Primavera P6 Enterprise Project Portfolio Management

Help

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P6 Overview

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 EPPM. When you accept a consent notice, your consent covers the collection, processing, storing, and transmission of PI data in all areas of P6 EPPM and means of retrieving data from P6 EPPM including but not limited to project export, downloaded tables, reports, documents, web services, API, and P6 mobile. If you refuse consent you might not be able to log in to P6 EPPM or access some areas of P6 EPPM might be restricted.

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 EPPM.

You can withdraw your consent at any time by clicking **Reset Notification** in the Personal Information tab in My Preferences.

Working with P6

After logging into P6 with a secure user name and password, navigate to one of the following main sections described below to begin your work. Because your capabilities within the application are limited based on security profiles, access settings, optional user interface views, personal preferences, and other assignments, you may not be able to view all the sections or use all the features within a section.

The P6 web user interface is composed of the following main sections:

Dashboards

This section presents highlights of major areas in resizable windows called portlets arranged in customizable workspaces called dashboards.

Who Uses Dashboards?

- *Temporary subcontractors checking their next assignment, activity, or calendar entry.*
- *Employees reporting or resolving issues preventing them from moving forward.*
- *Financial executives checking costs, earned value performance to prepare forecasts.*

Portfolios

This section presents data, metrics, and comparisons of related projects bundled into portfolios. This section includes views, portfolio analysis, resource demand/capacity planning, and overall performance status.

Who Uses Portfolios?

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- *Executives and critical thinkers interested in planning and analysis and other metrics spanning multiple projects.*

Projects

The working core of the application. This section includes WBS, activities, risks, issues, Gantt charts, calendars, expenses, and resource assignments.

Who Uses Projects?

- *Project Managers planning new projects.*
- *Project leads and activity owners coordinating the completion of tasks.*
- *Risk Managers implementing risk assessments or mitigation policies.*
- *Executives who want hands-on access to the EPS to view a portfolios's issues and other status details*
- *Resources providing input about the status of their activities including progress updates, notebook entries, and issues.*

Resources

This section helps you plan and manage resources, roles, and teams.

Who Uses Resources?

- *Human resource specialists, buyers, and purchasing officers assessing labor, non-labor, and material resources.*
- *Project Directors coordinating teams and managing the planned roles across the entire company.*
- *Project Managers planning resources for a particular project or time period.*

Approvals

This section provides Project Managers and Resource Managers to assess Timesheets entered by resources and, if configured, Status Updates made to activities.

Who Uses Approvals?

- *Project Managers and Resource Managers with responsibility for approving timesheets.*
- *Project Managers ensuring the accuracy of projects and schedules with respect to their current status.*

Reports

This section provides users with reports they can run on-demand or schedule for recurring output.

Who Uses Reports?

A cross-functional array of users from all departments at your organization will likely be generating, receiving, and analyzing reports.

Administration

This section provides administrative settings for configuring the framework for the application. This includes user accounts, security profiles, views, application settings, and enterprise data such as codes, user-defined fields, categories, templates, forms, calendars, roles, units of measure, and other items used throughout the application.

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Who Uses Administration?

- *Application and System Administrators and other users authorized to define the essential framework for all other sections of the application, ultimately influencing how work is performed and measured at the organization.*
- *Users accessing their own personal preferences and calendars.*

> **Note**
>
> Resource managers and project managers can take advantage of a shortcut to an abbreviated set of enterprise data to self-administer applicable information related to resources and projects.

Customizing the P6 User Experience

P6 includes sophisticated layers of security, view, and customization features designed to control access and structure the collaborative experience of your entire team while also allowing users to individually customize views and format their data. Periodically perform the sequence of steps below for each user to optimize their experience.

When customizing your user experience, consider the following questions. These checks may be performed in whole or in part, and in any sequence. The order shown here is not mandatory. These items simply provide a basic checklist when examining your interaction with the application.

- **Do I have the right module access settings?** This determines which main modules of the solution you can access, such as Portfolios, Reports, P6 Professional, and P6 EPPM Web Services.
- **Do I have the right user interface view?** This determines which main pages in the application you can access. Your administrator may assign you to an optional role-specific *user interface view* that corresponds to your assignments and work processes. A group of users with similar roles will often be assigned the same user interface view. You can edit your own personal view settings on the **My Preferences** page.
- **Do I have the right security profiles?** This determines what functions you can perform. Your administrator will likely assign you to a role-specific *global security profile* and *project security profile* that corresponds to your assignments and work processes. A group of users with similar roles will often be assigned the same security profile.
- **Do I have the right OBS (project) access settings?** This determines which projects are available to you based on your assigned responsible manager.
- **Do I have the right global preferences?** This determines the general formatting and preferred settings of data across the application. For example, you can specify the currency and date format you want to use. Even though you can customize these preferences, it is recommended that teams make choices aligned with team goals.
- **Do I have the right application settings?** This determines how P6 information is handled and appears for all users. For example, the default hours per time period, ID string lengths, integration links, and other default settings.
- **Do I have the current page customized to fit my needs?** There are two main ways to customize a page, detailed below.
  - **Customizable Page-Specific Views**: Certain pages of the application provide a standard mechanism for configuring shared views and customizing individual views.

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These include Activity, EPS, Resource Assignment, and portfolio views in portlets or on the Portfolio Analysis page. They provide common ways to view and work with data on their respective pages of application. Instead of manually adjusting the current page, you can simply switch the applied view.

- **On-Screen Controls**: Manually invoke the customization features provided on each page. Throughout the application, these features are available through **Customize** links or other context-specific toolbars and options displayed on the page. Examples of screen customization follow:
  - Generally speaking, within all pages, you can hide, show, expand and collapse elements as needed. In some pages, you can drag items such as columns or detail window tabs to order them as needed.
  - The **Activities** page and **Portfolio Capacity Planning** page, for example, offer extensive options that enable you to retrieve, organize, and chart data according to your specific requirements.
  - In the **Issues** portlet, you can filter, group, and chart issues as well as choose the data details to display.
  - You can customize dashboards to display the portlets you want and to specify how you want to organize them within the workspace. The dashboard filtering feature lets you focus on information related to a single project or all projects associated with a specific portfolio or project code.

About Industry-Specific Field Names

If your company plans on using P6 EPPM with both the core P6 web application and the P6 Professional application for Microsoft Windows, you may be interested in the following information on industry-specific field names.

When you install P6, the application uses one consistent naming convention for all fields. However, when you install P6 Professional, the installer will offer you the option of specifying a particular industry setting. Based upon your selection, the P6 Professional user interface displays certain fields with titles appropriate for that industry. For example, in an Engineering and Construction environment, costs and units would be *budgeted*, durations would be labeled *original* and the global name for a company would be *organization*. In an IT environment, the same cost and unit fields would be termed *planned*, durations would be labeled *planned*, and the company would be referred to as *enterprise*.

Keep these subtle changes in mind when switching between P6 and P6 Professional. In order to minimize any confusion when using both P6 and P6 Professional, install P6 Professional with the IT industry setting. This configuration matches the field naming used by the P6 web application.

About the User Interface

The application's user interface consists of familiar screen controls such as navigation areas, pages, tabs, and dialog boxes, data entry controls, buttons, and links appearing in a standard web browser.

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> **Note**
>
> Your access to data and ability to interact with the user interface are controlled by various security features.

Working with the P6 User Interface

The user interface presents familiar screen elements you manipulate in your web browser. They include all of the following common types of user interface objects and several more special objects not listed:

- navigation structures
- shortcuts
- pages
- tabs
- dialog boxes
- detail windows
- portlets
- fields
- lists
- buttons
- links
- tables
- charts
- calendars

Refer to the sample images below to orient yourself with the P6 graphical user interface inside your web browser.

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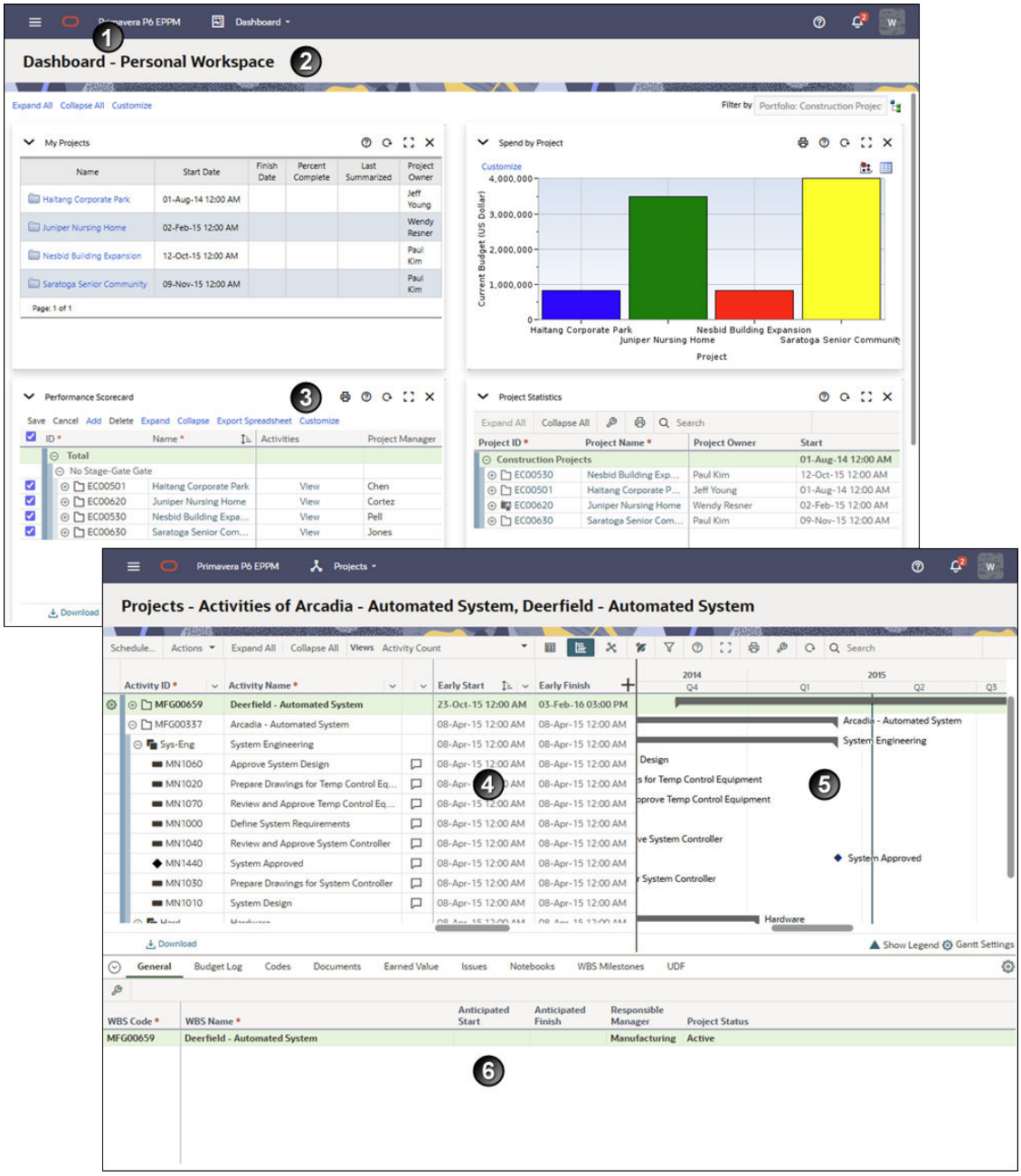


Table of Common User Interface Elements

Item	Description
1	**Oracle O**: Click here to go to the page you have configured as your start page on the View tab of My Preferences.
2	**Personal Workspace dashboard**: This default dashboard displays the portlets you have selected that are important to your work goals. In this example, notice the familiar hyperlinks including **Customize** which you can click to configure the dashboard for use by you or multiple users.

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Item	Description
3	**Scorecard portfolio view portlet**: In this example, the user has customized this dashboard by adding a portfolio view of type scorecard within its own portlet. The scorecard can be customized to suit work goals. The colors of a bar chart or histogram are also visible in the **Spend by Project** portfolio view portlet.
4	**Activity Table**: One of the central work areas of the entire application, this table allows you to customize its columns (fields), grouping bands, and sort options, and apply filters.
5	**Activity Gantt chart**: Next to the Activity Table, the Activity Gantt chart represents your schedule. The Gantt chart offers robust customizable project management features including drag and drop editing, timescale, progress lines, relationship lines, spotlights, and helpful mouseover tips.
6	**General detail window**: To gather the related details associated with a particular item in certain tables, the application often provides one or more detail windows in a series along the bottom. On pages supporting applied views, you can determine which detail windows are shown or hidden with your view.

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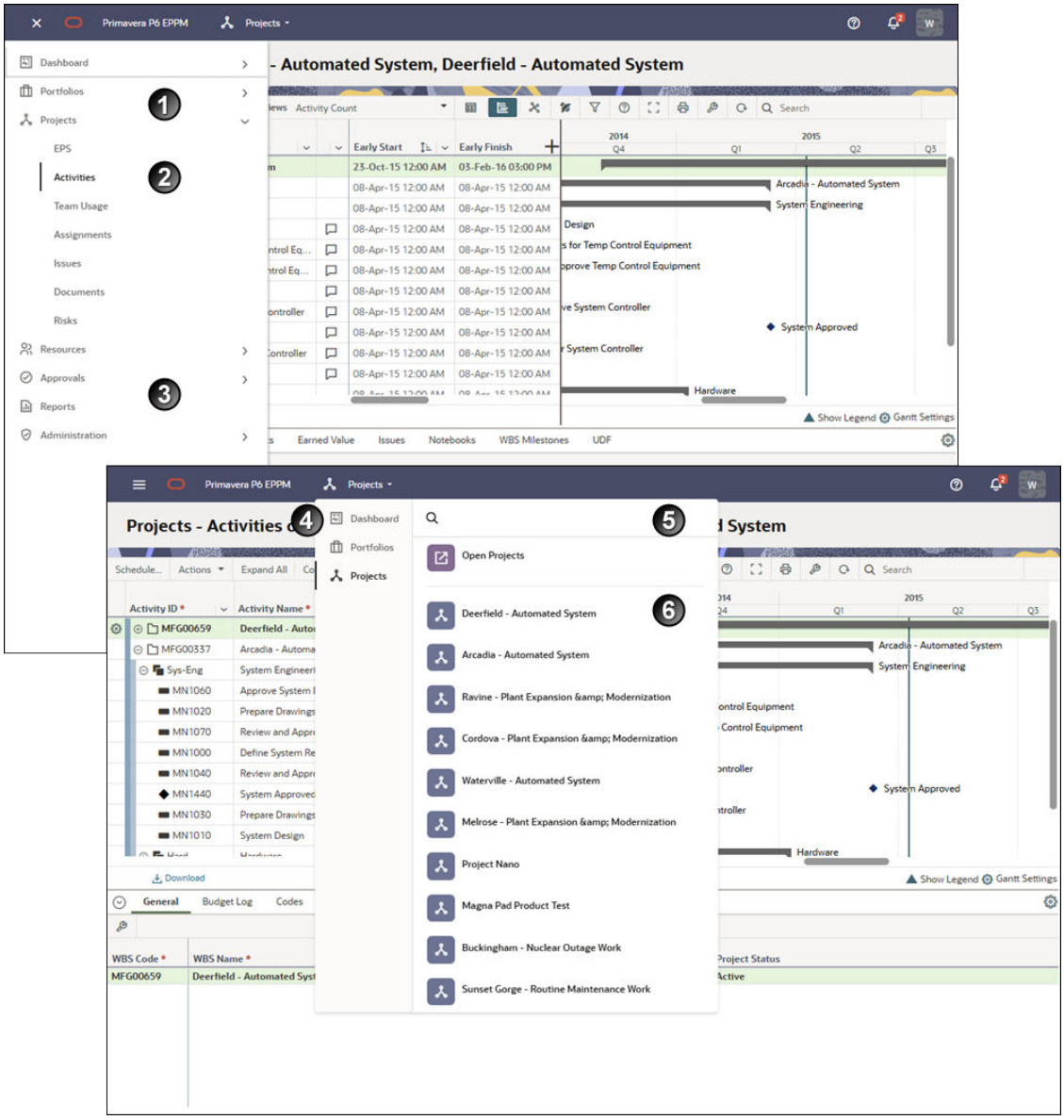


Table of Menus

Item	Description
1	**Navigation Menu**: This menu provides access to all main modules of the application. Use it to navigate to the pages and menus in the dashboards, portfolios, projects, resources, approvals, reports, or administration sections of the application.
2	**Expanded Navigation Menu section**: This user has expanded the **Projects** branch of the Navigation Menu to show the pages available there. Notice that the page you are viewing—in this case **Activities**—is highlighted in the Navigation Menu.
3	**Collapsed Navigation Menu sections**: This user has collapsed other branches of the navigation menu, but you can expand as many of the branches as you like. The branches you see are determined by your permissions.

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Item	Description
4	**Context Menu**: Use the Context menu access the **Manage Dashboards**, **Open Portfolio**, **Manage Porfolios**, **Manage Portfolio Views**, and **Open Projects** dialog boxes.
5	**Search field**: This type-ahead search allows you to search the most recently used list.
6	**Most Recently Used list**: The **Projects** and **Portfolios** areas of the application provide a list of the projects and portfolios you have opened recently. Use the most recently used menu to switch between projects and portfolios quickly and efficiently.

Navigating Using a Keyboard

You can use the keyboard to navigate throughout P6. Use the tab key to cycle through elements within the application, and press Enter to access them. Use application keyboard shortcuts to access frequently used or important functionality. Keyboard shortcuts may change depending on the browser you use.

General

- **Ctrl + S**: Save.
- **Escape**: Cancel.
- **Delete**: Delete a row in a detail tab or grid.
- **Insert**: Add.
- **Shift + Insert**: Add child.
- **Ctrl + C**: Copy.
- **Ctrl + X**: Cut.
- **Ctrl + V**: Paste.
- **Ctrl + P**: Print.
- **Ctrl + Right Arrow**: Expand.
- **Ctrl + Left Arrow**: Collapse.
- **F11**: Full Screen.
- **Alt + Up Arrow**: Move focus up.
- **Alt + Down Arrow:** Move focus down.
- **Alt + Right Arrow**: Move focus right.
- **Alt + Left Arrow:** Move focus left.
- **Shift + F10**: Access right click menu.
- **F9**: Schedule.
- **Shift + F9**: Leveler.

Picker Windows

- **Ctrl + Left Arrow**: Move currently selected nodes to the left.

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- **Ctrl + Right Arrow**: Move currently selected nodes to the right.

Grids and Detail Tabs

- **Up Arrow**: Move focus to the node or cell above.
- **Down Arrow**: Move focus to the node or cell below.
- **Ctrl + Left**: Collapse group node or move to parent node.
- **Ctrl + Right**: Expand group node or move to first child node.
- **Home**: Move focus to first node in the tree.
- **End**: Move focus to the last visible node in the tree.
- **Escape**: Remove search string.
- **Space**: Select current node.
- **Shift + Up Arrow**: Add the row above to the selection.
- **Shift + Down Arrow**: Add the row below to the selection.
- **Ctrl + Shift + Up Arrow**: Move the currently selected or focused node up.
- **Ctrl + Shift + Down Arrow**: Move the currently selected or focused node down.
- **Insert**: Add.
- **Ctrl + Insert**: Assign.
- **Ctrl + C**: Copy row.
- **Ctrl + X**: Cut row.
- **Ctrl + V**: Paste row.
- **Ctrl + Shift + C**: Copy cell value.
- **Ctrl + Shift + X**: Cut cell value.
- **Ctrl + Shift + V**: Paste cell value.
- **Ctrl + Alt + R**: Assign Resource in the Assignments detail window.
- **Ctrl + Alt + O**: Assign Role in the Assignments detail window.
- **Ctrl + Alt + Q**: Open a Request for a Resource in the Assignments detail window.
- **Insert**: Assign successor or predecessor activity in the Relationships detail window.

> **Note**
>
> – The shortcuts for moving a tree node are only available for trees which can be reordered.
>
> – The shortcuts for extending a selection are only available for trees which allow you to select more than one node.

About Screen Controls

As is typical with enterprise software, the application's main pages present more detail the further the user navigates within them. The following types of screen controls will appear:

- Pages

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- Tabbed Pages or simply, Tabs
- Detail Windows
- Dialog Boxes
- Portlets
- Notification Button

Working with Tables

Tables appear throughout the application to not only display information, but also to allow you to modify it, as permitted. The following general features are common to most tables.

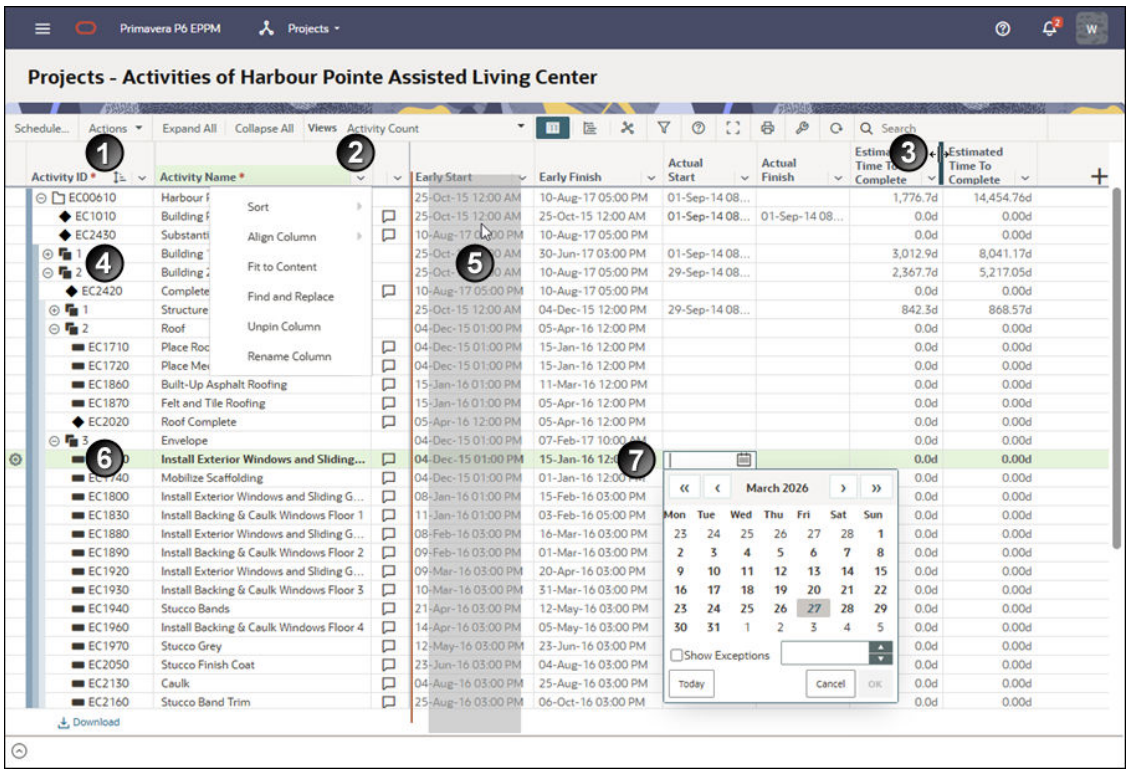


Table of Common Table Features

Item	Description
1	**Sort Order Indicators**: Indicates the column you have selected to sort the rows. Each time you click a column header, the sort order toggles from ▲ ascending order, to ▼ descending order, and, for some tables, it cycles back to unsorted order (the original order in which the entries were created).
2	**Column Menu**: You can adjust the sort order, alignment, width, and name of a column, pin it in place, and find and replace data in a column.
3	**Column Resizing**: You can drag to resize column widths.
4	**Grouping Levels**: Many tables group related rows into hierarchical levels you can click through to expand or collapse. Some tables use colored bands to help you view these levels.

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5	**Column Order**: You can drag and drop column headings to customize your tables.
6	**Selection Highlighting**: The currently selected row is highlighted for you. You can directly click and drag to select one or more entries. Hold down the **Ctrl** key as you mouse click rows to select more than one. Hold down **Shift** as you click two entries to select all contiguous rows.
7	**Data Entry Features**: Tables allow you to directly edit data with convenient controls to assist you in entering the right type of data. For example, a date field will display a date picker that looks like the page of a calendar.

About Columns (Fields)

Fields hold data. They generally either allow you to enter values or just display the current value for the field (called a *read-only field*). Pages with tables often permit you to configure the fields that make up the columns of the table. Some pages with grid views also allow you to pin columns to the start of the column list so they are always visible, even when you scroll.

The list of columns available for you to add to a view may depend on the circumstances. For example, some baseline fields (such as actual baseline cost fields, and many baseline date fields) can only be added to the view if you have assigned a baseline to the project (rather than using the current project as the baseline).

> **Tip**
>
> In the EPS, Activities, and Assignments pages, select **Show Hint Help (Alt+F1)** to view a description of a column when you hover over the column heading.

Showing or Hiding Columns in a Table

When the list of available fields or columns for a table is relatively short, indicated by the presence of the Select Columns icon and field list in the toolbar, use it to show and hide the columns that appear.

To show and hide columns:

1. Click **Customize View**.
2. Click the **Columns** tab.
3. From the resulting list of fields or columns:
   a. Select an available column to display it in the table.
   b. Select a currently visible column to hide it in the table.
4. Click **Save and Apply**.

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> **Note**
>
> You might have to scroll to the right end of a table to see all the columns.

Renaming Columns

You can rename columns and save the customized names with views. The same column can have a different name in different views, but if you save a renamed column in the Assignments view of either the Projects or Resources sections, the customized name will show in both views. When you click **Download**, your customized column names appear in the Excel file. When you export a view, your customized column names are saved with the exported view.

To rename a column:

1. Click **Open Column Menu** in a column heading and click **Rename Column**.
2. In the **Rename Column** dialog box:
   a. Either type a new name for the column in the **New Name** field, or click **Default** to return a previously renamed column to the default.
   b. Click **Rename**.
3. Click **Save View**.

> **Tip**
>
> - If a renamed column is removed from a view, the column name is returned to the default for that view.
> - When you rename a code or UDF column and save the view, your customized name remains with that column in the view even if the code or UDF name is changed in the Enterprise Data page.

Selecting Items from a List of Available Items

When the list of available projects, fields, columns, or values for a list, table, view, scorecard, or other entity is relatively long, follow these common steps to configure the fields or values you want. You can move the items you want from the *available* list to the *selected* list.

These steps apply in several areas of the application and you should be familiar with them. For example, perform these steps when selecting projects or templates in the **Open Projects** dialog box, when configuring the fields to display as columns in a table, on a detail tab in the Activity or EPS pages, or when assigning individual users to a user interview view.

To select projects, fields, columns, or values:

1. In the **Available Items** list, click an entry to select it. If arranged in a hierarchy, click **Expand** to view the grouping of items. Hold down the **Ctrl** key as you click to select individual items or press the **Shift** key to extend your selection to an entire block of items including the first and last items you clicked.

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2. Click **Move Item Right** or double-click each item to add them to the **Selected Items** list. This is the list of selected fields or values you want to appear in your customized list, table, view, scorecard, or other entity.
3. To remove items, select them in the **Selected Items** list and click **Move Item Left** or double-click them. If you need them again, the items are available in the list of available items.
4. In the **Selected Items** list, if applicable, adjust the order of appearance of your items:
   a. Click **Move Item Up** to advance the item up or to the left in a table.
   b. Click **Move Item Down** to advance the item down or to the right in a table.
5. If applicable, click **Save**, **Save and Close** or **OK**.

Tip

- You can add new columns where you need them by first selecting a column in the **Selected Columns** list. When you add columns to the list, they will be added directly below the column you selected.
- You can also directly click and drag columns in tables to configure their order of appearance.

Working with Select a Value Dialog Boxes

Throughout the application, certain types of fields require specific types of values. To assist you in selecting from only a constrained list of available choices, the interface will display Select a Value dialog boxes for you to search for and select a specific value appropriate for the current field.

Note

Field lists of values are used when the available choices are manageable (usually, less than 10 values). However, when the number of available choices is large (for example, there might be hundreds of projects), the application will offer Select a Value dialog boxes.

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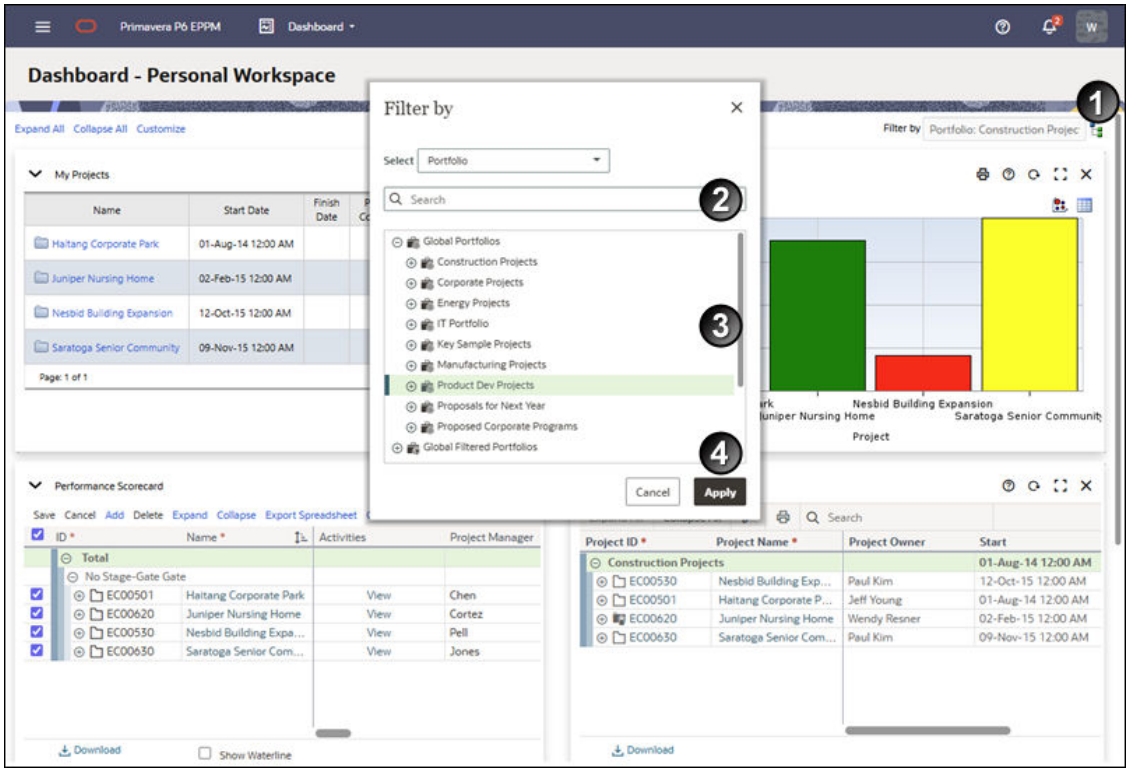


Table 1 of 2: Select a Value Dialog Boxes

Item	Description
1	**Select a Value icon**: Throughout the application, click **Select a Value** to open a selection dialog box.
2	**Search Area**: The top part of the dialog box contains search controls to help you constrain the values based on your criteria.
3	**Results area**: The middle part of the dialog box displays the available values based on your search criteria, if any. Make your selection here.
4	**Command buttons**: The bottom part of the dialog box contains command buttons. Standard buttons include **OK, Apply, Select** and **Assign** to accept the value you selected, and **Close** or **Cancel** to cancel the operation, close the dialog box, and return to the previous screen.

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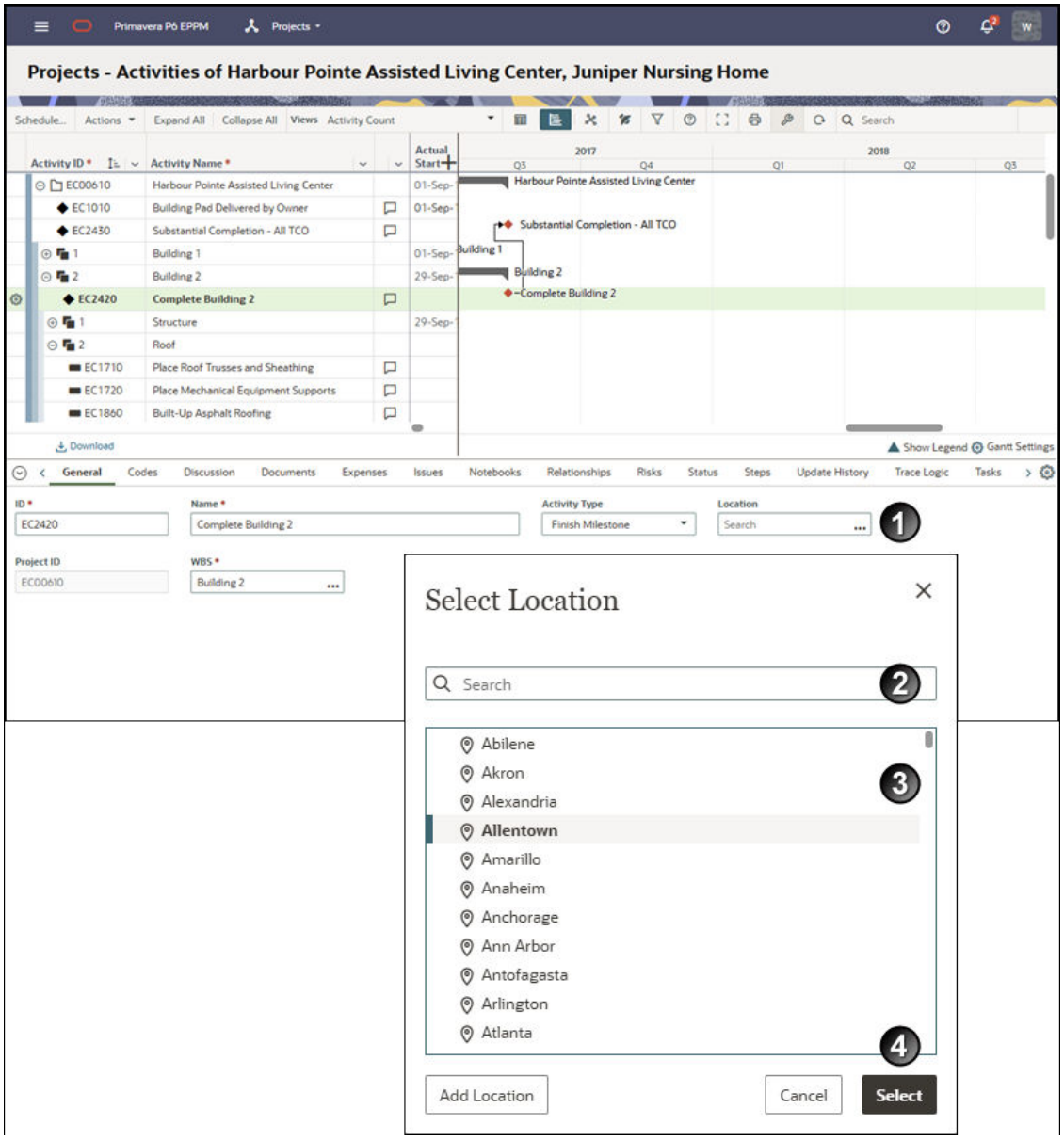


Table 2 of 2: Select a Value Dialog Boxes

Item	Description
1	**Selection icons**: Similar to the icon, in these examples, click **Assign...** or **Select** to choose a particular item.
2	**Search Area**: The top part of the dialog box contains custom search controls to help you constrain the values based on your criteria.
3	**Results Area**: The middle part of the dialog box displays the available values based on your search criteria, if any. Make your selection here.

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Item	Description
4	**Command Buttons**: The bottom part of the dialog box contains command buttons. Standard buttons include **OK, Apply, Select** and **Assign** to accept the value you selected, **Close** to shut the dialog box after you made assignments, or **Cancel** to cancel the operation, close the dialog box, and return to the previous screen. Other buttons can also appear in this area.

Selecting Values from "Select a Value" Dialog Boxes

To assist you in selecting from a constrained list of available values, the application will often display *Select a Value* dialog boxes. Use these special dialog boxes to search for potential matching values and select one or more specific values appropriate for the current field.

> **Note**
>
> Although commonly used throughout the application, each dialog box can contain unique options.

To select a value from a **Select a Value** dialog box:

1. Enter any search criteria to reduce the number of values shown.
2. Select a value in the list. If grouped in a hierarchy, expand a group to view the values.
3. Click **OK**, **Select** or **Assign**.
4. Repeat these steps to select additional values if necessary.
5. When finished, click **Close**.
6. If applicable, click **Save**, **Save and Close** or **OK**.

Working with Data in P6

The application's data entry controls are convenient and easy to use.

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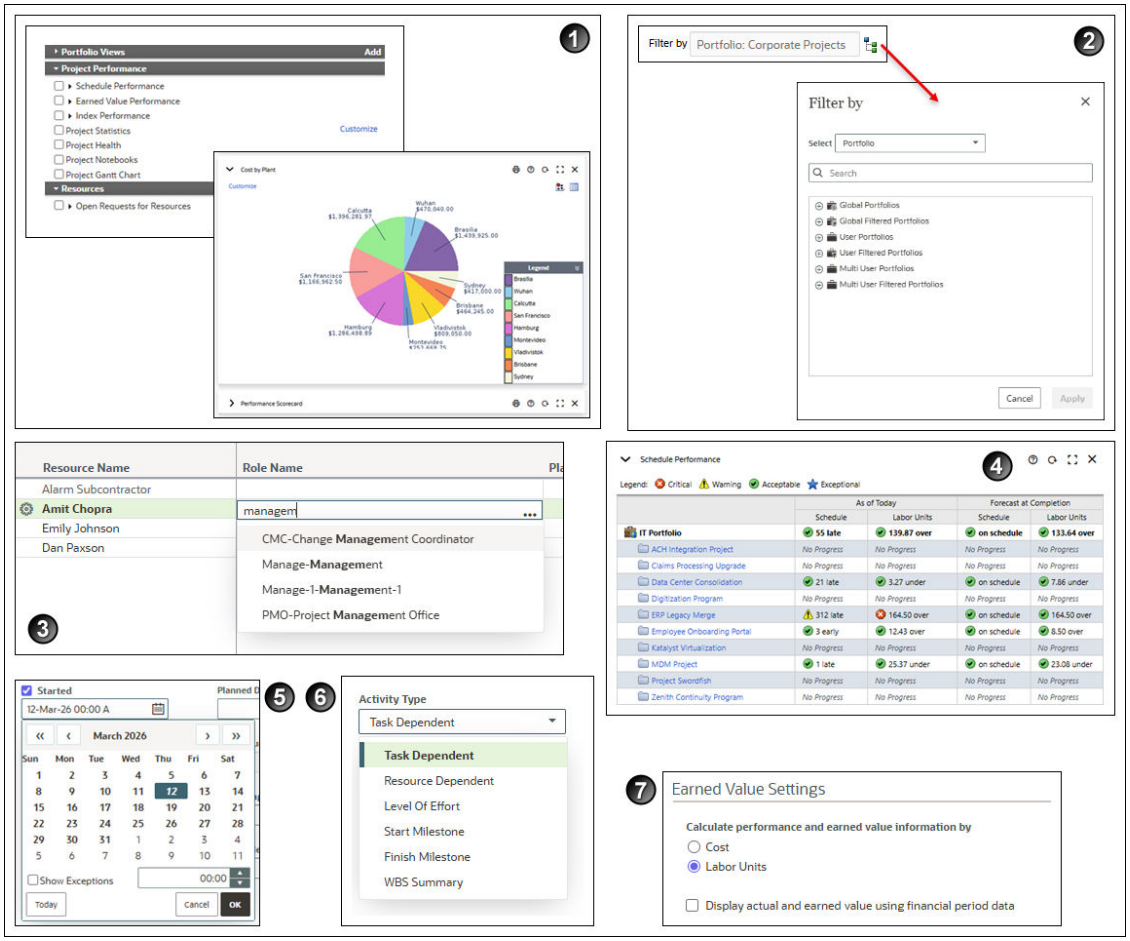


Table of Common Data Entry Controls

Item	Description
1	**Expandable sections**: Often visual clutter is reduced on a screen by hiding fields and other controls. Expand these regions to show the fields. In the sample images, we say that the **Project Performance** section and **Spend by Phase** portlet are *expanded* or opened, and the **Budget by PM** portlet is *collapsed* or closed.
2	**Select a Value from an Extended List**: Click to select a field value from a *Select a Value* dialog box listing only valid values. You cannot type in your own entry in fields where the **Select from Value List** icon appears. This convention is used whenever a field's value must be logically constrained and validated against a pre-defined set of values. To illustrate this point, consider the following example. You can type whatever you want in a **Name** field for a new item you are creating; however, in a **User** field, you *must* enter a valid user.

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Item	Description
3	**Auto-Complete**: Also known as *type-ahead*. As you type in a field that must be assigned a value from a pre-defined list of acceptable values, the closest single matching value is automatically selected for you. If multiple values match your typed input, they appear in a list. To select a value, click one or press the up or down arrow keys on your keyboard and then press **Enter**.
4	**Indicators**: To help you readily identify the meaning of a given metric, these color-coded graphics appear. You can also define your own custom user-defined indicators.
5	**Dates**: You can type a date in a valid format directly into a date field. Or, you can select a date, including the time, from a small pop-up calendar. Also of note, you can directly modify the **Planned Duration** field but the **Actual Duration** field information is *read-only*. Data you enter can later become read-only for you or other users.
6	**Select a Value from a Short List**: In this example, the Activity Type field is shown. Below that, after the user has selected the field's list, its values appear. For these kinds of fields, you will see references in the documentation to selecting a value from the **Activity Type***list*.
7	**Options**: For simplicity's sake, both radio buttons and check boxes are referred to as *options*.

Working with Detail Windows

When additional details about an item are necessary, rather than clutter the main work area, the application will often use subordinate tabbed panels called detail windows. Detail windows supplement their parent pages with related data and often include their own toolbars. You can show or hide detail windows to focus on the data most important to you. You can also hide the detail windows to provide a larger area for the grid.

When you customize the detail windows on the EPS, Activities, or Assignments pages, P6 prompts you to save the settings with the current view.

