tracking layout
- Save a tracking layout
- Share a layout with other users
- Zoom in and out of a timescaled layout

Project Table tasks

- Create a Project Table
- Customize a Project Table

Project Bar Chart Tasks

- Create a Project Bar Chart
- Customize a Project Bar Chart
- Specify Project Bar Chart data and display options
- View bar details in a Project Bar Chart

Project Gantt/Profile tasks

- Create a Project Gantt/Profile
- Customize a Project Gantt/Profile

Resource Analysis tasks

- Create a Resource Analysis tracking layout
- Customize a Resource Analysis layout
- Filter resources in the Resource Explorer window
- Group and sort resources in the Resource Explorer window
- Specify how resources are listed in the Resource Explorer window

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Working with the Gantt Chart

- Add or modify a Gantt Chart bar filter
- Assign a filter to a Gantt Chart bar
- Change a Gantt Chart bar's label
- Change a Gantt Chart bar's style
- Change a Gantt Chart bar's timescale
- Change a Gantt Chart's background lines
- Customize the data date line
- Delete a bar from a Gantt Chart
- Show or hide a Gantt Chart's legend
- Specify Gantt Chart bar data and display options

Working with the Profile and Spreadsheet

- Change a profile's background lines
- Display past period actuals in a profile
- Display project data as a profile or spreadsheet
- Display resource data as a profile or spreadsheet
- Dynamically level resources
- Modify a spreadsheet field title in a tracking layout
- Select spreadsheet data fields
- Show or hide a profile legend
- Show or hide resource availability in a profile
- Show or hide resource limits and overallocation in a profile
- Show or hide resource overtime in a profile
- Specify a project profile's data, filter, and display options
- Specify a resource profile data and display options for a stacked histogram
- Specify a resource profile's data and display options for a regular histogram

Units & Prices tab - Resource Details

Shift Calendar: Displays the resources shift calendar.

Shift: Type or click the arrows to enter the applicable shift number for which you are setting limits, if the shift calendar has more than one shift.

Effective Date: You can set varying limits and prices over time by specifying the effective start date for each change.

Max Units/Time: The number of units available during each workperiod (hour, day, week, or month) of the specified timeframe; you can enter a percentage, or a numeric value followed by a forward slash (/) and the appropriate time duration, depending on your user preference setting for time units.

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Price/Unit: Double-click the cell, then type the resource's monetary price per unit. You can customize the columns to add additional price/unit fields.

When connected to a P6 Professional database: The columns display the names defined in the Admin Preferences dialog box for the rate types.

When connected to a P6 EPPM database: The columns display the names defined in the Application Settings in P6 for the rate types.

Add: Click to add additional limits.

Delete: Removes the selected limit.

Units & Prices tab - Resource Details

Shift Calendar: Displays the resources shift calendar.

Shift: Type or click the arrows to enter the applicable shift number for which you are setting limits, if the shift calendar has more than one shift.

Effective Date: You can set varying limits and prices over time by specifying the effective start date for each change.

Max Units/Time: The number of units available during each workperiod (hour, day, week, or month) of the specified timeframe; you can enter a percentage, or a numeric value followed by a forward slash (/) and the appropriate time duration, depending on your user preference setting for time units.

Price/Unit: Double-click the cell, then type the resource's monetary price per unit. You can customize the columns to add additional price/unit fields.

When connected to a P6 Professional database: The columns display the names defined in the Admin Preferences dialog box for the rate types.

When connected to a P6 EPPM database: The columns display the names defined in the Application Settings in P6 for the rate types.

Add: Click to add additional limits.

Delete: Removes the selected limit.

Update History tab - Activity Details

Use the Update History tab to view details of the pending and approved status updates made to the activity.

Show updates for: Select the data type for which you want to view status updates.

Filter: Select whether to show all updates, or only those made in the last week, month, or the last three months.

Codes tab - Activity Details

Use the Codes tab to add and remove activity code value assignments for the selected activity.

Activity Code: Lists the selected activity's assigned activity codes.

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Code Value: Lists the activity code values assigned to the selected activity. To change an activity code value, double-click it.

Description: Describes each activity code value.

Assign: Assigns an activity code and value to the selected activity.

Remove: Removes the selected activity code and value from the selected activity.

Codes tab - Activity Details

Use the Codes tab to add and remove activity code value assignments for the selected activity.

Activity Code: Lists the selected activity's assigned activity codes.

Code Value: Lists the activity code values assigned to the selected activity. To change an activity code value, double-click it.

Description: Describes each activity code value.

Assign: Assigns an activity code and value to the selected activity.

Remove: Removes the selected activity code and value from the selected activity.

Budget Log tab - Project Details

Use this tab to view or modify budget information for the current project/node.

Original Budget: Enter an estimate of the total budgeted or planned amount you require for this project, including all funding contributions.

Current Budget: Shows the sum of the original budget plus approved budgets.

Proposed Budget: Shows the sum of the original budget plus approved and pending budgets.

Budget Change Log: Enables you to track changes to the original budget.

Date: Shows the date the budget change request was made.

Amount: Record the amount of money required by this change request.

Responsible: Enter the name of the person responsible for the change.

Status: Shows the current status of the change: pending, approved, or not approved. The status for each budget change affects the totals shown in the Current Budget and Proposed Budget fields.

Reason: Enter an optional reason for the budget change request.

Change Number: Number associated with the change request. Useful for reporting or tracking changes to the original budget.

General tab - Resource Assignments Details

Resource: The resource assignment for the activity. Click  to select a different resource.

Role: The role assignment for the activity. Click  to select a different role.

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Activity Name: The name of the activity to which the resource/role is assigned.

Cost Account: The cost account associated with the resource/role assignment. Click  to select a different cost account.

Price/Unit: The selected resource/role assignment's cost per unit.

Rate Type: Determines which price/unit is set on the resource/role assignment. You can choose a new rate type.

Primary Resource: Mark to indicate the selected resource assignment is the primary resource for the activity.

Codes tab - Assignment Details

Assignment Code: Lists any assigned assignment codes.

Code Value: Lists the values for the assigned code.

Code Description: Lists a description for each code.

Assign: Click to assign a value to the assignment for a selected assignment code.

Remove: Click to remove a selected assignment code from the assignment.

User Defined Fields tab - Risks Details (P6 Professional Only)

Use the UDFs tab to add and remove risk UDF assignments for the selected risk.

User Defined Field: Lists the UDFs that you have selected to show.

Data Type: Shows the data type for the corresponding UDF.

Value: Shows the value of the UDF if it is assigned to this item.

Customize User Defined Fields: Opens the Used Defined Fields dialog box.

Budget Log tab - WBS Details

Original Budget: Enter an estimate of the total amount you require for this project in the Original Budget field, including all funding contributions.

Current Budget: Shows the sum of the original budget plus approved budgets. (calculated field)

Proposed Budget: Shows the sum of the original budget plus approved and pending budgets. (calculated field)

Budget Change Log: Enables you to track changes to the original budget.

Date: Shows the date the budget change request was made.

Amount: Record the amount of money required by this change request.

Responsible: Enter the name of the person responsible for the change.

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Status: Shows the current status of the change: pending, approved, or not approved. The status for each budget change affects the totals shown in the Current Budget and Proposed Budget fields.

Reason: Enter a reason for the budget change request (optional).

Change Number: Number associated with the change request. Useful for reporting or tracking changes to the original budget.

General tab - Work Product and Document Details

Title: The selected work product or document's name. You can type a new name.

Version: The selected work product or document's version number. You can type a new number.

Revision Date: The date of the selected work product or document's last update. Click  to select a new date.