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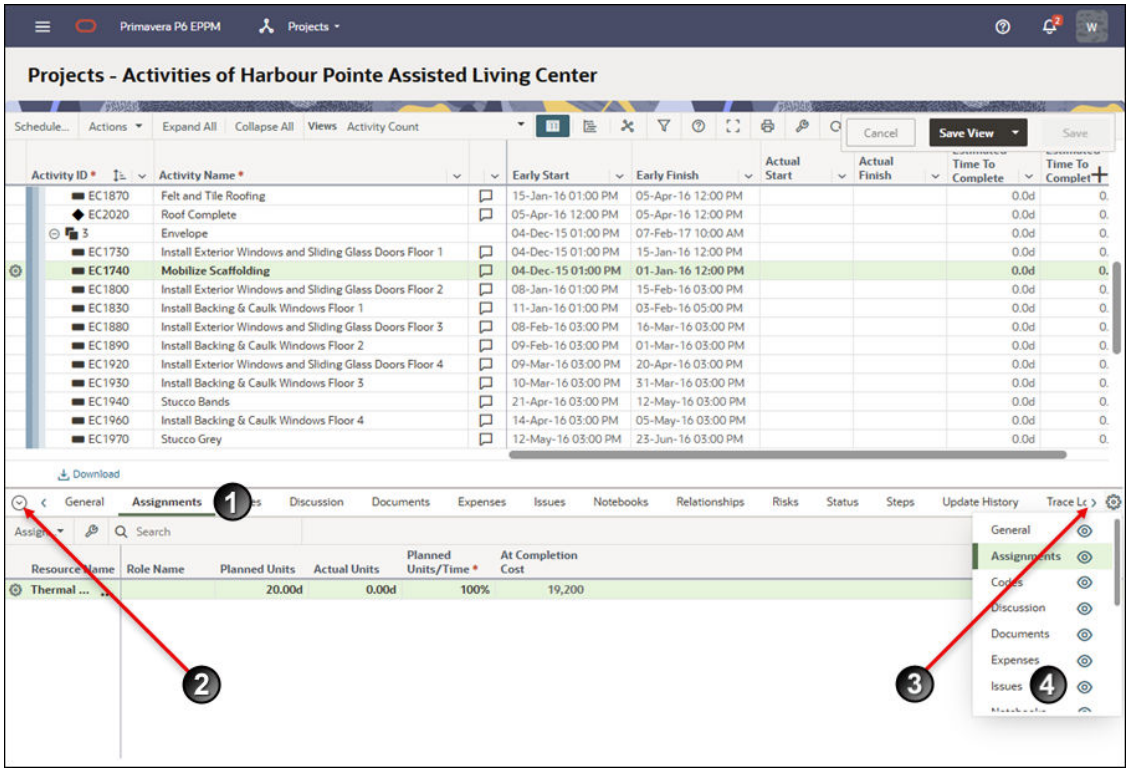


Table of Key Detail Window Elements

Item	Description
1	**Detail Windows**: Detail windows appear as tabs. You can only view the data on one detail window at a time. Here the Assignments detail window is selected. Click the name of another detail window to view that window.
2	**Collapse Dock**: Hide the detail windows to allow more space for the grid.
3	**Scroll**: If more tabs are visible than can be shown on screen, you can scroll left and right.
4	**Show/Hide Tabs**: Focus on the data most important to you by selecting which detail windows are visible.

About Portlets

Portlets are small expandable windows representing a specific theme or particular subject matter. They are only available on dashboards and they display data based on association, ownership, or applied filters. Portlets provide a concise way to organize, present, and assess project data within a single page and also offer tools for adding, modifying, and personalizing portfolio, project, and resource data. Portlets on shared dashboards provide a centralized place for collaborating with other users.

About Data Entry Controls

Data Entry Controls: P6 provides easy-to-use controls for entering data. To assist you in choosing the right types of values, fields will sometimes present dialog boxes or calendars for selecting from a pre-defined list of values or dates. Familiar value lists help narrow choices and

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enforce consistency. You'll also recognize standard options (a term used for both check boxes and option buttons or radio buttons), tables, spreadsheets, Gantt charts, calendars, and other on-screen controls. Where you can select multiple options, you can hold down Shift while clicking to select a contiguous group of items, or hold down Ctrl while clicking to select individual items.

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 EPPM. 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 survey from the User menu.

To open the feedback survey:

- Click the **User** menu and select **Share Your Feedback**.

About Security

The application provides the following methods for managing your security needs:

Secure Logins: Users must authenticate their access to the application with individual user names and passwords.

Password Policy: Administrators can configure a more robust set of password rules for users logging into P6. If the **Enable Password Policy** option is selected on the **General** page of the **Application Settings** page, users must enter a strong password with a minimum length of 8 characters, including one alphabetic character and one numeric character. If the option is cleared, the password requirements are relaxed, and users must enter a password of at least one and up to 20 characters in length.

Security Profiles: Defined collections of global and project level security privileges are stored and then assigned to users as needed. Users can only edit and save items if they have the appropriate security privileges.

Access Settings: Administrators can configure each user's security permissions. Settings include module access, OBS access, application settings, and more.

User Interface Views: Access to pages and menus within each section can be controlled by configuring and assigning user interface views. Users may be allowed or denied the ability to edit their view settings.

Printing Pages Using P6 Printing Tools

Available on most pages within the application, the printing tools and options provided with the user interface offer the best options and output. You can use the Print Preview before generating output.

To print application pages:

- Navigate to the specific page or tab and customize the view to meet your data requirements.

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- Click **Print**.
  - In the Print Options dialog box, configure the options and then click **Print** to send the document to your printer.

Tip

- If the application printing tools are not available for the specific page or view you want to print, you might be able to print the page using your web browser; however, this method can never be guaranteed and might produce substandard results.
- The Print Preview dialog box for the Portfolio Analysis page includes special options.

Printing Pages Using Your Web Browser

Because P6 runs inside your web browser, you can print data using your browser's **Print** command. P6 application pages also feature a **Print** link you can click. In addition, many pages also include separate Print icons in a toolbar.

Note

Whenever they are available, the printing commands provided by the application offer the best options and output. You can use the Print Preview feature before generating output.

To print data:

1. On any page that supports printing, select your browser's **Print** item.
2. In the resulting **Print** dialog box for your operating system, choose a printer and click **OK** to print.

Tip

- To refine the output, use the options available in your browser's **Print Preview** and **Page Setup** dialog boxes.
- The Gantt chart only prints if it is showing in the view.

About email Notifications

Notifications is a feature that enables users to be contacted by email when changes occur relating to project data such as issues or timesheets. For example, you can be notified when a timesheet is awaiting your approval.

When new user accounts are created, the user's email address can be stored. This allows them to receive email notifications when certain events occur such as when a user also

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mapped to a resource is assigned to an activity. Using issues as another example, users can be notified about issues when the issue's priority level is set to "high", when a specific issue code is assigned, or when any change to an issue occurs.

Email notifications can be sent manually or configured to be sent automatically by the application.

Working with Email Notifications

If available on the current page, portlet, or dialog box, you can click  **Email** or  **Send Email** to manually send an email message.

P6 provides the following email notifications. Follow the summary steps below (or, if needed, see more detailed task topics) to configure automatic Email notifications for a particular item.

Requirements:

In general, you should have an email address stored in your user account to send Email and recipient users should have an email address stored in their user accounts to receive email. The email accounts are required in order to send email to users by selecting them from a list. They are then automatically applied to the email message. However, it is also possible to manually enter a recipient's email address in the **Email** dialog box just before sending the message.

To use the *Notifications* feature, your administrator will enable settings in P6 Administrator application and configure it for use with a mail server.

After notifications are enabled, each individual can specify their personal notification preferences enumerated below:

- To configure automatic email to a resource when that resource is added or removed from an assignment, select the Send Email to resources upon adding or removing assignments option in the **General** section of the **Global** tab of the **My Preferences** page.
- To receive email notifications about issues, configure the Issues section of the Global tab of the My Preferences page. You can be notified about issues based on an issue's priority level. For example, you can be notified only when an issue's priority is listed as "high." You can also be notified when issues are modified, or when issues are assigned a specific issue code. You can be notified about issues for projects based on whether you have project access rights, issue access rights, if you are the Project Owner or Issue Owner, or if you are assigned as a resource to that activity.
- To automatically send email to a designated temporary project manager delegate assigned to approve timesheets, select the check box on the Assign Project Manager Delegate dialog box. This will notify the delegate of their temporary assignment to review timesheets and will list the designated projects.
- To automatically send email to a designated temporary resource manager delegate assigned to approve timesheets, select the check box on the Assign Resource Manager Delegate dialog box. This will notify the delegate of their temporary assignment to review timesheets and will list the designated projects and individual resources.
- To automatically send email to a resource about a rejected timesheet, reject the timesheet on the Timesheet Approval page from within P6. You will be prompted to send a notice.
- Administrators can configure Oracle BPM to notify a user when a project workflow is awaiting that user's approval.

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Sending Email about Documents

You can send email for a project document that includes basic details and a bookmark link to the document.

To send document Emails:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab, select a document and click **Email Document Details**.
4. In the **Email** dialog box:
   a. Edit the recipient list, message, and subject as needed.
   b. Click **Send Email**.

Tip

- You must have an Email address listed in you user profile to send an email.
- You can also send document Emails from the My Documents portlet of the Dashboards page, or the Documents page (without the content repository).

Sending Email about Issues

You can send emails about project issues that include basic information, such as project, issue name, priority and due date.

To send issue emails:

1. On the **Navigation Menu**, expand **Projects** and click **Issues**.
2. On the **Issues** page, expand a project, click **Context** and select **Email Issue Details** for one of the issues.
3. In the **Send Email** dialog box:
   a. Edit the fields as needed.
   b. Click **Send**.

Tip

- You must have an email address listed in you user profile to send an email.
- You can also send issue emails from the My Issues portlet on the Dashboards page.

Sending Email about Timesheets to Resources

As a timesheet approval manager, you can send an Email notification to a resource at any time. For example, you might want to remind a resource or group of resources about

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timesheets that need to be submitted. The resources and users you notify must already have a valid Email address stored in P6.

To send Email about timesheets:

1. On the **Navigation Menu**, expand **Approvals** and click **Timesheets**.
2. On the **Timeshests** page:
   a. Select Project Manager or Resource Manager from the **Approving as** list. Or, if you are a delegate, select the value from the list that best represents your current role.
   b. Click **Action Required** to view timesheets awaiting your input or **All Timesheets**to view all timesheets.
   c. Select a timesheet about which you want to send an email.
   d. Click **Context** and select **Email**.
3. In the **Send Email** dialog box:
   a. P6 pre-fills the recipient list and subject of the Email. Edit the recipients and subject as necessary.
   b. Enter the message body in the large field below the subject line.
   c. Click **Send**.

> **Note**
>
> Use the Bcc field to send Email to multiple recipients. This hides the list of recipients when delivered, safeguarding the privacy of each recipient.

Sending Email to a Project Manager

You can send email to the manager of a particular project.

To send email to a project manager:

1. On the **Navigation Menu**, expand **Projects** and click **Team Usage**.
2. On the **Team Usage** page:
   a. Click **Resource**.
   b. In the left pane, expand a resource and click a project.
3. In the **Activities for Project** dialog box, click **Send Email**.
4. In the **Send Email** dialog box:
   a. Edit the recipient list, message, subject, and body as needed.
   b. Click **Send**.

> **Tip**
>
> You must have an email address listed in you user profile to send an email.

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Sending Email to Project Resources

You can send email to the resources listed for an open project.

To send Email to project resources:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Communication Center** portlet.
4. In the **Communication Center** portlet:
   a. Click **Expand** to expand a project and view its assigned resources.
   b. Select the check box for each resource you want to add to the mailing list. Each name you select will appear in the Email message's distribution list (the **To**: field).
   c. Click the **Send an Email** link.
5. In the **Email** dialog box:
   a. Edit the recipients, subject, and message text if needed.
   b. Click **Send Email**.

Tip

- Select the check box next to the project name to automatically select all resources listed. Clear the same check box to automatically clear all resources.
- You must have an Email address listed in your user account to send Email.

Sending Email to Resource Teams

You can send email to an entire resource team of your choosing.

To send Email to a resource team:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Resource Team Summary** portlet:
4. In the **Resource Team Summary** portlet:
   a. Click **Filter by** and select the team to which you want to send an Email.
   b. Click **email resource team**.
5. In the **Email** dialog box:
   a. Edit the recipient list, message, and subject as needed.
   b. Click **Send Email**.

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> **Tip**
>
> You must have an Email address listed in you user profile to send an Email.

Updating the Progress of Activities Using Email Statusing Service

If Email Statusing Service is configured at your organization, you can request a list of your assigned activities using email. Then, you can reply with your status updates.

To update your status using email:

1. Log into the email account uniquely associated with your P6 user account.
2. Create a new email to send to the Email Statusing Service address provided to you by your P6 administrator.
3. Request a list of activities from P6 by specifying the *Email Statusing Service Activity Filter Options*Email Statusing Service Activity Filter Options in the subject line using the format:

   ```
   <Activity Status> <Time Frame, optional> <Project, optional>
   ```

   Send the email.
4. When you get the list of your assignments as a message in your inbox, open it.
5. (Optional) To update the status of only a single activity:
   a. Click on the **Update this activity** link.
   b. In the resulting form, enter your updates.
   c. Click **Send**.

   > **Note**
   >
   > To save time, try to update the status of all your activities at the same time. If your email application does not support inline email editing in your reply message, use the **Update this activity** step for each activity.
6. To update the status of one or more activities at the same time, click **Reply**.
7. In the reply message:
   a. Enter your status updates using the approved formatting.

   > **Note**
   >
   > - To avoid potential errors, delete the original value in its entirety before entering an updated value.
   > - If the same activity is listed twice in your activity list, you are assigned as a resource to this activity and you are also either assigned as the activity owner or you are assigned a Team Member work distribution filter that is capturing the same activity. Update only one of the two activities per email update. If you need to update both activities, request another activities list and then update the second activity.

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b. Click **Send**.

A confirmation message will be sent to you after your updates have been processed.

> **Note**
>
> If you need assistance with the options, syntax, or required formatting of these messages, send an email message with only the word "Help" or a question mark in the subject line to receive more detailed instructions.

About Grouping and Sorting

To simplify the display of complex tables of data, you can group rows of similar data and sort the grouped bands as well as the data under them. Grouping helps you block distracting data and focus only on the information you need. It also permits you to collapse and expand hierarchical arrangements of your data rather than navigate large flat lists.

You can sort the EPS page, Assignments page, and the Activities page by any columns in your view and specify the order in which column sorts are applied. For example, you might sort by Primary Resource, then Start date, then by Planned duration, and finally by Activity ID. This would mean that if more than one activity has the same Primary Resource, Start Date, and Planned Duration, they will be in the same place in the list and sorted in order of Activity ID.

When you sort your view by multiple columns, the column headings will show numbers representing the sort order as well as an arrow showing whether the sort is ascending or descending. Hierarchies can also be sorted while maintaining the structure of the hierarchy.

Working with Group and Sort Features

This set of controls appears throughout the application (most notably on the **Activities**, **EPS**, and **Assignments** pages) and offers similar functionality for grouping and sorting the fields (or columns) in a list, table, or scorecard.

To answer questions you need answered involving two or more fields, consider grouping by those fields. For example, if you need to know *Do we have any code yellow activities that started this month or last and that are assigned to vendor ABC?* then group and sort by your **code**, **start date** (to the month level), and **vendor** fields.

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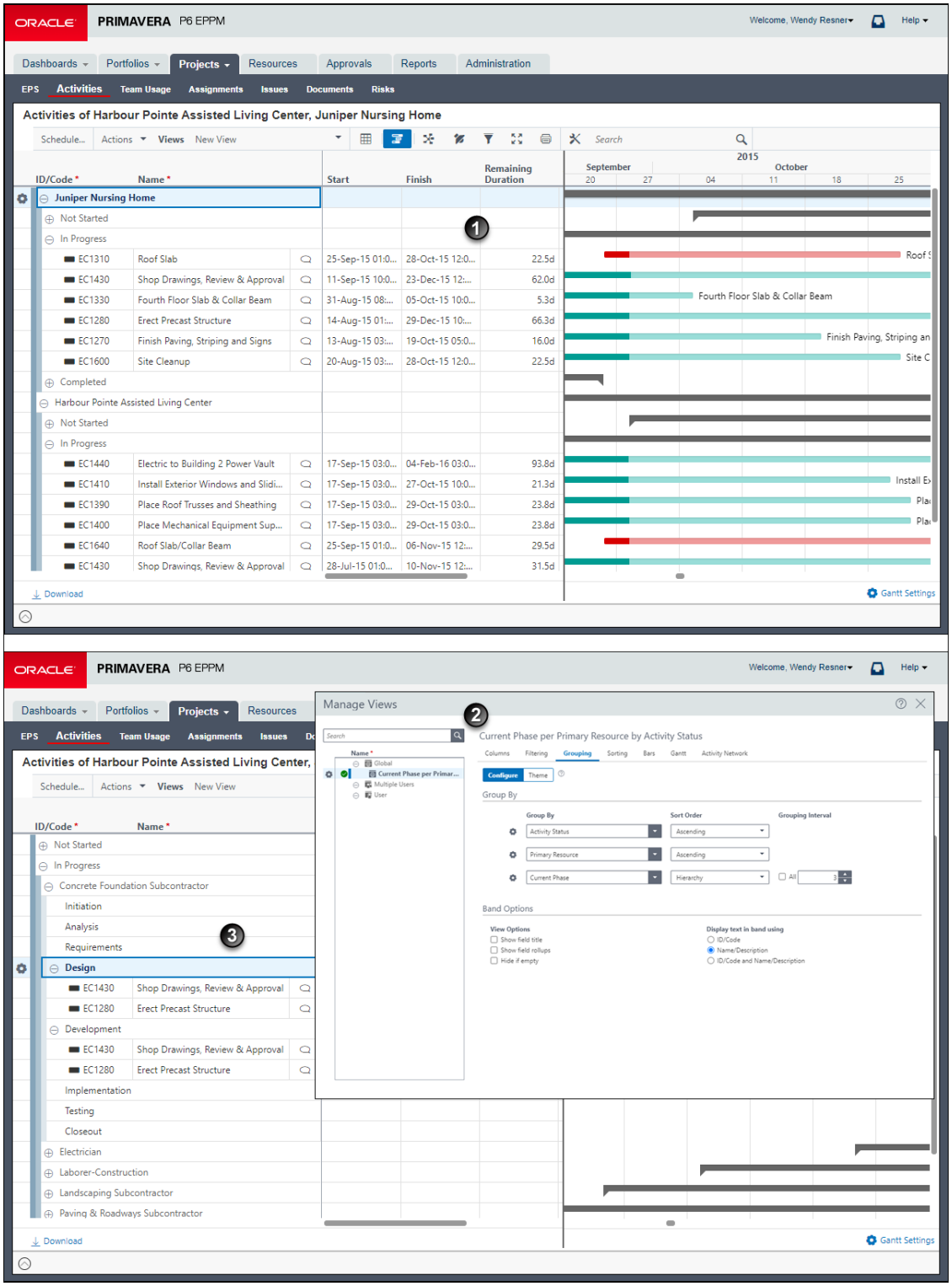


Table of Common Grouping and Sorting Screen Elements

Item	Description
1	**Common Group and Sort Example**: In this example, the **Activities** page is grouped by the **Project** and **Status** fields.

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Item	Description
2	**Custom Grouping Settings**: These are the corresponding **Manage Views** dialog box settings applied to achieve the example in item 3 below. The hierarchical fields are capable of displaying data in many nested levels, as indicated by a 3 in the level field. You can also choose Ascending or Descending for hierarchical fields to sort sibling nodes of the hierarchy while maintaining the hierarchical structure. To sort the data within each group, configure the Sorting tab.
3	**Custom Group and Sort Example**: In this example, the **Activities** page is grouped by **Activity Status**, then by **Primary Resource**, and finally by the **Phase** project code. This helps the user pinpoint the exact data they were looking for.

> **Note**
>
> - Most groupings support up to 10 levels with some pages such as the **Activities**, **EPS**, and **Resource Assignments** pages supporting up to 20 levels of grouping by one or more fields.
> - Because projects can be in two different portfolios, the same project can appear in two different group bands when you are grouped by portfolio. If you edit one of these bands, the other bands will automatically be updated.

Grouping and Sorting Information

Grouping and sorting data helps reduce its visual complexity.

To group and sort data:

1. Navigate to a page supporting grouping and sorting.
2. Select **Customize View**.
3. On the **Manage Views** dialog box:
   a. Select a view.
   b. Select **Grouping**.
   c. In the Grouping tab, select a field you want to use to group other data.

      If you select a hierarchical field, select whether to show the hierarchy in the default order, or to apply ascending or descending sorting to elements within the same hierarchical level.

      If you select a hierarchical filed, you can also select either to show all levels, or a number of levels to show. For example, if your project contained ten levels of hierarchical WBS elements, enter 2 here if you want to restrict the list to the top two levels of WBS values. This is useful if you only want to see tasks grouped into high-level arrangements, making hierarchies easier to navigate.

   d. Select **Sorting.**
   e. In the Sorting tab, select a field and sort order.

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Ascending sorts from A to Z, from smaller numbers to larger numbers, or from earlier dates to most recent.

Descending sorts from Z to A, from larger numbers to smaller numbers, or from most recent to older dates.

> **Note**
>
> You can click a column header in a table you customized to change the column used to sort the data rows under each band.

f. Click **Save** to close the dialog box and apply your grouping options to the page you selected in step 1.

About Find, Search, and Filter Features

The application provides three main ways to find the data you need: *Find*, *Search*, and *Filter.*

The *Find* feature is available in tables to help you find the next matching row in a column. Use the *Find* feature in table columns to locate matching rows of data one at a time up or down the table.

> **Note**
>
> - For pages with static data, use the *Find* feature in your web browser to locate fixed elements of the user interface. See the help documentation for your web browser.
> - You can also use *Replace* with *Find*, for example if you want to replace one word with another throughout a project.

The *Search* feature is available on certain pages or dialog boxes to help you reduce the number of available values, showing only those values that meet your search criteria. Use the *Search* feature wherever it is available to locate only matching values.

The *Filter* feature is available on certain pages to help you reduce the amount of data in tables, showing only those values that meet your filter criteria. Use the *Filter* feature wherever it is available to view only matching values. For example, you might configure a *view* with pre-defined *filter*, *group*, and *sort* parameters.

Working with Find, Search, and Filter Features

The application supports three general ways to find only the data you need. The options available vary from page to page.

- **Find**: Use the basic *Find* feature to search for matching entries, one at a time, in tables.
- **Search**: Use *Search* to view all matching entries in certain dialog boxes and special pages.
- **Filter**: An advanced type of search, filters show all matching entries while hiding the data you don't want to view on the Activities, EPS, and Resource Assignments pages. You can also apply filters to include only certain kinds of projects in a portfolio, or to include only specific project codes on a dashboard.

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Finding Entries

Another common feature of P6 tables is the *Find* command. Unlike the *Search* feature which shows you all matching results at once, the *Find* feature searches up or down in a column to find the next single matching entry.

To find entries in a table:

1. Navigate to any page with a table of entries.
2. Right-click in a specific column of the table and choose **Find**.
3. In the **Find** dialog box:
   a. In the **Find what** field, enter your search criteria
   b. Select the **Match entire words only** option to constrain the results to only values that match the exact words as typed.
   c. Select the **Match case** option to constrain the results to only values that match the upper or lowercase spelling of the words as typed.
   d. In the Direction section, select either **Up** or **Down** to indicate the direction of the search.
   e. Click **Find** or press **Enter** to search up or down through the rows of values in the selected column. Your matching search results are highlighted in the current table.
4. To find the next matching entry, right-click and select **Find Next**.
5. If you change any data, click **Save**.

> **Note**
>
> You can also use the Replace feature, if you need to find and change data in a table.

To find matching data on a page, however, use your web browser's **Find** command.

To find entries on a page:

1. Navigate to any page displaying field data.
2. In your web browser, select **Find** from the **Edit** menu.
3. In the **Find** field, enter your search criteria and click **OK** or press **Enter**.
4. Your matching search results are highlighted on the current page.

Replacing Entries

Use the Replace feature to change one piece of text for another in a specific column throughout a project. You can replace text in the EPS, Activities, and Assignments pages.

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> **Note**
>
> - You cannot make assignments using the Replace feature. For example, you cannot replace resource assignments or code assignments using the Replace feature.
> - You cannot use the replace feature in any column that you cannot edit.
> - You cannot use Replace in a column that allows you to select data from a list, for example Indicator type UDF fields, Percent Complete Type, and Cost Account.
> - If you want to replace data globally, you can use **Global Search & Replace**.

To replace entries in a table:

1. Navigate to any page with a table of entries.
2. Right-click in a specific column of the table and choose **Replace**.
3. In the **Replace** dialog box:
   a. In the **Find what** field, enter your search criteria.
   b. In the **Replace with** field, enter the text to which you want to change the found entries.
   c. Select the **Match entire words** option to constrain the results to only values that match the exact words as typed.
   d. Select the **Match case** option to constrain the results to only values that match the upper or lowercase spelling of the words as typed.
   e. Click **Replace** if you want to replace the highlighted entry, **Replace All** if you want to replace all entries, or **Find Next** to skip the highlighted entry and move to the next entry.
4. If it becomes active, click **Save**.

Searching for Entries

The application provides similar search tools wherever they are required to help you search for matching entries. For example, if you create a new issue while viewing a project on the Activities page, one of the required fields you'll need to complete is called Responsible

Manager. To complete the field, you can either type a value if known, or click ••• **Select** to open the Select Responsible Manager dialog box. If you open the dialog box, you can use the search field provided to search for a particular name in the OBS rather than manually click through all the OBS entries. As another example, when you open projects, templates, or portfolios, you can use the search tools to find matches by name or ID.

To search for matching entries:

1. If a search button such as **Search** is available, click it to show the **Search** field. If not, proceed to the next step.
2. In the **Search** field, enter your search criteria and the search results will automatically narrow as you type.
   - If no search options are available, the current page or dialog box does not support searching.

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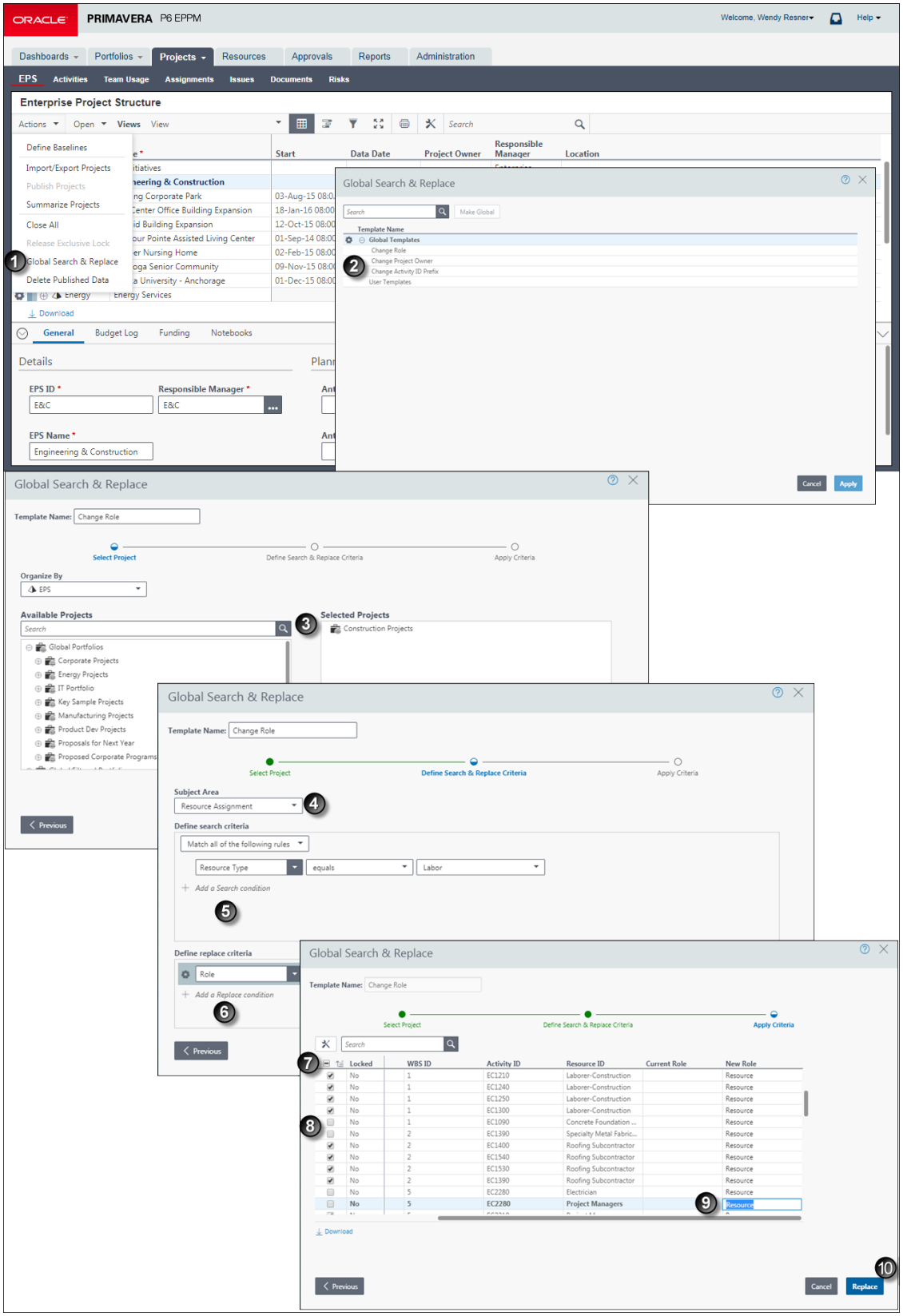
- Common dialog boxes in which you are asked to select a value (accessible by clicking ••• **Select** throughout the application) often include search features.

Working with Global Search and Replace

P6 provides a way to replace data in multiple activities, WBS elements, and projects. You can configure a Global Search & Replace template to determine the data which will be replaced.

You can create a template to filter the data to be changed and specify what changes to make. You can save templates to be used later, and modify or delete templates. You can apply the changes and review the data before committing to the change. At the review stage, you can exclude certain rows from being changed and modify data in one or more rows before applying the change.

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Global Search & Replace

Item	Description
1	**Navigation**: Begin by navigating to the **EPS** page in the Projects section. Then, click the **Actions** menu and select **Global Search & Replace**.
2	**Select a Template**: Select an existing template to use, or create a new template. You can also modify an existing template or delete a template.
3	**Select Projects**: Each template can be applied to a different project or set of projects.
4	**Select a Subject Area**: Select a subject area to determine whether the Global Replace job will modify **Project**, **WBS**, or **Activity** data. Each template can be configured to replace data in one subject area.
5	**Define Search Criteria**: Define search criteria and select to match All or Any of the criteria.
6	**Define Replace Criteria**: Define up to 5 rows of criteria to replace.
7	**Automatically Excluded Rows**: If the **Search Criteria** and **Replace Criteria** you defined include rows which cannot be replaced, the rows will automatically be excluded. For example, you may not have the privilege to edit data in a project.
8	**Exclude Rows**: Clear the **Include** option for rows that you do not want to replace.
9	**Edit New Values**: If necessary you can edit the new values which will be applied to rows.
10	**Replace**: When you are done, click **Replace** to submit the Global Replace job. To see the progress of the job, click the **User** menu and select **View Service Status...**.

Configuring Global Search & Replace Templates

Configure Global Search & Replace templates to enable changing Project, WBS or Activity data in multiple projects at the same time.

To configure global search and replace templates:

- On the **Navigation Menu**, expand **Projects** and click **EPS**.
  1. On the **EPS** page, click the **Actions** menu and select **Global Search & Replace**.
  2. In the **Global Search & Replace** wizard, in the template name list, select **Context** and click **Add**.
  3. On the **Select Project** step, move the EPS nodes or Projects you want to change from the **Available Projects** list to the **Selected Projects** list. Select **Next**.
  4. On the **Define Search And Replace Criteria** step, select a **Subject Area** to change.
  5. Select **Add a Search condition** and complete the **Parameter**, **Is**, and **Value** fields to determine the data to change.
  6. Create other search conditions if needed.

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7. Select + **Add a Replace condition** and complete the **Parameter**, **Is**, and **Value** fields to determine the data to replace.
8. Create other replace conditions if needed. Select **Save**.

Tip

- You need the Perform Global Search & Replace project privilege to open the Global Search & Replace dialog box.
- You can create up to five search criteria and replace data in up to five fields with one template.

Searching For and Replacing Global Data

Use the Global Search & Replace feature to change Project, WBS or Activity data in multiple projects at the same time.

To search for and replace data in multiple projects:

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click the **Actions** menu and select **Global Search & Replace**.
3. In the **Global Search & Replace** wizard, select a template and click **Apply**.

Note

You can select the ⚙ **Context** menu and select **Add** to create a template or **Edit** to modify an existing template.

Review the changes. You can edit the data in the changed fields manually and clear the **Selected** option for any items you do not want to change. To mark or clear the include option for all rows, right click and select **Select All/Deselect All**.

4. Click **Replace**.

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Tip

- You cannot use Global Search & Replace to modify data in a project which is opened exclusively by another user.
- You need the Perform Global Search & Replace project privilege to open the Global Search & Replace dialog box.
- Global Search & Replace respects your user privileges. If you do not have sufficient privileges to modify the data specified in the template, the Global Search & Replace report will show which data could not be modified.
- P6 will automatically exclude rows which will not be changed. For example a row will automatically be excluded if the project in which the data exists is opened exclusively, you do not have sufficient access rights or privileges to be able to modify the data, the field name is not applicable for the row, or the field value cannot be set for the row.

1. To check the status of the Global Search & Replace service on the EPS page, click the **User** menu and select View Service Status.... You can also view logs for completed Global Search & Replace jobs on the View Service Status page.

About Filters

As you work with increasing amounts of data over time, you will recognize a need to limit your focus to only the data most relevant to your particular task or need. A filter is a predefined constraint you place on data so that data that does not meet your filter criteria is hidden and only the data you need are shown.

Working with Filters

Apply filters to large tables or complex pages in the application so their complexity and time to display are reduced. For example, rather than displaying *all* activities for *all* resources from *all* projects, likely to result in an unmanageable volume of data, you might filter the Activities page to display only the activities assigned to you from a single project. In this example, your filter criteria include an identifier for the single project and an identifier for you.

Some pages feature basic filter options while others handle the most advanced logical parameters. Applied alone or in combination, filters represent a powerful tool for managing vast amounts of data.

Basic Filters

The application presents simple filters you can apply to refine the data displayed. Basic filters do not require you to define very detailed parameters.

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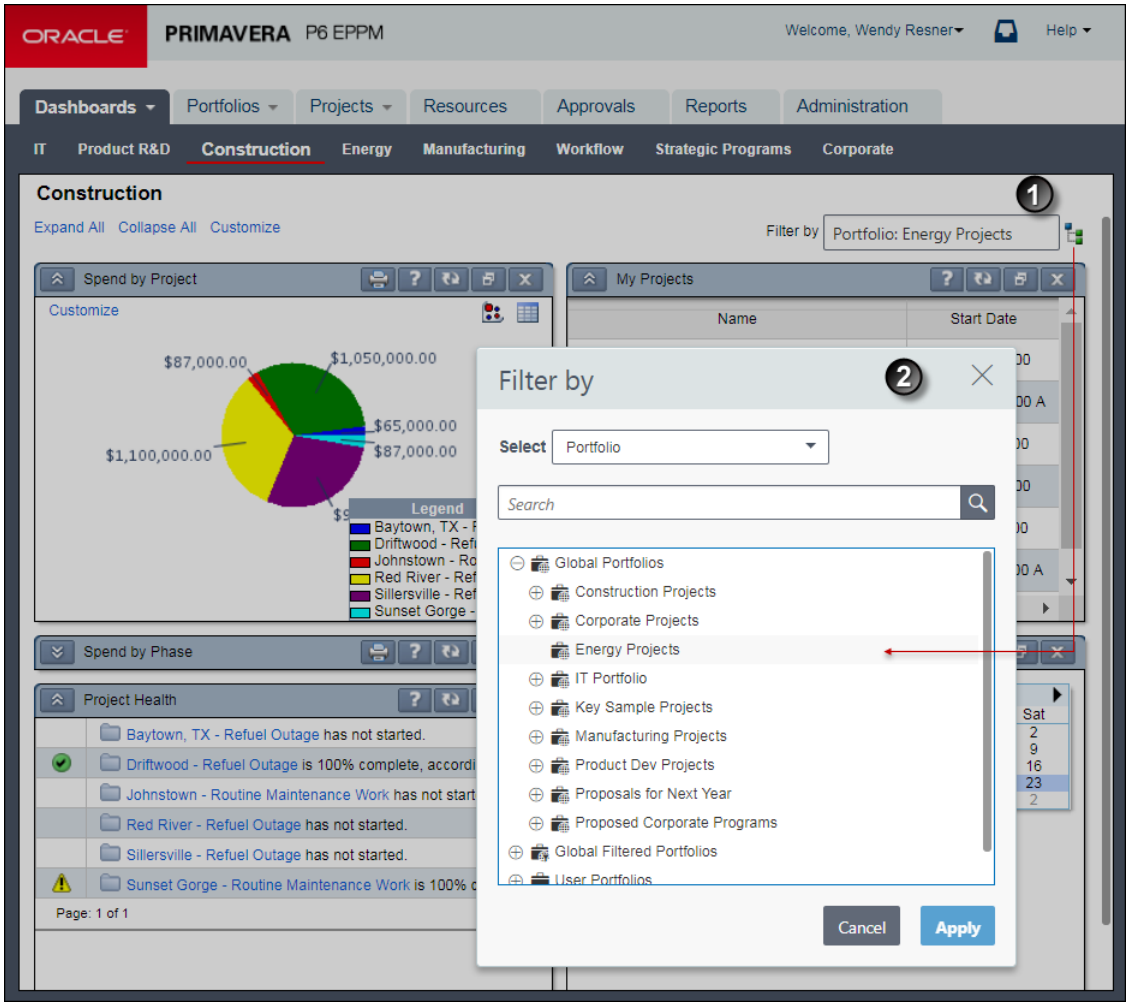


Table of Basic Filter Elements

Item	Description
1	**A dashboard filter**: In this example, the user has decided to apply a filter to their Construction dashboard. The applied filter will determine the data that appears in all the portlets of the dashboard.
2	**The dashboard filtered by portfolio**: The filter parameters the user selected are basic. Essentially, the user selects a portfolio. Notice here that the user could have elected to filter the dashboard by a special type of portfolio called a filtered portfolio that is itself defined by more advanced filter criteria. These examples illustrate how you can use filters to refine the precision of the data you need while eliminating the noise or data you do not need.

Advanced Filters

You can create advanced filters to control with pinpoint accuracy the data displayed. Advanced filters enable you to define what some users might perceive as complicated logical parameters.

Example: A project manager for Release 2 is tasked with assigning resources to all Design and Engineering Phase activities. She wants to examine all of Cindy Lee's assignments to see if

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she is available to assign to other activities that have not yet started and do not yet have resources assigned to them. Her filter criteria is demonstrated below:

`Release equals Release 2 (a custom project code) any of the following rules Phase equals to Design and Engineering Phase Primary Resource equals LeeC - Cindy Lee Primary Resource is empty`

The PM applies both her own user filter and the standard Not started activities only filter to view activities matching either set of criteria in order to cast a wider net and review the results.

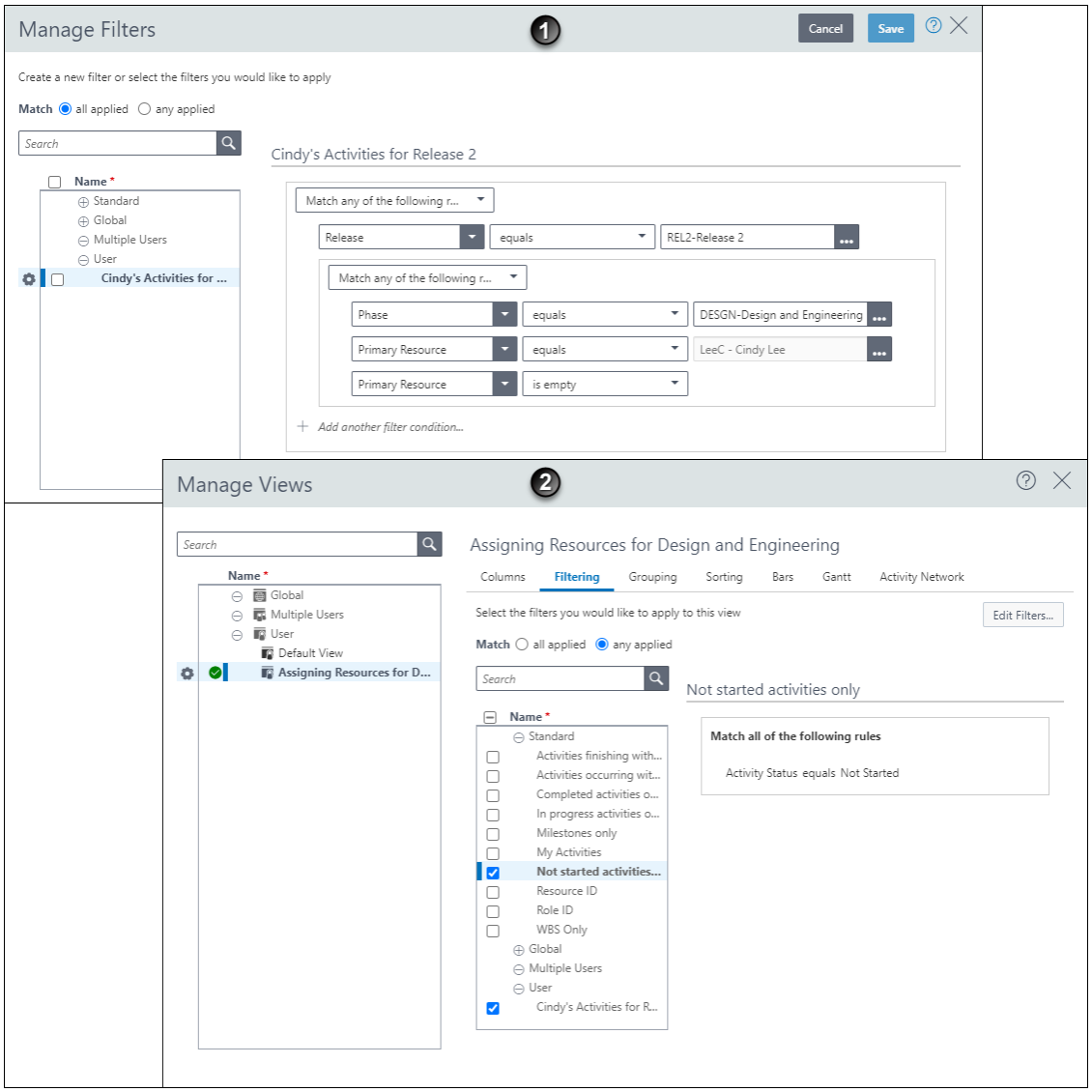


Table of Advanced Filter Elements

Item	Description
1	**Creation of a new filter**: In this example, the user wants to reduce the number of activities on the Activities page. After naming the new filter, the user defines custom parameters to constrain the data.

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Item	Description
❷	**Filters applied to the current activity view**: After creating the new single user filter, the user marks it and also marks one of the standard filters. The user has also elected to show matches for *any* applied filters.

Filtering Data

Filters use logical rules you define to hide the data that you don't want to display. This allows you to work with only the "good" data you want. Filters help reduce visual clutter and improve performance.

To use filters:

1. Navigate to a page that supports filtering.
2. Define and save your filter criteria.
3. Enable or apply the filter.
4. Save the view.

> **Note**
>
> Defining filter criteria varies within the application from making a few simple selections to applying advanced logic.

Pages Supporting Filters

The following areas of P6 support filtering:

Page	Description
Activities page	Apply filters based on project and activity parameters to target specific activities.
EPS page	Apply filters based on EPS and project parameters to target specific projects.
Resource Assignments page	Apply filters based on resource and role parameters to target specific assignments.
Dashboards page	Apply filters based on portfolios, projects, or codes to target specific project and portfolio data displayed in portlets on the dashboard.
Timesheet Approval page	Apply filters based on timesheet status to target specific timesheets. Also apply filters to the activities for a selected timesheet.
Portfolio Analysis page	Apply filters based on EPS, portfolio, and project code to target specific portfolio data.
Issues page and Issues portlets	Apply filters based on issue parameters to target specific issues.
Risks page	Apply filters based on risk parameters to target specific risks.

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Page	Description
Create Portfolio and Manage Portfolios pages	Apply filters based on project data, codes, and UDFs to target specific projects that make up a portfolio.

Creating, Modifying, Saving, and Deleting Data

In general, you can create items and then directly modify the data in any field at any time; however, the application will often guide you by making certain fields read-only or hiding them when appropriate. To create items, follow the steps in the task topics included in this online help or user guide. To modify data, follow the *Getting Here* steps to navigate to a page or dialog box where you can directly view and edit the data. For example, to modify activity data, navigate to the Activities page.

Once on a page, click in a field on a page or double-click in a table cell to edit or remove a value. Once you select save, changes made will cascade through P6 automatically. You should save after each change that you make to views, portlets, and layouts, even if you have not changed any data in the view.

Other P6 users can make updates simultaneously on the same page you are working on. To view saved changes made by other users, update your view by using the internet browser refresh or navigate away and return to the page.

If you cannot modify the data item, consider the following reasons:

- **The item is read-only.** In other words, the data on the page is only being displayed for you to view; however, it cannot be modified.
- **Your current view settings do not allow you to access the data.** For example, you might be able to access the data by adjusting your group and sort or filter settings. Or, you might need to customize your user interface view settings or ask your administrator to configure or reassign your user interface view.
- **Your current security settings do not allow you to access the data.** You do not have security, OBS, module access, or other access permissions to modify the item.
- **Specific business logic prohibits making certain modifications.** For example, the item can only be modified by its creator and cannot be modified by other users, or it cannot be changed after a certain date.

Cutting, Copying, and Pasting Data

Use the standard Cut, Copy, and Paste features to save time while working with a variety of items in the application. For example, instead of creating a new user from scratch, administrators might add a new user by simply copying and pasting an existing entry on the Users page for a similar user.

The steps for copying and pasting the following types of data in the application are essentially the same:

- individual field and cell values
- activities, including their steps and other associated data items
- WBSs, including their activities and other associated data items
- projects, including their WBS, activities, steps and other associated data items

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- EPS nodes, including their project & WBS data and activity data
- resource and role assignments
- user accounts and their associated data items
- global and project security profiles, including their privileges
- currencies, funding sources, calendar data, project codes, activity codes, and other enterprise data supporting copy and paste functionality
- scheduled reports

> **Note**
>
> The list above is not meant to represent all areas of the application supporting this feature. Cut, Copy, and Paste functionality is generally supported when these commands appear in a toolbar or shortcut (right-click) menu. Be aware, however, that there are exceptions. For example:
>
> – Your ability to copy, copy and paste data is partially determined by whether or not you have the privileges to view costs and financial data for the assigned Responsible Manager.
>
> – You cannot cut an activity and paste it to another project if timesheet actuals are applied and you do not have the 'Delete Project Data with Timesheet Actuals' privilege.
>
> – 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.

To copy and paste a value:

1. Click **Context** and select **Copy** or **Cut**.
2. Navigate to the supported destination for the new copied item, click **Context** and select **Paste**.
3. If it becomes active, click **Save**.

> **Tip**
>
> - Hold down the **Ctrl** key while clicking to select multiple rows in a table. Hold down the **Shift** key to select contiguous rows.
> - When you copy and paste some types of data, including when you copy multiple WBS nodes, or when you copy a project, the new data might not appear immediately. The process runs as a background service and you will see a notification once it has completed.
> - When you copy and paste projects, WBS nodes, activities, resources, or roles you can choose to exclude secure codes from being pasted with the rest of the data. This includes secure assignment codes where the data you copy includes assignments.

About Removing and Deleting Data

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In general, when you have the required security privileges, the application supports direct modification, removal, and deletion of data. For example, you can directly input a value over an existing field value or select an entry in almost any list or table and click **Delete** to remove an assignment or delete an item. In some cases, certain additional security settings might be required. You should also be aware of subtle differences between *removing* an item and permanently *deleting* an item. Be aware that there may be undesired consequences of your decision to remove or delete an item.

Deleting Entries

The steps for deleting any entry in the entire application, such as activities, steps, or users, are generally the same.

To delete an entry:

1. Navigate to any table or list of entries in the application.
2. Select an entry. To select multiple entries, press and hold the **Ctrl** key down as you click additional entries. Press and hold the **Shift** key down to select all contiguous entries.
3. Delete the entry using one of the following generally available methods:
   a. Click **Context** and select **Delete**.
   b. If prompted to confirm, click **Yes**.
   c. If it becomes active, click **Save**.

Undoing Mistakes

Mistakes happen from time to time and P6 includes some standard methods for reversing unwanted changes. Follow the steps below and stop at the step that fixes your data entry error. If a step does not undo your accidental entry, proceed to the next step.

To undo mistakes:

1. If the page you are viewing shows a Cancel button or link, click it to discard any pending changes and revert back to the last saved state.
2. If the page you are viewing shows a **Restore to Defaults** button or link, click it to restore the page.

> ⚠ **Caution**
>
> **Caution** This command will discard all changes that have ever been made and will revert back to the original default values.

3. In a limited number of fields on only a few pages and dialog boxes, press **Ctrl+Z** to undo only the most recent unsaved changes to only that field.
4. If you made an assignment and want to remove or change it, navigate back to the page where you made the assignment and remove or change it. For example, you can easily remove or change the users assigned to a user interface view, OBS element, or portfolio. Begin by following the procedures in this help system for assigning an entity and simply remove the assignment instead of making it.

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5. If you created an item by mistake, and want to permanently delete it, begin by following the procedures in this help system for creating the entity and simply delete it:
   a. Navigate to the page showing the items.
   b. Find the item you want to delete then click **Context** and select **Delete**.
   c. Click **Save** to save your changes.

About Metrics and Calculations

P6 automatically calculates and displays various performance metrics designed to enhance your company's competitive edge within your industry. Color-coded indicators, such as Critical, Warning, Acceptable, and Exceptional, appear on dashboards and portfolio pages to provide instant visual feedback.

The following categories of performance metrics are applied to portfolios, projects, or even a single WBS to help you assess status relative to your goals.

Schedule - Metrics based on the current schedule, baseline duration, performance percent complete, and schedule percent complete. This category also calculates metrics at completion based on the current schedule. Examples include Schedule to Date, Cost to Date, Schedule at Completion, and Cost at Completion.

Earned Value - Metrics based on Earned Value calculations. This category includes the same metrics as the Schedule category, but uses different methods based on Earned Value concepts such as SV and CV.

Index - Metrics based on cost or labor unit indices. This category includes:

- **SPI -** A measure of the work accomplished as a percentage of the work scheduled. The Schedule Performance Index helps determine if your schedule is meeting earned and planned values.
- **CPI -** A measure of the value of work accomplished as a percentage of the actual costs. The Cost Performance Index helps assess spending vs. budget.
- **TCPI -** A measure of the value of the remaining project work. The To Complete Performance Index helps determine the level of performance required to achieve your objectives within budget and on time.

Additional summaries, forecasts, variances, and other calculations are also provided automatically.

Using Visual Indicators

Indicators are a special type of user-defined field (UDF) that enable you or other users to select icons (such as , , , and) to display as values in columns to highlight specific activities, activity steps, activity resource assignments, documents, projects, resources, risks, WBS elements, expenses, and issues.

To configure and apply user-defined indicators:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand a group and select a UDF entry.

   For example, expand **Activities** and click **Activity UDFs**.

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3. On the **UDFs** page:
   a. Click + **Add**.
   b. Enter a name for the UDF and then select **Indicator** from the **Data Type** list.
   c. Click **Save**.
4. Navigate to the page where you want to display the color-coded indicator field, such as Activities, EPS, or Risks, and add the indicator field to the table. Depending on the page, click **Customize View**.
5. In the **Indicator** field, select a color-coded visual indicator from the list.
6. Click **Save**.

About Importing and Exporting Data

Import/Export features allow you to bring data into P6 as well as export data to other tools when needed. Global and Project level privileges control the ability to import and export data.

When you export projects to XML or XER format, P6 adds a SHA-256 checksum to the exported files. P6 validates the checksum during import to detect files that might have changed or been damaged after export. If the checksum doesn't match on import, P6 will stop the import, warn you that the file might have changed or been damaged, and ask whether you still want to import the file.

Available Import Options:

- Import projects from other P6 EPPM users or Microsoft Project
- Import multiple projects in a single XML or XER file
- Import multiple projects in a single XML file contained within a single zip file
- Import activities
- Import resources
- Import locations
- Import appointments as personal non-work exception time from Microsoft Outlook and other applications that support the iCalendar format
- Move activity codes and calendars to projects
- Remove codes, UDFs, and calendars from projects
- Rename codes, UDFs, and calendars
- Specify resource hierarchical position for importing into the resource breakdown structure
- Map resources to generic resource names
- Save import options in a template
- Import views
- Import enterprise data

Available Export Options:

- Export projects
- Export multiple projects in a single XML or XER file

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- Export multiple projects in a single zip file containing a single XML or XER file
- Export baselines
- Export activities
- Export resources
- Export resource allocation and cost
- Export risks
- Export views
- Export enterprise data

> **Note**
>
> For best practices on exporting data from P6 EPPM to be imported into Oracle Primavera Cloud, see: *Primavera Cloud P6 EPPM XML Import Guide.*

About Importing and Exporting Projects

You can import and export information to and from P6 using external files and then share this information with other P6 EPPM users, Oracle Primavera Contractor users, other project management tools (such as Microsoft Project and Microsoft Excel), and your organization's human resource and accounting systems. You can also use external files to archive your projects or create a backup of your database. You must have the *Export Project Data* project privilege to export projects.

You can import and export project data between P6 and other applications using the following file formats:

- CPP format.
- Oracle Primavera's XML or XER formats which enable you to share project information stored in the P6 EPPM database.
- Microsoft Project XML format which enables you to share information with Microsoft Project and other applications that use the Microsoft Project XML format.
- UN/CEFACT format.
- IPMDAR format.
- Excel format which enables you to view and amend project data in a spreadsheet.

Configure export settings to determine which projects and which baselines to export, and whether to export to a compressed file.

Configure import templates to control how and where data is imported. You can also specify in an import template how conflicting data should be handed when matches are found. You can choose to deal with conflicting data in different ways depending on the type of data.

Import templates can also help you to identify differences in calendars between your database and an import file, allowing you to make more informed decisions about whether to import individual calendars on a case-by-case basis.

You can import and export project data every day, week, two weeks, or month by creating and configuring a project scheduled service.

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> **Note**
>
> All project data is stored in a central database. You can also import projects using the Primavera XER format in P6 Professional.

For more information on importing and exporting projects, see: *P6 EPPM Importing and Exporting Guide*.

> **Tip**
>
> - On-premises only: The maximum file size for XML import can be configured in P6 Administrator application. The maximum file size for export is limited by the JVM settings and the available space in the Temporarily File Location. For more information see: *P6 EPPM System Administration Guide for On-Premises*.
> - Cloud only: The maximum file size for XML import, is 600 MB by default. The maximum file size for export is limited by the JVM memory allocation of your deployment. The default allocation is 8MB. If you want to increase this allocation, you must submit a service request and additional charges might apply.

About P6 Help

Use this online help system to learn more about the P6 application. Context-sensitive help is available from almost every screen by clicking its **Help** link or **Help** button.

Use the Table of Contents, Search, and Related Topics features to find the topics of most interest to you and your team.

> **Note**
>
> The help files include information about all features; however, each user might not be authorized by their administrators to access every feature. The help files are written as if you have the access settings required to perform the task or view all the screen elements. If you cannot perform a step or view an element, try adjusting your security settings. Your access to data and ability to interact with the user interface are controlled by various security features. See About Security.

Viewing Help Content

As you work in the application, there will be times when you need assistance, on varying levels. You might need just a reminder or a complete series of tasks to follow step by step. Refer to the information below if you need help as you work in the application.

1. Consult your internal procedures. Your organization might enforce certain rules and policies that override any instructions provided by Oracle.
2. If you want to access the P6 Online Help system, consult the table below to determine how to open it from your current location in the application.

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Current Location:	How to Open the Online Help:
a page or tab	Click the **Help** link at the top right of the page.
a dialog box	Click the **Help** button, if available. If no help button is available, try searching for the name of the dialog box as stated in the titlebar or use the related topic links provided for similar topics in the Online Help.
a dashboard portlet	Click the **Help** button in the portlet's titlebar.
a detail window (panel)	Click the **Help** link at the top right of the detail window's parent page and then click the link for the detail window in the Online Help.
a work area in full-screen view	Exit the full-screen view and click the **Help** link at the top right of the page.

Working with P6 Help Topics

The online help appears in your default web browser whenever you need help using P6.

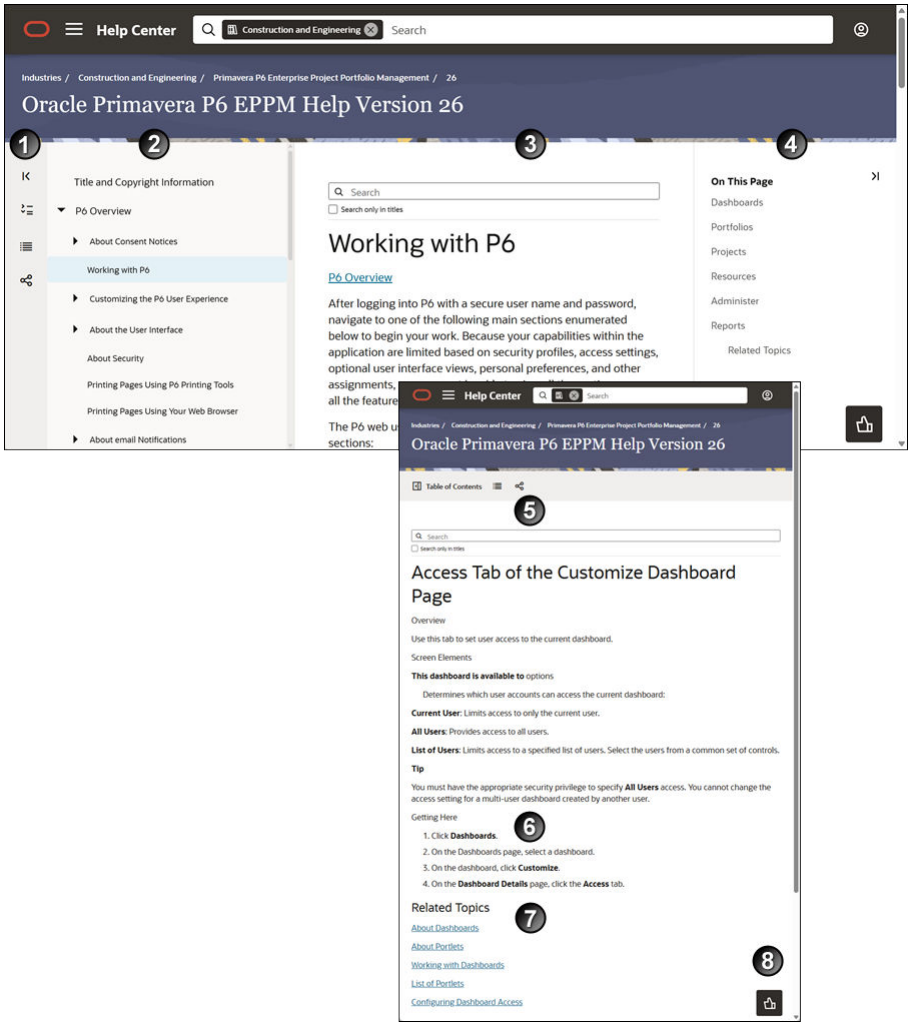


Table of Key Concepts: P6 Help

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Item	Description
1	**Controls**: These controls enable you to: • Hide or show the contents tree. • Expand or collapse all branches of the tree. • Show the table of contents. • Share the page on social media.
2	**Contents Tree**: You can see the contents of the guide in a familiar tree format. The page names here are links to the relevant page in the guide.
3	**Topic Reading Pane**: Provides a search box to enable you to search the whole of the guide including an option to limit your search to the titles of topics. By default, the search includes all text of all topics in the guide. This area also shows the main text of the selected topic and provides a link to the start of the chapter. Context-sensitive help topics include an overview, details for all screen elements on the P6 page or dialog box. Other types of topics include conceptual topics that tell you about main ideas, Working With topics that summarize how a feature works often with sample screen images, task topics that take you step-by-step through a procedure, and reference topics that describe icons, fields, and other information. All topics may also include applicable notes, tips, examples, and other information.
4	**On This Page Panel**: Provides links to each of the subheadings in the topic. You can hide or show this pane.
5	**Context Sensitive Help**: When you select a help button or icon in P6, the associated help page is opened for you in a separate browser window. The controls allow you to open the Contents Tree pane, go to the Table of Contents for the guide, and share the page on social media. The search box is available here too.
6	**Getting Here:** Lists the steps required to navigate to the relevant part of P6
7	**Related Topics**: Provide you with an opportunity to learn more about the functionality related to this part of the software.
8	**Thumbs Up Menu**: Here you can provide us with feedback about the text of the topic. When you allow your cursor to hover-over the Thumbs Up menu, you can select either the thumbs up icon (if the topic is helpful) or the thumbs down icon to tell us about problems with the page or ways to improve the information we provide.

Common P6 Commands

To reduce repetition, the following screen elements are considered common and are documented once in the list below rather than on every help topic. They may appear in P6 as links or buttons:

Save: Validates the data you entered or changed and then stores it. If it cannot validate and save your data, the application will alert you so you can make corrections; for example, when a required field value is missing or if a logical constraint is not met.

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Close: Closes the current page or dialog box. If you modified but did not yet save data, you will be prompted to save or discard your changes.

Save and Close: Attempts to save the data and then close the current page or dialog box, returning you to the previous page.

Cancel: Closes the page without saving any changes.

Defaults: Restores all options on the current page to their original default settings.

Apply: Applies your modified settings to the object you are editing but does not save them. This allows you to preview the impacts of your changes and decide if you want to save them or make additional changes.

Customize: Opens the available options for customizing the current item. The custom settings you make may be available to *only* you or to other users depending on the item being customized.

OK: On a message box or alert dialog box, acknowledges that you have read the message and want to continue rather than close or cancel the operation. On a typical application dialog box, accepts your input and attempts to continue the current task.

Assign: Applies your selection and continues the current task.

About Timesheets

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.

Working with Timesheets

Resources required to submit their time using the optional timesheets provided by P6 Team Member Web will navigate to an online timesheet they can fill in and submit for approval by their manager.

Resources submitting a timesheet must meet the following requirements:

1. The resource must be assigned to activities in the project.
2. The resource must be assigned to a user account with Timesheet module access by their administrators.

Approval managers must meet the following requirements:

1. Approval managers must be assigned as the Approval Manager for the resource submitting the timesheet.
2. Approval managers must be granted Timesheet access by their administrators to utilize the full set of timesheet features; however, a manager strictly reviewing timesheets just needs access to the Timesheet Approval page from dashboards.

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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:

- 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
- runs a timesheet report in the Reports section of P6

> **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

As a timesheet approval manager or delegate, you can approve or reject timesheets for resources for which you are responsible. Depending on your P6 EPPM Application settings, an email may be sent to other managers when you reject a timesheet.

To approve or reject timesheets:

1. On the **Navigation Menu**, expand **Approvals** and click **Timesheets**.
2. On the **Timesheets** page:
   a. Select Resource Manager from the **Approving as** list.
   b. Select **Action Required** to view timesheets awaiting your input or **All Timesheets**to view all timesheets.
   c. Configure the options in the **Filter** dock to filter the list of timesheets if required.
   d. Select the timesheets you want to approve or reject. To select multiple timesheets, use Ctrl+click or Shift+click.
   e. To approve the selected timesheets, click **Approve** or, to reject the selected timesheets, click **Reject**.

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Tip

- A setting in P6 Administrator application enables daily emails to be sent to all users listing all their timesheets which have been approved or rejected in the past 24 hours. An administrator can configure P6 to prevent timesheets from being rejected if they were submitted before the current week, before the current month, or at all.
- You can see whether there have been more units approved against an assignment than were planned by adding the Approved Units, Planned Units, and Variance Units columns to the details dock.
- The Timesheets page of the Application Settings pane specifies how timesheets are submitted and approved, including whether Resource Managers or Project Managers, or both, must review and approve timesheets. Manager approval is not required if these settings specify that timesheets are automatically approved upon submission; however, you can still review and even reject those timesheets if needed.
- The PM Approved and RM Approved status types are only valid when two approval levels are required. In this case, the PM Approved status appears in the Action Required filter for the resource manager when two approval levels are required, the PM has approved, and resource manager approval is pending; likewise, the RM Approved status appears in the Action Required filter for the project manager when two approval levels are required, the RM has approved, and project manager approval is pending.
- If you are a Resource Manager, you can review timesheets for resources to whom you have been assigned as timesheet approval manager. If you are a timesheet approval delegate for a Resource Manager, you can review timesheets for resources to whom the original manager has been assigned as timesheet approval manager.

Sending Email about Timesheets to Resources

As a timesheet approval manager, you can send an Email notification to a resource at any time. For example, you might want to remind a resource or group of resources about timesheets that need to be submitted. The resources and users you notify must already have a valid Email address stored in P6.

To send Email about timesheets:

1. On the **Navigation Menu**, expand **Approvals** and click **Timesheets**.
2. On the **Timeshests** page:
   a. Select Project Manager or Resource Manager from the **Approving as** list. Or, if you are a delegate, select the value from the list that best represents your current role.
   b. Click **Action Required** to view timesheets awaiting your input or **All Timesheets**to view all timesheets.
   c. Select a timesheet about which you want to send an email.
   d. Click **Context** and select **Email**.
3. In the **Send Email** dialog box:

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a. P6 pre-fills the recipient list and subject of the Email. Edit the recipients and subject as necessary.

b. Enter the message body in the large field below the subject line.

c. Click **Send**.

> **Note**
>
> Use the Bcc field to send Email to multiple recipients. This hides the list of recipients when delivered, safeguarding the privacy of each recipient.

Assigning a Project Manager Delegate for Timesheets

If you are a project manager, you can assign a temporary delegate to process timesheets awaiting your approval while you are not able to process them yourself. For example, you might be on business travel or vacation, or the workload requires you to assign timesheet approval responsibility to others.

To assign a project manager delegate:

1. On the **Navigation Menu**, expand **Approvals** and click **Timesheets**.
2. On the **Timesheets** page:
   a. Select **Project Manager** from the **Approving as** list.
   b. Click **Actions** and select **Assign Project Manager Delegate**.
3. In the **Assign Project Manager Delegate** dialog box:
   a. If more than one project is listed, select a project.
   b. Double click the **delegate** field, click **Select**, and select a user from the **Select a User** dialog box. Click **OK**.
   c. To activate the delegate's approval rights, select the check box for the project row where you need to designate a delegate.
   d. Click **Apply**.
   e. Repeat for each project that you want to assign to a delegate.
   f. Click **OK**.

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Tip

- You can assign any user as your delegate; however, the activities that appear in the table are dependent on the delegate's OBS access.
- If you are a project manager, the Assign Project Manager Delegate dialog displays a list of all projects for which you are responsible for processing timesheets. You can assign the same delegate to each project, or you can select a different delegate per project.
- The maximum number of projects displayed in the Assign Project Manager Delegate dialog is controlled by the Maximum number of rows displayed in trees and pick lists value on the My Preferences page Global tab.
- To disable a delegate's approval rights, clear the check box or clear the top-level option to clear all delegate options. If you want to remove a user as a potential delegate in the Assign Project Manager Delegate dialog box, select the user's name and press the Delete key or select another user to replace the previously listed user.
- Even when you activate a delegate's approval rights, you continue to have approval rights as a resource manager or project manager.
- When you add or remove a delegate's approval rights, the delegate will receive an email notification if they have a valid email address defined with their user account. When adding a delegate, the format of the message is:

  ```
  <username> has assigned you to review timesheets for the following projects:
  <project 1>, <project 2>, etc. Please contact <username> if you need
  assistance.
  ```

  <username> has assigned you to review timesheets for the following projects: <project 1>, <project 2>, etc. Please contact <username> if you need assistance.

When removing a delegate, the format of the message is:

```
<username> has removed your time approval delegate rights for the following projects:
<project 1>, <project 2>, etc. Thank you for your assistance.
```

Assigning a Resource Manager Delegate for Timesheets

If you are a resource manager, you can assign a temporary delegate to process timesheets awaiting your approval while you are not able to process them yourself. For example, you might be on business travel or vacation, or the workload requires you to assign timesheet approval responsibility to others.

To assign a resource manager delegate:

1. On the **Navigation Menu**, expand **Approvals** and click **Timesheets**.
2. On the **Timesheets** page:
   a. Select **Resource Manager** from the **Approving as** list.
   b. Click **Actions** and select **Assign Resource Manager Delegate**.
3. In the **Assign Resource Manager Delegate** dialog box:

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a. Click ••• **Select** and select a user from the **Select a User** dialog box.

b. To activate the delegate's approval rights, select **Make this delegate active**.

c. Click **Apply**.

Tip

- You can assign any user as your delegate; however, the activities that appear in the table are dependent on the delegate's OBS access.
- To disable a delegate's approval rights, clear the check box next to the delegate's name. If you want to remove a user as a potential delegate in the Assign Resource Manager Delegate dialog box, you can select the user's name and press the Delete key or select another user to replace the previously listed user.
- Even when you activate a delegate's approval rights, you continue to have approval rights as a resource manager or project manager.
- When you add or remove a delegate's approval rights, the delegate will receive an email notification if they have a valid email address defined with their user account.
- When adding a delegate, the format of the message is: `<username> has assigned you to review timesheets for the following people: <resource 1>, <resource 2>, etc.`
- When removing a delegate, the format of the message is: `<username> has removed your time approval delegate rights for the following people: <resource 1>, <resource 2>, etc. Thank you for your assistance.`

```
<username> has assigned you to review timesheets for the following people:
<resource 1>, <resource 2>, etc. <username> has removed your time approval
delegate rights for the following people: <resource 1>, <resource 2>, etc.
Thank you for your assistance.
```


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2

Dashboards

About Dashboards

A dashboard is a customizable page consisting of the data you need to perform your role. Dashboard data appears in one or more smaller regions called portlets.

There are three types of dashboards:

- **User dashboards** are private workspaces you create or customize that are not available to other users. Use them to organize information meaningful to you. For example, a dashboard that only contains My Activities, My Projects, My Documents, and My Calendar.
- **Multi-user dashboards** are accessible to a specific group of users you select. If another user configures a dashboard for your use, you can view it on the Dashboards Home page. Only the dashboard's creator can modify its content, layout, or access. Dashboards created by other users and made available to you should contain project or resource information relevant to you.
- **Global dashboards** contain information relevant to all users. All users can view them. You must have the appropriate security privileges to create, edit, and delete global dashboards.

Working with Dashboards

P6 provides customizable dashboards which represent multiple projects. You can customize the content and layout of each dashboard to display the portlets you want to view. Portlets provide a means for adding, customizing, editing, and viewing portfolio, project, resource, and personal data, as well as for collaborating with other users.

The Dashboards page displays the global and multi-user dashboards available to you as defined in your user interface view settings, along with your private user dashboards. Each dashboard displays one or more portlets.

> **Note**
>
> An administrative setting limits the number of portlets that can display in a dashboard to 12; however, administrators can specify a different maximum.

Use the Manage Dashboards page to modify the list of available dashboards that display on the Dashboards page or to create your own private or multi-user dashboards.

The two primary types of dashboards appearing on the Dashboards page enable you to view and manage project data based on your module access, security privileges, and role relative to a project.

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Global Dashboards

As an administrator, you can create one or more global dashboards, customized for your company's business needs, that apply to all P6 users. If your administrator creates global dashboards and assigns one or more to your view:

- they are automatically displayed as tabs on the Dashboards page when you login to P6
- the title of the global dashboard is determined by the administrator, for example, Personal Workspace or Special Projects
- only users with the required security privilege can modify the global dashboard's content, layout, or access

If the administrator who created the global dashboard did not select the Restrict users from changing the dashboard filter option on the Content tab of the Dashboard Details page, you can specify your own dashboard filter in the Filter by field on the dashboard.

To hide a global dashboard, choose Manage Dashboards from the Dashboards menu in the global navigation bar, then clear the dashboard's corresponding check box in the Displayed Dashboards section.

Multi-user Dashboards

As an administrator, you can configure one or more multi-user dashboards, customized for your needs. If you assign a multi-user dashboard to a user interface view, only users who have access to the dashboard as specified in the Access tab of Dashboard Preferences can view the dashboard.

Using Dashboards

As an administrator, you can configure and assign a user interface view for all users, even new users. As users, you can access global and multi-user dashboards as defined in your view when you log into P6. If you have the rights to access the Manage Dashboards page, you can create and display the dashboards you want to view. On the Manage Dashboards page, dashboards currently displayed are listed in the Displayed Dashboards section; dashboards you have access to, but that are currently not displayed, are listed in the Available Dashboards section. If you do not have the rights to access the Manage Dashboards page, you can view only the dashboards included in your view.

> ⚠ **Caution**
>
> **Caution** Exercise caution whenever you delete a multi-user dashboard. Other users might be using it and should be notified before you make such a change.

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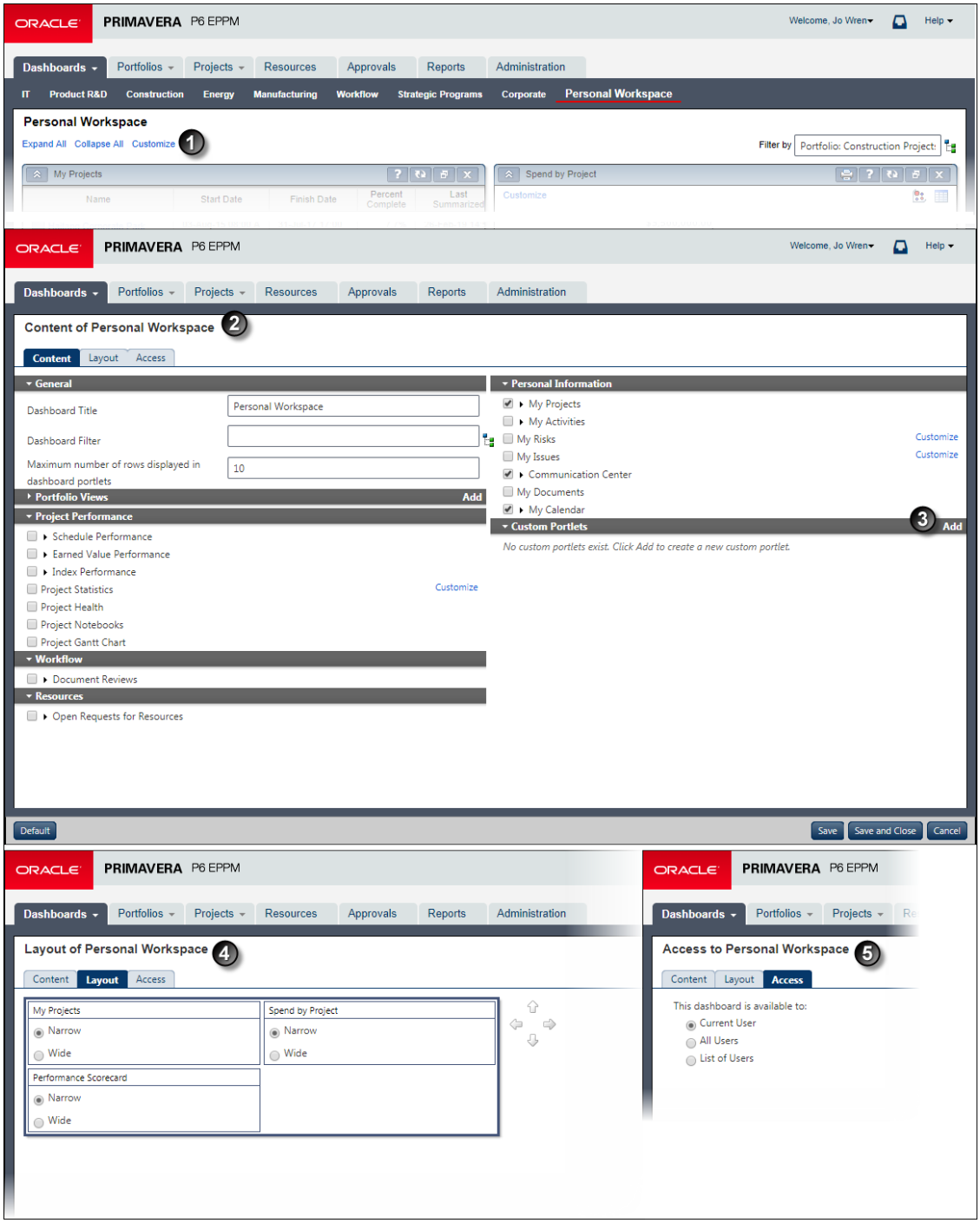


Table of Screen Highlights

Item	Description
1	**Customize button**: On the Dashboards page, select a dashboard and click Customize to open a page with three tabs where you can configure the dashboard's settings such as its portlet content, size and positioning in the dashboard layout, and user access.

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Item	Description
2	**Content tab**: In this example, the General, Portfolio Views, and Personal Information sections are expanded (the other sections are collapsed). This shows the available fields and options you can configure. Select a portlet's check box to show it on the dashboard.
3	**Custom Portlets**: Click the Add link to create your own portlets on the dashboard.
4	**Layout Tab**: Use the arrow icons or drag and drop to change the position of portlets within the dashboard. You can also choose from Narrow or Wide size.
5	**Access Tab**: Use the common controls to select the user accounts permitted to view this dashboard. You can also enable all users to view the dashboard or restrict access to only you, the current user.

Creating Dashboards

Create dashboards to display portlets and data that pertain to your role. Multi-user dashboards are also available, including global dashboards for all users to share data.

To create a dashboard:

1. In the context selector, select **Dashboard** and then click **Manage Dashboards**.
2. On the **Manage Dashboards** page, click **Create Dashboard.**
3. On the **Copy from Existing Dashboard** dialog box:
   a. Select *Default Dashboard* or an existing dashboard to use as the basis for your new dashboard.
   b. Click **OK**.
4. On the New Dashboard page, click the **Content** tab.
5. On the Content tab:
   a. Expand the **General** section.
   b. In the **Dashboard Title** field, enter a name.
6. On the New Dashboard page, click **Save and Close**.

> **Tip**
>
> Customize a new dashboard by configuring its content, layout, and user access settings.

Customizing Dashboards

You can customize dashboards to display and organize the content you want to view. For each user-defined or multi-user dashboard you create, you can customize the dashboard's content, layout, and access.

To customize dashboards:

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1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, click **Customize**.
4. On the **Customize** page:
   a. Click the **Content** tab and configure what portlets display on the dashboard page.
   b. Click the **Layout** tab and customize the display of the dashboard portlets.
   c. Click the **Access** tab and select an option to determine which users can use the dashboard.
   d. Click **Save and Close**.

Tip

- You can also select a dashboard on the **Manage Dashboards** page to customize it.
- You can always customize your private dashboards, as well as multi-user dashboards you create. You cannot customize multi-user dashboards created by another user. You must have the required security privilege to customize a global dashboard. For global and multi-user dashboards you have access to view, but not edit, you might be able to specify a user filter that overrides the dashboard filter specified by the dashboard's owner. Be aware this may lead to unexpected results.

Configuring Dashboard Content

You can determine which portlets appear on a dashboard and how they display their information. Your changes apply to all users of the current dashboard.

To customize dashboard content (select the portlets you want to appear):

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, click **Customize**.
4. On the **Dashboard Details** page, click the **Content** tab.
5. On the **Content** tab:
   a. Expand the **General** section to modify the dashboard title and its filters, or to specify the maximum number of rows displayed in portlets.
   b. Expand the other sections representing the data of interest to users of this dashboard. For example, **Resources**.
   c. Select the portlets you want to display by checking the box adjacent to the name of the portlet.
   d. For portfolio view and custom portlets, click **Add**.
   e. Expand a portlet name to configure its options, fields, and lists that determine what will display on the dashboard. Click **Customize** if available for the selected portlet.
   f. Click **Save and Close**.

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> **Tip**
>
> The default maximum number of portlets you can display in a dashboard is twelve; however, your administrator can specify a different maximum.

Configuring Dashboard Access

You can make a dashboard available only to you (user dashboard), to all users (global dashboard), or to a list of users you specify (multi-user dashboard).

To configure dashboard access:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, click **Customize**.
4. On the **Dashboard Details** page, click the **Access** tab.
5. On the **Access** tab:
   a. Select an option to determine which users can use the dashboard. If you select **List of Users**, use the common set of controls to specify which user accounts can use the dashboard.
   b. Click **Save and Close**.

> **Tip**
>
> You must have the appropriate security privilege to specify access. You cannot change the access setting for a multi-user dashboard created by another user.

Configuring Dashboard Filters

For multi-user and global dashboards, the dashboard owner can elect to restrict users from changing the dashboard filter. If the dashboard owner selects this option, the dashboard displays data according to the specified dashboard filter. If the dashboard owner does not select to restrict users from changing the dashboard filter, users can select their own filter for the dashboard.

To configure dashboard filters:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, click **Filter by** at the top of the tab and select a filter from the dialog box.

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> **Tip**
>
> You can also change the filter from the **General** section on the **Content** tab of the **Customize** page.

Configuring Dashboard Layout

You can arrange the portlets on the dashboard to accommodate your viewing preferences.

To configure the layout of the portlets on a dashboard:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, click **Customize**.
4. On the **Dashboard Details** page, click the **Layout** tab.
5. On the **Layout** tab:
   a. Select the **Narrow** or **Wide** option for each portlet to make it one or two columns wide.
   b. Select a portlet and click the up, down, left, or right arrows; or, drag and drop the portlet to change its position.
   c. Click **Save and Close**.

Showing and Hiding Dashboards

Determine which of the dashboards available to you should appear on your **Dashboards** page as its own separate tab.

To show or hide dashboards:

1. In the context selector, select **Dashboard** and then click **Manage Dashboards**.
2. On the **Manage Dashboards** page:
   a. Expand both the **Displayed Dashboards** and the **Available Dashboards** sections.
   b. In the **Available Dashboards** section, select the dashboards you want to show on the **Dashboards** page.

      When you check a dashboard, it immediately moves to the **Displayed Dashboards** section.
   c. In the **Displayed Dashboards** section:
   d. Select the dashboards you want to hide from the **Dashboards** page.

      When you check a dashboard, it immediately moves back to the **Available Dashboards** section.
   e. If more than one dashboard appears, click the up and down arrows to customize their order of appearance.

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Tip

- There is no need to save your changes on this page; they are automatically applied.
- Click **Delete** to permanently delete the dashboards you created or have permissions to delete.

Caution

Caution Exercise caution whenever you delete dashboards. Other users might be using them and should be notified before you make such a change.

Caution Exercise caution whenever you delete dashboards. Other users might be using them and should be notified before you make such a change.

About Project Performance Metrics

An array of performance metrics can be employed to measure project success against time, cost, and other standards. Baselines are also often used to measure how a project is progressing.

Project performance ratings are determined based on thresholds set for each of three metrics: schedule, earned value, and index. Project health is calculated based on these schedule performance thresholds.

Assessing Project Performance

You can use dashboards to quickly measure project performance. You can measure project earned value, schedule, index, or statistics performance according to both project cost and schedule.

To assess project performance:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Earned Value Performance**, **Schedule Performance**, **Index Performance**, or **Project Statistics** portlet and select a project to see its individual performance.

Tip

- If applicable, you can continue to follow the WBS down its line of children to view individual WBS performance.
- If a portlet is not available, add it to the dashboard.

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Assessing Project Health

You can use dashboards to quickly determine the health of a project and identify areas where you might need to focus attention.

To assess project health:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Project Health** portlet to see a quick summarization of the project.

> **Tip**
>
> If the portlet is not available, add it to the dashboard.

Customizing Project Statistics

Customize project statistics to define how columns and groups are displayed in a Dashboard.

To customize project statistics:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, click **Customize**.
4. On the **Customize** page, click the **Content** tab.
5. On the **Content** tab, expand the **Project Performance** section and click **Customize** for the Project Statistics portlet.
6. In the **Customize Project Statistics** dialog box, click the **Columns** tab.
7. On the **Columns** tab:
   a. Configure the columns in the **Selected Columns** list.
   b. Select options from each list.
8. In the **Customize Project Statistics** dialog box, click the **Group** tab.
9. On the **Group** tab, repeat the following for each level you want to customize:
   a. Select options from the lists for each **Level**.
   b. Select or clear the options.
10. In the **Customize Project Statistics** dialog box, click **Save**.
11. On the **Content** tab, click **Save and Close**.

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Identifying Critical Activities Behind Schedule

You can create an activity view to identify activities that have zero or negative float and a negative finish date variance.

To create a filter to identify activities with zero or negative float:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, click **Filters** and select **Manage Filters**.
3. In the **Manage Filters** dialog box:
    a. In the filters list select **User** or **Global**, click **Context** and select **Add**.
    b. Double click the new filter and rename it Critical Activities.
4. In the filter definition area, click **Add a filter condition...**.
    a. In the **Field** field, select Critical.
    b. In the **Operator** field, select equals.
    c. In the **Value** field, select Yes.
    d. Click **Save**.

To create a view to show which critical activities are behind schedule:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, click **Customize View**.
3. In the **Manage Views** dialog box:
    a. In the views list, click **Context** and select Add.
    b. Double click the new view and rename it Critical Activities Behind Schedule.
4. Click **Columns.**
    a. On the **Columns** tab:
        - In the **Search** bar, type Var.
        - Select a column which matches your definition of behind schedule and move it to the Selected Columns list.
5. Click **Filtering**.
    a. On the **Filtering** tab, select the **Critical Activities** filter.
6. Click **Sorting.**
    a. On the **Sorting** tab.
        - In the **Sort By** list, select the column which matches your definition of behind schedule.
        - In the **Order** list, select **Descending**.
7. Click **Save**.

About Performance Thresholds

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To help you assess the relative performance, earned value, index, and other calculations for a WBS, project, or portfolio, P6 includes performance thresholds with visual indicators. These thresholds capture the current calculation, variance, or metric and re-routes it into one of four ranges or "buckets" as follows:

- **Exceptional**: Indicates that the metric falls into a range your organization considers better than normal or exceeding expectations.
- **Acceptable**: Indicates that the metric falls into a range your organization considers aligned with normal or within expectations.
- **Warning**: Indicates that the metric falls into a range your organization considers below normal. The project may need attention.
- **Critical**: Indicates that the metric falls into a range your organization considers far below normal. The project likely requires significant corrective action.

Instead of each project member assessing a variance of, say 2.9%, and wondering if that is *good* or *bad*, thresholds will assign an easily recognized visual indicator based on standards and business goals at your organization. With thresholds, everyone can agree what `2.9%under` means.

As an example, if you consider falling 50 days behind schedule to be critical, set the critical thresholds setting to 50 days. For each performance metric, you can specify the values used to determine if the result is exceptional, acceptable, warning, or critical. Project health is calculated based on performance schedule thresholds described in this topic.

> **Note**
>
> The same metric result may be **Acceptable** for one project and a **Warning** for another.

Working with Performance Thresholds

Project performance ratings are determined based on thresholds set for each of three metrics: schedule, earned value, and index. Project health is calculated based on the performance schedule thresholds. Use the **My Preferences** page to set threshold values to aid in evaluating progress against plans for each specific project.