Document Category: A classification used to organize various document types. For example, you could create document categories for purchase orders, specification documents, or change orders.

Author: The person who created the selected work product or document. You can type a new name.

Reference No.: The selected work product or document's reference or catalog number. You can type a new number.

Status: The selected work product or document's status for the open project. You can select a status.

Deliverable: Mark this checkbox to indicate that the work product or document is a project deliverable.

Note (P6 EPPM Only)

- If the selected work product or document has been added via a P6 installation with a configured content repository, the detail fields are read-only and the document cannot be opened from P6 Professional.

WBS Details

Use the Work Breakdown Structure Details to view and edit detailed information about the selected WBS element. The Work Breakdown Structure Details appear in the Work Breakdown Structure window.

The available tabs are shown below:

- General tab - WBS Details
- Notebook tab - WBS Details
- Budget Log tab - WBS Details
- Spending Plan tab - WBS Details
- Budget Summary tab - WBS Details

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- WBS Milestones tab - WBS Details
- WPs & Docs tab - WBS Details
- Earned Value tab - WBS Details
- When connected to a P6 EPPM database: Planning Resources tab - WBS Details
- User Defined Fields tab - WBS Details

WBS Milestones tab - WBS Details

% Complete: The WBS element's percent complete is calculated based on the weight of the completed milestone in relation to the remaining milestones.

WBS Milestone: Lists the tasks or portions of work signifying a milestone for the selected WBS element. To add new milestones, click Add.

Weight: Type a number indicating the significance of this milestone relative to the others listed.

Completed: Mark the checkbox when each milestone is complete.

Work Breakdown Structure window

Use the Work Breakdown Structure window to create, view, and edit the open project's work breakdown structure (WBS). You can group and sort the WBS, customize columns, and open and save WBS layouts.

To display the Work Breakdown Structure window, do one of the following:

- Click  on the Project toolbar.
- On the Project menu, choose WBS.

Refer to the following sections of this topic for information and links to concepts and tasks about working with the WBS in the Work Breakdown Structure window:

- Working in the Work Breakdown Structure window
- WBS concepts
- WBS tasks

Working in the Work Breakdown Structure window

When working in the Work Breakdown Structure window, you can:

- Use the Edit menu on the Menu bar, the Edit toolbar, or shortcut (right-click) menu to add, delete, cut, copy, and paste WBS elements.
- Use the Layout Options bar, the View menu on the Menu bar, the Layout toolbar, or shortcut (right-click) menu to customize WBS layouts. For example, you can customize columns of the WBS table, group and sort WBS elements, specify a timescale, customize Gantt Chart bars, and open or save WBS layouts.
- Use the Layout Options bar, the View menu on the Menu bar, or the Top Layout toolbar to show or hide the WBS table, WBS chart, and Gantt Chart in the top layout.

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- Use WBS Details to view or define properties for the selected WBS element. To show or hide WBS Details, choose View, Show on Bottom, Details, or click  on the Bottom Layout toolbar.
- Use the arrows on the Move toolbar to move the selected WBS element around in the hierarchy.

WBS concepts

The following concepts relate directly to working with the WBS:

- Calculating earned value using resource curves or manual future period buckets
- Earned Value
- OBS security
- Organizational breakdown structure (OBS) overview
- Using a WBS for top-down planning
- Using weighted milestones in the work breakdown structure
- WBS status types
- Work Breakdown Structure

WBS tasks

You can perform all of the following tasks in the Work Breakdown Structure window:

- Add a WBS element
- Assign an OBS element to a WBS element
- Assign WBS weighted milestones
- Assign work products and documents to a WBS element from the Work Breakdown Structure window
- Change the work breakdown structure chart display
- Change the work breakdown structure table display
- Copy and paste a work breakdown structure element
- Cut and paste a work breakdown structure element
- Define earned value settings for a specific work breakdown structure element
- Delete a work breakdown structure element
- Determine a WBS element's status
- Display work breakdown structure details
- Display work product and document details in the Work Breakdown Structure window
- Edit a work breakdown structure element
- Move around the WBS chart
- Open a work product or document from the Work Breakdown Structure window
- Remove work product and document assignments in the Work Breakdown Structure window
- Save a layout in the Projects or Work Breakdown Structure window
- View the WBS

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Work Product and Document Details

Use Work Product and Document Details to view and edit detailed information about and/or open the selected work product or document. You can also use Work Product and Document Details to assign the selected work product or document to work breakdown structure (WBS) elements and activities.