For each performance metric, you can specify the values used to determine if the status of a project is exceptional, acceptable, warning, or critical. For example, if you want to raise a warning flag when the project Cost Performance Index (CPI) falls 5% below 1, set the CPI warning threshold to 5 for the index metric. If the project CPI falls between 5% below 1 and the value set for the critical threshold, the project status will be displayed as **Warning** in the **Index Performance** portlet on the **Dashboard** page.

In the **Performance Threshold** section on the **Global** tab of the **My Preferences** page, if the value calculated for the project is:

- Greater than the critical value, the status will be critical .
- Greater than the warning value and less than the critical value, the status will be warning .

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- Less than the exceptional value and less than the warning value, the status will be acceptable .
- Greater than the exceptional value, the status will be exceptional .

About Cost Performance Index (CPI)

Cost Performance Index (CPI) is a measure of the value of work accomplished as a percentage of the actual costs. In this way, CPI helps you assess spending versus budget.

The CPI is computed as CPI equals Earned Value Cost divided by Actual Cost. A CPI threshold value is expressed as a ratio. A value less than one indicates that actual costs have exceeded the value of work performed. If the lower threshold value is one, an issue is generated whenever the actual costs exceed the value of the work performed.

About Schedule Performance Index (SPI)

Schedule Performance Index (SPI) is a measure of the work accomplished as a percentage of the work scheduled, SPI indicates whether you are meeting earned and planned values within your schedule.

SPI threshold values are expressed as ratios, where SPI is equal to Earned Value Cost divided by Planned Value Cost. A value less than one indicates that less work was actually performed than was scheduled. If the threshold value is one, the work performed is aligned with the expected cost of performing that work according to the schedule.

About To-Complete Performance Index (TCPI)

The To-Complete Performance Index (TCPI) is a calculated projection of the cost performance that must be achieved on the remaining work to meet recognized business goals, such as the Budget at Completion (BAC) or the Estimate at Completion (EAC).

TCPI is essentially a ratio of the *remaining work* to the *remaining funds*. It enables a project manager to determine the level of performance needed to achieve the cost or time objectives.

Based on the BAC, TCPI is calculated as (Budget at Completion minus Earned Value) divided by (Budget at Completion minus Actual Cost). Based on the EAC, TCPI is calculated as (Budget at Completion minus Earned Value) divided by (Estimate at Completion minus Actual Cost). P6 initially sets the BAC equal to the EAC in order to use only EAC in TCPI calculations.

About Portlets

Portlets are small expandable windows representing a specific theme or particular subject matter. They are only available on dashboards and they display data based on association, ownership, or applied filters. Portlets provide a concise way to organize, present, and assess project data within a single page and also offer tools for adding, modifying, and personalizing portfolio, project, and resource data. Portlets on shared dashboards provide a centralized place for collaborating with other users.

Working with Portlets

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As a project manager or administrator, you can arrange the portlets you want on a shared dashboard for other users to view.

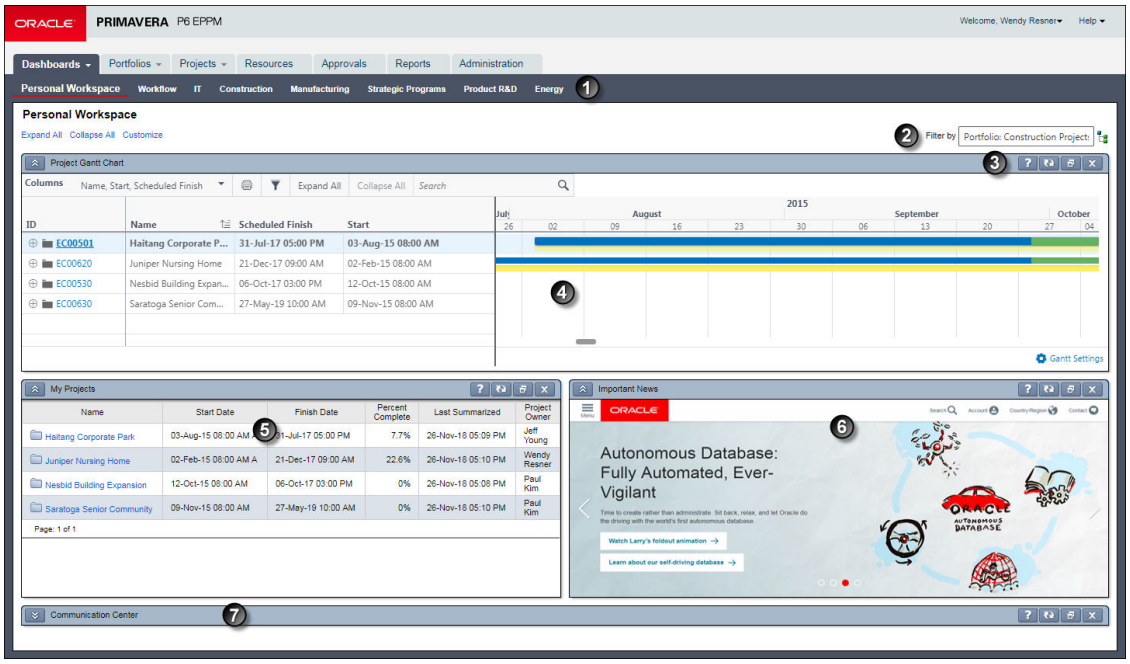


Table 1 of 2: Working with Portlets

Item	Description
1	**Dashboards Page**: Portlets appear on dashboards. In this example, the **Dashboards** page presents a series of tabbed dashboards. The currently selected dashboard also shows links for expanding and collapsing its portlets, as well as a **Customize** button where you can configure the portlets that appear.
2	**Dashboard Filter**: The same portlets are capable of displaying data for any number of projects. Use this field to filter all portlets on a dashboard by project, portfolio, or projects sharing a project code.
3	**Portlet Titlebar**: In addition to its title, each portlet's titlebar shows icons for expanding or collapsing, accessing help, refreshing, maximizing or restoring, and closing it. Some portlets also include a print icon.
4	**Wide Layout Size**: The **Project Gantt Chart** portlet is positioned on top and set to a wide size. Each portlet includes features unique to itself, such as toolbars, customizable elements, filters, links to other data, and mouseover tooltips.
5	**Narrow Layout Size**: The **My Projects** portlet is positioned below it and to the left in a narrow size. This portlet requires that you select a resource team before it can display any data.
6	**Custom Portlet**: You can use a portlet to display custom online content.
7	**Collapsed Portlet**: The **Communication Center** portlet is collapsed. Expand it to view its contents.

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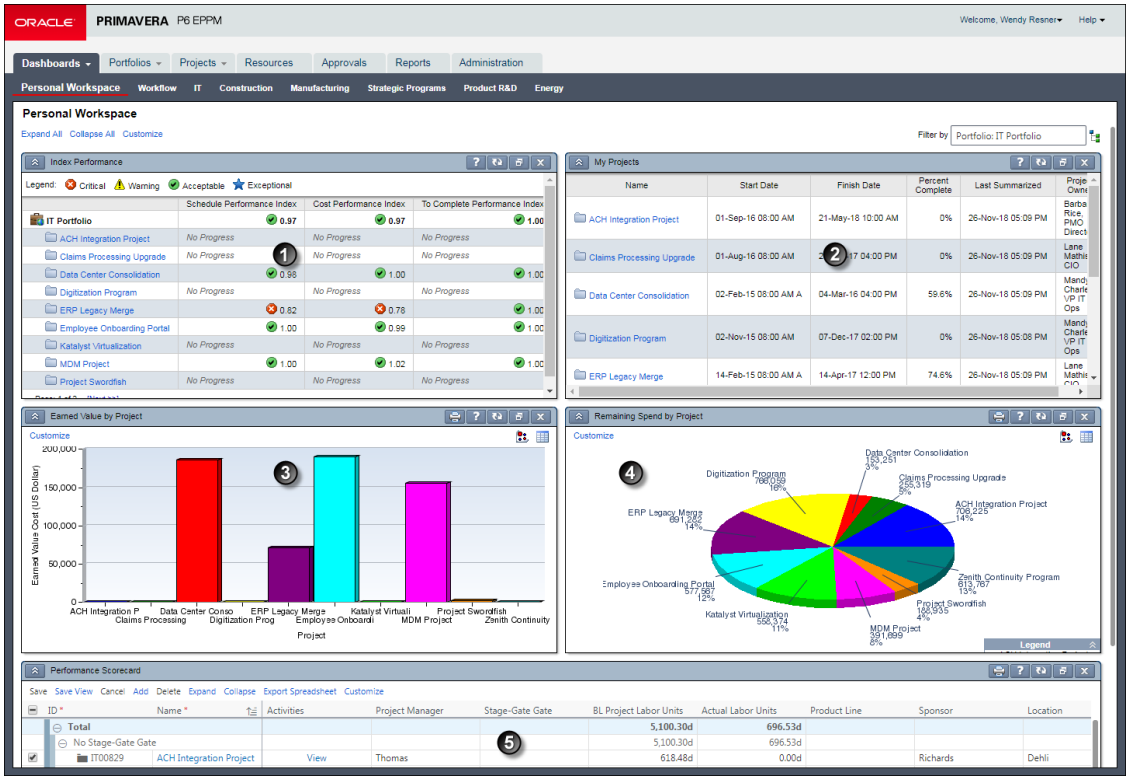


Table 2 of 2: Working with Portlets

Item	Description
1	**Performance Portlet**: Quick visual indicators immediately report status in the Schedule, Earned Value, and Index Performance portlets.
2	**My Projects Portlet**: This portlet provides a high-level listing of each project's current status. Click a project name link to open the project.
3	**Histogram**: This portfolio view portlet has been formatted as a histogram comparing earned value data per project.
4	**Pie Chart**: This portfolio view portlet has been formatted as a pie chart and configured to show its data labels and a color-coded legend. Other formats available include bubble charts, scorecards, and three varieties of histogram.
5	**Scorecard**: This portfolio view portlet has been formatted as a scorecard with a custom assortment of columns.

List of Portlets

Listed below, grouped by theme, are all possible portlets available on the **Dashboards** page. The portlets available in your configuration may vary. Click the portlet name to view a description of the portlet, the steps required to navigate to it, and any related tasks you can perform using the portlet.

Personal Data for the Currently Logged-In User

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- Communication Center Portlet of the Dashboards Page
- My Activities Portlet of the Dashboards Page
- My Issues Portlet of the Dashboards Page
- My Projects Portlet of the Dashboards Page
- My Calendar Portlet of the Dashboards Page
- My Risks Portlet of the Dashboards Page

Portfolio Views

- Portfolio View Portlet of the Dashboards Page

Project Performance

- Earned Value Performance Portlet of the Dashboards Page
- Schedule Performance Portlet of the Dashboards Page
- Index Performance Portlet of the Dashboards Page
- Project Statistics Portlet of the Dashboards Page
- Project Health Portlet of the Dashboards Page
- Project Notebooks Portlet of the Dashboards Page
- Project Gantt Chart Portlet of the Dashboards Page

Resources

- Open Requests for Resources Portlet of the Dashboards Page

Custom Portlets

- Custom Portlet of the Dashboards Page

Custom Portlets

- Custom Portlet of the Dashboards Page

Project Collaboration

- Communication Center Portlet of the Dashboards Page

Project Performance

- Schedule Performance Portlet of the Dashboards Page
- Earned Value Performance Portlet of the Dashboards Page
- Index Performance Portlet of the Dashboards Page
- Project Statistics Portlet of the Dashboards Page
- Project Health Portlet of the Dashboards Page

Customizing Portlets

In general, click **Customize** within a portlet to set options for it. The following tasks help guide you through the steps to customize the specific portlets listed.

Customizing the My Risks Portlet

Customize the **My Risks** portlet to determine which columns and filters to apply to the portlet.

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To customize My Risks:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Risks** portlet and click **Customize**.
4. In the **Customize Risks** dialog box, click the **Columns** tab.
5. On the **Columns** tab, select columns from the **Available Columns** list.
6. In the **Customize Risks** dialog box, click the **Filter** tab.
7. On the **Filter** tab:
   a. Select an option from the **Display** list.
   b. If applicable, select or clear the options.
8. In the **Customize Risks** dialog box, click **Save**.

Customizing Portfolio View Portlets

Customize portfolio view portlets to determine what and how information will display in the portlet.

To customize portfolio view portlets:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the portfolio view portlet you want to customize and click **Customize**.
4. In the **Customize** dialog box:
   a. Configure the settings to determine the information that appears in the portfolio view portlet. The settings vary based on your choice of chart, scorecard, or histogram in the **Type** field.
   b. Click **Save**.

Tip

- You can further customize scorecard portfolio view portlets to reflect the data you need.
- You can also customize **Portfolio View** portlets from the **Content** tab of the **Customize Dashboard** page.

Creating Custom Portlets

Create custom portlets if the existing portlets do not fulfill your needs.

To create custom portlets:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.

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3. On the dashboard, click **Customize**.
4. On the **Customize** page, click the **Content** tab.
5. On the **Content** tab, expand the **Custom Portlets** section.
6. In the **Custom Portlets** section:
    a. Click **Add** on the Custom Portlets heading line.
    b. Enter a title for the new portlet.
    c. Provide the URL for the new portlet.
7. On the **Content** tab, click **Save and Close**.

Creating Portfolio View Portlets

Create portfolio view portlets to display project portfolio data in a bubble chart, pie chart, scorecard, histogram, side-by-side histogram, or stacked histogram portfolio view.

To create a portfolio view portlet:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, click **Customize**.
4. On the **Customize** page, click the **Content** tab.
5. On the **Content** tab, expand the **Portfolio Views** section and click the **Add** link.
6. In the **Create View** dialog box, select a new or existing portfolio view and click **OK**.
7. In the **Portfolio Views** section, expand the new view:
    a. Enter a name in the **Title** field.
    b. Select a portfolio view format from the **Type** list.
    c. Configure the settings that vary based on your choice in the **Type** field. If you selected *Scorecard*, click **Customize** to configure it.
8. On the **Content** tab, click **Save and Close**.

Tip

- To show the portlet on the dashboard, select the check box near its name before you click **Save and Close**. To remove the portlet from the dashboard, clear its check box. To remove the portlet from appearing as a potential portfolio view, click **Remove**.
- Your security access settings determine if you can create new portlets based on new or existing portfolio views.

Document Review Portlets

The following topics apply to document reviews in portlets.

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Participating in Document Reviews

If you have configured the optional *Content Repository* with P6, and you are assigned as a reviewer for a specific document, you can review documents from the Document Reviews portlet on a dashboard. As a reviewer, you can access review details, add comments or attachments, and approve or reject the document.

To respond to a document review:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Document Reviews** portlet and click the **Action Required** tab.
4. On the **Action Required** tab:
   a. Select a document to review.
   b. Click **View** to view the document.
   c. Click **Details** to view attachments and comments from previous reviewers.
   d. Click **Approve** or **Reject**.
5. In the Approve Document Review or Reject Document Review dialog box:
   a. Enter any supporting comments.
   b. Click **Approve** or **Reject**.

Tip

- If the review type is set to Everyone Must Review in Sequence, the review will not appear in subsequent reviewers' Action Required portlets until the document has been approved by the previous reviewer.
- If the Document Reviews portlet is not available, configure dashboard content and add it to the dashboard.

Terminating Document Reviews

You can terminate document reviews that you initiated.

To terminate a document review:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Document Reviews** portlet.
4. In the **Document Reviews** portlet, click the **My Reviews** tab.
5. On the **My Reviews** tab:
   a. Select the name of the document review you want to terminate.
   b. Click **Terminate**.

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> **Tip**
>
> Configure dashboard content to add a portlet to the dashboard if it is not available.

Opening Projects from Dashboard Portlets

You can open projects from within certain project-related portlets such as **My Projects** or **Project Health**. You must have OBS access, be the owner, or assigned as a resource or activity owner in the project. In these portlets, wherever the project name appears as a link, you can click it to open the project in the **Projects** section.

> **Note**
>
> Not all portlets allow you to open projects in this fashion. For example, the **Project Statistics** and **Schedule Performance** portlets will not open the project when its project link is clicked. Instead, these portlets offer more detailed views into the data they represent.

To open a project from within a portlet:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the portlet and select a project.

> **Tip**
>
> - In scorecard **Portfolio View** portlets, click the name of the project you want to open.
> - In the Project Gantt Chart portlet, hold down the **Ctrl** key to select multiple projects and click **Open Projects** in the portlet toolbar to open them.

Sending Email to Resource Teams

You can send email to an entire resource team of your choosing.

To send Email to a resource team:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Resource Team Summary** portlet:
4. In the **Resource Team Summary** portlet:
   a. Click **Filter by** and select the team to which you want to send an Email.
   b. Click **email resource team**.

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5. In the **Email** dialog box:
   a. Edit the recipient list, message, and subject as needed.
   b. Click **Send Email**.

> **Tip**
>
> You must have an Email address listed in you user profile to send an Email.

Assigning Resources to Unstaffed Activities Using Open Requests for Resources Portlet

You can assign resources to activities that have been assigned a role, but do not currently have resource assignments.

To assign resources to unstaffed activities:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Open Requests for Resources** portlet.

> **Note**
>
> If the portlet is not displayed, click Customize. On the Customize page, click the Content tab and select the Open Requests for Resources portlet under the Resources section. Click Save and Close.

4. In the **Open Requests for Resources** portlet, click a role name or project name, depending on your customization options.
5. On the **Resource Staffing** page:
   a. Select the **Unstaffed** display option.
   b. Select the **Select** option for each unstaffed activity to which you want to assign the same resource.
   c. Click **Assign Resource**.
6. In the **Assign Resources** dialog box:
   a. Select a resource.
   b. Optionally click to view the usage of the selected resource.
   c. Click **Select**.
   d. Choose whether settings from the resource or assignment are used and click **OK**.
7. Click **Dashboards** to return to the **Open Requests for Resources** portlet.

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Tip

- The list of resources you can select from is determined by your resource access privileges and the current project association of the individual resources.
- To review allocation details before assigning, in the Assign Resource dialog box, select a resource and click **Show Usage** ».
- You can also assign resources to activities from the Assignments detail window of the Activities page.

Sending Email Notifications about Resource Assignments

An automatic notification feature can be configured to send Email to the affected resources when you add, change, or remove a resource assignment.

To configure P6 to automatically send Email about resource assignments:

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Global** tab.
3. On the **Global** tab, expand the **General** section.
4. In the **General s**ection:
   a. Select the **Send Email to resources upon adding or removing assignments** option.
   b. The system automatically selects the Prompt before sending Email option. Clear the option if you do not want prompts.
5. On the **Global** tab, click **Save and Close**.

Tip

- The address and subject line for the Email are generated based on the specific assignment circumstances. For example, when you first assign a resource to an activity, the Email subject line tells the resource they have been assigned and provides the activity name. In all cases, the message text includes the project name, resource start and finish dates, planned units, and planned units/time.
- When the automatic Email option is on, confirmation messages are sent to you, indicating the names of the recipients.
- If a resource does not have an Email address specified on the Resources tab of the Administration page, no Email can be sent.
- When a resource is replaced on an activity, an Email is sent to the removed resource and to the replacement resource.

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Portfolios

About Portfolios

A portfolio is a collection of projects. Group projects into portfolios so you can easily view data from more than one project at a time. For example, you might filter a dashboard by a portfolio to view a wide range of information for multiple related projects at one time.

In a more strategic sense, you should group projects and programs together to facilitate the effective new product development and management of those projects to optimize your organization's success at meeting business objectives.

Using portfolios, you can review summary data and status information for the group as a whole or for individual projects in a portfolio.

You can create portfolios for your own use or for sharing with other users. You can also create multiple user portfolios, which are available to a selected set of users and global portfolios, which are available to all users.

Portfolio views, such as pie charts, enable you to compare portfolios visually. For example, compare costs for all projects in region A (one portfolio) against those in region B (another portfolio).

Working with Portfolios

To begin using the analysis features in the portfolios section, you must already have created and updated multiple projects. Begin your work in the portfolios section by creating and configuring at least one portfolio. It's also possible for another user to create one and share it with you. Over time, your team will create additional portfolios and views in order to perform comparative analysis, obtain status, and perform other operations.

When creating a portfolio, decide whether you want to hand pick the projects that it will comprise, or if you want the application to create and periodically update the set of projects in your portfolio based on your filter criteria. Either way, you can change these settings at any time.

> **Note**
>
> An administrative option is available to increase or decrease the refresh interval for filtered portfolios. A portfolio will be refreshed when you view its projects in either a dashboard or portfolio view, if it has not been refreshed within the interval specified in the Filter Portfolio Stale Period on the Data Limits page of the Application Settings page.

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Opening Portfolios

When working in the portfolios section of the application, it is important to open only the project group you want to include in the various work areas. You can specify these project groupings by EPS, portfolio, or project code. You can open a portfolio in any of the following ways:

To open a portfolio:

1. In the context selector, select **Portfolios**, then click **Open Portfolio**.
2. In the **Open Portfolio** dialog box
   a. Select a grouping method on the **Organize By** list.
   b. Expand the resulting groups to select the entry representing the projects you want to open collectively as a portfolio.
   c. Click **Open**.

Tip

- To re-open the last portfolio you were working with, click **Portfolios**.
- To open another recently used portfolio, click the **Portfolios** menu and choose the portfolio from the list.

Creating Portfolios

Perform these steps to create a new group of projects called a portfolio. When creating a portfolio, decide whether you want to hand pick the projects that it will comprise (manual), or if you want the application to create the set of projects in your portfolio based on your filter criteria (automatic). Either way, you can change these settings at any time.

To create a portfolio:

1. In the context selector, select **Portfolios**, then click **Manage Portfolios**.
2. In the **Manage Portfolios** dialog box:
   a. In the Portfolios list:
      - Hover over a group representing the type of portfolio you want to create, **Global**, **Multple Users** or **User**.
      - Click **Context** and select **Add**.
   b. Select **Manual** or **By Filter**.
      - If you selected **Manual**, add the projects you want to include from the Available Projects list to the Selected Projects list.
      - If you selected **By Filter**, enter your filter criteria.
   c. If you added the portfolio in the Multiple Users group, select **Access** and configure access to the portfolio by making a selection from the **Available Users** list.
   d. Click **Save**.

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Tip

There are two alternate ways to create a portfolio:

- Click Portfolios, click Portfolio Analysis, and then select a scorecard in the View field. From the toolbar, click Create Portfolio from Selected Projects.
- Click Portfolios, click Capacity Planning, and then click Create Portfolio from Selected Projects.

Creating Projects While Working with Portfolios

Generally, you create projects while working in the Projects section of the application. However, you can also create a project while viewing a portlet in the Dashboards section or analyzing a portfolio in the Portfolios section. Refer to the tasks below:

- Creating Projects in a Portfolio View Scorecard Portlet
- Creating Projects on the Portfolio Analysis Page

Creating Projects in a Portfolio View Scorecard Portlet

Generally, you create projects while working on the **EPS** page in the Projects section of the application. However, it is also possible to create what-if projects while viewing a portfolio view scorecard portlet on a dashboard.

To create a project in a portfolio view scorecard portlet:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, locate your portfolio view scorecard portlet's titlebar and click **Click here to maximize or minimize this section** to expand and maximize it.
4. In the expanded and maximized portfolio view scorecard portlet:
   a. Select a project row.
   b. Click **Add**.
5. For the first project you create, if defaults are not already set, the **Add Project** dialog box appears:
   a. Select a default **Parent EPS** element.
   b. Select a default **Responsible Manager**.
   c. Click **Select**.
6. In the portfolio view scorecard portlet:
   a. Select your new project row by clicking on it in the **Name** column.
   b. Enter a name for your new project to replace the default name.
   c. Click **Save**.

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Tip

- When you create a project from a scorecard on a dashboard, the project is automatically added to the filter currently associated with the dashboard. However, if the dashboard is filtered by a global portfolio and you do not have the required security privilege to edit global portfolios, the new project is removed from the scorecard when you click **Save**.
- You can change the **Project Status** field on the **General** detail window of the **EPS** page. For example, you may later want to change a project from *What If* to *Planned* status.

Creating Projects on the Portfolio Analysis Page

Generally, you create projects while working on the **EPS** page in the Projects section of the application. However, it is also possible to create what-if projects while analyzing portfolios. During the process of evaluating a portfolio, you will often want to capture a new project idea.

To create a project on the portfolio analysis page:

1. On the **Navigation Menu**, expand **Portfolios** and select **Portfolio Analysis**.
2. On the **Portfolio Analysis** page:
   a. Make sure you are working with the primary portfolio (at top or left) and not the comparison set for the next steps.
   b. In the **View** list, select a portfolio view scorecard.
   c. In the scorecard, select a row where you want to add a new project.
   d. Click **Add Project**.
3. In the **Add Project** dialog box:
   a. Specify a **Project ID** and **Project Name**.
   b. Select an **EPS** element.
   c. Select a **Responsible Manager**.
   d. Select a **Project Planned Start** date.
   e. Click **Create**.

Tip

You can change the what-if project's **Project Status** field value on the **General** detail window of the **EPS** page. For example, you may later want to change a project from *What If* to *Planned* status.

Assigning Projects to a Portfolio

When comparing portfolios on the Portfolio Analysis page, you can assign a project to the selected portfolio in either half of the page.

To assign a project to the selected portfolio:

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1. In the context selector, select **Portfolios**.
2. In the context selector:
   - Click **Open Portfolio** to select a group of projects by portfolio type, EPS node, or project code.
   - Or choose a portfolio in the Most Recently Used list.
3. On the **Navigation Menu**, expand **Portfolios** and select **Portfolio Analysis**.
4. On the **Portfolio Analysis** page, click **Assign a project to this portfolio**
5. In the **Select Project** dialog box select a project and then click **Select**.

> **Tip**
>
> You cannot assign a project to a portfolio when displaying a scenario; you must select *<Latest Data>*.

Defining Performance Thresholds

To help you assess the relative performance, earned value, index calculations, and other metrics for a WBS, project, or portfolio, you can set performance thresholds. These thresholds capture the current calculations, variances, and metrics and re-route them into one of four ranges or "buckets" as follows:

- **Exceptional**: Indicates that a WBS, project, or portfolio is exceeding expectations.
- **Acceptable**: Indicates that a WBS, project, or portfolio is performing within an expected range.
- **Warning**: Indicates that a WBS, project, or portfolio needs attention and is performing below expectations.
- **Critical**: Indicates that a WBS, project, or portfolio requires significant corrective action.

To define your own performance thresholds:

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click **Global** tab.
3. On the **Global** tab:
   a. Expand the **Performance Threshold** section and then expand **Performance, Earned Value, and Index**.
   b. For each parameter, shown with its color-coded visual indicator, enter a threshold value. For lists, select a value from the list.
   c. Click **Save and Close**.

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> **Tip**
>
> If any logical constraints are not satisfied by your selections, a message appears at the top of the page. For example, if you set a warning to 25 days late, a critical threshold cannot be set to 10 days late; logical constraints require that critical thresholds be greater than warning thresholds. Correct the thresholds and try saving again.

About Portfolio Views

A portfolio view is a scorecard or chart providing high-level information spanning an entire group of projects. Portfolio views can appear in an individual user's personal dashboard or shared among multiple users in shared dashboards. They are also used when comparing portfolios on the **Portfolio Analysis** page.

Working with Portfolio Views

Each user's personal portfolio views and any global portfolio views appear on the **Portfolio Views** page. From this page, you can manage views in your choice of scorecard, bubble or pie chart, or one of the types of bar charts or histograms as detailed below:

- **Scorecard:** Similar to tables or spreadsheets, you can display the columns you want in scorecards on the Portfolio Analysis page, the Capacity Planning page, or the Portfolio View portlet. To assist with more sophisticated analysis on a set of projects, you can also use a scorecard to conduct a waterline analysis. A waterline is a visual modeling tool that ranks projects into two separate groups by sorting and applying a constraining limit. Scorecards also permit you to edit some of their fields.
- **Bubble Chart:** A bubble chart displays four project data fields. The X-axis represents the values from one data field, the Y-axis represents a second field, the size of the bubble represents a third, and the field selected for grouping the data represents a fourth field. A bubble chart is useful when you want to analyze three independent project variables at one time, grouped by a fourth set of values.
- **Pie Chart:** A pie chart is a circular chart divided into proportional slices, where each slice represents its contribution to the whole. The size of the slice represents the value of the selected data field. A pie chart is useful for analyzing relative parts of a whole.
- **Histogram:** A basic histogram lets you analyze project data in a vertical bar chart format. You can select a project data field to display on the X-axis and another field to display on the Y-axis of the chart; typically, the X-axis represents categorical data, and the Y-axis represents individual data values.
- **Side-by-Side Histogram:** A histogram where categorized data can be grouped, side-by-side, to assist with comparisons. A side-by-side histogram chart is useful when analyzing relative parts of a whole. For example, use a side-by-side histogram to analyze original budget based on project status.
- **Stacked Histogram:** A more sophisticated version of the histogram, where categorized data is grouped, or stacked, to assist with comparisons. A stacked histogram is useful when analyzing relative parts of a whole.

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Creating Portfolio Views

When creating portfolio views, specify the scorecard or chart type, the project information you want to appear, and the users who will have access to the view. Portfolio view types include scorecard, bubble chart, pie chart, and three types of histograms (basic, side-by-side, and stacked).

To create a portfolio view:

1. In the context selector, select **Portfolios**, then click **Manage Portfolio Views**.
2. On the **Portfolio Views** page, click **Create View**.
3. On the **Create View** dialog, decide if your new view should be entirely new or based on an existing view.
   - To create an entirely new view, expand **New Portfolio View**, select a chart type, and click **OK**.
   - To create a new view based on an existing view, expand **Existing View**, select one from the expanded user and global views shown and click **OK**.
4. On the **Create Portfolio View** page, expand any collapsed groupings, complete the required fields, and specify any additional details about the view. The fields on the Create Portfolio View page automatically adjust based on the value you select for the **Type** field.
5. Click **Save**.

Tip

- If you add a project to a scorecard, refresh your browser to see the data in the scorecard.
- You can use any of these alternate methods to create a portfolio view:
- Click **Portfolios**, click **Portfolio Analysis**, and then click **Create Portfolio View**.
- Click **Portfolios**, click **Portfolio Analysis**, configure a particular view, and then click **Save As**.
- Click **Dashboards**, select a dashboard, and then click **Customize**. In the Portfolio Views group, click **Add**. Using this method, your new view appears in the Portfolio View portlet with the title you assigned to it.

Working with Portfolio View Scorecards

A scorecard is a type of portfolio view you can use to analyze project data in a table with projects in rows and up to 30 data fields in columns. You can display scorecards on the Portfolio Analysis page, the Capacity Planning page, and the Portfolio View portlet, and choose the columns of information you want to display. A scorecard is beneficial when you want to analyze data in a spreadsheet-type format.

To assist with more sophisticated analysis of a set of projects, you can also use a scorecard to conduct a waterline analysis. A waterline is a visual modeling tool that ranks projects into two separate groups by sorting and applying a constraining limit.

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It is also possible to edit some global and project data in a scorecard, such as project codes, user-defined fields, and responsible manager. Additionally, you can add projects with default data and delete projects directly from a scorecard.

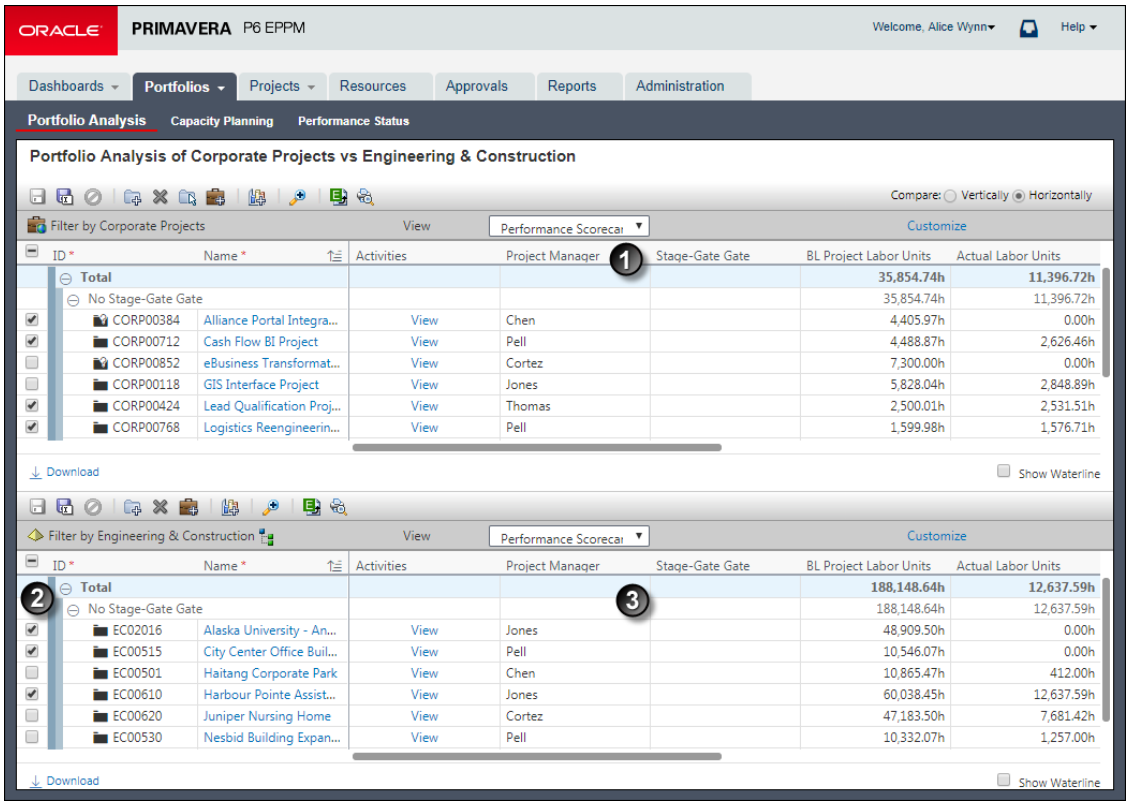


Table of Key Scorecard Elements

Item	Description
1	**Scorecard** work area: The first scorecard will appear in this upper work area.
2	**Project Selection** options: Select an option to add a project's data to the cumulative **Total** line.
3	**Scorecard** work area: The second scorecard will appear in this lower work area. In this example, the user has customized the view with a waterline. Use a waterline to analyze a project group by sorting projects into two separate groups based on a defined sorting and constraint limit. Projects above the waterline, displayed with a white background, are those that fall outside the constraint limit value; all other projects, displayed with a light blue background, appear below the waterline.

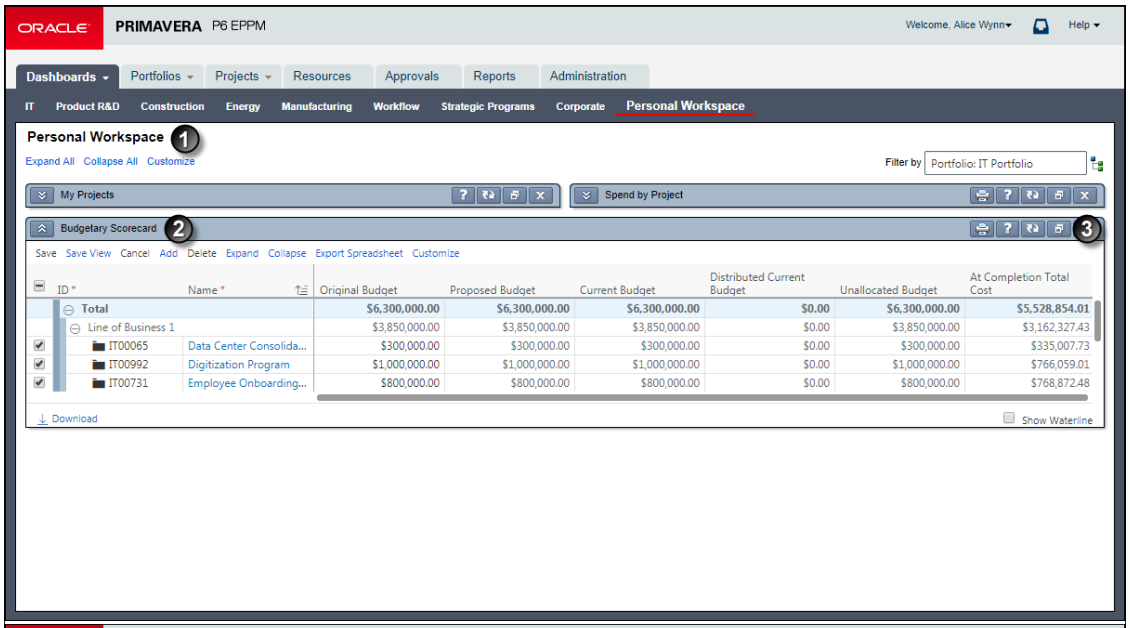
> **Note**
>
> To support comparative analysis, the Portfolio Analysis work area is divided into two parts. The elements above generally appear within both parts.

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More About Scorecards

You can save the same scorecard view used on the Portfolio Analysis page and display it in private or share it later in a portlet on a dashboard.

> **Note**
>
> The application also makes use of general tables of data also referred to sometimes as scorecards; however, they are not the same as your individually named portfolio view scorecards.



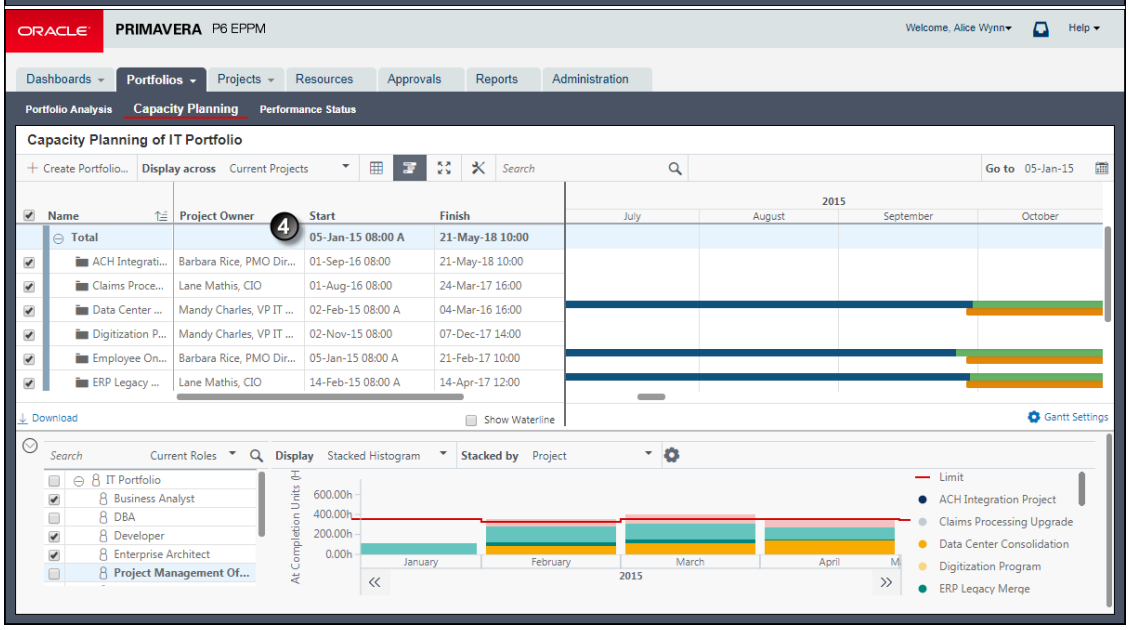


Table of Related Scorecards

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Item	Description
1	**Dashboard:** The **Personal Workspace** dashboard. You can show portfolio views on private, multi-user, or global dashboards.
2	**Scorecard in a portlet:** The **Budgetary Scorecard** displays in a portlet on a dashboard. This example demonstrates a named portfolio view scorecard.
3	**Click here to maximize or minimize this sectionicon**: Click to maximize and expand the scorecard. Additional command links will appear at the top of this portlet when it is maximized.
4	**Scorecard on the Capacity Planning page:** This example demonstrates a general table format also referred to as a scorecard; however, this is not a named portfolio view scorecard.

Working with Portfolio View Bubble Charts

In addition to plotting data along the x-axis and y-axis, bubble charts also adjust the relative size of each entity's bubble or circle to depict a third value, and they group the data by still a fourth value.

Example: Sheila wants to compare the projects in the *Engineering & Construction* portfolio with those in *Energy Services*. She navigates to the **Portfolio Analysis** page and customizes the portfolio views, filters, and bubble chart options shown below. She sets *Original Budget* to display on the x-axis and *At Completion Total Cost* on the y-axis. Next, she selects *Remaining Total Cost* as the **Bubble Size** and sets the **Group by** list to *Project*. When the chart appears, each bubble represents a single project; the size of the bubble represents the *Remaining Total Cost* value for the project; the bubble's position on the x-axis represents its *Original Budget* value for the project; and the bubble's position on the y-axis represents the *At Completion Total Cost* value for the project. Sheila configures a second bubble chart to display these settings for another portfolio. The chart data is again grouped by project.

> **Note**
>
> To support comparative analysis, the Portfolio Analysis work area is divided into two nearly identical parts with the key difference being the data that appears in each part. The elements below appear within each part.

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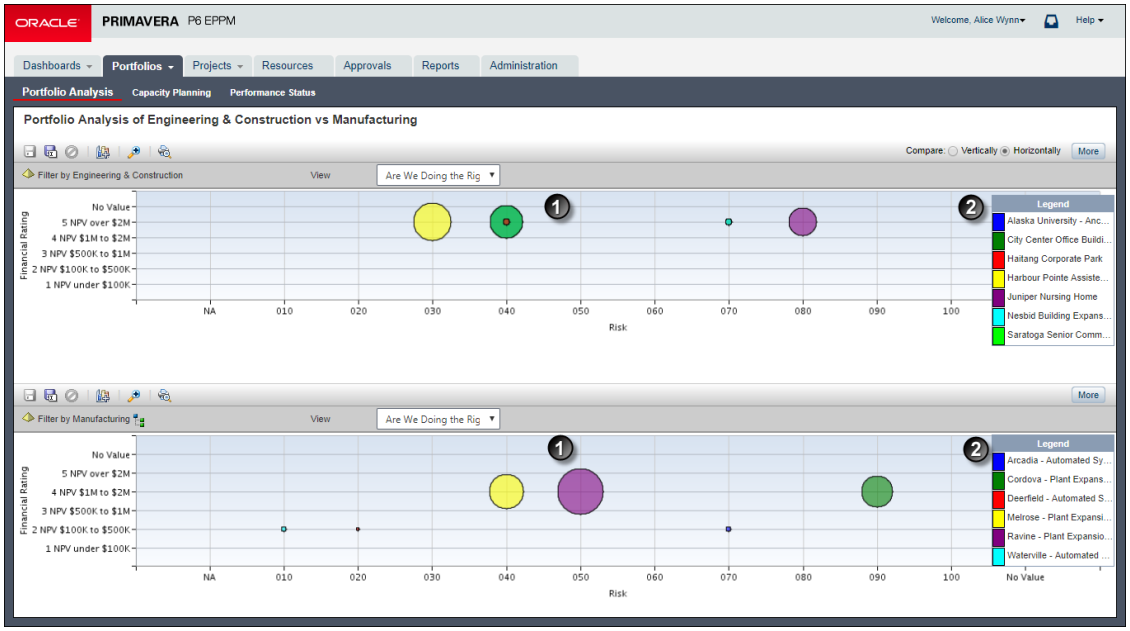


Table of Key Bubble Chart Elements

Item	Description
1	**Bubble Chart**: Your chart will appear in this section. Mouse over a bubble to view its source data.
2	**Legend**: Based on the **Group By** field, each item in the legend is assigned a color from the selected **Color Theme** palette.

Working with Portfolio View Pie Charts

A pie chart is a circular chart divided into slices, where each slice represents a particular group. The size of the slice represents the value of the selected data field, relative to the group's total value. A pie chart is useful for analyzing relative parts of a whole.

Example 1: You can create a pie chart to analyze the at completion total cost for projects, based on project status. To do this, customize the chart and select At Completion Total Cost as the data field, then choose to group by Project Status. When the chart displays, each slice represents a single project status (e.g., Planned, Active, Inactive, What If); the size of the slice represents the At Completion Total Cost value for all projects assigned the project status.

Example 2: The pie chart below shows **Current Budget** in slices representing **Location**.

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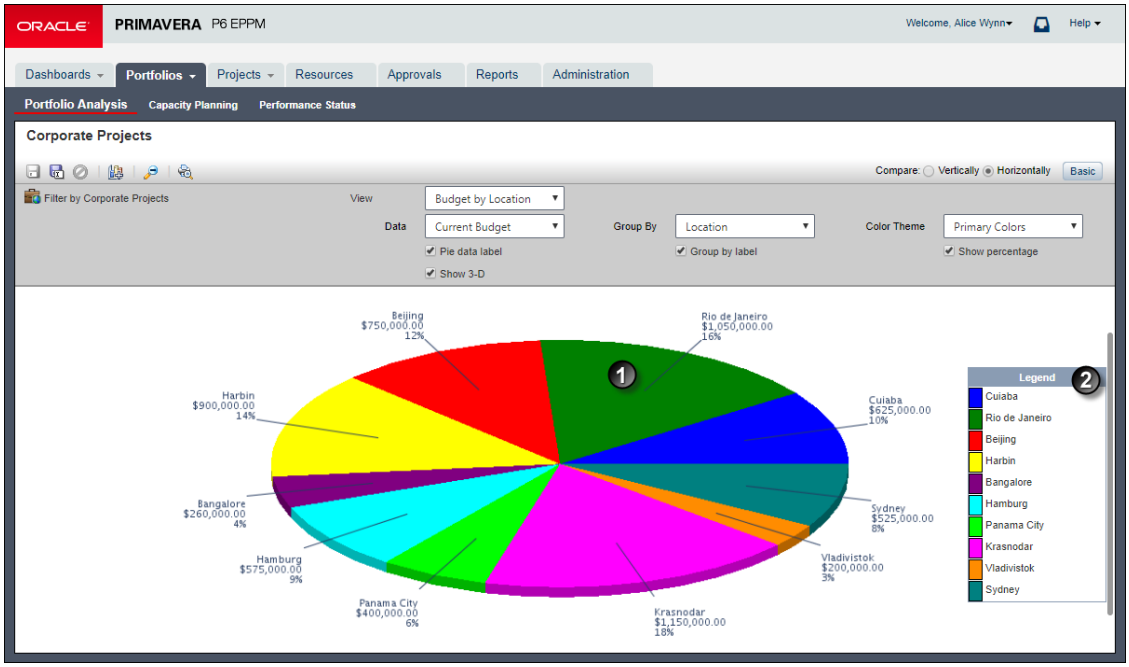


Table of Common Pie Chart Elements

Item	Description
1	**Slice**: The proportionate contribution of each data group to the total is represented by a color-coded wedge or piece of the pie. In the example, this slice represents Rio de Janeiro's value of $1,050,000.00 which equates to 16% of the **Current Budget** by **Location**.
2	**Legend**: Based on the Group By field, each item in the legend is given a color based on the selected color theme.

Working with Portfolio View Histograms

Histograms render data into multi-colored bars with relative sizes to help you make fast comparisons. Three similar types of histograms are available: basic, side-by-side, and stacked.

Example: Todd wants to analyze current budget values for each project in the *Corporate Projects* portfolio. He also wants to compare this data to the **BL Total Cost** for the current project phase. He navigates to the **Portfolio Analysis** page and customizes the portfolio views, filters, and histogram chart options shown below. He sets **Project** to appear on the x-axis and **Current Budget** on the y-axis. When the chart appears, each bar represents a project; the size of the bar represents the **Current Budget**. He configures a second histogram to display the **Current Phase** on the x-axis and **BL Total Cost** on the y-axis.

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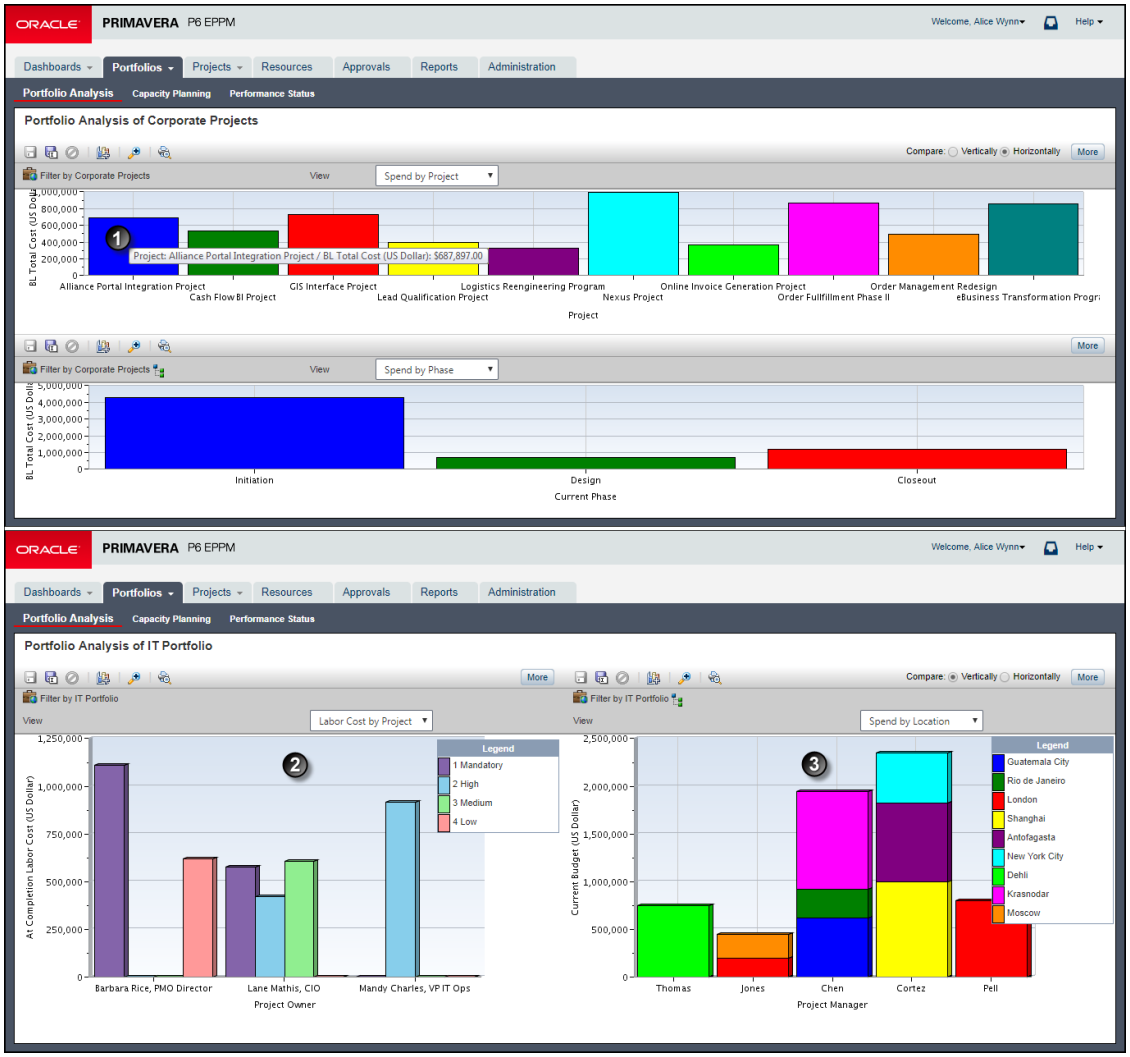


Table of Key Histogram Elements

Item	Description
1	**Tooltip**: Mouse over a bar to view a summary.
2	**Side-by-Side Histogram**: The **Group By** field is added. In this example, **At Completion Labor Cost** is tracked along the y-axis for each **Priority** grouped by **Project Owner** along the x-axis.
3	**Stacked Histogram**: The **Stack By** field is added instead of the **Group By** field. In this example, the **Current Budget** is graphed for each **Project Manager**. The data is stacked by location.

About What-if Analysis

Rooted in business management principles of sound decision theory (*which option should we pursue?*) is the what-if analysis technique aimed at assessing the results and impacts of potential scenarios. Its name stems from the question, "*What if* the scenario actually came to fruition?"

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Use what-if projects to determine the impact different costs or investments have on business goals. Unanticipated adversities can make a business or project unstable and proactive handling of these uncertainties is required. With what-if analysis, your organization can evaluate the feasibility of completing the project under unfavorable conditions, prepare contingency and response plans to avoid or overcome the worst scenario, and mitigate the impact of uncertain or unexpected situations.

Capacity Planning

About Capacity Planning

Executives, managers, and planners tasked with managing a portfolio of existing projects and new opportunities in the pipeline need a way to evaluate both active and proposed projects to answer one essential question: *Do we have the resource capacity to successfully complete all the work?* The Capacity Planning process helps answer this question. It reveals when your organization is over or under allocated. Decisions to proceed, delay, freeze, or terminate projects can then be made.

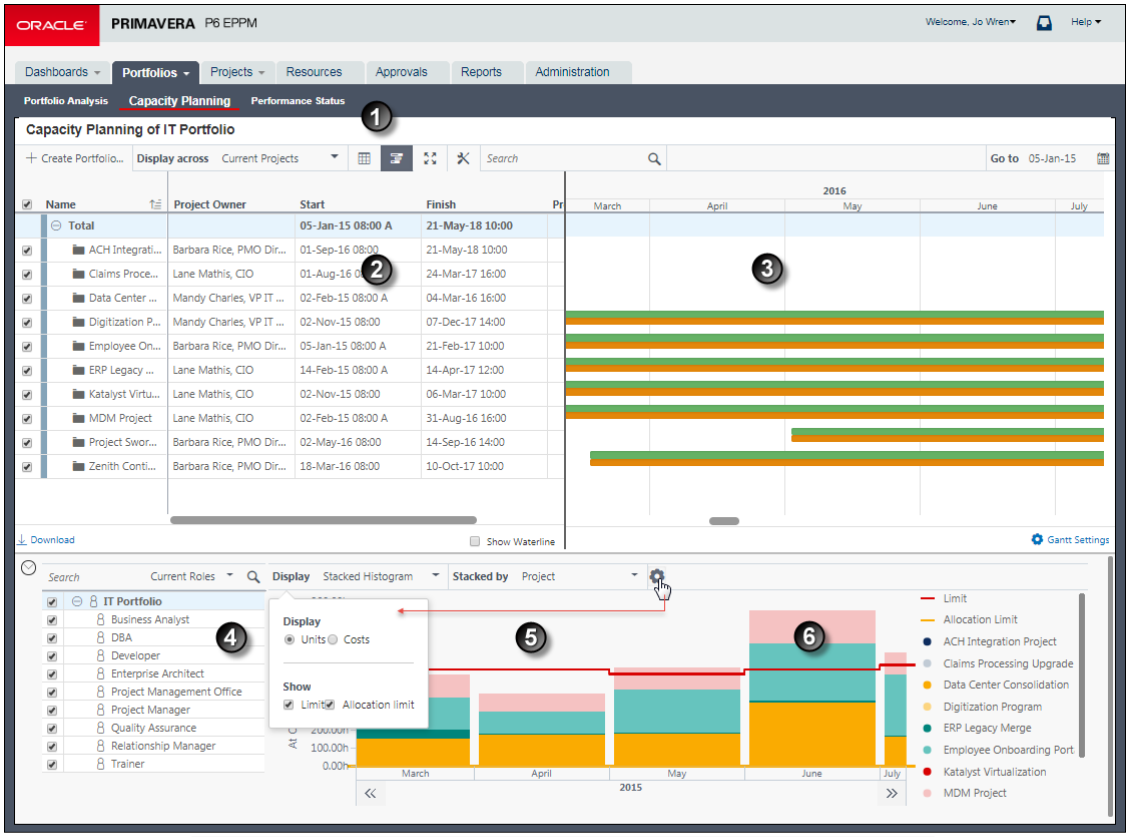
Working with the Capacity Planning Page

Use the Capacity Planning page to perform *What-if* analysis, graphically change project forecast dates, and apply waterline analysis techniques to assist with critical, executive-level decision making. Before assessing capacity or demand on roles, create role estimates for each project. After conducting your analysis, you can create new portfolios containing only the projects that meet your planning criteria.

When you choose to display a stacked histogram, area chart, or spreadsheet, the Capacity Planning chart displays the total at completion units or costs over time for the combination of selected roles and projects. Each of these charts contains the same information in different formats with a data stacking option for the projects and roles you select.

When you choose to display a net availability chart, the chart displays underallocated or overallocated units for each selected role over time for the currently selected projects. The limit line is always placed at zero. If the total units for a role equals the limit, no bar is displayed for that role. Bars placed above the limit line indicate net under-allocation for the associated role during the displayed time period; bars placed below the limit line indicate net over-allocation for the associated role during the displayed time period.

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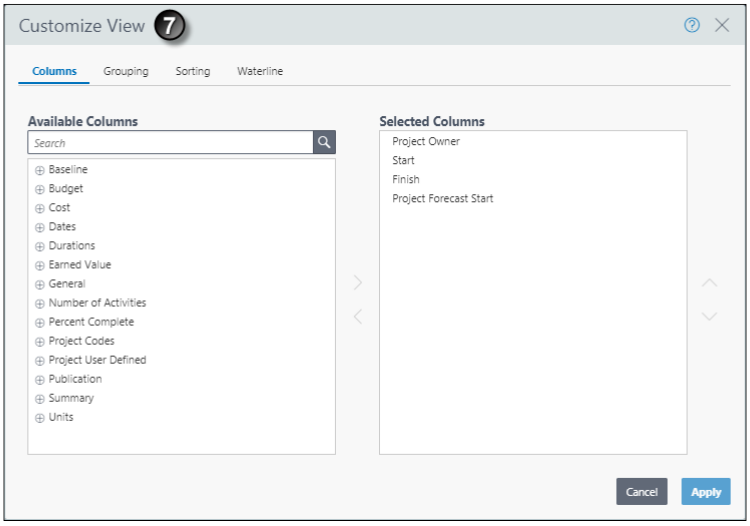


Table of Key Capacity Planning Page Elements

Item	Description
1	**Navigation:** Before you begin, first open the portfolio you want to work with, then select **Capacity Planning**.
2	**Scorecard:** Use this table to analyze, sort, and select projects. Only the projects you select in the option column appear in the Capacity Planning chart. The scorecard on this page is not related to the set of defined portfolio view scorecards.
3	**Gantt chart:** View current and forecast schedules. Drag the bars to adjust the Capacity Planning chart data.

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Item	Description
4	**Role Selection Area:** Select the options for the roles you want to include in the Capacity Planning chart.
5	**Capacity Planning Chart (Under Allocated):** View role allocation as a stacked histogram, area chart, net availability chart, or spreadsheet.
6	**Capacity Planning Chart (Over Allocated):** Customize the chart to show a limit line representing the maximum capacity of the currently selected roles by timescale period.
7	**Customize Capacity Planning Chart:** Customize the columns, grouping, waterline, or chart options.

> **Note**
>
> The net availability charts are often the best place to begin a resource capacity or demand analysis since they represent a streamlined birds-eye view. These charts include all related projects and roles in a single view allowing you to expand or drill down into only the roles with perceived problems.

Analyzing Role Allocation (Capacity Planning)

You can analyze role allocation over time for one or more projects on the Capacity Planning page. Using multiple chart formats and role groupings, you can identify areas of under-allocation or over-allocation.

To analyze role allocation:

1. In the context selector, select **Portfolios**.
2. In the context selector:
   - Click **Open Portfolio** to select a group of projects by portfolio type, EPS node, or project code.
   - Or choose a portfolio in the Most Recently Used list.
3. On the **Navigation Menu**, expand **Portfolios** and click **Capacity Planning**.
4. On the **Capacity Planning** page:
   - (Optional) Choose to complete any number of the following optional sub-steps:
     i. Click **Customize View** to set column, grouping, sorting, and waterline options.
     ii. In the project grid, mark or clear the option next to each project to include or exclude the data for the project in the Capacity Planning chart. Data in the Capacity Planning chart is updated to reflect your changes.
     iii. In the roles list in the dock, select whether to display roles by Role Hierarchy, Role Team or for the Current Portfolio Projects. Mark or clear the check box next to each role to include or exclude the allocation data for the role in the Capacity Planning chart. Role data is immediately updated in the chart.

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> **Note**
>
> - When grouped by Current Portfolio Projects or Role Team, all child roles are automatically selected when you select a parent role.
> - You can only select the to display roles in the Role Hierarchy or by Role Team when you are displaying all projects.

iv. In the **Display** list in the dock, select a display type, and then in the **Stacked by** list, choose how you want to stack the chart.

v. Hold your mouse over a color-coded section of the chart to view the capacity data for that section.

> **Tip**
>
> - The **Go to** date selector moves the gantt and capacity planning chart to the same date simultaneously.
> - An application level setting determines whether cost spreads account for changes in resource and role rates over time.

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4

Projects

About Projects

A project is any temporary series of activities performed in some coordinated arrangement in order to create a product, service, or measurable business result. Projects have a definite beginning and end. A project is concluded when its objectives have been reached or when the project is terminated.

Working with Projects

While it is true that you are working with project data in almost all areas of the application, P6 provides two main pages for working with projects: the EPS page and the Activities page.

By default, if no projects are open when you log on to P6 or if you are a new user, clicking **Projects** in the P6 navigation bar will take you directly to the **EPS** page as long as this page is available in your user interface view. If you do not have access to the **EPS** page or you navigate to another page in the **Projects** section, the **Open Projects** dialog box appears when you click **Projects**. Use this dialog box to open the projects you need. Once you have at least one project open, the next time you click **Projects** (and each time thereafter), the application automatically opens the last open project or project group.

You can always open a different project or project group from the **Open Projects** dialog box, the most recently used projects list in the **Projects** menu, or the **EPS** page. To access the **Open Projects** dialog box at any time, select **Open Projects** from the **Projects** menu.

> **Note**
>
> When you upgrade P6, the projects you previously had open are not lost. When you click **Projects**, the application will open the last open project or group of projects.

To restrict or grant access to projects and their data, you must assign project profiles to users. A project profile is a role-based profile that limits privileges to specific project data, such as baselines and the WBS. Project profiles are linked to users through one or more OBS assignments. You assign responsibilities to specific projects and work within projects by assigning OBS elements to various levels of the EPS and each project's WBS.

The combination of the user assignment to an OBS element, and the OBS assignment to the EPS/project/WBS, determines which projects and project data the user can view. For each OBS element a user is assigned to, the user's assigned project security profile (per OBS assignment) further determines the project data the user can view or edit.

Creating Projects

Create projects to define a set of activities and WBSs that work toward a common goal.

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To create a project:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select the EPS element to which you want to add the new project.
   b. Click **Context** and select **Add Project**.
   c. In the **Add Project** dialog box:
      - Click the **General** tab and select an option or enter a value in each required field.

      Note

      Avoid using the pipe character (|), or brackets (< or >) in the Project Name.

   d. Click **Create**.

Tip

- You can add a **Description** of the project. If the project has a definitive deadline you can add a **Must Finish By** date, which will allow you to determine if the project is behind schedule.
- You can copy a project from an existing project or template.
- To configure advanced options, you must select a project to copy. This will enable the **Advanced** tab. If you select to copy a template, the **Advanced** tab will not be enabled. When you choose to copy data from another project, the new project might not appear immediately. The process runs as a background service and you will see a notification once it has completed.
- You can also right-click the table and select **Add Project** to create a project.
- You can perform the cut, copy, and paste functions to create new projects from existing projects.

Assigning Locations to Projects

Assign locations to projects so you can report on projects by location in Primavera Analytics.

To assign a location to a Project:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select a project and click the **General** detail window.
   a. In the **General** detail window, click **Select** in the Location field.
   b. In the **Select Location** dialog box, select the appropriate location and click **Select**.
   c. On the **EPS** page, click **Save**.

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Tip

- You must create locations before you can assign them.
- You must have the 'Edit Project Details Except Costs/Financials' project privilege to assign locations to projects.

Opening Projects or Templates

Perform these steps to open one or more projects or a single template in order to view or modify project data on any of the pages in the Projects section of the application. You can open templates and projects from several locations in the application; however, these steps using the common selection controls on the **Open Projects** dialog box represent the standard way to determine and change which projects are currently open.

To open a project or template:

1. In the context selector, select **Projects**.
2. Click **Open Projects**.
3. In the **Open Projects** dialog box:
   a. Click **Projects** or **Templates**.
   b. Select an item from the **Organize By** list to choose a viewing arrangement.
   c. Use the common selection controls to identify and select the items you want to open.
      - In the **Available Templates** list, add a template to the **Selected Templates** list.
      - In the **Available Projects** list, add one or more projects, or an entire group of projects, to the **Selected Projects** list.
   d. Click **OK**.

Note

After initial installation or upgrade, and for all new users, the first time you launch P6 and click Projects, the EPS page will open if this page is available and set as the default page under the Projects section in your user interface view. If the EPS page is not available in your user interface view or you navigate to another page in the Projects section, the **Open Projects** dialog box will appear.

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Tip

- You can open a combination of projects, for example, two projects, an EPS node, and a portfolio. However, you can only open one template at a time, and never in combination with any other projects.
- Press **Shift+click** or **Ctrl+click** to select multiple projects, or select an EPS element to open all projects belonging to that EPS element and all child EPS elements.
- When grouped by project code, you cannot select an entire project code. You can however select a project code value to open all projects that share that value.
- To open projects exclusively in the **Selected Projects** lists, select **Open Exclusively**. When you open a project exclusively, no other users can modify data in the project until the exclusive lock is removed from the project. You must have the required security privilege to open a project exclusively.
- As convenient shortcuts, click **Projects** to re-open the last project or projects you had open, or click the **Projects** menu and select a project, project group, or template from the list of your most-recently used items.
- You can also open projects from within certain project-related portlets such as **My Projects** or **Project Health**. You must have OBS access, be the owner, or assigned as a resource or activity owner in the project. In these portlets, click the project name hyperlink to open it in the **Projects** section.

About Importing and Exporting Projects

You can import and export information to and from P6 using external files and then share this information with other P6 EPPM users, Oracle Primavera Contractor users, other project management tools (such as Microsoft Project and Microsoft Excel), and your organization's human resource and accounting systems. You can also use external files to archive your projects or create a backup of your database. You must have the *Export Project Data* project privilege to export projects.

You can import and export project data between P6 and other applications using the following file formats:

- CPP format.
- Oracle Primavera's XML or XER formats which enable you to share project information stored in the P6 EPPM database.
- Microsoft Project XML format which enables you to share information with Microsoft Project and other applications that use the Microsoft Project XML format.
- UN/CEFACT format.
- IPMDAR format.
- Excel format which enables you to view and amend project data in a spreadsheet.

Configure export settings to determine which projects and which baselines to export, and whether to export to a compressed file.

Configure import templates to control how and where data is imported. You can also specify in an import template how conflicting data should be handed when matches are found. You can choose to deal with conflicting data in different ways depending on the type of data.

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Import templates can also help you to identify differences in calendars between your database and an import file, allowing you to make more informed decisions about whether to import individual calendars on a case-by-case basis.

You can import and export project data every day, week, two weeks, or month by creating and configuring a project scheduled service.

> **Note**
>
> All project data is stored in a central database. You can also import projects using the Primavera XER format in P6 Professional.

For more information on importing and exporting projects, see: *P6 EPPM Importing and Exporting Guide*.

> **Tip**
>
> - On-premises only: The maximum file size for XML import can be configured in P6 Administrator application. The maximum file size for export is limited by the JVM settings and the available space in the Temporarily File Location. For more information see: *P6 EPPM System Administration Guide for On-Premises*.
> - Cloud only: The maximum file size for XML import, is 600 MB by default. The maximum file size for export is limited by the JVM memory allocation of your deployment. The default allocation is 8MB. If you want to increase this allocation, you must submit a service request and additional charges might apply.

Configuring Microsoft Project Templates

Configure Microsoft Project templates to define data exchange options for both exporting to and importing from Microsoft Project.

To configure Microsoft Project templates:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/Export Projects** dialog box, click the **Import** or **Export** tab.
   c. On the **Import** tab:
      - In the **Import Type** list, select **Microsoft Project XML**.
      - On the **Import** tab, click **Browse** in the **File** field and select a Microsoft Project XML file to import.
      - Click **Manage Templates**.
   d. Or on the **Export** tab:
      - In the **Export Type** list, select a Microsoft Project XML file type to export.
      - Click **Manage Templates**.

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e. In the **Manage Templates** dialog box, click a template.

f. In the **Modify Template** dialog box

- Configure the lists, options, and fields on each tab.
- Click **Save**.

Tip

The area you select from the **Select Subject Area** list on the **Custom Field Mapping** tab determines what appears in the **Project Management** and **Microsoft Project Fields**.

Note

Once data is exported from P6 into another project management tool, dates, durations and other data may no longer reflect those in P6 if the other project management tool recalculates this data.

Configuring UN/CEFACT Templates

Configure UN/CEFACT templates to define data exchange options for exporting to UN/CEFACT XML Format 6.

To configure UN/CEFACT templates:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/Export Projects** dialog box, click the **Export** tab.
   c. On the **Export** tab:
      - Select **UN/CEFACT XML Format 6** from the **Export Type** list.
      - Select a project.
      - Click **Manage Templates**.
   d. In the **Manage UN/CEFACT Templates** dialog box:
      - Click a template or click **Add** to create a new template.
   e. In the **UN/CEFACT Template** dialog box:
      - Configure the lists, options, and fields on each tab.
      - Click **Save**.

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> **Note**
>
> Once data is exported from P6 into another project management tool, dates, durations and other data may no longer reflect those in P6 if the other project management tool recalculates this data.

Configuring IPMDAR Templates

Configure IPMDAR templates to define data exchange options for exporting to IPMDAR format.

To configure IPMDAR templates:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/Export Projects** dialog box, click the **Export** tab.
   c. On the **Export** tab:
      - Select **IPMDAR** from the **Export Type** list.
      - Select a project.
      - Click **Manage Templates**.
   d. In the **Manage IPMDAR Templates** dialog box:
      - Click a template or click **Add** to create a new template.
   e. In the **IPMDAR Template** dialog box:
      - Configure the lists, options, and fields on each tab.
      - Click **Save**.

> **Note**
>
> Once data is exported from P6 into another project management tool, dates, durations and other data may no longer reflect those in P6 if the other project management tool recalculates this data.

Configuring CPP Templates

Configure CPP templates to define data exchange options for exporting to CPP format.

To configure CPP templates:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.

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b. In the **Import/Export Projects** dialog box, click the **Export** tab.

c. On the **Export** tab:

- Select **DOD - CPP** from the **Export Type** list.
- Select a project.
- Click **Manage Templates**.

d. In the **Manage CPP Templates** dialog box:

- Select a template or click **Add** to create a new template or **Import Template** to import a template.

> **Note**
>
> To export a CPP template, select **Context** and select Export.

e. In the **CPP Template** dialog box:

- Configure the lists, options, and fields on each tab.

> **Note**
>
> To export the full path of a code value (that is the path to a code value's place in its hierarchy), in the code value picker, mark the **Include code value path** option. When this option is selected, each hierarchical level of the path to the code value is separated with a dot. For example, ENG.Elec.Micro.Interface.

- Click **Save**.

> **Note**
>
> Once data is exported from P6 into another project management tool, dates, durations and other data may no longer reflect those in P6 if the other project management tool recalculates this data.

Managing Primavera XER and XML Import Templates

Manage Primavera XER and XML import templates from the EPS page when you need to create or maintain templates without starting an import.

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page click the **Actions** menu and select **Manage Import Templates**.
3. In the **Manage Primavera XER and XML Templates** dialog box:
   - To add a new template, click **Add**
   - To modify an existing template, click the template name.

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4. In the **Primavera XER and XML Template** dialog box:
   a. In the **Template Name** field, provide a descriptive name for the template.
   b. On the **Import Type** list, choose whether the template will be available for **XER** imports, **XML** imports, or both **XER and XML** imports.
   c. Configure the options and fields on each of the tabs.
5. Click **Save**.

Importing Projects using Primavera XML Format

You can import projects and baselines using the Primavera XML format and create or update a project.

> **Note**
>
> Avoid using the pipe character (|), or brackets (< or >) in the Project Name.

To import projects using Primavera XML format:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/ExportProject** dialog box, click the **Import** tab.
   c. On the **Import** tab:
      - In the **Import Type** list, select **Primavera XML**.
      - In the **File** field, click **Browse**.
   d. In the **File Upload** dialog box, select a file and click **Open**.
   e. On the **Import** tab:
      - Select a **Template** to use.

        > **Note**
        >
        > If you need to create a template or modify an existing template, click **Manage Templates**.

      - Select an option for **Import Action**.

        If you selected **Create New**, click **Select** in the **Import To** field and select the EPS where you want to import the XML file.

        If you selected **Update Existing**, click **Select** in the **Import To** field and select the project where you want to import the XML file.
      - Select which **Baselines** to import.

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> **Note**
>
> If you select to import with update existing and you select to import baselines, matching baselines will be updated with the data from the XML file according to the options in the selected template.

f. Click **Import**.

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Tip

- To understand how the import of secure codes is handled, see Secure Codes.
- You can manage XER and XML import templates separately from the importing and exporting process using the **Manage Import Templates** option on the **Actions** menu of the EPS page.
- You can see the status of the import in the **View Service Status** dialog box.
- You can import multiple projects as one file using Primavera XML format.
- You can import a Primavera XML file from within a zip file. If the zip file contains multiple XML files, only the file with the same name as the zip will be imported. If the zip contains only one XML file, the name of the zip and XML file need not match.
- You can update baselines when you import a project and its baselines from an XML file. When you select the Update Existing import action at the project level, matching baselines you import will be updated from the import file. Baselines you choose to import but which do not have a match in your database against the project you selected to update will be added to the project as baselines, but will not be assigned as the project, primary, secondary, or tertiary user baseline.
- The Activity Owner field shows the P6 EPPM user who owns the activity. If a Primavera XML file that includes the Activity Owner field is imported into a database, the Activity Owner data is imported only if the user already exists in the database.
- Stored performance data can be imported as long as the start and finish dates of periods match between the import file and the financial period calendar assigned to the project for all financial periods with data stored at the activity or assignment level.
- If the XML file was generated from a version earlier than release 20.4, when it is imported into release 20.4 or later rates for roles will be the same for all effective dates. If an XML file generated from release 20.4 or later is imported into a database with a version of 20.3 or earlier, only the rates which were effective at the time of export will be imported.
- If the currency stored in the XML file matches a currency in your database, you can select whether to import financial data using the base currency in your database or the currency present in the XML file. If you chose to use the XML rate, financial data is converted as follows:
- Cost imported = Cost in XML file * (Exchange rate in XML file / Exchange rate of the matching currency in your database)
- For example:
- Michelle Peterson in the London office exports a project to a Primavera XML file and sends the project file to her colleague Judy Billings in the Paris office. The XML file that Michelle generates, contains information about the view currency Michelle used and its exchange rate with the base currency in her database. When Judy receives the file, she imports it into her database using the option to import with the XML rate.
- Michelle's view currency is GB Pounds (£) and the base currency in her database is US Dollars ($). The exchange rate between GB Pounds and the base currency in Michelle's database is 0.79. Judy's database has a base currency of Euros (€), and the exchange rate between GB Pounds (£) and the base currency is 0.88.

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- Costs are always stored in units of the base currency of the database. So to import the correct value in GB Pounds, P6 converts the costs in the XML file by multiplying by the exchange rate for GB Pounds in the XML file divided by the exchange rate for GB Pounds in Judy's database.
- In Michelle's database, Activity A1000 has a planned cost of £1,000. The cost is stored in the database in the base currency of US Dollars as $1,265.82. The Primavera XML file contains the cost of the activity in the base units as well as information about the ID, name, and exchange rate for GB Pounds in Michelle's database. When Judy imports the file, P6 converts the cost of Activity A1000 as follows:
- $1,265.82 × (XML exchange rate / destination exchange rate)
- = $1,265.82 × (0.79 / 0.88) = €1,136.36
- When Judy changes her view currency to GB Pounds (£), the value stored in the database is converted to the view currency by multiplying by the exchange rate for the view currency, so:
- €1,136.36 × 0.88 = £1000.00

Exporting Projects using Primavera XML Format

You can export projects to locations outside P6 using the Primavera XML format to share project information between Project Management databases.

To export projects using Primavera XML format:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Export** tab.
4. On the **Export** tab:
   a. In the **Export Type** field, select **Primavera XML**.
   b. Click **Add Project...**, and in the **Select Project** dialog box select the projects you want to export, then click **Select**.
   c. Optionally, on the **Select Baselines** list, select the baselines according to their assignment as project, primary, secondary, or tertiary baseline to export with projects as default.
   d. Optionally, select **Export to ZIP** to export a compressed file containing the XML file.
   e. Optionally, in the **Baselines** field for a project, click **Select** to open the Select Baselines dialog box, then customize which baselines you want to export with a the project.
   f. Click **Export**.

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Tip

- You can manage XER and XML import templates separately from the importing and exporting process using the **Manage Import Templates** option on the **Actions** menu of the EPS page.
- You can see the status of the import in the View Service Status dialog box.
- If you export projects using a scheduled service, use the Baselines column on the Project Settings tab of the service to select specific named baselines, the baseline assigned as the project baseline, and those assigned as the user's primary baselines that will be exported.
- To download the exported file, click the link in the View Service Status tab or Notifications dialog box.
- You can export multiple projects as one file using Primavera XML format.
- If you choose to customize the baselines to export with a project in the Select Baselines dialog box, those customizations over-ride the selections of baselines by assignment that you made in the Select Baselines list.
  For example, if you use the Select Baselines list to select the Project and Primary baselines by default, then for Project A you click **Select** and in the Select Baselines dialog box you clear the option to export Project A's Primary baseline, then when you export Project A, only the baseline assigned as the project baseline for Project A will be exported.

  Conversely, if you have customized the exact baselines to export with a project and then use the Select Baselines list to choose the baselines to export according to their assignment as project, primary, secondary, or tertiary baseline, those choices will override any selections of the relevant baseline made in the Select Baselines dialog box.

Importing Projects using Primavera XER Format

You can import projects and baselines using P6 Professional's native Primavera XER format and create or update a project.

Note

- Avoid using the pipe character (|), or brackets (< or >) in the Project Name.
- P6 and P6 Professional handle the import of XER files slightly differently.P6The XML import options in P6 have a few extra options when compared to the XML import options in P6 Professional (Document Categories, Document Statuses, Locations, and WP and Docs). However the import options for XER files in P6 Professional allow less configuration than the XML import options. Also, in P6 Professional only users with the Admin Superuser global security profile or Project Superuser project security profile can import projects, whereas any user with the appropriate permissions can import projects in P6.

To import projects using Primavera XER format:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.

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2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/ExportProject** dialog box, click the **Import** tab.
   c. On the **Import** tab:
      - In the **Import Type** list, select **Primavera XER**.
      - In the **File** field, click **Browse**.
   d. In the **File Upload** dialog box, select a file and click **Open**.
   e. On the **Import** tab:
      - Select a **Template** to use.

        > **Note**
        >
        > If you need to create a template or modify an existing template, click **Manage Templates**.

      - Select an option for **Import Action**.

        If you selected **Add Into Existing Project**, click **Select** in the **Import To** field and select the project or WBS node where you want to create a new child WBS to contain the imported project from the XER file.

        If you selected **Create New**, click **Select** in the **Import To** field and select the EPS where you want to import the XER file.

        If you selected **Replace Existing**, click **Select** in the **Import To** field and select the project you want to replace with the imported project from the XER file.

        If you selected **Update Existing**, click **Select** in the **Import To** field and select the project you want to update with the imported project from the XER file.

      - Select which **Baselines** to import.

        > **Note**
        >
        > If you select to import with update existing and you select to import baselines, matching baselines will be updated with the data from the XER file according to the options in the selected template.

   f. Click **Import**.

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Tip

- You can manage XER and XML import templates separately from the importing and exporting process using the **Manage Import Templates** option on the **Actions** menu of the EPS page.
- To understand how the import of secure codes is handled, see Secure Codes
- Risks in P6 Professional are stored in the ProjRisk table. ProjRisks are included in the XER file format and are imported from XER files into P6 EPPM, however ProjRisks are not visible in P6. If you need to import and export risk information, Oracle recommends you use XML format.
- You can see the status of the import in the **View Service Status** dialog box.
- You can import multiple projects as one file using Primavera XER format.
- You can update baseline when you import a project and its baselines from an XER file. When you select the Update Existing import action at the project level, matching baselines you import will be updated from the import file. Baselines you choose to import but which do not have a match in your database against the project you selected to update will be added to the project.
- The Activity Owner field shows the P6 EPPM user who owns the activity. If a Primavera XER file that includes the Activity Owner field is imported into a database, the Activity Owner data is imported only if the user already exists in the database.
- Stored performance data can be imported as long as the start and finish dates of periods match between the import file and the financial period calendar assigned to the project for all financial periods with data stored at the activity or assignment level.
- If the XER file was generated from a version earlier than release 20.4, when it is imported into release 20.4 or later rates for roles will be the same for all effective dates. If an XER file generated from release 20.4 or later is imported into a database with a version of 20.3 or earlier, only the rates which were effective at the time of export will be imported.
- The structure of an XER file doesn't include information about the EPS node the projects were exported from. Therefore it is not possible to import EPS level activity codes as EPS level codes, even if an XER file is being imported back into its origin database. If you export projects with EPS level activity codes to XER, when you import the XER file, the only import options you can choose for EPS Activity Codes and EPS Activity Code Values are Convert to Project or Ignore.

Exporting Projects using Primavera XER

You can export projects to Primavera XER format to share them with P6 Professional.

To export projects using Primavera XER format:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/ExportProject** dialog box, click the **Export** tab.

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c. On the **Export** tab:
   - In the **Export Type** list select **Primavera XER**.
   - In the **Project** field, click ••• **Select** and select a project to export.
   - In the **Template** list select a template to use.

> **Note**
>
> If you need to create a template or modify an existing template, click **Manage Templates**.

   - Click **Export**.

> **Tip**
>
> - You can manage XER and XML import templates separately from the importing and exporting process using the **Manage Import Templates** option on the **Actions** menu of the EPS page.
> - You can see the status of the import in the **View Service Status** dialog box.

Importing Projects using Microsoft Project XML

You can import projects using the Microsoft Project XML format to create and manage them as new projects in P6.

> **Note**
>
> - To import a project via XML using P6 or P6 Professional, your user account's Resource Access field must be set to *All Resources*. This change can be made temporarily and then restored on the Users pane on the User Access page.
> - Avoid using the pipe character (|), or brackets (< or >) in the Project Name.

To import projects using the Microsoft Project XML format:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/ExportProject** dialog box, click the **Import** tab.
   c. On the **Import** tab:
      - In the **Import Type** list, select **Microsoft Project XML**.
   d. In the **File** field, click ••• **Browse**.
   e. In the **File Upload** dialog box, select a file and click **Open**.

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f. On the **Import** tab:

- Select a **Template** to use.

> **Note**
>
> If you need to create a template or modify an existing template, click **Manage Templates**.

- Select an option for **Action**.

  If you selected **Create New**, click ••• **Select** in the **Import To** field and select the EPS where you want to import the XML file.

  If you selected **Update Existing Project**, click Select in the **Import To** field and select the project where you want to import the XML file.

- Select an EPS to element in the **Import To** field.

g. Click **Import**.

> **Tip**
>
> - You can see the status of the import in the **View Service Status** dialog box.
> - You can import multiple projects as one file using Microsoft Project XML format.

Exporting Projects using Microsoft Project XML

You can export projects to locations outside of P6 using the Microsoft XML format to share information with Microsoft Project.

To export projects using Microsoft Project XML format:

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** ▾ menu and select **Import/Export Projects**.
   b. In the **Import/ExportProject** dialog box, click the **Export** tab.
   c. On the **Export** tab:
      - In the **Export Type** list select a Microsoft Project XML file type to export.
      - In the **Project** field, click ••• **Select** and select a project to export.
      - In the **Template** list select a template to use.

> **Note**
>
> If you need to create a template or modify an existing template, click **Manage Templates**.

      - Click **Export**.

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Tip

- You can see the status of the import in the **View Service Status** dialog box.
- The software automatically creates a UDF called MSP Activity ID the first time anyone exports a project to Microsoft Project format. This UDF is hidden and cannot be modified. You should avoid creating a UDF with that name.

Exporting Projects using UN/CEFACT XML

You can export projects to locations outside of P6 using UN/CEFACT XML Format 6.

To export projects using UN/CEFACT XML Format 6:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/Export Project** dialog box, click the **Export** tab.
   c. On the **Export** tab:
      - In the **Export Type** field, select **UN/CEFACT XML Format 6**.
      - In the **Project** field, click **Select** and select a project from the dialog box.
      - In the **Template** field, select a template.

        Note

        If you need to create or modify a template, click the **Manage Templates** button.

      - Click **Export**.

Tip

You can see the status of the import in the **View Service Status** dialog box.

Exporting Projects using IPMDAR

You can export projects to locations outside of P6 using IPMDAR Format. The IPMDAR export generates a collection of JSON files which constitute the IPMDAR data.

To export projects using IPMDAR:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.

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b. In the **Import/Export Project** dialog box, click the **Export** tab.

c. On the **Export** tab:

- In the **Export Type** field, select **IPMDAR**.
- In the **Project** field, click **Select** and select a project from the dialog box.
- In the **Template** field, select a template.

> **Note**
>
> If you need to create or modify a template, click the **Manage Templates** button.

- Click **Export**.

> **Tip**
>
> You can see the status of the import in the **View Service Status** dialog box.

Exporting Projects using CPP

You can export projects to locations outside of P6 using CPP Format. The CPP format export generates a collection of JSON files which constitute the CPP data.

To export projects using CPP:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:

a. Click the **Actions** menu and select **Import/Export Projects**.

b. In the **Import/Export Project** dialog box, click the **Export** tab.

c. On the **Export** tab:

- In the **Export Type** field, select **DOE - CPP**.
- Click **Add Project...** to select the projects you want to export.
- Optionally, to remove a project from the export list, click **Context** and select **Remove**.
- Select a project and click **Add Baseline...** to select the baselines you want to export for that project.
- In the **Template** field, select a template.

> **Note**
>
> If you need to create or modify a template, click the **Manage Templates** button.

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- Click **Validate** » to view the validation report.
- Click **Export**.

> **Tip**
>
> You can see the status and download the export file in the **View Service Status** dialog box.

Importing Projects from a Zip File

You can import projects and baselines from compressed zip file that contains a file using the Primavera XML format. If the zip file contains multiple XML files, only the file with the same name as the zip will be imported. If the zip contains only one XML file, the name of the zip and XML file need not match.