These are the available tabs:

- General tab - Work Product and Document Details
- Description tab - Work Product and Document Details
- Files tab - Work Product and Document Details
- Assignments tab - Work Product and Document Details
- UDFs tab - Work Product and Document Details

WPs & Doc Details

Right-click and select WP & Doc Details.

WPs & Docs tab - Activity Details

Use the WPs & Docs tab to add, edit, and remove work product and document assignments for the selected activity. You can also view details about and/or open an assigned work product or document.

Title: Lists the selected activity's assigned work products and documents. To sort the display, click the Title column label.

Status Code: Displays the status of the selected activity's work products and documents.

Work Product: Mark this checkbox to indicate that the document is a work product.

Assign: Assigns a document to the selected activity.

Remove: Removes the selected work product or document assignment.

Details: Displays details about the selected work product or document.

WPs & Docs tab - Attribute Details dialog box

WPs & Docs table: Lists titles and reference numbers for work products and documents assigned to activities in the selected attribute.

WPs & Docs tab - WBS Details

Title: Lists any work products and documents assigned to the current WBS element.

Assign: Click to view a list of work products and documents that you can select and assign to the WBS element.

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Remove: Click to remove the selected work product or document from the selected WBS element.

Details: Click to view details about the selected work product or document.

WPs & Docs tab - WBS Details dialog box

WPs & Docs table: Lists titles and reference numbers for work products and documents assigned to activities in the selected WBS.

WPs & Docs window

Use the WPs and Docs window to create and maintain work product and document records for the open project, such as records for standards, procedures, guidelines, and templates.

To display the WPs and Docs window, do one of the following:

- Click  on the Project toolbar.
- On the Project menu, choose Work Products and Documents.

Refer to the following sections of this topic for information and links to concepts and tasks about working with work products and documents in the WPs and Docs window:

- Working in the WPs and Docs window
- Work product and document concepts
- WPs and Docs tasks

Working in the WPs and Docs window

When working in the WPs and Docs window, you can:

- Use the Edit menu on the Menu bar, the Edit toolbar, or shortcut (right-click) menu to add, delete, cut, copy, and paste document records, and launch documents.
- Use the Display Options bar, the View menu on the Menu bar, the Layout toolbar, or shortcut (right-click) menu to customize the window. For example, you can customize columns of the work product and document table, and group, sort, and filter document records.
- Use WP & Doc Details to view or define properties for the selected document record, associate activities and WBS elements with work products and documents, and launch documents. To show or hide WP & Doc Details, choose View, Show on Bottom, Details, or click  on the Bottom Layout toolbar.
- Use the arrows on the Move toolbar to move the selected document record around in the hierarchy. The arrow icons are only available in the outline display.

Work product and document concepts

The following concepts relate directly to working with work products and documents:

- Activities
- Work Breakdown Structure
- Work Products and Documents

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WPs and Docs tasks

You can perform all of the following tasks in the WPs and Docs window:

- Add a work product or document record
- Assign a document status or category
- Assign work products and documents from the WPs and Docs window
- Delete work product or document records
- Display work product and document details in the WPs and Docs window
- Identify a document as a work product
- Identify a work product or document as a deliverable
- Open a work product or document from the Work Products and Documents window
- Remove work product and document assignments from the WPs and Docs window
- Specify work product and document location references
- View a project's document library

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