To import projects from a zipped file:

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** ▾ menu and select **Import/Export Projects**.
   b. In the **Import/ExportProject** dialog box, click the **Import** tab.
   c. On the **Import** tab:
      - In the **Import Type** list, select **Primavera XML**.
      - In the **File** field, click ••• **Browse**.
   d. In the **File Upload** dialog box, select a zipped file containing an XML file and click **Open**.
   e. On the **Import** tab:
      - Select a Template to use, configure the Import Actions for each project, and optionally select which baselines to import.
   f. Click **Import**.

> **Tip**
>
> You can see the status of the import in the **View Service Status** dialog box.

Exporting Projects to a Zip File

You can export projects to a compressed file. The resulting zip file contains a single Primavera XML file that describes the projects you selected to export.

To export projects to a compressed file:

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:

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a. Click the **Actions** menu and select **Import/Export Projects**.
b. In the **Import/ExportProject** dialog box, click the **Export** tab.
c. On the **Export** tab:
   - In the **Export Type** field, select **Primavera XML**.
   - Select the **Export to ZIP** option.
   - Click **Add Project...**, and in the **Select Project** dialog box select the projects to export then click **Select**.
   - In the **Baselines** field, click and select which baselines you want to include with the export.
   - Click **Export**.

> **Tip**
>
> To download the exported file, click the link in the View Service Status tab or Notifications dialog box.

Exporting Projects to Excel

You can export the list of projects in your EPS view to a Microsoft Excel (.xlsx) file.

To export projects:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select an EPS view from the **Views** list.
   b. Configure the EPS view to determine what data is exported.
   c. Click **Download**.
   d. In the **Opening** dialog box, choose whether to open or save the file.

> **Tip**
>
> All data is exported as it appears in the current EPS view.

Secure Codes

If you have the suitable permissions, you can control how secure codes are imported from Primavera XML files into your database. The information here assumes that the person importing the data has the add/delete, edit, assign, and view permissions for secure codes.

Unlike UDFs and calendars, for codes, the Action setting on the Advanced tab of the import tab controls only the security status of a code, that is, whether or not the code is secure. In situations where the security status of a code is the same in the import file as in the database, the code and its values are imported according to the import action selected on the basic tab for the data type and the action selected on the advanced tab for each code.

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However if the security status of a code is different in the import file from the code in the database, further rules are applied.

Mismatch of Secure or Unsecured Status

When the security status of a code differs between the import file and your database, the rules used for importing depend on the import action for the data type and the action for the code.

> **Note**
>
> Importing a file will never change a secure code into an unsecured code.

When the import action for the data type is Insert New, Keep Existing, or Do Not import, neither the code's security status, nor other attributes of the code are imported, even if you have set the action for the code to Keep. This is because the rule used where a match is found in your database for Insert New, Keep Existing, and Do Not Import is not to update the matching data.

However, when the import action for the data type is Update Existing, the action you choose for each code determines how that code in your database will be updated. The table below summarizes the rules.

Status in Import File	Status in Database	Action	Update Code to Secure?	Update Other Attributes?
Unsecured	Secure	Do Not Import	No	No
Secure	Unsecured		No	Yes
Unsecured	Secure	Keep	No	Yes
Secure	Unsecured		Yes	Yes

About Opening a Project Exclusively

Open a project exclusively when it is important that you are the only person updating the project's data at that time. For example, a project manager will open a project exclusively when creating a baseline for the project; running services, such as scheduling, leveling, summarizing, applying actuals, and storing period performance; reviewing team member status updates; or running reports against one or more projects.

You can open a project exclusively in P6 or P6 Professional. Users can view a project that is opened exclusively, but cannot update the project data until the exclusive lock is released from the project.

P6 Team Member interface users will see their assigned activities, but will not be allowed to update their activities until the exclusive lock is released from the project.

Opening Projects Exclusively

Open a project exclusively to ensure changes will not be made by other users when you are performing an important action on the project, such as updating the schedule.

You can open a project exclusively from the EPS page or the Open Projects dialog box.

To open a project exclusively from the EPS page:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.

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2. On the **EPS** page:
   a. Select one or more projects.
   b. Click **Open** and select **Open Exclusively**.

To open a project exclusively from the Open Project dialog box:

1. In the context selector, select **Projects**.
2. Click **Open Projects**.
3. In the **Open Projects** dialog box:
   a. Move the projects you want to open exclusively to the **Selected Projects** list.
   b. Select **Open Exclusively**.
   c. Click **OK**.

Tip

- All projects open in your view are either opened exclusively or opened in shared mode. You cannot open projects in exclusive mode and shared mode at the same time. Opening one or more projects exclusively closes all other projects that are open in your view that are not already opened exclusively by you.
- The locked project icon indicates a project is opened exclusively. You can see which users have a project open by clicking **Users** next to the project name in the Available Projects list.
- You cannot open a project exclusively if another user currently has it open or checked out. You can email the other users who are working in the project by clicking **Users** and then clicking **Email All**.
- You must have the Check In/Check Out Projects and Open Project Exclusively project privilege to open projects exclusively.

Removing the Exclusive Lock on Projects

Remove the exclusive lock on projects to enable other users to modify project data.

Note

You can only release the exclusive lock for projects that you opened in P6. If you opened a project exclusively in P6 Professional, you must use P6 Professional to remove the exclusive lock.

To remove the exclusive lock:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click **Actions** and select **Release Exclusive Lock**.

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Tip

You can also remove the exclusive lock for a project by:

- Logging out of the application.
- Opening the **Open Project** dialog box and reopening the same set of projects, making sure the **Open Exclusively** option is cleared.
- Closing the project on the **EPS** page by right-clicking on the project and selecting **Close**.

Working With Primavera Unifier

You can use Primavera Unifier to perform advanced cost, cash flow and earned value analysis on your P6 projects.

If your P6 deployment is integrated with Primavera Unifier, you can send P6 data to Primavera Unifier and import some data from Primavera Unifier back into P6. Once the link between a P6 project and a Primavera Unifier project and schedule sheet or summary sheet is set up, P6 will retrieve the Cost Breakdown Structure (CBS) from the Primavera Unifier project regularly.

If you want to limit which data is sent to Primavera Unifier, you can choose to send only data about activities, resource assignments, or expenses to which you have assigned a CBS code. You can then send either the entire project, or only those items which have a CBS code assigned, to Primavera Unifier.

You can link P6 to Primavera Unifier by configuring schedule sheet integration, summary sheet integration, or activity sheet integration.

If you configure integration using schedule sheets:

- P6 can send project, WBS, resource assignment, and activity data to Primavera Unifier.
- You must define mappings in Primavera Unifier before sending data from P6. However, Primavera Unifier includes a default mapping that you can use.
- You must configure the preferences of P6 projects that you want to integrate with Primavera Unifier to link the P6 project to a Primavera Unifier schedule sheet.

If you configure integration using summary sheets:

- P6 can send the WBS hierarchy and summarized information about projects, baselines, resource assignments, and expenses to Primavera Unifier based on the CBS code you assign to those data items. WBS information is used to generate the CBS hierarchy in Primavera Unifier.
- You must configure data flows, synchronizations, the P6 web services URL, and the Unifier Provider URL in Primavera Gateway and then configure the Gateway tab on the Application Settings page in P6 before you can send data from P6. However, Primavera Gateway includes out-of-the-box data flows and synchronizations that you can use.
- You must configure the preferences of P6 projects that you want to integrate with Primavera Unifier to link the P6 project to a Primavera Unifier summary sheet.

If you configure integration using activity sheets:

- Primavera Unifier can retrieve activity data from P6 and send actual dates for those activities to P6. The first time you exchange data between P6 and Primavera Unifier, you

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must initiate the exchange from Primavera Unifier. After the first time, you can initiate the exchange of data from P6, P6 Professional, or Primavera Unifier.

- You must configure data flows, synchronizations, the P6 web services URL, and the Unifier Provider URL in Primavera Gateway and then configure the Gateway tab on the Application Settings page in P6 before exchanging data with Primavera Unifier. However, Primavera Gateway includes out-of-the-box data flows and synchronizations that you can use.
- You must configure the preferences of P6 projects that you want to integrate with Primavera Unifier to link the P6 project to a Primavera Gateway deployment.

> **Note**
>
> – If you copy a project which has links to Primavera Unifier set up, the new project does not retain those links.
>
> – If you copy an activity which has a CBS assigned to it, the new activity will not be assigned a CBS.
>
> – If you create a reflection project or baseline for a project with links to Primavera Unifier, these links will not exist between the reflection or baseline project and Primavera Unifier.
>
> – You cannot link a template project to Primavera Unifier.

Linking P6 and Primavera Unifier Applications Using Schedule Sheets

Perform the steps below to link P6 to Primavera Unifier using schedule sheet integration. This link at the application level allows you to establish links at the project level. When the applications and projects are linked, P6 users can send data to Primavera Unifier schedule sheets.

To link P6 to Primavera Unifier using schedule sheet integration:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click the **Integration & Allow Lists** tab.
3. On the **Integration & Allow Lists** tab:
   a. Enter a URL in the **Primavera Unifier URL** field of the Unifier section.
   b. Enter a Primavera Unifier integration user name in the **Integration User Name** field.
   c. Enter the Primavera Unifier password for the integration user name in the **Password** field.
   d. Click **Save and Close**.

> **Tip**
>
> You need the Edit Application Settings privilege to edit the settings in the Application Settings page.

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Linking P6 and Primavera Unifier Projects and Schedule Sheets.

When the P6 and Primavera Unifier applications are linked, you can link projects in P6 to Primavera Unifier projects and schedule sheets. This will allow you to send P6 data to Primavera Unifier.

> **Note**
>
> You cannot link a template project to Primavera Unifier.

To link a P6 to a Primavera Unifier project and schedule sheet:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project.
   b. Click **Context** and select **Set Project Preferences**.
   c. In the **Project Preferences** dialog box, click **Integrations**.
   d. On the **Integrations** page, click **Unifier**.
   e. On the **Unifier** page in the **Schedule Sheet Integration** section:
      - Select the **Link project to a Primavera Unifier project** option.
      - In the **Project Name** field, click **Select** and select a Primavera Unifier project.
      - In the **Schedule Sheet** field, click **Select** and select a Primavera Unifier schedule sheet.
      - In the **Data Mapping** field, click **Select** and select a mapping document.
      - Select the **Delete activities no longer in the P6 Schedule from Primavera Unifier** option if you want the Unifier schedule sheet to reflect only the activities currently in P6.
      - Select the **Only send activities with CBS codes assigned** option if you want to filter which activities are sent to Primavera Unifier.
   f. Click **OK**.

> **Tip**
>
> You need the Allow Integration with Primavera Unifier privilege to change any of the settings on the **Primavera Unifier** page of **Project Preferences**.

Linking P6 and Primavera Unifier Applications Using Summary Sheets

Perform the steps below to link P6 to Primavera Unifier using summary sheet integration. This link at the application level allows you to establish links at the project level. When the

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applications and projects are linked, P6 users can send data to Primavera Unifier summary sheets.

To link P6 to Primavera Unifier using summary sheet integration:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click the **Gateway** tab.
3. On the **Gateway** tab in the Primavera Gateway Parameters section:
   a. Enter the URL of the Primavera Gateway server in the **API Url** field of the Primavera Gateway Parameters section.
   b. Enter a Primavera Gateway username in the **Username** field.
   c. Enter a Primavera Gateway password in the **Password** field.
   d. Click **Test Connection**.

   > **Note**
   >
   > If the connection test fails, contact your Primavera Gateway administrator.

   e. Enter a Primavera Gateway deployment name into the **P6 Deployment** field.
4. On the Gateway tab in the Primavera Unifier Integration Parameters section:
   a. Select a synchronization from the **Export Synchronization** list.
   b. Select a synchronization from the **Import Synchronization** list.
5. Click **Save and Close**.

> **Tip**
>
> You need the Edit Application Settings privilege to edit the settings in the Application Settings page.

Linking P6 and Primavera Unifier Projects and Summmary Sheets.

When the P6 and Primavera Unifier applications are linked, you can link projects in P6 to Primavera Unifier projects and summary sheets. This will allow you to send P6 data to Primavera Unifier.

> **Note**
>
> You cannot link a template project to Primavera Unifier.

To link a P6 to a Primavera Unifier project and summary sheet:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:

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a. Select a project.

b. Click **Context** and select **Set Project Preferences**.

c. In the **Project Preferences** dialog box, click **Integrations**.

d. On the **Integrations** page, click **Gateway**.

e. On the **Gateway** page, select a deployment.

f. On the **Integrations** page, click **Unifier**.

g. On the **Unifier** page in the **Summary Sheet Integration** section:

h. Select a schedule type from the **Schedule Type** list.

- Select **Duration** to send units data, 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.

i. Select the **Synchronize WBS Hierarchy** option if you want the WBS hierarchy in P6 to be synchronized with the cost sheet in Primavera Unifier. If you do not select this option, only project data will be sent to Unifier.

j. If you selected to synchronize the WBS hierarchy, select how much of the hierarchy you want to synchronize.

- Select **Complete** to synchronize all levels of the WBS.
- Select **Levels** and then specify a number of levels to synchronize only a certain number of levels of the hierarchy.
- Select **Partial** to synchronize only those data items to which you have assigned a CBS code.

k. Click **OK**.

Tip

You need the Allow Integration with Primavera Unifier privilege to change any of the settings on the **Unifier** page of **Project Preferences**.

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Linking P6 and Primavera Unifier Applications Using Activity Sheets

Perform the steps below to link P6 to Primavera Unifier using activity sheet integration. This link at the application level allows you to establish links at the project level. When the applications and projects are linked, Primavera Unifier users can exchange activity data with P6.

> **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 data exchange from P6, P6 Professional, or Primavera Unifier.

To link P6 to Primavera Unifier using activity sheet integration:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click the **Gateway** tab.
3. On the **Gateway** tab in the Primavera Gateway Parameters section:
   a. Enter the URL of the Primavera Gateway server in the **API Url** field of the Primavera Gateway Parameters section.
   b. Enter a Primavera Gateway username in the **Username** field.
   c. Enter a Primavera Gateway password in the **Password** field.
   d. Click **Test Connection**.

      > **Note**
      >
      > If the connection test fails, contact your Primavera Gateway administrator.

   e. Enter a Primavera Gateway deployment name into the **P6 Deployment** field.
4. On the Gateway tab in the Integration Parameters section:
   a. Click **Add**.
   b. In the Action Type field, select **Import** or **Export**.
   c. In the **Source/Destination Deployment** field, select the name of your Primavera Unifier deployment.
   d. In the **Synchronization** field, select a synchronization.
   e. In the **Action Name** field, enter a name for this action.

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> **Note**
>
> The action name you assign here will create a new menu item on the **Exchange Data** menu. Users will need to select from the available action names when they want to exchange data between P6 and Primavera Unifier, so you should make this action name clear and descriptive.

5. Click **Save and Close**.

> **Tip**
>
> You need the Edit Application Settings privilege to edit the settings in the Application Settings page.

Linking P6 and Primavera Unifier Projects and Activity Sheets.

When the P6 and Primavera Unifier applications are linked, you can link projects in P6 to Primavera Unifier projects and activity sheets. This will allow you to send P6 data to Primavera Unifier.

> **Note**
>
> - You cannot link a template project to Primavera Unifier.
> - 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 data exchange from P6, P6 Professional, or Primavera Unifier.

To link a P6 to a Primavera Unifier project and activity sheet:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project.
   b. Click **Context** and select **Set Project Preferences**.
   c. In the **Project Preferences** dialog box, click **Integrations.**
   d. On the **Integrations** page, click **Gateway**.
   e. On the **Gateway** page, select a deployment from the **Deployment** list.
   f. Click **OK**.

> **Tip**
>
> You need the Allow Integration with Primavera Unifier privilege to change any of the settings on the **Integration** page of **Project Preferences**.

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Filtering Data to be Sent to Primavera Unifier

Once you have linked a P6 project to a Primavera Unifier project and schedule, summary or activity sheet, you can choose to filter which data will be sent to Primavera Unifier. Which data is sent to Primavera Unifier depends on the type of integration you have configured as well as how you have configured the integration.

To filter activities and WBS nodes data to be sent to Primavera Unifier:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select a CBS for each activity you want to send to Primavera Unifier.
3. Click **Save**.

> **Note**
>
> If you are using summary sheet integration, you must mark the Synchronize WBS Hierarchy option and select Partial to filter which WBS levels are sent to Primavera Unifier.

To filter resource assignments to be sent to Primavera Unifier (only available with summary sheet integration):

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. On the **Assignments** page, select a CBS for each resource assignment you want to send to Primavera Unifier.
3. Click **Save**.

To filter expense data to be sent to Primavera Unifier (only available with summary sheet integration):

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Expenses** detail window.
3. In the **Expenses** detail window, select an Expense Category and a CBS for each expense you want to send to Primavera Unifier.

> **Note**
>
> - Expense data is sent to Primavera Unifier on the basis of the Expense Category and the CBS assignment.
> - Expense data with zero cost will not be sent to Primavera Unifier.

4. Click **Save**.

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Tip

- If the CBS column is not included in your view, click **Customize View**, click the Columns tab, then expand General in the Available Columns list and double-click CBS to add it to the Selected Columns list.
- You can use Fill Down in the CBS column if you want to assign more than one activity, assignment or expense the same CBS, as long as all the activities belong to the same project.
- You can send between 10 and 15,000 activities to Primavera Unifier per project.
- If you are using schedule sheet integration, you must select the Only send activities with CBS codes assigned option in Project Preferences to filter which activities are sent to Primavera Unifier. If this option is not selected, the whole project will be sent. You need the Allow Integration with Primavera Unifier privilege to change this option.
- When you use the Only send activities with CBS codes assigned option, relationships between activities are not sent to Primavera Unifier.

Exchanging P6 data with Primavera Unifier

Once you have linked a P6 project to a Primavera Unifier project and schedule or summary sheet and optionally assigned CBS values to those activities you want to send to Primavera Unifier, you can send data to Primavera Unifier. You can either send projects ad hoc or, if you are using schedule sheet integration, you can set up a Project Scheduled Service to send the data on a regular basis. If you are using summary sheet integration, your Primavera Gateway Administrator can set up processes to send the data on a regular basis.

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 send projects to Primavera Unifier using a Project Scheduled Service (schedule sheet integration only):

1. On the **Navigation Menu**, expand **Administration** and click **Scheduled Services**.
2. On the **Scheduled Services** page, select **Project**.
3. Click **Add** and select **Send to Schedule Sheet**.
4. Type a name in the **Service Name** field.
5. Select or clear the **Enable Service** option.
6. In the **Project Settings** detail window:
   - Enter or select values for all the other fields.
7. Click **Save**.

To send projects to Primavera Unifier on an ad hoc basis:

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> **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 data exchange from P6, P6 Professional, or Primavera Unifier.

1. Open one or more projects.
2. On the **Navigation Menu**, expand **Projects** and click **Activities**.
3. Click the **Actions** menu and select **Exchange Data** and then select an action.
4. If you selected an export action and the integration uses Primavera Gateway, in the action dialog box:
   a. Select **Summary Sheet** or **Activity Sheet**.
   b. If you select to send the summary sheet, select **WBS Hierarchy** if you want to send the WBS hierarchy to Primavera Unifier.
   c. Select which baselines you want to send to Primavera Unifier.

      > **Note**
      >
      > You cannot send baseline data if you are using activity sheet integration.

   d. Click **Send**.

> **Tip**
>
> - You need the Exchange Project Data with Primavera Unifier privilege to be able to do this.
> - You can also send projects to Primavera Unifier ad hoc from the Activities page. In this case, only projects which you have open and which are also linked to Primavera Unifier are sent.

Working With Oracle Primavera Cloud

You can send data to Oracle Primavera Cloud to:

- Manage scope using data sent from P6.
- Perform quantitative analysis of enterprise risks data sent from P6 then bring data about the results of that analysis into your P6 schedule to see pre and post response pessimistic dates and show pre and post response bars for activities.
- Take advantage of the risk, scope, tasks, and portfolio functionality in Oracle Primavera Cloud while leveraging the execution data from P6.

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Sharing data with Oracle Primavera Cloud using Primavera Gateway

If P6 EPPM is integrated with Oracle Primavera Cloud using Primavera Gateway or a P6 connection in Oracle Primavera Cloud, you can control when you send data to Oracle Primavera Cloud. The data you send to Oracle Primavera Cloud can be manipulated in Oracle Primavera Cloud and then imported back into P6 EPPM.

To integrate P6 with Oracle Primavera Cloud, you should ask your Primavera Gateway administrator to configure the necessary flows.

For further information about configuring integration between P6 and Oracle Primavera Cloud see Working With Primavera Gateway*Working With Primavera Gateway*.

Working With Oracle Primavera Cloud for Scope Management

You can share data with Oracle Primavera Cloud for Scope Management. You can send a scope management project and its work packages to P6. Then you can add activities to a work package in your P6 project so when you click **Actions** , select **Exchange Data,** and then select an appropriate action, your project and activity data will be sent to the Oracle Primavera Cloud scope management project.

Tip

- Before you can send data from P6 to Oracle Primavera Cloud for scope management, you must link the two applications. See Linking P6 and Oracle Primavera Cloud Applications.*Linking P6 and Oracle Primavera Cloud Applications.*Linking P6 and Oracle Primavera Cloud Applications.*Linking P6 and Oracle Primavera Cloud Applications.*Linking P6 and Oracle Primavera Cloud Applications.
- If the work package structure in Oracle Primavera Cloud changes, you can update your P6 project with the new structure by clicking **Actions** and selecting Exchange Data and and then select an action for updating data from Oracle Primavera Cloud.
- 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.
- You need the **Exchange Project Data with Oracle Primavera Cloud** privilege to send data to Oracle Primavera Cloud.
- Scope data is not included if you copy and paste a project in P6 or P6 Professional connected to an EPPM database.
- If a project has been integrated with Oracle Primavera Cloud for scope management, when you check out a project in P6 Professional connected to an EPPM database, Scope and Work Package data is included with the checked out project.

Working With Oracle Primavera Cloud Tasks

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You can view public tasks associated with activities from the Oracle Primavera Cloud Tasks app in P6. Tasks are visible in P6 on the Tasks detail tab in an integrated project. In the Activities page, you can easily see which activities have tasks assigned to them and can identify activities with tasks that are all completed or that have dates outside of the activity dates by adding these columns to the Activities grid: Task Status - Dates, Task Status - Completion, and Task Status - Indicator.

You can also view quantitative risk analysis data associated with the activities from the Oracle Primavera Cloud Risks app in P6. In the Activities page, you can see which activities were part of the critical path during risk analysis in Oracle Primavera Cloud and how often those activities were on the path in the Pre-Response Criticality Index and Post-Response Criticality Index columns. In the EPS page, you can view the Pre-Response Pessimistic Start Date, Pre-Response Pessimistic Finish Date, Post-Response Pessimistic Start Date, and Post-Response Pessimistic Finish Date fields calculated in Oracle Primavera Cloud during quantitative risk analysis.

Tip

- If you change the Activity ID of an activity in P6 which is linked with Oracle Primavera Cloud Tasks, the ID will be overwritten with the Activity ID which exists in Oracle Primavera Cloud Tasks the next time data is imported.
- By default, activities which exist in the P6 project but not in the integrated Oracle Primavera Cloud project are removed when the Send Primavera Cloud project data to P6 for Task (formerly Send Primavera Cloud project data to P6 for Lean Task) flow is activated in Primavera Gateway. Your Primavera Gateway administrator can change this behavior.
- If Oracle Primavera Cloud and P6 are integrated via Oracle Primavera Cloud workspace instead of using Primavera Gateway, activities which exist in the P6 project but not in the integrated Oracle Primavera Cloud project are always removed when the Send Primavera Cloud project data to P6 for Task flow is activated.

Sharing Enterprise Risk Data with Oracle Primavera Cloud

After you have configured enterprise risk data you can send that data to Oracle Primavera Cloud to perform quantitative risk analysis. You can then update P6 with the results of that analysis from Oracle Primavera Cloud and see the results in the pre and post response pessimistic dates fields and pre and post response bars in the Activities view.

To share Enterprise risk data with Primavera Cloud, perform the following tasks:

1. Configuring Risk Enterprise Data
2. Linking P6 and Oracle Primavera Cloud Applications.*Linking P6 and Oracle Primavera Cloud Applications.*Linking P6 and Oracle Primavera Cloud Applications.*Linking P6 and Oracle Primavera Cloud Applications.*Linking P6 and Oracle Primavera Cloud Applications.
3. Transferring Data Between P6 and Oracle Primavera Cloud*Transferring Data Between P6 and Oracle Primavera Cloud*Transferring Data Between P6 and Oracle Primavera Cloud*Transferring Data Between P6 and Oracle Primavera Cloud*
4. Updating Projects With Data From Oracle Primavera Cloud*Updating Projects With Data From Oracle Primavera Cloud*

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Linking P6 and Oracle Primavera Cloud Applications.

Perform the steps below to link P6 to Oracle Primavera Cloud. This link at the application level allows you to establish links at the project level. When the applications and projects are linked, P6 users can send data to Oracle Primavera Cloud.

To link P6 and Oracle Primavera Cloud applications:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click the **Gateway** tab.
3. On the **Gateway** tab in the **Primavera Gateway Parameters** section:
   a. Enter the URL of the Primavera Gateway server in the **API Url** field of the Primavera Gateway Parameters section.
   b. Enter a Primavera Gateway username in the **Username** field.
   c. Enter a Primavera Gateway password in the **Password** field.
   d. Click **Test Connection**.

   > **Note**
   >
   > If the connection test fails, contact your Primavera Gateway administrator.

   e. Enter a Primavera Gateway deployment name into the **P6 Deployment** field.
4. On the Gateway tab in the Integration Parameters section:
   a. Click Add.
   b. Select an action from the **Action Type** list.
   c. Select a deployment from the **Source/Destination Deployment** list.
   d. Select a synchronization from the **Synchronization** list.
   e. Enter a name in the **Action Name** field.
5. Click **Save and Close**.

> **Note**
>
> You need the Edit Application Settings privilege to edit the settings on the Application Settings pane.

Linking P6 Projects With Oracle Primavera Cloud

To link P6 projects to Oracle Primavera Cloud:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select a project.

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3. In the **Project Workspace c**olumn, select a Oracle Primavera Cloud workspace.

> **Note**
>
> If the Project Workspace column is not included in your view, add it from the Project Codes grouping in the Available Columns list. If the Project Workspace column is not included in the Available Columns list, contact your Primavera Gateway administrator.

4. Click **Save**.

Transferring Data Between P6 and Oracle Primavera Cloud

You can send data for a linked P6 project to Oracle Primavera Cloud and retrieve data from the linked project in Oracle Primavera Cloud to update your P6 project.

To transfer data between P6 and Oracle Primavera Cloud:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. In the **Activities** page click the **Actions** menu and select **Exchange Data** and and then select the menu option for sending data to Oracle Primavera Cloud.

> **Tip**
>
> - The option for sending data to Oracle Primavera Cloud will be available if your administrator has configured the integration options.
> - Data can also be transferred between P6 EPPM and Oracle Primavera Cloud from within Oracle Primavera Cloud and Primavera Gateway.

Updating Projects With Data From Oracle Primavera Cloud

You can update a linked P6 project with data from Oracle Primavera Cloud.

To update projects with risk data from Oracle Primavera Cloud:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. In the **Activities** page click the **Actions** menu and select **Exchange Data** and then select the menu option for updating data from Oracle Primavera Cloud.

Working With Primavera Gateway

You can use Primavera Gateway to integrate your P6 installation with other products, including Oracle Primavera Cloud and Primavera Unifier.

If your P6 deployment is integrated with Oracle Primavera Cloud, you can send data to Oracle Primavera Cloud for scope management. You can also exchange data with Oracle Primavera Cloud for quantitative risk analysis. P6 risk register and three point estimate information is sent to Oracle Primavera Cloud and pre response and post response pessimistic activity dates are

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received from Oracle Primavera Cloud. You can then see that data in the Pre response pessimistic start, Pre response pessimistic finish, Post response pessimistic start and Post response pessimistic finish columns, and pre and post response bars in the Gantt chart.

If your P6 deployment is integrated with Primavera Unifier, you can exchange data with Primavera Unifier summary sheets for cost analysis.

Linking P6 and Primavera Unifier Applications Using Summary Sheets

Perform the steps below to link P6 to Primavera Unifier using summary sheet integration. This link at the application level allows you to establish links at the project level. When the applications and projects are linked, P6 users can send data to Primavera Unifier summary sheets.

To link P6 to Primavera Unifier using summary sheet integration:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click the **Gateway** tab.
3. On the **Gateway** tab in the Primavera Gateway Parameters section:
   a. Enter the URL of the Primavera Gateway server in the **API Url** field of the Primavera Gateway Parameters section.
   b. Enter a Primavera Gateway username in the **Username** field.
   c. Enter a Primavera Gateway password in the **Password** field.
   d. Click **Test Connection**.

   > **Note**
   >
   > If the connection test fails, contact your Primavera Gateway administrator.

   e. Enter a Primavera Gateway deployment name into the **P6 Deployment** field.
4. On the Gateway tab in the Primavera Unifier Integration Parameters section:
   a. Select a synchronization from the **Export Synchronization** list.
   b. Select a synchronization from the **Import Synchronization** list.
5. Click **Save and Close**.

> **Tip**
>
> You need the Edit Application Settings privilege to edit the settings in the Application Settings page.

Linking P6 and Oracle Primavera Cloud Applications.

Perform the steps below to link P6 to Oracle Primavera Cloud. This link at the application level allows you to establish links at the project level. When the applications and projects are linked, P6 users can send data to Oracle Primavera Cloud.

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To link P6 and Oracle Primavera Cloud applications:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click the **Gateway** tab.
3. On the **Gateway** tab in the **Primavera Gateway Parameters** section:
   a. Enter the URL of the Primavera Gateway server in the **API Url** field of the Primavera Gateway Parameters section.
   b. Enter a Primavera Gateway username in the **Username** field.
   c. Enter a Primavera Gateway password in the **Password** field.
   d. Click **Test Connection**.

   > **Note**
   >
   > If the connection test fails, contact your Primavera Gateway administrator.

   e. Enter a Primavera Gateway deployment name into the **P6 Deployment** field.
4. On the Gateway tab in the Integration Parameters section:
   a. Click Add.
   b. Select an action from the **Action Type** list.
   c. Select a deployment from the **Source/Destination Deployment** list.
   d. Select a synchronization from the **Synchronization** list.
   e. Enter a name in the **Action Name** field.
5. Click **Save and Close**.

> **Note**
>
> You need the Edit Application Settings privilege to edit the settings on the Application Settings pane.

About Project Templates

Project templates are reusable models of projects you can store and use later, in whole or in part, to save time and standardize your operations.

A template includes all the details, best practices, and de facto standards your organization associates with projects of a particular type. For example, use project templates to create a library of predefined project structures that can later be used as starting points for new projects. In addition, specific WBS branches and their activities can be copied from projects or templates and inserted wherever you need them.

You can organize your template projects within the EPS, assign them project codes, and provide them with descriptions to aid in reuse. You can create templates from projects or to create projects from templates. You can also create projects based on other projects, and templates based on other templates.

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Working with Project Templates

Project templates act as a format that you can use when creating new projects or templates.

Working with project templates

The Documents, Issues, and Team Usage pages are not available for project templates. If you navigate to one of these pages while working with a project template, you will see the message: *Project templates are not supported on this page*. When working with templates on the Activities or EPS pages, the Issues and Documents detail windows are visible but their icons are disabled.

Creating project templates

You can create a brand new project template, or you can copy and modify an existing template or project to make a new template. If you select to copy a project or template, you can copy the entire template, or you might insert only the WBS portion into a project.

Because issues and documents are not available for project templates, when you copy an existing project to make a template, the issue and document information does not carry over.

When you copy a project to create a template, some fields are automatically cleared of any values and disabled to prevent the reuse of data out of context. For example, actual dates and costs are not permitted in templates.

Opening project templates

Project templates cannot be opened in conjunction with other project templates or with projects. If you open a project or a project template on the **EPS** page when you have a project template open, the initial project template will close. Conversely, if you have a project or group of projects open and you open a project template, the projects will close.

This is also true when working in the **Open Projects** dialog box. For example, when you have a project template open, the **Open Projects** dialog box will display the template in the **Selected Templates** list. If you add a project to the **Selected** list, the application will remove the project template from the list. If you already have a project template selected, the application will not allow you to add another template to the list. On the other hand, if you try to open a project template when projects are already open, the projects are replaced by the project template.

Creating Project Templates

You can create project templates to act as a standard or format for future projects.

To create project templates:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select the EPS element to which you want to add the new project template.
   b. Click **Context** and select **Add Project Template**.
   c. In the **Add Project Template** dialog box:
      - Click the **General** tab and configure each required field.
      - Click **Create**.

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Tip

- To configure advanced options, you must select to copy from an existing project or template. This will enable the **Advanced** tab.
- If you choose to copy from an existing project, select either the **Use Actual Costs and Units** or **Use Planned Costs and Units** option. If you select to copy from a template, the application will disable the **Use Actual Costs and Units** option.
- You can also right-click the table and select **Add Project Template** to create a project template.

The EPS

About the Enterprise Project Structure (EPS)

The enterprise project structure (EPS) represents the hierarchical structure of all projects in the database. The EPS can be subdivided into as many levels or nodes as needed to represent work at your organization. Nodes at the highest, or root, level might represent divisions within your company, project phases, site locations, or other major groupings that meet the needs of your organization; projects always represent the lowest level of the hierarchy. Every project must be included in an EPS node.

The number of EPS levels and their structure depend on the scope of your projects and how you want to summarize and aggregate data. For example, you might want to define increasingly lower levels of EPS nodes, similar to an outline, to represent broad areas of work that expand into more detailed projects. Specify as many projects as needed to fulfill the requirements of your operations executives and program managers.

Multiple levels enable you to manage projects separately while retaining the ability to aggregate and summarize data to higher levels. For example, you can summarize and aggregate information for each node in the EPS. Conversely, you can use top-down budgeting from higher-level EPS nodes down through their lower-level projects for cost control.

User access and privileges to nodes within the EPS hierarchy are implemented through a global organizational breakdown structure (OBS) that represents the management responsible for the projects in the EPS. Each manager in the OBS is associated with an area of the EPS, either by node or by project, and the WBS of the particular level of the hierarchy.

Once you have added users and associated them with OBS elements and project profiles, you can define the EPS and assign a responsible manager (OBS element) to each level. You must specify a responsible manager for each node of the EPS.

Working with the EPS

Your P6 projects are arranged in a hierarchy called the enterprise project structure, or EPS. The EPS can be subdivided into as many levels or nodes as needed to parallel work at your organization. Nodes at the highest, or root, level might represent divisions within your company, project phases, site locations, or other major groupings that meet the needs of your organization. Projects always represent the lowest level of the hierarchy. Every project must be included in an EPS node.

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Ideally, one person or group controls the EPS across the organization. The project control coordinator creates the hierarchical structure that identifies the company-wide projects. The coordinator works with the project manager in each area of the organization to define basic project information for each group and to develop standards before any projects are added.

After you set up an EPS, you can define additional data about each EPS division, such as anticipated dates, budgets, and spending plans. Use the detail windows on the EPS page to specify this information. Or, you can begin adding projects under the applicable levels in the structure if you have access rights to these functions. Access rights are set by your application administrator.

Throughout the application, when selecting projects to work with, you can open all projects that belong to an EPS node or sort them by EPS. When you create a project, you must specify a single parent EPS node. User access and privileges to nodes within the EPS hierarchy are implemented through a global OBS that represents the management responsible for each project. Each manager in the OBS is associated with an area of the EPS, either by node or by project, and the WBS of the particular level of the hierarchy.

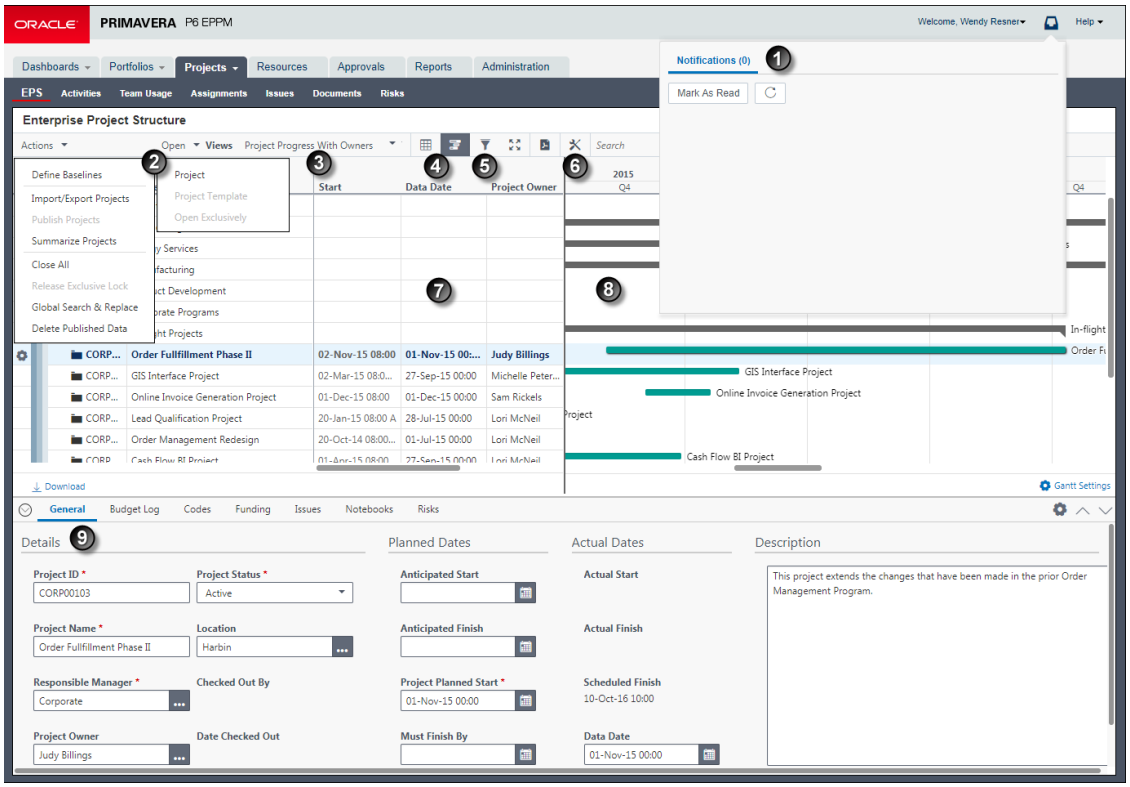


Table of Key EPS Page Elements

Item	Description
1	**Notifications area**: When background services, for example project summarization, finish running you will be notified here.
2	**Actions and Open menus**: Use these menus to work with the **EPS** page.
3	**EPS Views list**: Determines how you see data on the **EPS** page.

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Item	Description
4	**Grid and Gantt view buttons**: Determines whether you see a grid of EPS data, or a grid and a graphical representation of dates on a timeline.
5	**Filter button**: Enables you to customize the **EPS** page.
6	**Customize View button**: Enables you to customize the **EPS** page
7	**EPS/Project Grid**: Displays each project within the EPS. In this example, the data is grouped by **EPS**, then by **Portfolio**, and then by a project code called **Financial Rating**.
8	**EPS Gantt** : Displays project and EPS data in a Gantt format.
9	**Detail Windows**: The **General** detail window for the project selected in the table. You can customize which detail windows appear in the view.

Creating EPS Elements

Create enterprise project structure (EPS) elements to represent the hierarchical positions of all the projects in your database. You can create sibling EPSs to represent those that are hierarchically equal, or child EPSs to represent those that are subordinate.

To create EPS elements:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select an EPS.

      The EPS can act as a sibling or a parent.

   b. Click **Context**:
      - To add a sibling, select **Add Sibling EPS**.
      - To add a child, select **Add Child EPS**.
   c. Double-click in the **ID** field to enter an ID for the new EPS.
   d. Click **Save**.

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Tip

- To remove all projects and templates from the view, apply the *EPS Only* standard filter when creating an EPS element. You are then able to easily see where your new EPS fits into the EPS hierarchy as a whole.
- To create an EPS, grouping must be configured to have the **Level 1 Field** list set to *EPS*. When filtering is configured to display projects that belong to an EPS, the **Hide if empty** option is disabled. Data will not display.
- You can only create a new root level EPS if you are logged in to P6 as a user with the *Admin Superuser* global security profile.
- The application automatically names the new EPS *New EPS*, *New EPS-1*, *New EPS-2*, et cetera.
- You can also right-click an EPS on the table and select **Add Child EPS** or **Add Sibling EPS** to create an EPS.

Configuring the EPS

Configure the EPS for your organization to develop a hierarchy that establishes the way your organization operates. Divide the EPS into multiple levels or nodes to represent the work that needs to be done in your organization. You can then assign projects to these nodes and levels to reflect work that needs to be done in each area.

The number of EPS levels and their structure depend on the scope of your projects and how you want to summarize and aggregate data. For example, you might want to define increasingly lower levels of EPS nodes, similar to an outline, to represent broad areas of work that branch into more detailed projects.

To configure the EPS:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Create the EPSs you need to represent the divisions in your company, site locations, or other major groupings of projects.
      - Click **Context** and select **Add Sibling EPS** or **Add Child EPS** to create an EPS structure.
      - Add projects to the EPS nodes. Click **Context** and select **Add Project**.
   b. On the **EPS** page, click **Save**.

Tip

The farther to the left an EPS is, the higher-level EPS it is.

Assigning OBS Elements to the EPS

You must specify a responsible manager for each node in the EPS to enable security rights and privileges; P6 EPPM uses the uppermost level of the OBS to which you have access as

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the default for all nodes. You can change the responsible manager (OBS element) for each level of the EPS.

> ⚠ **Caution**
>
> **Caution**Users assigned to an OBS that is assigned to the root EPS have access to all nodes beneath the root.

To assign OBS elements to the EPS:

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select an EPS node, double-click the **Responsible Manager** field, and click the browse button.
3. In the **Select Responsible Manager** dialog box, select the appropriate OBS element and click **OK**.
   - The users associated with the responsible manager will have access rights to the selected EPS node and all nodes/projects within that branch. The specific data that can be accessed within the projects depend on the project profile that corresponds to the OBS element.
   - If more than one user is responsible for the same node of the EPS, you must assign each of those users to the corresponding OBS element.

> **Tip**
>
> - Once the EPS and OBS structures are defined and security is implemented at the EPS level, project managers can begin to add their own projects to the hierarchy. To further control security within projects, project managers can assign specific OBS elements to WBS levels.
> - If the **Responsible Manager** field is not available in the table, open the **Customize Columns** dialog box and add **Responsible Manager** to the **Selected Columns** list.
> - You may also assign an OBS element to the EPS from the **General** detail window on the **EPS** page.

Opening Projects or Templates in the EPS

While viewing the EPS, it is also possible to designate one or more projects or a single template as *open*. When you later navigate to other pages in the Projects section, such as the Activities page, these projects or the designated template will already be open so you can begin viewing or modifying them.

To open projects or templates from the EPS:

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project, template, or EPS element to open.

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b. Click **Open** and select Project or Project .

> **Tip**
>
> - You can also open a project directly to the Activities page by clicking the hyperlink in the ID or Name column.
> - If you select to open an EPS, all the projects contained in that EPS will open.
> - You can open more than one project. Use Shift+click or Ctrl+click to select all the items you want to open.
> - You cannot open a template in combination with any other item.
> - To close a project, right-click the project you want to close and select Close Project. To close all of the open projects and templates on the EPS page, right-click and select Close All.
> - When a project is open, it will display an open folder indicator. When a project is closed, its corresponding folder indicator will also be closed. Templates also exhibit this change in their visual indicators.
> - The Team Usage, Documents, and Issues pages are not available when you open a template.

About Projects

A project is any temporary series of activities performed in some coordinated arrangement in order to create a product, service, or measurable business result. Projects have a definite beginning and end. A project is concluded when its objectives have been reached or when the project is terminated.

Creating Projects

Create projects to define a set of activities and WBSs that work toward a common goal.

To create a project:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select the EPS element to which you want to add the new project.
   b. Click **Context** and select **Add Project**.
   c. In the **Add Project** dialog box:
      - Click the **General** tab and select an option or enter a value in each required field.

> **Note**
>
> Avoid using the pipe character (|), or brackets (< or >) in the Project Name.

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d. Click **Create**.

> **Tip**
>
> - You can add a **Description** of the project. If the project has a definitive deadline you can add a **Must Finish By** date, which will allow you to determine if the project is behind schedule.
> - You can copy a project from an existing project or template.
> - To configure advanced options, you must select a project to copy. This will enable the **Advanced** tab. If you select to copy a template, the **Advanced** tab will not be enabled. When you choose to copy data from another project, the new project might not appear immediately. The process runs as a background service and you will see a notification once it has completed.
> - You can also right-click the table and select **Add Project** to create a project.
> - You can perform the cut, copy, and paste functions to create new projects from existing projects.

Creating Projects from Existing Projects or Templates

In place of making a project from scratch, you can use a template or a copy of an existing project as a starting point.

To create a project from an existing project or template:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select the EPS element to which you want to add the new project.
   b. Click **Context** and select **Add Project**.
   c. In the **Add Project** dialog box, click the **General** tab.
   d. On the **General** tab select an option or enter a value in each required field.
   e. Click the **Advanced** tab.
   f. Click the **Copy from existing project or template** field and click **Select**.
   g. In the **Select Project or Template** dialog box:
      - Click **Projects** or **Templates.**
      - Select a project or template.
      - Click **OK**.
   h. Select the data items to copy from the project or template.
   i. Click **Create**.

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Tip

- To configure advanced options, you must select a project to copy. This will enable the **Advanced** tab. If you select to copy a template, the **Advanced** tab will not be enabled.
- You can also right-click the table, select **Add Project**, and follow steps 4 and 5 to create a project from an existing project or template.
- You cannot copy from a project unless you have the privilege to view costs for a project.

Creating Project Templates from Existing Projects or Templates

In place of making a project from scratch, you can use a template or a copy of an existing project as a starting point.

To create a project from an existing project or template:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Context** select **Add Project Template**.
   b. In the **Add Project Template** dialog box:
   c. On the **General** tab:
      - Select an option or enter a value in each required field.
   d. On the **Advanced** tab:
      - In the **Copy from existing project or template** field, click **Select**
      - In te **Select Project or Template** dialog box, click **Projects** or **Templates** and select a project or template from the dialog box, then click **Select**.
   e. Click **Create**.

Tip

If you choose to copy from an existing project, select either the **Use Actual Costs and Units** or **Use Planned Costs and Units** option. If you select to copy from a template, the application will disable the **Use Actual Costs and Units** option.

Deleting Projects or EPS Elements

Delete projects or EPS elements when they are no longer necessary.

To delete a project or EPS element:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:

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a. Select a project or EPS element.

b. Click **Context** and select **Delete**.

c. In the **Confirm** dialog box, click **Yes**.

d. Click **Save**.

Customizing Detail Windows

You can customize which detail windows appear on the EPS page or Activities page.

To customize detail windows:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page:
   a. Select a view from the **Views** list.
   b. Click **Show/Hide Tabs** and select **Show**/**Hide** for each tab you want to show or hide.
   c. Click **Save View**.

Tip

- Click and drag detail windows to change their order.
- You can save or cancel the view changes you made to the detail windows. These changes will only be saved for the view selected in the Activity or EPS View list.

Configuring Project Preferences

You can set various behavior and data preferences for each project or a group of projects by performing the tasks below on the Project Preferences dialog box of the EPS page or the Default Project Preferences for EPS dialog box of the EPS page.

Configuring History Settings for Primavera Analytics

Use this task to configure the type of data stored in Primavera Analytics and in what time interval.

To configure history settings:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project.
   b. Click **Context** and select **Set Project Preferences**.
   c. In the **Project Preferences** dialog box, click **Analytics & Services**.
   d. On the **Analytics & Services** page:

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- On the **History Level** list, choose how to store historical spread data.
- If you selected Project or WBS, select an option on the **History Interval - Project or WBS** list.
- If you are running ODI, select an option on the **Data Warehouse Update Frequency** list.

e. Click **Apply**.

Configuring Project Calculations

Configure project calculations to define how the application will compute values concerning activities, earned value, and units and costs.

To configure project calculations:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project.
   b. Click **Context** and select **Set Project Preferences**.
   c. In the **Project Preferences** dialog box, click **Calculations**.
   d. On the **Calculations** page:
      - In the **Resource Assignments** section, specify how the units and costs on assignments and activities should be updated when actual units or costs fields are changed.
      - Select whether to **Recalculate actual units and costs when Duration % Complete changes**.
      - Select whether to **Link actual to date and actual this period units and costs**.
   e. Click **Apply**.

Configuring Project Defaults

Configure project defaults to define how new activities and assignments will display in a project.

To configure project defaults:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project.
   b. Click **Context** and select **Set Project Preferences**.
   c. In the **Project Preferences** pane, click **General**.
   d. On the **General** page:
      - In the New Activities section, configure the default **Duration Type**, **Percent Complete Type**, **Activity Type**, **Calendar**, **Cost Account**, and **Price/Unit** for new activities added to the project.

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- In the New Activities - Auto Numbering section, configure the **Activity ID Prefix**, **Activity ID Suffix**, and **Increment** to use for the Activity ID for new activities added to the project.
- In the New Assignments section, configure the **Rate Type** to use for new assignments made in the project, whether new assignment should **Drive activity dates by default**, and whether **Resources can be assigned to the same activity more than once**.
- In the General section, specify a **WBS Code Separator** and select a month on the **Fiscal year begins on the first day of** list.

e. Click **Apply**.

Configuring Project Summarization and Publication Services

You can configure options for the project summarization and publication services.

To configure project services:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project.
   b. Click **Context** and select **Set Project Preferences**.
   c. In the **Project Preferences** dialog box, click **Analytics & Services**.
   d. On the **Analytics & Services** page:
      - Select or clear the **Enable Summarization** option.
      - If you select this option, configure the enabled options and **Summarize to WBS Level** list.
      - Select or clear the **Enable Publication** option.
      - If you select this option, configure the **Publication Priority** by selecting a number from 0 to 100.
   e. Click **Apply**.

> **Tip**
>
> If you clear the **Enable Summarization** option in the EPS table, you will be asked if you would like to delete the summary information. If there is no summary information, then the application will not prompt you.

Configuring P6 Team Member Status Update Reviews

Configure the team member status updates feature to enable a project manager to manually edit and approve status updates made by P6 Team Member interface users before the updates are applied to the project.

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> **Note**
>
> The status update reviews feature is turned off by default.

To configure status updates:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project.
   b. Click **Context** and select **Set Project Preferences**.
   c. In the **Project Preferences** dialog box, click **Team Member.**
   d. On the **Team Member** page, click **Status Reviews**.
   e. On the **Status Reviews** tab:
      - Select **Enable review for team member status updates**.
      - Select **Review required by default for new activities** if all new activities require approval. When prompted to apply the setting to all existing activities in the project, choose **Yes** or **No**.
      - In the **Review Type** list, select whether anyone can or everyone must review status updates.

        > **Note**
        >
        > You cannot change the review type if there are pending status reviews for the project.

      - In the **Reviewers** list, click **Select**.
   f. In the **Select Status Reviewers** dialog box:
      - Select people to review activity status updates.
      - Click **Select**.
      - When prompted to set this user as the status reviewer for all WBS nodes in the project, choose **Yes** or **No**.
   g. Click **Apply.**

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Tip

- You can also assign status reviewers to projects by adding the Status Reviewer column to your EPS page view.
- Assigning status reviewers at project level with Fill Down on the EPS page automatically assigns the same status reviewers to all WBS nodes in each of the selected projects, overwriting existing status reviewer assignments to those WBS nodes.
- Status reviewers can be set at the WBS level and apply to each activity included in the WBS, but not to its child, sibling, or parent WBS nodes.
- A setting in P6 Administrator application enables daily emails to be sent to status update reviewers listing all the updates pending their review. There is also a setting to allow all users to receive a daily email listing all their status updates which have been approved or rejected in the past 24 hours.
- The assigned status reviewers, or a user with Admin or Project superuser privileges can view, edit, and approve the status updates for the project. However, only users identified as status reviewers receive notifications that pending status updates exist.
- You can manually change the reviewers for each WBS on the **Activities** page. Click the **General** detail window for the WBS and double-click the **Status Reviewers** field. If the **Status Reviewers** column is not displayed, click **Customize View** to add it to your view.
- To require approval on an activity, on the **Activities** page, select **Review Required** for the activity. If the **Reviewer Required** column is not displayed, click **Customize View** and add the **Review Required** column.
- If an activity does not require review, it is automatically approved. View the **Update History** detail window on the **Activities** page to view all updates made the to the activity.
- Team members can continue to update their activities even if a review is pending.

Configuring P6 Team Member View Preferences

Configure the Team Member view preferences to enable users to view and update the fields that are important for statusing the project in P6 Team Member Web, P6 for Android, or P6 for iOS.

To configure view preferences:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project.
   b. Click **Context** and select **Set Project Preferences**.
   c. In the **Project Preferences** dialog box, click **Team Member** then click the **Status Updates** tab.
   d. On the **Status Updates** tab:

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- Choose whether you want team members to provide status at **Assignment Level**, **Activity Level**, or both.
- If you selected the Activity Level option choose whether you want team members to provide status **As Owner** or **As Primary Resource**. Select the **As Owner** option if your team members are assigned Team Member work distribution filters.
- Click + **Add** to add an **Assignment Field** or **Activity Field** and select the field you want team members to use to update their activities. Users assigned Team Member work distribution filters update Activity Fields.
- Choose whether you want team members to update **Additional Time Spent** or **Total Time Spent** when updating actual units.
- Select whether you want Team Members to be able to see **Planned units**, **Baseline dates**, and **Total float**.
- Choose whether you want team members to update status in P6 Team Member Web Timesheets view by changing **Percent Complete** or **Remaining Units**.
- Choose whether you want primary resources to be able to mark activities as complete.
- Choose whether you want primary resources to be able to update activity dates in timesheets.

e. On the **Activity Updates** Tab:

- Select the **Add and delete steps** option if you want to allow team members using P6 Team Member Web, P6 for Android, or P6 for iOS to add and delete their own steps.
- Select the **Update notebooks** option if you want to allow team members using P6 Team Member Web, P6 for Android, or P6 for iOS to be able to update notebook topics.
- Select the **Status other resource assignments on an activity** option if you want to allow team members using P6 Team Member Web who are assigned as the activity owner, primary resource or who have been assigned Team Member work distribution filters, to update other resource assignments on the activity.
- Select the **Warn team members when their update might put the activity out-of-sequence** option if you want team members using P6 Team Member Web, P6 for Android, or P6 for iOS to receive a warning if the change they are trying to make could affect schedule logic.
- Click + **Add Code or UDF** and select a global activity code, EPS activity code, or a UDF that should be visible to team members. The **Read-only** option next to each code and UDF is selected by default. If you want team members to update the code or UDF value clear this option.
- Click +**Add Step UDF** and select a step UDF that should be visible to team members. The **Read-only** option next to each code and UDF is selected by default. If you want team members to update the code or UDF value clear this option.

f. On the **Activity Assignments** Tab:

- Select the **Assign themselves to activities** option if you want to allow team members using P6 Team Member Web, P6 for Android, or P6 for iOS to add themselves to activities.
- Select the **Outside assigned OBS access** option if you want to allow team members using P6 Team Member Web, P6 for Android, or P6 for iOS to add

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themselves to activities even if the resource does not have access to the relevant OBS for the activity.

- Select the **Assign themselves to activities as owners** option if you want to allow team members using P6 Team Member Web to assign themselves as the owners of activities.
- Select the **Outside assigned OBS access** option if you want to allow team members using P6 Team Member Web to assign themselves as the activity owner even if the resource does not have access to the relevant OBS for the activity.
- Select the **Reassign activities to a different owner** option if you want to allow team members using P6 Team Member Web to assign other team members as activity owners.
- Select the **Assign themselves to activities with role assignments matching Team Member's role** option if you want to allow team members using P6 Team Member Web, P6 for Android, or P6 for iOS to be able to assign themselves to activities on the basis of their role. Then select which Units/Time and Overtime factor to use when a resource assigns themself to an existing activity assignment, and when a resource and role share an activity assignment.
- Optionally select whether the assignment proficiency should be considered when team members assign themselves to an activity on the basis of their role.

g. Click **Apply**.

Tip

- Time Spent is read only if the **Team members enter new actual units** option is selected.
- If reviews are enabled for status updates and you allow team members to add or delete steps, the status reviewer is prompted to approve the change of a step name; however, steps that are added or deleted by a team member are not submitted for review.
- The assignment and activity fields display in P6, Email Statusing Service, P6 for Android, and P6 for iOS in the following order, if selected:
- The activity codes and UDF fields will appear in the P6, Email Statusing Service, P6 for Android, and P6 for iOS interfaces in the same order as shown on this tab.
- Expected Finish
- Activity % Complete
- Remaining Duration
- Actual Units or Actual Labor Units
- Actual Nonlabor Units
- Remaining Units or Remaining Labor Units
- Remaining Nonlabor Units

Configuring Project Preferences for Multiple Projects

If you need to make changes to the preference for multiple projects simultaneously, you can make the change to the highest relevant EPS node. All changes you make to the fields,

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options, and lists in the project preferences dialog box at EPS level will be applied to all visible child projects in all visible child EPS nodes of the selected EPS node.

To change project preferences for multiple projects:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select an EPS node.
3. Click the **Context** menu and select **Set Project Preferences**.
4. In the **Project Preferences of EPS** dialog box:
   a. Make the changes you want to apply to child projects.
   b. Click **Apply**.

   > **Note**
   >
   > Only the preferences you edited will be applied to child projects.

   c. Click **Save**.

> **Tip**
>
> - If you do not want to apply the change to all child projects of the selected EPS node, apply a filter to your view. Projects that are not selected to show in your view will not be modified when you change project preferences at the EPS level.
> - To change setting for multiple projects to the current default for the EPS node, select an option other than the default for that setting, then re-select the default setting before you apply the changes.

Running the Project Checker

Run the Project Checker to assess the health of the data that constitutes projects. The Project Checker looks for data that violates unique and foreign key constraints and business rules. You must be logged in to P6 as a user with the *Admin Superuser* global security profile to run the Project Checker.

To run the Project Checker:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Click the **Actions** menu and select **Project Checker**.
3. In the **Project Checker** dialog box:
   a. In the **Project Selection** field, select **Select**
      - In the **Select Project** dialog box, select the projects to check and click **Select**.
   b. On the **Options** list, select the checks to run.
   c. Optionally select the **Limit report rows** option to reduce the size of the report.

      If you selected to limit the rows returned by the report, in the **Maximum Rows** field, select the maximum number of rows you want to return for each check in the report.

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d. Select **Run**.

> **Tip**
>
> - To download the report, click the link in the View Service Status tab.
> - You can also schedule the Project Checker to run at a time you specify. If you run the Project Checker as a Project Scheduled Service, you can specify that the report should be sent by email to the addresses you supply when the check is complete.

Opening Projects or Templates

Perform these steps to open one or more projects or a single template in order to view or modify project data on any of the pages in the Projects section of the application. You can open templates and projects from several locations in the application; however, these steps using the common selection controls on the **Open Projects** dialog box represent the standard way to determine and change which projects are currently open.

To open a project or template:

1. In the context selector, select **Projects**.
2. Click **Open Projects**.
3. In the **Open Projects** dialog box:
   a. Click **Projects** or **Templates**.
   b. Select an item from the **Organize By** list to choose a viewing arrangement.
   c. Use the common selection controls to identify and select the items you want to open.
      - In the **Available Templates** list, add a template to the **Selected Templates** list.
      - In the **Available Projects** list, add one or more projects, or an entire group of projects, to the **Selected Projects** list.
   d. Click **OK**.

> **Note**
>
> After initial installation or upgrade, and for all new users, the first time you launch P6 and click Projects, the EPS page will open if this page is available and set as the default page under the Projects section in your user interface view. If the EPS page is not available in your user interface view or you navigate to another page in the Projects section, the **Open Projects** dialog box will appear.

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Tip

- You can open a combination of projects, for example, two projects, an EPS node, and a portfolio. However, you can only open one template at a time, and never in combination with any other projects.
- Press **Shift+click** or **Ctrl+click** to select multiple projects, or select an EPS element to open all projects belonging to that EPS element and all child EPS elements.
- When grouped by project code, you cannot select an entire project code. You can however select a project code value to open all projects that share that value.
- To open projects exclusively in the **Selected Projects** lists, select **Open Exclusively**. When you open a project exclusively, no other users can modify data in the project until the exclusive lock is removed from the project. You must have the required security privilege to open a project exclusively.
- As convenient shortcuts, click **Projects** to re-open the last project or projects you had open, or click the **Projects** menu and select a project, project group, or template from the list of your most-recently used items.
- You can also open projects from within certain project-related portlets such as **My Projects** or **Project Health**. You must have OBS access, be the owner, or assigned as a resource or activity owner in the project. In these portlets, click the project name hyperlink to open it in the **Projects** section.

About Gantt Charts

A Gantt chart is a graphical representation of the duration and sequence of activities or projects. It is useful for planning, scheduling, and monitoring progress against a timeline.

Working with the Activity Gantt Chart

Use the Activity Gantt chart to view the progression and relationships of activities or projects on a timeline.

Gantt chart bars and activity dates or durations

You can easily update dates and durations by resizing or moving current bars in a Gantt. When you change bar positions in a Gantt, the start and finish date columns update to reflect the new bar position. After moving a Gantt bar, when you save your changes, the remaining duration is recalculated based on the new dates and the activity or project calendar. Because this calendar is applied when you save, if you move but do not resize a Gantt bar, the duration might shorten or lengthen based on the non-work time of the calendar.

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> **Note**
>
> If you click the drag bars on the Remaining Early Start date of the bar of an In Progress activity, you can move the Remaining Early Start to a later date, or to an earlier date up to and including the Actual Start date. If you click elsewhere on a bar or on a milestone marker and drag it along the timescale, you will be prompted to add a Start On or After constraint. In the Gantt chart, you can impose only a Start On or After constraint.

Customizing the Gantt chart

You can change the progress line options or the timescale for the Gantt chart in the Manage Views dialog box.

Viewing the Gantt chart

In the Gantt chart, a vertical blue line represents the current data date for the project. Vertical sightlines appear at each minor increment (bottom) of the timescale. The timescale background is shaded to indicate non-work time based on the global default calendar.

Activity highlight

To quickly locate the activities you need to update, you can use the Progress Spotlight feature, which highlights all activities that should have progressed during a specific time period. This time period is defined by the smallest increment of the current timescale since the last data date. For example, if the current timescale is set to Month/Week, Progress Spotlight highlights all activities that should have progressed during the week since the data date.

Configuring Gantt Charts

On the EPS and Activities pages, configure the Gantt chart to adjust activity beginning and finishing dates as well as constraints.

To configure the Gantt chart:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page, click **Gantt View**.
3. On the **Gantt chart**:
   a. To resize bars, select a bar and click and drag the beginning or end of it to a new date. (Only applicable on the Activities page.)
   b. To expand a specific area of the Gantt chart, hover over the timescale at the top of the Gantt chart (the pointer will become a double-headed arrow), move the pointer to select the portion of the timescale you want to expand, and click again. You can perform this step several times.
   c. To apply a Start On or After Activity Constraint, click the middle of a bar and drag it along the timescale. (Only applicable on the Activities page.)
4. On the **Activities** or **EPS** page, click **Save**.

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Tip

- After resizing or moving a Gantt bar, when you save your changes, the activity remaining duration is recalculated based on the new dates and the activity's calendar. Because the calendar for the activity is applied when you save, a date you specified for an activity might change slightly if it occurs during calendar non-work time. Also, if you move, but do not resize, a Gantt bar, the duration might shorten or lengthen based on the activity calendar's non-work time.
- If you select the option Do not show this again in the Activity Constraint dialog box, it will not reappear until the next time you log in.
- You can create or configure activity relationships directly in the Gantt chart.

About Bars

Bars are used in different views to graphically represent the project timeline. They can symbolize milestones, activities, assignments, or projects. Bar type options vary depending on your current view.

Activities View

Current Bar: Spans the early remaining/actual start to the early remaining/actual finish for each activity, and indicates how the schedule is progressing according to the original plan.

Float Bar: Shows the total amount of time that an activity can be delayed without delaying completion of a project.

Free Float Bar: Shows the amount of time that an activity can be delayed without causing subsequent activities to be delayed.

Late Bar: Shows the late start to the late finish of an activity.

Percent Complete Bar: Shows the completion percentage of an activity.

Plan Bar: Shows the forecasted status of planned activities, and is used for simulating the outcome of the project schedule as part of project planning.

Project Baseline Bar: Shows the project baseline start and finish dates of an activity, and indicates how the schedule is progressing according to the original plan.

User's Primary Baseline Bar: Shows the primary baseline start and finish dates of an activity, and indicates how the schedule is progressing according to the original plan.

UDF Bar: Shows the amount of time spanning the selected Activity UDF start date and the Activity UDF finish date. UDF bars can be used to show a risk adjusted schedule using dates imported from Oracle Primavera Risk Analysis.

Pre Response Bar: Shows the pre response pessimistic dates of activities calculated by Oracle Primavera Cloud.

Post Response Bar: Shows the post response pessimistic dates of activities calculated by Oracle Primavera Cloud.

Assignments View

Current Bar: Spans the early remaining/actual start to the early remaining/actual finish for each activity, and indicates how the schedule is progressing according to the original plan.

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Late Bar: Shows the late start to the late finish of an activity.

Plan Bar: Shows the forecasted status of planned activities, and is used for simulating the outcome of the project schedule as part of project planning.

EPS View

Current Bar: Spans the early remaining/actual start to the early remaining/actual finish for each activity, and indicates how the schedule is progressing according to the original plan.

Project Baseline Bar: Shows the project baseline start and finish dates of an activity, and indicates how the schedule is progressing according to the original plan.

Forecast bar: Shows the forecast start to the forecast finish dates, and indicates how the schedule is progressing according to the original forecast dates.

About Baselines

A baseline is a copy, or snapshot, of project data at a given time. Because a baseline is a static representation of a project plan, it can be used as a benchmark against which to measure performance as a project progresses.

You can create multiple baselines to establish metrics throughout the project life cycle. Typically, you would want to create an initial baseline once the project plan is approved, then you would create additional baselines according to your organization's requirements. For example, you could create new baselines at specific reporting intervals.

Although many baselines can be created for a project, only four baselines can be used at any given time to display and compare data. These are known as the Project Baseline and User's Primary Baseline, User's Secondary Baseline, and User's Tertiary Baseline. The current project can also be used as the baseline, for example, in situations where no other baseline yet exists.

The Project Baseline is a single metric for comparison that enables all members of a team to have a shared and consistent set of data against which to evaluate project progress. There is only one Project Baseline at any time. All pages that display summarized data compare and display data against the Project Baseline. As a project progresses, you can update baseline data.

The User's Primary, Secondary, and Tertiary Baselines are optional personal baselines that are used to evaluate project progress.

Note

- How Are Baseline Dates Calculated In P6? [VIDEO] [KB333624]
- How Baseline Dates Are Calculated in P6 [KB617147]

Working with Baselines

Before you update a schedule for the first time, you should create a baseline plan. 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. You can save a copy of the current project to use as the baseline or you can convert another project in the EPS hierarchy to a baseline for the current project.

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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*, *customer sign-off*, or *midproject baseline*.

Regardless of the number of baselines you store for a project, at any given time you can only select at most two baselines for use in making comparisons in P6. The project-level baseline is used for project/activity usage spreadsheets and profiles. You can choose which baseline to use for earned value calculations in the project preferences.

You can convert another project in the EPS hierarchy to a baseline for use in comparisons with the current project. 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, in order to modify it or update it.

If you choose to update a baseline, you have control over which data items are updated. For example you can choose to add new activities from the project to the baseline, but not to delete activities from the baseline which have been deleted from the project. You can also control which activities to update using a filter.

> **Note**
>
> You must have the Edit Project Details Except Costs/Financials and Assign Project Baseline project privileges to set the project baseline.

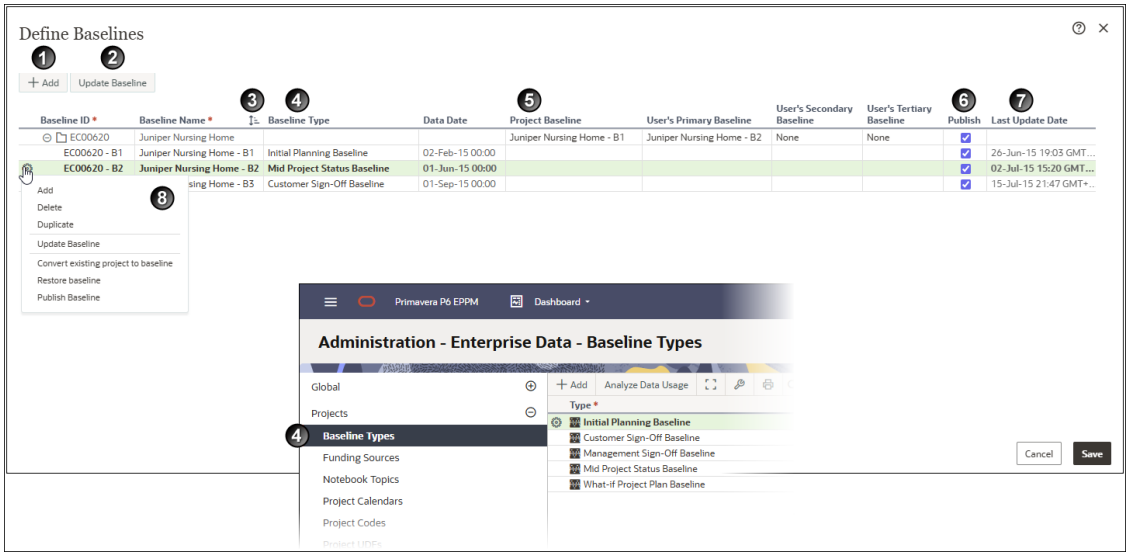


Table of Working with Baseline Elements

Item	Description
1	**Add Baselines**: When you add a baseline, give it a name, assign it a type, and decide if you want to make it the Project Baseline or one of the User's baselines for the currently selected project.
2	**Update Baselines**: Update the baseline with the latest data from the project. You can select which data to update.

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Item	Description
3	**Sorting**: Click on a column heading to sort the list by that column.
4	**Baseline Type**: Assign baseline types to baselines to help categorize multiple baselines for a single project. Configure the available baseline types along with your other Enterprise Data settings.
5	**Assigned Baselines**: Assign the baselines to use as the Project, Primary, Secondary, or Tertiary baseline. **Project Baseline**: Lists the available baselines for the selected project. Select the baseline to use as the project baseline. If a baseline does not exist, the current project is the default value. **User's Baselines**: Select your primary, secondary, and tertiary baseline from the list of available baselines. If a baseline does not exist, the current project is the default value.
6	**Publish**: Select this option for any baselines that you want to publish for reporting purposes. You must publish a project before you can publish any of its baselines.
7	**Last Update Date**: The date that the baseline was last updated.
8	**Context Menu**: Click the **Context** menu against any baseline to access further options, including: **Convert Existing Project to Baseline**: Save a copy of the baseline before you convert it. Convert a project to use it as a baseline for a current project. **Restore Baseline**: Use restore a baseline to modify a baseline project. You must first unlink a baseline 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.

> **Note**
>
> You can define up to three user baselines for a project in P6 Professional.

Creating Baselines

Create baselines to measure project performance.

To create a baseline:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page
   a. Click the **Actions** menu and select **Define Baselines...**.
   b. In the **Define Baselines** dialog box:
      - Select the project to which you will add the baseline.

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- Click **Context** and select **Add**.
- Enter a name in the **Baseline Name** field.
- Select a type from the **Baseline Type** list.
- Click **Save**.

Tip

- The application automatically assigns the baseline a name based on the selected project. For example, if you select Project A, the application will name the newly created baseline "A - B1".
- Specify the default **Project Baseline** and **User's Primary Baseline** by selecting from the list of available baselines for each project in the table on the Baselines dialog box.
- Click **Convert a Project to Baseline** and select a project to convert a project into a baseline.
- Select a baseline and click **Restore a Baseline** to remove the baseline and make it a project.
- When you create a new baseline, the **Publish** option is switched off by default.

Updating Baselines

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. You can preview the changes that would be made to the baseline before you commit to updating the baseline.

To update a baseline:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page
   a. Click the **Actions** menu and select **Define Baselines...**.
   b. In the **Define Baselines** dialog box:
      - Select the baseline to update.
      - Click **Update Baseline**.
   c. In the **Update Baseline** dialog box:
      - Select **Run Optimized** to optimize the speed of updating the baseline.

Note

If you select Run Optimized, error logging is switched off. If errors occur during the baseline update process when you have Run Optimized selected, update the baseline again without Run Optimized selected to see which activities caused the errors.

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- Select **Ignore Last Update Date** to update all activities in the baseline, regardless of the last time they were updated. Select this option when you want to update a data item that you did not include in your last baseline update.

  > **Note**
  >
  > If you clear the Ignore Last Update Date option, data items are updated only with additions or modifications that have occurred since the last time the baseline was updated.

- On the **Project Data** tab, select which types of project data should be updated.
- On the **Activity Data** tab, select whether to update all activities or activities matching a filter, whether to add new activities to the baseline which have been added to the project since the baseline was created, and whether to delete activities from the baseline which no longer exist in the project.
- On the **Update Options** tab, select which types of activity data should be updated.

d. Click **Update**.

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Tip

- You cannot update a project's baselines if the project has been opened in Exclusive mode or checked out by another user.
- If errors occur while the project is updating, the module logs the errors inthe specified log file (if the 'Run Optimized' option is not selected) and continues updating the project. If the Update Baseline process produces errors, scheduling the project to the current data date, then run Update Baseline again might resolve some errors. Insufficient user privileges can cause errors when updating baselines.The *Run Baseline Update* privilege is a minimum requirement. Oracle also recommends users should have all project and global view, create, edit, and delete privileges to avoid encountering errors when updating baselines.
- Project calendars, activity codes, and the WBS are always updated when you update a baseline.
- 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.
- The following date fields are not updated when you update baselines because they are calculated by the scheduler: Early Start, Early Finish, Late Start, and Late Finish. To update these fields after updating the baseline, restore the baseline project, schedule the restored baseline project and re-attach it as a baseline to the project.
- If you only want to update project-level data (and not activity-level data), clear the 'Add new activities and activity data (except actuals)' and 'Delete from baseline any activities no longer in the current project' on the Activity Data tab, and the 'Update existing activities already in the baseline' option on the Update Options tab.
- If the 'Planned values with planned dates' option is selected for the 'When calculating earned value from a baseline use' setting on the Earned Value page of Application Settings, the BL Project Start and BL Project Finish dates are updated with the planned dates of the project. When the Planed Values with Current Dates option is selected, the BL Project Start and BL Project Finish dates are updated with the current dates of the project.
- For further information about how baseline dates are calculated see the following Knowledgebase article: How Baseline Dates Are Calculated in P6 (KB617147)

Previewing Updates to Baselines

When you update baselines, you can choose to preview the updates that will be made to a baseline before you commit to making those changes. The Update Baselines dialog box provides an overview of all the changes that will be made to each subject area if you choose to update the baseline with the selected settings.

When you preview the changes to the baseline that will be made if you update using the options as you configured them, you can return and reconfigure the options as many times as you need to before updating the baseline. Alternatively, you can exit the preview without updating the baseline.

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To preview updates to a baseline:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page
   a. Click the **Actions** menu and select **Define Baselines...**.
   b. In the **Define Baselines** dialog box:
      - Select the baseline to update.
      - Click **Update Baseline**.
   c. In the **Update Baseline** dialog box:
      - Choose whether to **Run Optimized**.
      - Choose whether to **Ignore Last Update Date**.
      - Configure the options on the **Project Data,Activity Data**, and **Update Options** tabs.
      - Click **Preview**.
   d. In the **Update Baselines Preview** dialog box:
      - Select a **Subject Area** from the list to see the changes that would be made to that data.
      - Optionally, select **Download** to download a spreadsheet of the changes that would be made to that subject area.
      - Select **Back** if you want to change the configuration of the Update Baseline options, **Update** if you want to update the baseline with the changes as previewed, or **Cancel** to exit the preview without making any changes to the baseline.

> **Tip**
>
> If the Update Baseline Preview needs more time to complete, you can view the Update Baselines Preview in the View Service Status dialog box, by selecting the Update Baseline job and selecting View Log.

About Summary Data

Projects often contain large amounts of data. Users expect to rearrange and group this data to obtain subtotals and totals for status reporting. Performance problems would naturally arise if the data had to be re-calculated over and over for each minor change. To resolve these issues and to obtain accurate aggregate values representing sub-totals and totals, projects are summarized using the web summarizer. The web summarizer creates *summary data* and *spread data*. *Summary data* means a new summary record is created to store aggregate values for totals in columns. *Spread data* means a new sub-summary or spread record for each spread period is created with only the individual values for that period.

Some features in P6 and P6 Professional use summary enterprise or project data calculations spanning multiple records and therefore rely on the creation of summarized data. To ensure that enterprise records are current, you need to summarize projects. Summarization performs the series of calculations that update records with any new information that has been entered since the last update. Summary data tables temporarily store and share the data.

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When a project is summarized, a scheduled service creates summary data for the following entities:

- All project data for a given project. This includes all the data displayed in columns in the tables on the EPS page.
- Project and WBS data for each financial period or week/month, including totals.
- Resources and roles by project, and totals for all projects (enterprise resource summary).

When an EPS element is summarized, a scheduled service creates summary data for the following entities:

- EPS summary records representing all project summary data for all projects within a given EPS node.

> **Note**
>
> Portfolio *Capacity Planning* uses summarized data. If you are using this feature, you should use the scheduled job service to summarize all projects in the portfolio.

The following types of projects are not summarized:

- Templates
- Baselines
- Requested Projects

> **Note**
>
> Projects that are checked out in P6 Professional or opened exclusively by another user cannot be summarized even if set to *Enable Summarization*. Projects that are opened exclusively by another user can only be summarized by that user.

You can delete summarized data on the EPS or Activities pages using the **Delete Summarized Data** item on the **Actions** menu.

Working with the Summarizer Service

You can summarize data at any time or you can use the Scheduled Services page to schedule a time when data are regularly summarized. For example, set the application to summarize every Monday at 8:00 a.m. In each case, project data is summarized according to the settings you specify and the new summary values are saved to the project database, overwriting any previously calculated summary data. If you run the summarizer from the Scheduled Services page, you can select to summarize the entire EPS, including all the projects assigned to that EPS node. Otherwise, an EPS node uses the sum of all the project records beneath it.

Resources

Resource-related features in P6 that use summary data rely on the creation of enterprise (EPS) resource records. Each record is the sum of all assignments for a resource. When you summarize a project, the application creates resource records for that project. Each time the service runs, the records are updated.

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Summarizing Projects

Summarize projects to maintain up-to-date project data.

To summarize projects:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project or EPS node.
   b. Click **Actions** and select **Summarize Projects**.

Tip

- Using the Project Scheduled Services page, you can schedule the application to automatically summarize projects on a periodic basis.
- You can also delete summarized data if it is no longer needed, using the **Delete Summarized Data** item on the Click **Actions** menu.
- These services are removed from the database based on the ASAP Cleanup Rate your P6 administrator specifies on the Configurations tab in P6 Administrator application. Once the time is met all ASAP jobs that have a status other than running or delegated will be removed from the table automatically. Running and delegated jobs will be removed if they are older than the cleanup rate or if they are older than one day, whichever is greater.

Deleting Summarized Data

Delete summarized project data when you need to clear stored summary values without turning off summarization for the project. P6 does not change the project summarization settings when you delete summarized data.

To delete summary data:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project or EPS node.
   b. Click **Actions** and select **Delete Summarized Data**.

Tip

- If you delete summarized data, the **Contains Summary Data**, **Last Summarized Date**, and **Last Summarized On** fields are cleared.
- You can also delete summarized data for open projects on the **Activities** page, using the **Delete Summarized Data** item on the Click **Actions** menu.

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About Budgets

Budgets help you track the total estimated effort or quantity of resources or materials and the cash flow required to complete a project. Before a project starts, the resource/cost manager, along with the operations executive, program manager, and project manager, determine scope and budget requirements, and set these high-level budget estimates at the EPS level. As requirements change, resource and financial support are adjusted to compensate for those changes. The individuals involved in project planning, funding, and financial support can estimate their budgets from the top down and log changes to the budget at any time from as early as the project planning stage to well after the project is underway. P6 tracks these changes, while retaining the original amounts.

Budget change logs help you keep track of budget alterations as they occur. The **Current Budget** field (original budget plus approved budget changes) and **Proposed Budget** field (original budget plus approved and pending budget amounts) incorporate changes so you have up-to-date and accurate budget information for each EPS node or project. These logs also provide a clear indication of the who, what, when, where, and why behind the approved or denied request.

Change amounts are not incorporated in the current budget until these amounts have an **Approved** status. Only authorized project participants can issue budget changes and mark them as approved. You can post a change amount as **Pending**; the program manager of the affected EPS node, or the project manager of the affected project, must then mark the amount as **Approved** or **Not Approved**. P6 recalculates the new budgeted amount and adjusts the current budget based on approved changes to the log.

Working with Budgets

Establish budget estimates during the planning stage, then refine them as projects progress. Document budget changes as they occur, and then use these changes to calculate the latest budgeted amounts for the project. You can also record monthly, quarterly, or yearly spending of budgeted funds, track the current and undistributed variance amounts, and aggregate the monthly spending plan of each project in a branch to its higher EPS nodes.

P6 facilitates a top-down budgeting approach to cost management. The resource/cost manager or other person responsible for making decisions about project launches generally establishes high-level budget estimates. These estimates are set for each EPS element. Project managers distribute the budgets to the projects for which they are responsible in each EPS element, as shown in the following example.

Once budget estimates are set at the EPS level, you can establish a monthly spending plan to keep track of cash flow for each node and project.

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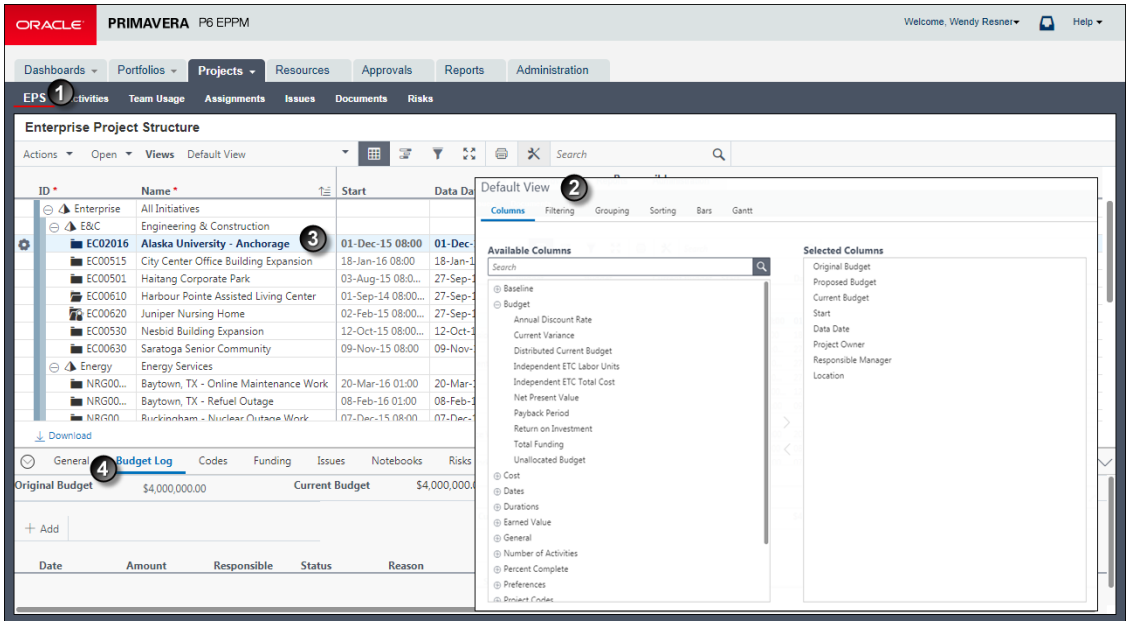


Table of Key Budget Elements

Item	Description
1	**EPS Page**: Navigate to the **EPS** page in the **Projects** section.
2	**Budget fields**: Customize the EPS table by selecting the columns available under the **Budget** category. You can also configure an EPS view with these settings for easy retrieval when needed in the future.
3	**Select a project**: Select a project or EPS element and then click the **Budget Log** detail window.
4	**Budget Log detail window**: In this detail window, set the **Original Budget**. As the project life cycle continues, track budget changes within this same detail window.

Establishing Budgets

You can establish budget estimates during the planning stage, then refine them as projects progress. Start at the EPS level and work down through projects and their WBS elements. This is known as performing *top-down budgeting*.

Follow the steps below to set up the total budget for each EPS node in the hierarchy first, then enter the applicable portion of the total budgeted amount to each project in the node's branch. Once these initial total amounts are entered, you can start apportioning anticipated monthly spending amounts per project. P6 then tallies the amounts for the projects so you can keep track of the total spending plan and assess the variance between this total and the current budget. This process is ongoing throughout the project life cycle. Close to the completion of the project, you can better determine profitability.

To establish budgets in a top-down approach:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select an EPS element.

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b. Click the **Budget Log** detail window.

c. In the **Budget Log** detail window:

- In the **Original Budget** field, enter the original budget in units of currency.
- Click + **Add** to add a budget log line item.
- In the **Date** field, select a date.
- In the **Amount** field, enter a currency value.
- In the **Status** list, select a value. Select *Pending* to add the amount to the **Proposed Budget** total. Select *Approved* to add the amount to the **Current Budget**. Select *Not Approved* to keep only a record of the budget change line item.

d. On the **EPS** page, click **Save**.

e. Repeat these steps with the following variations:

- On the **EPS** page, repeat for each project or template within an EPS element.
- On the **Projects** navigation bar, click Activities.
- On the **Activities** page, repeat for each project, template, or WBS.

Creating Budget Change Requests

Create budget change requests when seeking approval to proposed changes to an EPS, project, or WBS budget.

As projects progress, changes in scope, resource reallocation, funding additions/withdrawals, or other factors that affect original budgeted amounts, often occur. The **Budget Log** detail windows enable you to track modifications that affect the budget. This log also provides a clear indication of the who, what, when, where, and why behind the change.

To create a budget change request:

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select an EPS or project and click the **Budget Log** detail window.
   a. In the **Budget Log** detail window:
      - Click + **Add** to add a budget log line item.
      - In the **Date** field, select a date.
      - In the **Amount** field, enter a currency value.
      - In the **Responsible** field, enter the name of the responsible person or department.
      - In the **Status** list, select a status value for the proposed change.
   b. On the **EPS** page, click **Save**.

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Tip

- You can also create budget change requests for a project or WBS element from the **Budget Log** detail window of the **Activities** page.
- In general, you should contact the person listed in the **Responsible** field to determine if the request is *Approved* or *Not Approved*.
- Enter a reason for the proposed change in the **Reason** field. The program manager of the affected EPS node or the project manager of the affected project can append this field with a reason for approval or denial.

Approving or Denying Budget Change Requests

If you have the authority, you can approve or deny a budget change request for a WBS, project, or entire EPS element.

To approve or deny a budget change request:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select the EPS or project with a budget change request and click the **Budget Log** detail window.
3. In the **Budget Log** detail window:
   a. Select and review the budget change request.
   b. In the **Status** list, select **Approved** or **Not Approved**.
   c. In the **Reason** field, enter an explanation for the new status.
   d. Save your changes.

Tip

- You can also approve or deny budget change requests for a WBS or project from the **Budget Log** detail window on the **Activities** page.
- To update the original budget, enter a new amount in the **Original Budget** field and click **Save**. The **Current Budget** and **Proposed Budget** are updated with the new value.
- Only authorized project participants can issue budget changes and mark them as **Approved**.

About EPS Views

EPS views are the visual layout of project and EPS node information. EPS views are customizable; you can change their filters, Gantt chart options, column selection, column label, et cetera. Selecting the best view or customizing a view that suits your needs can facilitate the process of recording project data. For example, to quickly record a range of details for a project or projects, you might select a table view which maximizes the number of data columns available.

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Configuring EPS Views

Configure EPS views to define how you see EPS and project data. EPS views affect the filters, grouping, columns, et cetera that are applied to the EPS page. Detail window visibility is also affected by the selected EPS view.

To configure EPS views:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Views** list and select an EPS view.
   b. Click **Customize View**.
   c. In the **Customize View** dialog box:
      - Configure the **Columns** tab.
      - Configure the **Filtering** tab.
      - Configure the **Grouping** tab.
      - Configure the **Sorting** tab.
      - Configure the **Bars** tab.
      - Configure the **Gantt** tab.
      - Click **Save and Apply**.

Tip

- You can modify any view you create. You can only modify multi-user and global EPS views if you have the appropriate security privileges.
- Many of these configurations, configuring columns and filters for example, do not require you to open the **Customize EPS View** dialog box. If the necessary icons are available on your toolbar, you can use them to configure the EPS view.

Configuring EPS View Columns

Configure EPS view columns to specify which columns are visible in the Gantt chart or table.

To configure EPS view columns:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Views** list and select a view.
   b. Click **Customize View**.
   c. In the **Customize View** dialog box, click the **Columns** tab.
   d. On the **Columns** tab:
      - Double click columns in the **Available Columns** list to add them to the **Selected Columns** list.

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- Click **Save and Apply**.

> **Tip**
>
> - The top-to-bottom order of fields in the Selected Columns list corresponds to the left-to-right display order of the columns on the EPS page.
> - You can display a maximum of 30 columns.
> - To move multiple columns at a time into the Selected Columns list, use Shift+click or Ctrl+click to select the appropriate columns, then click **Add column to Selected Columns** (Ctrl + Shift + Right Arrow).
> - If you make changes to the Responsible Manager column for an EPS, the application will prompt you to decide if you want to assign these changes to the child EPS elements of the selected EPS. The responsible manager will not be changed for the child projects of this EPS; project responsible managers must be changed individually.

Configuring EPS View Grouping

Configure grouping options to define how fields are grouped on the EPS page.

To configure EPS view grouping:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Views** list and select a view.
   b. Click **Customize View**.
   c. In the **Customize View** dialog box, click the **Grouping** tab.
   d. On the **Grouping** tab, configure the grouping options and click **OK**.
   e. Click **Save and Apply**.

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Tip

- When activities are grouped, the **Gantt chart** displays a summary bar for each group. The summary bar represents the time period from the earliest **Start** to the latest **Finish** for the group.
- Use the **To Level** list to select the number of hierarchy levels when grouping by a hierarchical field. When grouping by dates, use the **To Level** list to select a time interval.
- The band color you select will be displayed in the table.
- Grouping bands are displayed by default when you group by a project code or EPS even if the bands are empty. Select the **Hide if empty** option in the Customize View or Customize Groupings dialog boxes to remove these bands from view.
- Empty bands are hidden, even if the **Hide if empty** option is not selected, when the view is grouped by multiple data items and one of the data items is hierarchical.

Configuring EPS View Filters

You can modify or create filters. These filters can then be applied to several different EPS views.

To customize EPS view filters:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Views** list and select a view.
   b. Click **Customize View**.
   c. In the **Customize View** dialog box, click the **Filtering** tab.
   d. On the **Filtering** tab:
      - You can modify a filter.
      - You can create a filter.
      - You can apply filters.
      - Click **Save and Apply** when finished.

Tip

You can also customize EPS view filters from the Customize Filters Dialog Box. Click the **View** menu, click the **Filters** submenu, and select **Filters**.

Applying Filters

Apply filters to a project to specify the data you want to display. You can add user-created filters or select from the list of standard filters.

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To apply filters:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page:
   a. Click the **Views** list and select a view to which you will add the filters.
   b. Click **Customize View**.
3. In the **Customize View** dialog box, click the **Filtering** tab.
4. On the **Filtering** tab:
   a. Select to match **all applied** or **any applied**.
   b. In the filter list, select the option for each filter you want to apply.
   c. Click **Save and Apply**.

Tip

- If you have Contributor module access, either assigned as a resource or activity owner, applying the My Activities filter will have no affect on the activity list display because your access is already restricted to your assigned and owner activities.
- You can also click the View menu and select Filters from the Filters submenu to open the Customize Filters dialog box. You can apply filters from this dialog box.
- If you want to save the application of these filters to the view, click Yes in the Primavera P6 dialog box which opens when you navigate away from the page.

Creating Filters

Create filters to narrow activity or project information to a specific data group.

To create filters:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page:
   a. Click the **Views** list and select a view to which you will add the filters.
   b. Click **Filters** and select **Manage Filters...**.
   c. In the **Manage Filters** dialog box:
      - Click **Context** and select **Add**.

Note

You can add new global or user filters. You cannot add new standard filters.

– Configure the fields and lists for one or more filter statements.
– Click **Save**.

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> **Tip**
>
> To add more criteria statements, click **Add another filter condition...**. To remove criteria, click **Context** and select **Delete**. To nest criteria, click **Context** and select **Add Filter Group Above**, **Add Filter Group Below**, or **Move into New Group**.

Configuring Filters

You can configure the detailed statements of a filter and who can use it.

To configure filters:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page:
   a. Click the **Views** list and select a view to which you will add the filters.
   b. Click **Filters** and select **Manage Filters...**.
   c. In the **Manage Filters** dialog box:
      - In the filter list, select a filter.
      - Configure the fields and lists to edit the filter statements.
      - Click **Save**.

> **Tip**
>
> - You can not edit Standard Filters.
> - To add more criteria statements, click **Add another filter condition...**. To remove criteria, click **Context** and select **Delete**. To nest criteria, click **Context** and select **Add Filter Group Above**, **Add Filter Group Below**, or **Move into New Group**.
> - You can also click the View menu and select Filters from the Filters submenu to open the Customize Filters dialog box. You can configure filters from this dialog box.

Configuring EPS View Gantt Chart Bars

Configure the bar settings for the Gantt chart view on the **EPS** page. You can specify options for up to three bars per project.

To configure EPS view bars:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Views** list and select a view.
   b. Click **Customize View**.

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c. In the **Customize View** dialog box, click the **Bars** tab.

d. On the **Bars** tab select an existing bar or label or click **Add** to add a new bar or label.

e. Select a bar or label.

- If you selected a label, configure the **Field**, **Height**, and **Color**.
- If you selected a bar, configure the **Bar Type**, **Height**, and **Bar Color**.
- If you selected a bar, choose whether to **Show Progress** on the bar. If you chose to show progress, select a **Progress Color** and **Progress Style** for the bar.

f. Click **Save and Apply**.

Tip

- You can configure up to three bars. Set at least one bar to **Current Bar**.
- When you display many bars at once, for greater ease in reading the bar labels and identifying a specific bar, you might find it helpful to vary the position of the label on each bar.
- You can also customize EPS view bars from the **View** menu. On the **View** menu, click **Gantt Chart Options**, then click the **Bars** tab.

Configuring EPS View Gantt Chart

Configure Gantt chart options to determine how the chart will display.

To configure EPS view Gantt chart:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Views** list and select a view.
   b. Click **Customize View**.
   c. In the **Customize View** dialog box, click the **Gantt** tab.
   d. On the **Gantt** tab, configure the options and click **Save and Apply**.

Tip

You can also configure the Gantt chart from the **View** menu. Click **Gantt Chart Options** on the **View** menu and click the **Gantt Chart** tab.

Configuring EPS View Access

Configure EPS view access to define who can see a view.

To configure EPS view access:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.

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2. On the **EPS** page:
   - Click the **Views** menu and select **Manage Views...**.
3. In the **Manage Views** dialog box:
   a. Select a view in the Multiple Users group or hover over the Multiple Users group, click **Context** and select **Add** to create a new view.
   b. Click the **Access** tab.
4. On the **Access** tab, select one or more users and add them to the Selected Users list.
5. In the **Manage Views** dialog box, click **Save**.

About Columns (Fields)

Fields hold data. They generally either allow you to enter values or just display the current value for the field (called a *read-only field*). Pages with tables often permit you to configure the fields that make up the columns of the table. Some pages with grid views also allow you to pin columns to the start of the column list so they are always visible, even when you scroll.

The list of columns available for you to add to a view may depend on the circumstances. For example, some baseline fields (such as actual baseline cost fields, and many baseline date fields) can only be added to the view if you have assigned a baseline to the project (rather than using the current project as the baseline).

> **Tip**
>
> In the EPS, Activities, and Assignments pages, select **Show Hint Help (Alt+F1)** to view a description of a column when you hover over the column heading.

About Grouping and Sorting

To simplify the display of complex tables of data, you can group rows of similar data and sort the grouped bands as well as the data under them. Grouping helps you block distracting data and focus only on the information you need. It also permits you to collapse and expand hierarchical arrangements of your data rather than navigate large flat lists.

You can sort the EPS page, Assignments page, and the Activities page by any columns in your view and specify the order in which column sorts are applied. For example, you might sort by Primary Resource, then Start date, then by Planned duration, and finally by Activity ID. This would mean that if more than one activity has the same Primary Resource, Start Date, and Planned Duration, they will be in the same place in the list and sorted in order of Activity ID.

When you sort your view by multiple columns, the column headings will show numbers representing the sort order as well as an arrow showing whether the sort is ascending or descending. Hierarchies can also be sorted while maintaining the structure of the hierarchy.

About Filters

As you work with increasing amounts of data over time, you will recognize a need to limit your focus to only the data most relevant to your particular task or need. A filter is a predefined

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constraint you place on data so that data that does not meet your filter criteria is hidden and only the data you need are shown.

About Funding Sources

Funding sources are the agencies, businesses, or groups that provide funding for a project.

You can maintain a hierarchical list of funding sources as part of your enterprise project data and then assign specific funding sources to a project or EPS elements as they develop. You can assign the same funding source multiple times with varying amounts and share contributions for different levels of the EPS. The amount contributed by a specific funding source is called the fund share value.

Working with Funding Sources

If your projects use funding sources to support budgets, set up your enterprise project funding source data, and then assign specific funding sources to budget items as you develop projects. When estimates are firmly established, managers and team leaders can set budget amounts and spending plans at the WBS or project levels for which they are responsible. Resources and budgets can then be allocated at the activity level.

You can define funding sources on the **Funding Sources** page along with other enterprise project data. You can then assign funding sources to projects on the **EPS** page. Be aware that funds are not totaled by EPS level; you edit them per project or EPS level to allow for manual top-down assessments and individual planning. For example, you would not want to be restricted from funding an important project just because a limited level of funding was planned for its parent EPS element.

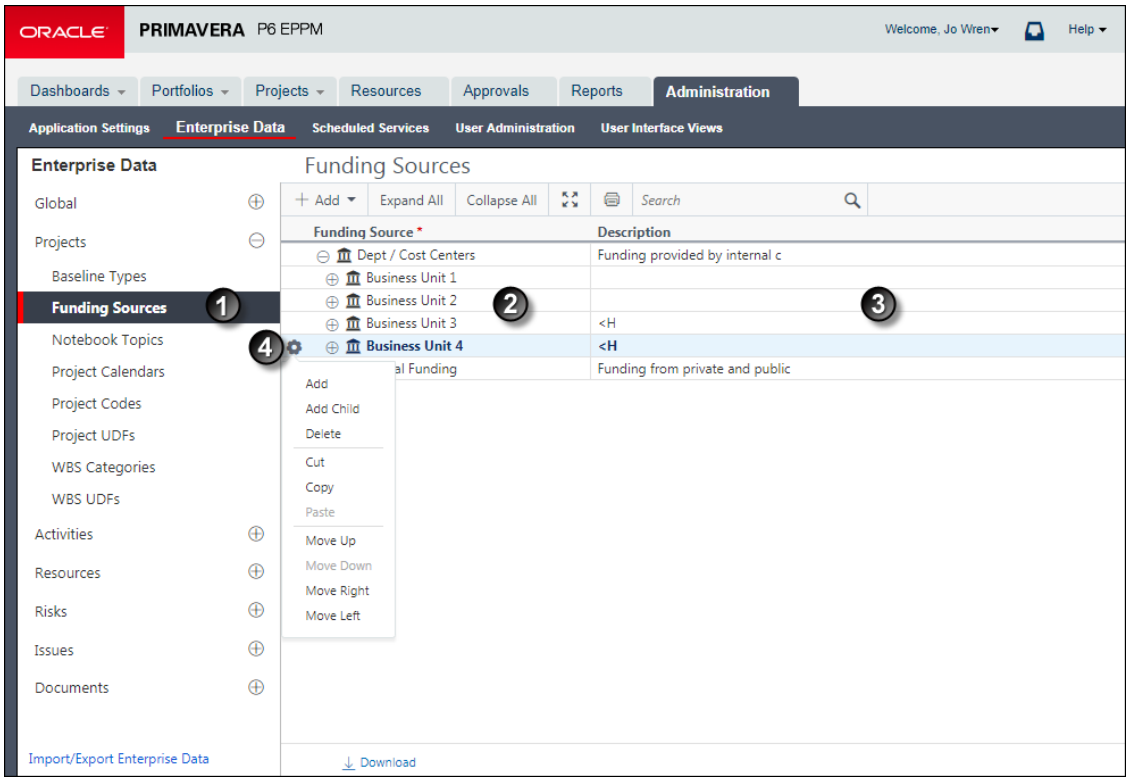


Table of Enterprise Data Funding Sources

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Item	Description
1	**Funding Sources**: You will use the **Funding Sources** page to view, add, and edit funding sources.
2	**Funding Source field**: You can customize the name of the funding source by double-clicking in the **Funding Source** field.
3	**Description field**: The **Description** field allows you to write a description of the funding source which includes any additional information about the funding source.
4	**Row Actions Menu**: You can configure funding sources, including creating new sources, and moving sources to new positions in the hierarchy from the **Context** menu. If funding sources are affiliated with a particular group, you can group funding sources with that group. You can use the **Move Up** and **Move Down** items to move a funding source below or above other funding sources. The **Move Right** and **Move Left** items can make the funding source a child or parent to other funding sources.

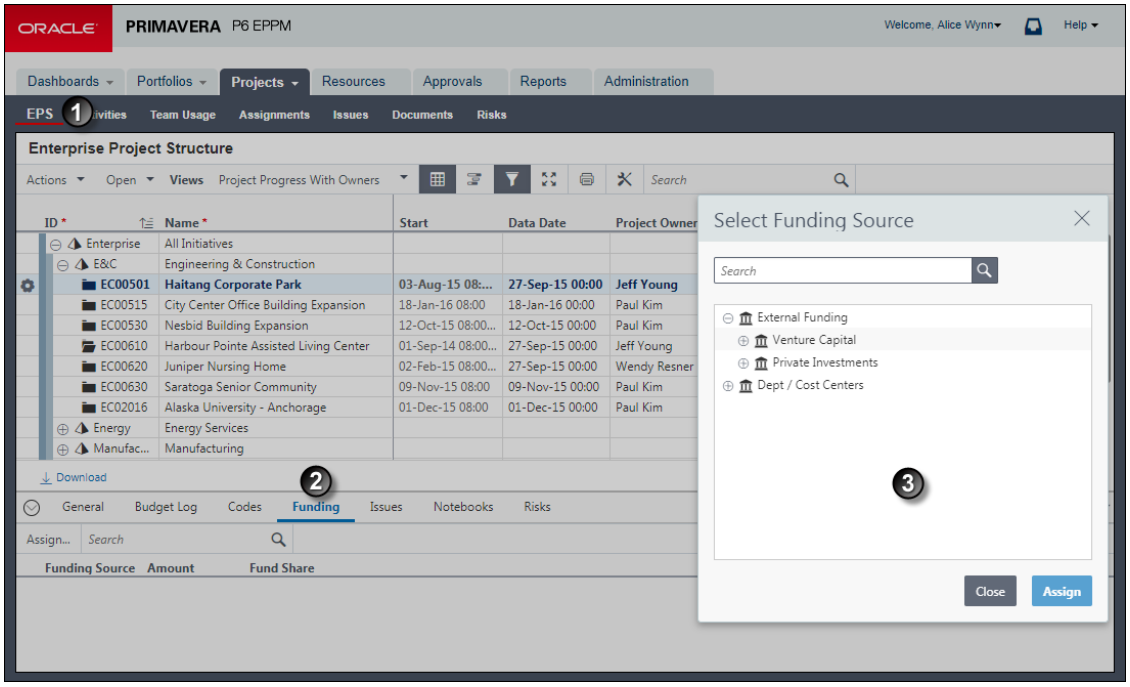


Table of Funding Source Assignments

Item	Description
1	**EPS Page**: Use the **EPS** page to assign funding sources and edit funding source information for a project or entire EPS element.

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Item	Description
2	**Funding detail window**: Click the **Funding** detail window to add funding sources. You can then edit the **Amount** and **Fund Share** fields, or you can remove the funding source from the project. Clicking remove will just remove the funding source from the project; it will still be available to assign to other projects. The total of all the funding source rows appears in the Activity Table in the **Total Funding** column.
3	**Select Funding Source dialog box**: You can assign the same funding source multiple times with varying amounts and fund share percentages for different levels of the EPS.

Assigning Project Funding Sources

Configure funding sources to update the amount and fund share of a funding source in a project budget.

To assign a funding source:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select a project or EPS to which you want to assign a funding source and click the **Funding** detail window.
   a. In the **Funding** detail window, click **Assign...**.
   b. In the **Select Funding source** dialog box, select a funding source and click **Assign**.
   c. On the **EPS** page, click **Save**.

About Project Codes

Project codes help you track different projects based on characteristics they share. You can use project codes to arrange projects hierarchically when your EPS contains many projects within many levels. If you have many projects in the hierarchy, project codes help you group and filter potentially vast amounts of information spanning different areas of the organization. The application supports an almost unlimited number of hierarchical project codes and values; you can establish as many as you need to meet the filtering, sorting, and reporting requirements of your organization.

Assigning Project Codes

Assign project codes to categorize projects.

To assign a project code:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select the projects to which you want to assign codes.
3. Click **Context** and select **Assign**, then select **Codes...**.
4. In the **Codes** panel:

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a. In the **Available Codes** list, select the code values to assign.

b. Click **Add to Selected**.

c. Click **Assign**.

> **Note**
>
> You can select other projects in the main grid to assign further codes without closing the Assign Codes panel.

d. When you have finished assigning codes, click **Close**.

> **Tip**
>
> - You can also remove code values in the Assign Codes panel.
> - You can also assign code values in the Codes detail window.

About Notebooks

A notebook is another name for a log or binder of electronic details about an activity, WBS, project, or EPS element. All the notes users enter or paste into the notebook, including email messages, web links, tables, and other entries, share a single common theme called a notebook topic. See About Notebook Topics.

About Notebook Topics

Notebook topics help multiple users apply a common theme or label to shared information about an activity, WBS, project, or EPS element such as its purpose, completion instructions, or other helpful notes. For example, you might copy an email message, a web link, a table of observations, and a series of text notes into a notebook topic called *Budget Recommendations* to capture the ongoing cost impacts of a recurring project.

When you delete notebook topics from the Enterprise Data page, you can choose to append their descriptions to a replacement notebook topic. For example, you might have a notebook topic called *Budget Recommendations* and another called *Budgetary Recommendations*. In this case, you might choose to delete the *Budgetary Recommendations* notebook topic and copy the descriptions from all instances of it to the *Budget Recommendations* notebook instead.

Working with Notebooks

Notebook topics are created by the administrator on the **Enterprise Data** page of the **Administer** menu. These topics are then assigned to activity, WBS, project, or EPS node notebooks.

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Assigning Notebook Topics

Depending on the page you are working on, you can assign notebook topics to a selected project or activity.

To assign a notebook topic to a project:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select a project or EPS node and click the **Notebooks** detail window.
   a. In the **Notebooks** detail window, click **Assign...**.
   b. In the **Select Notebook Topic** dialog box, select a notebook topic then click **OK**.
   c. On the **EPS** page, click **Save**.

Tip

- You can also create notebook topic descriptions. In the **Notebooks** detail window, double-click the **Description** field and click ... Enter a description in the dialog box.
- You can also assign notebook topics to activities from the **Notebooks** detail window of the **Activities** page or the **Activity Details** page of the **Open Requests forResources** portlet of the **Dashboards** page.

Activities

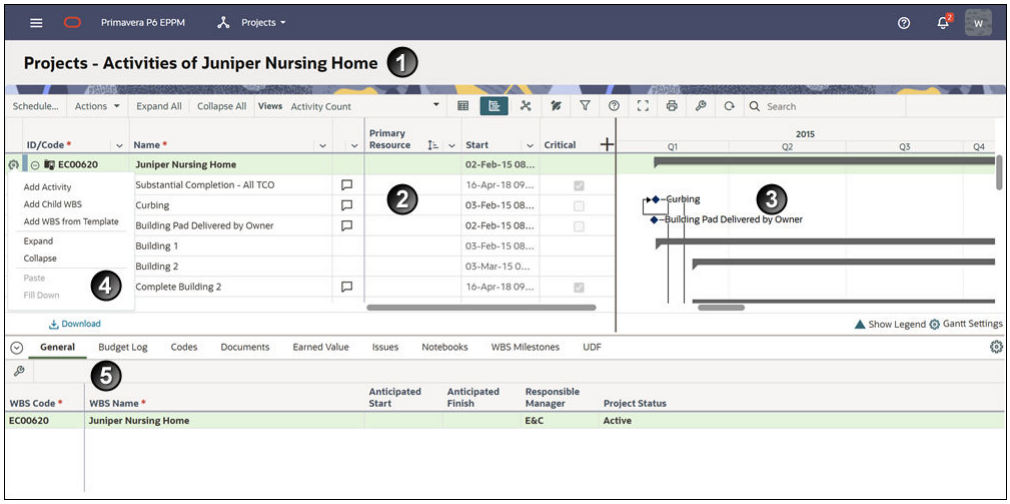
About Activities

Also known as tasks, events, or work packages, activities are the lowest level manageable work elements in a project or WBS. Activities typically have expected durations, costs, and resource or role requirements. Milestone activities, however, have no duration, cost, or assignments. The only exception is that Milestone activities can have a primary resource, representing the person responsible for marking the milestone complete in P6 Team Member. Collectively, all activities form the foundation of the entire project, driving resource assignments, relationships, constraints, expenses, and durations. Activities are sometimes further divided into any number of discrete steps.

Working with Activities

Although you might view activities any number of ways in P6, including on dashboards, reports, and the Resource Assignments page, the most common and direct way to work with project activities is on the Activities page and, specifically, in the Activity Table.

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The Activity Table

Item	Description
1	**Open Projects**: Open the projects you want to work with using the **Open Projects** control on the context selector. Then click **Activities** in the **Navigation Menu**. The **Activities** page shows which projects are currently open.
2	**Grid**: You can select activities and update them within the grid or on the detail windows.
3	**Gantt**: Refer to the optional Gantt view to supplement your work in the table with a visual representation of the schedule.
4	**Context**: Add and delete activities or add, delete, expand, and collapse WBS elements with this menu.
5	**Expand Dock** and **Collapse Dock**: Expand or collapse the dock to view detailed information about the selected activity.
6	**Show**/**Hide Tabs**: Show or hide the tabs you want to see in the view.

> **Note**
>
> - Using P6 Administrator application, your administrator can set a default value for the maximum number of activities that appear on the **Activities** page.
> - Your Administrator can provide a URL to access the Activities Page directly after logging into the system.

Creating Activities

Create activities to define a more detailed breakdown of projects or WBSs.

To create activities:

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1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click the **Context** menu and select **Add Activity**.
   b. Enter an ID in the **ID/Code** field.

> **Note**
>
> The ID/code must be unique in the project.

   c. Enter a name in the **Name** field.
   d. Click **Save**.

> **Tip**
>
> - Right-click a project, WBS, or activity and select Add Activity to quickly add an activity.You can also right click in the background of the Gantt view and select Add Activity.
> - The application automatically names new activities *New Activity*.
> - The default limit allows you to create up to 5000 activities per activity view.

Copying and Pasting Activities

You can copy and paste activities. When you copy and paste activities, you can control which data types are copied to the new activities.

To copy and paste activities:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select one or more activities.
   b. Click **Context** and select **Copy**.
   c. Select a single activity in the grouping band that you want to paste the new activities into, or if the grouping band is empty, select the grouping band itself.
   d. Click **Context** and select **Paste**.
   e. In the **Copy Activity Options** dialog box:
      - Select the data items to be copied.
      - Click **OK**.
   f. Click **Save**.

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Note

- Hold down the Ctrl key while clicking to select multiple rows in a table. Hold down the Shift key to select contiguous rows.
- When you copy an activity, the following data items are not copied: Issues, Assignment UDF values, Expense UDF values, Step UDF values, Activity Feedback, and Status Update History (from Team Member interfaces only)
- If you copy a WBS that includes activities, then Issues, Assignment UDF values, Expense UDF values, and Step UDF values are copied for each activity.
- Risk Assignments are copied for each activity when you copy activities or WBS elements to the same project. If you copy activities or WBS elements to a different project, Risk Assignments are not copied.

Renumbering Activities

If you copy and paste activities, you might need to renumber the activities to fit the numbering format of their new location.

To renumber activities:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select the activities to renumber, click **Context** and select **Renumber Activity IDs**.
3. In the **Renumber Activity IDs** dialog box:
4. Choose a method:
   - Select **Increment Activity ID based on selected activities** to increment the IDs of the selected activities by the same amount, then specify the amount to increment in the **Increment Value** box.
   - Select **Auto-number** re-write the IDs of the selected activities according to a numbering scheme you specify, then specify the **Prefix**, **Starting Number** and **Increment Value** to use.
   - Select **Replace beginning characters** to replace the first few characters of the activity IDs of the selected activities with specific text, then specify the **Number of characters** you want to replace and the text you want to **Replace with**.
5. Choose whether to **Renumber selected activities in baselines**.
6. Click **OK**.

Configuring General Activity Information

You can configure some of the general information for activities, including Activity Type, Duration Type, and Percent Complete Type.

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> **Note**
>
> If P6 is integrated with Oracle Primavera Cloud for task integration, do not change the Activity IDs of activities in integrated projects.

To configure general activity information:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **General** detail window.
   a. In the **General** detail window, configure the activity details to represent the information you want to display for that activity.
   b. Click **Save**.

Assigning Locations to Activities

Assign locations to activities so that you can report on activities by location in Primavera Analytics.

To assign a location:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **General** detail window.
   a. In the **General** detail window, click in the **Location** field.
   b. In the **Select Location** dialog box, select the appropriate location and click **Select**.
   c. In the **Activities** page, click **Save**.

> **Tip**
>
> You must have the Add/Edit Activities Except Relationships project privilege to assign locations to activities.

Recalculating Assignment Costs

Recalculate assignment costs to update price per time values on activities. This ensures that project costs reflect any updates.

To recalculate assignment costs:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select an activity.
   b. Click **Actions** and select **Recalculate Assignment Costs**.
   c. In the **Recalculate Assignment Costs** dialog box:
   d. (Optional) Select the **Synchronize overtime factor while recalculating costs** option to synchronize the overtime factor defined for each resource when recalculating costs.

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e. Click **Recalculate**.

Tip

- When activity dates change, run Recalculate Assignment Costs to update resource costs based on the new dates.
- These services are removed from the database based on the ASAP Cleanup Rate your P6 administrator specifies on the Configurations tab in P6 Administrator application. Once the time is met all ASAP jobs that have a status other than running or delegated will be removed from the table automatically. Running and delegated jobs will be removed if they are older than the cleanup rate or if they are older than one day, whichever is greater.

About Activity Types

One of many attributes for an activity, the *Activity Type* determines how the activity is scheduled according to various scheduling scenarios:

- **Task Dependent**: This type of activity indicates that assigned resources should be scheduled based on the activity's calendar, rather than the calendars of the resources.
- **Resource Dependent**: This type of activity indicates that resources should be scheduled based on their assigned calendars. Use this type when the activity duration may be affected by resource availability.
- **Level of Effort**: This type of activity indicates that it is ongoing with a duration determined by its dependent activities. The duration is calculated based on the schedule dates of its predecessors and successors. Administrative activities are typically designated as *Level of Effort*.
- **Start Milestone**: This type of activity indicates the beginning of a major project phase. Activities of this type have zero duration.
- **Finish Milestone**: This type of activity indicates the end of a major project phase. Activities of this type have zero duration.

About WBS Summary Activities

A WBS summary activity represents a group of activities that share a common work breakdown structure (WBS) level. The summary-level WBS activity enables the aggregation of dates and percent complete for the activity group. Aggregate values for a WBS summary activity are calculated when the project is scheduled. The duration of a WBS summary activity extends from the start of the earliest activity in a group to the finish of the latest activity.

You can assign resources to WBS summary activities and those assignments can be either driving or non-driving. If an assignment is driving, its dates are linked to the WBS summary activity and are adjusted to match the activity's dates. Depending on the duration type of the WBS summary activity, the assignments units or units per time are also recalculated. If an assignment is non-driving, its start date matches the start date of the WBS summary activity and the duration of the assignment will determine its finish date.

When you schedule the project, the dates and status of WBS summary activities are updated to match those of the activities it summarizes. Although you can assign relationships to WBS summary activities, they are not considered when the project is scheduled or leveled.

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The WBS code of a WBS summary activity determines which activities comprise the group. For example, a WBS summary activity assigned to WBS code A, would aggregate values for all activities under any subordinate WBS that relates to code A: A.1, A.1.1, A.2, A.2.1, and so on. If the WBS summary activity in this case were assigned to WBS code A.1, it would aggregate values for activities under WBS A.1 and A.1.1, but not for those activities under A.2 or A.2.1.

About Suspending and Resuming Activities

When updating progress for a project, you might need to record that the work on a particular activity has been suspended or resumed after a period of inactivity. For example, an activity might be suspended or resumed due to a plant shutdown. To record this, you must enter suspend and resume dates. The suspend date is the date on which an activity's progress has, or is planned to be, stopped. The resume date is the date progress on an activity begins again. When you indicate a suspend or resume date, work for the activity is considered to be suspended or resumed at the beginning of the specified day. If you have suspended an activity, you cannot complete it until you have entered a resume date.

Dissolving Activities

You can dissolve an activity to remove the dissolved activity and join the predecessor and successor activities to maintain the project's network logic. You cannot dissolve an activity unless it has a predecessor and successor. You can only dissolve one activity at a time.

To dissolve an activity:

- On the **Navigation Menu**, expand **Projects** and click **Activities**.
  1. Select a single activity and click **Actions** and select **Dissolve**.
  2. In the **Confirm** dialog box, click **Yes**.
  3. Click **Save**.

> **Tip**
>
> 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 in the General section in the Global tab of the My Preferences page 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.

About the Activity Table and Grid View

The Grid View presents all WBS and activity information for the currently open projects in a familiar table format. You can customize Grid View columns.

For example, you might change the information displayed in columns to show scheduling data, resource and cost data, user-defined fields, or any data items you select, including calculated data.

Use the Grid View to:

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- Create a list of activities and activity information quickly when you don't need to see the information graphically over time as in a Gantt chart.
- View all the activities for the currently open projects grouped by project and WBS.
- Sort activities to arrange them in an order you specify. For example, to view activities chronologically, you might sort them by a date field.

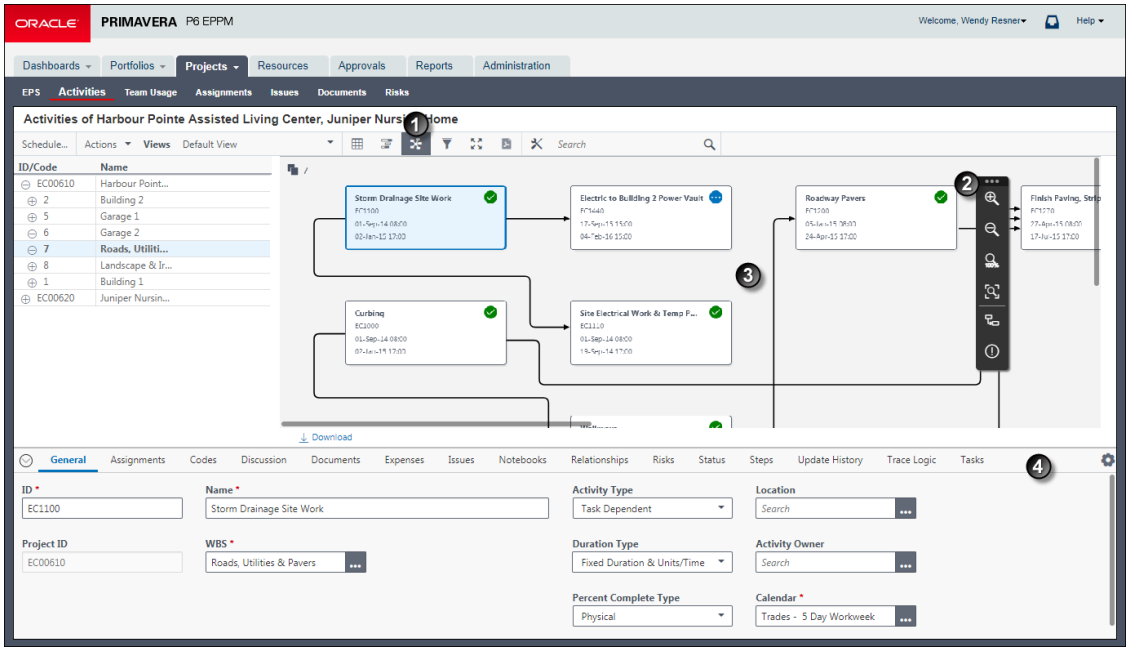
About Activity Networks

An Activity Network is a graphical display of activities and their logical relationships according to the WBS. You can use an Activity Network to view activity relationship paths and the flow of work through a project. Activity Networks also allow you to examine and edit an activity and its predecessors and successors.

Working with the Activity Network

In addition to the Activity Table format, you can also view activities in an Activity Network. You can include your choice of WBS and activity detail windows in this alternate viewing format.

The Activity Network maps the WBS elements and activities in your project into a series of interconnected boxes. Arrows between boxes represent the relationships between activities. Activity boxes outlined in red represent critical activities while activity boxes outlined in blue are not.



Activity Network

Item	Description
1	**Activity View**: Click **Activity Network View**.
2	**Toolbar**: You can **Zoom In** or **Zoom Out**, and select to **Show Driving Relationships** or **Show Critical Activities**. You can move the toolbar anywhere within the Activity Network area.

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Item	Description
3	**Activity Network**: The arrow from a predecessor activity points to its successor. Solid lines represent driving relationships, which indicate when a predecessor activity influences the start date of its successor. The predecessor drives the start date of the successor activity by causing it to start earlier or later than the scheduled date depending on the finish date of the predecessor. Dashed lines represent non-driving relationships, which include all predecessor and successor activity relationships: Start-to-Start, Finish-to-Start, Start-to-Finish, and Finish-to-Finish. You can show only driving relationships or show all relationships. You can customize the content and arrangement of the boxes that represent your activities in the network in the Customize View dialog box.
4	**Detail Windows**: The same WBS and Activity detail windows are available with any activity viewing format. In this example, the user has elected to show the **Risks** detail window. When you select an Activity Network box, the selected box displays a light blue background while the boxes that are not selected display a white background.

> **Note**
>
> P6 identifies relationships as driving when all of the following are true: 1) the successor activity has **Free Float** less than or equal to zero; 2) the activity does not have a **Start On** or **Finish On** constraint; and, 3) the activity does not have an **Actual Finish** date.

About Activity Views

An activity view is the visual layout of activity and WBS information. For each view, you can customize data and content-specific choices such as grouping, column selection, filter, column label, and visual display options. Selecting the best view for your needs can facilitate the process of recording project data. For example, to record a range of details for new activities, you might select a table view which maximizes the number of data columns available. Or, to assign an attributes to new activities as you add them, you could select a view which groups activities based on that attribute.

Working with Activity Views

Configure the Activities page and the Customize Activity View or Manage Views dialog box to customize the views that display the project and activity data you require in a format that meets your needs. You can save these settings with the view. Save the changes if you want them to appear the next time you work with the view. Do not save the changes if you only want your alterations to last for the session.

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The view list provides quick and easy access to all activity views that are available to you. While working with activities, choosing the best view for your needs can facilitate the process of recording project data.

You can configure the content and organization of any activity view you create. For activity views you can access but did not create, you can review activity view settings, but you cannot make changes.

> **Note**
>
> On the Activities page, to quickly rearrange the columns currently displayed in a view, drag and drop them.

Your ability to perform certain actions in a view depends on the access class of the view, your role as either creator or user of the view, and your security profile. For example, if a multiple user or global view includes cost data elements and the current user does not have rights to view costs, the data is dashed out so it is not visible to the user.

You can group all activities that contain the same value for a specific data field. For example, if you choose to group by Project then by Primary Resource, the Activities page groups activities in project groupings. Then, within each project group, activities are further categorized according to primary resource. Finally, within each primary resource group, activities are sorted based upon the sort field and sort order you specify, for example Start Date. You can sort EPS, Activities, and Assignments views by up to five columns.

In the Gantt chart, when you group activities, a summary bar appears for each group. You can expand and collapse the group as needed to focus only on the project Summary Schedule or on the Detailed Schedule. In the table, when you group activities, each grouping level is identified and separated by a colored band or background. You can elect to show aggregates, for each group.

You can export and import views to share them with colleagues working in another P6 system.

Creating Activity or EPS Views

Create views to determine how information is visually displayed. These steps represent the minimum required to create an activity or EPS view.

To create an activity or EPS view:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page:
   a. Click **Views** and select **Manage Views...**.
   b. In the **Manage Views** dialog box:
      - To create a new Global View, select the **Global Views** grouping band, then click **Context** and select **Add**.
      - To create a new Multiple User View, select the **Multiple User Views** grouping band, then click **Context** and select **Add**.
      - To create a new User View, select the **User Views** grouping band, then click **Context** and select **Add**.

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- Type a name for the new view.
- Select the view.

c. In the **Customize View** dialog box:

- Configure the options on the **Columns**, **Filtering**, **Grouping**, **Sorting**, **Bars**, Gantt, and **Access** tabs as necessary.
- Click **Save and Apply**.

Tip

You can also import views.

Configuring Activity Views

Configure activity views to define how you see activity data. Activity views affect the filters, grouping, and columns that are applied to the Activities page. Detail window visibility is also affected by the selected activity view.

To configure activity views:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click the **Views** list and select an activity view.
   b. Click **Customize View**.
   c. In the **Manage Views** dialog box:
      - Configure the **Columns** tab.
      - Configure the **Filtering** tab.
      - Configure the **Grouping** tab.
      - Configure the **Sorting** tab.
      - Configure the **Bars** tab.
      - Configure the **Gantt** tab.
      - Configure the **Activity Network** tab.
      - Configure the **Access** tab.
      - Click **Save**.

Tip

- You can modify any view you create. You can only modify global activity views if you have the appropriate security privileges.
- You cannot save modifications you have made to a multiple user view unless you created it. If you need to save a multiple user view that another user created, save it as a new view.
- When you copy and paste a user, you also copy the user's views.

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Configuring Activity View Columns

Configure activity view columns to specify which columns are visible in the grid or table.

To configure columns:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click **Customize View**.
   b. In the **Manage Views** dialog box, click the **Columns** tab.
   c. On the **Columns** tab:
      - Customize the **Selected Columns** list using values from the **Available Columns** list.
      - Click **Save and Apply**.

Tip

- You can display a maximum of 30 columns.
- You can customize activity view columns from the View menu. Click the View menu and select Columns.

Configuring Activity View Grouping

Configure grouping options to define how fields are grouped.

To configure activity view grouping:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click the **Views** list and select an view to configure.
   b. Click **Customize View**.
   c. In the **Manage Views** dialog box:
      - Click the **Grouping** tab and configure the grouping options in each section.
      - Click **Save and Apply**.

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Tip

- When activities are grouped, the Gantt chart on the Activities page displays a summary bar for each group. The summary bar represents the time period from the earliest Early Start to the latest Early Finish for the group.
- Use the To Level list to select the number of hierarchy levels when grouping by a hierarchical field. When grouping by dates, use the To Level list to select a time interval.
- The band color you select will display in the table and the Activity Network.
- You can also access activity view grouping from the View menu. Click the View menu, then select Group.
- Grouping bands are displayed by default when you group by a project code or EPS even if the bands are empty. Select the **Hide if empty** option in the Customize View or Customize Groupings dialog boxes to remove these bands from view.
- Empty bands are hidden, even if the **Hide if empty** option is not selected, when the view is grouped by multiple data items and one of the data items is hierarchical.

Configuring Activity View Sorting

Configure activity view sorting to determine the order in which activities will be displayed within a grouping band.

To configure sorting:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click the **Views** list and select an view to configure.
   b. Click **Customize View**.
   c. In the **Manage Views** dialog box:
      - Click the **Sorting** tab and configure the sorting options in each section.
      - Click **Save and Apply**..

Tip

To sort by a column it must be showing in the view.

Configuring Activity View Filters

You can modify or create filters. These filters can then be applied to several different activity views.

To configure activity view filters:

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- On the **Navigation Menu**, expand **Projects** and click **Activities**.
  1. On the **Activities** page:
     - Click the **Activity View** list and select an activity view to configure.
     - Click **Customize View**.
  2. In the **Manage Views** dialog box, click the **Filtering** tab.
  3. On the **Filtering** tab:
     - You can modify a filter.
     - You can create a filter.
     - You can apply filters.
     - Click **Save and Apply** when finished.

> **Tip**
>
> - The My Activities filter displays all project activities you are either assigned to as a resource or designated as the activity owner.
> - For the Activities occurring within (blank) days or Activities finishing within (blank) days filters, specify a number of days.
> - You can also customize activity view filters from the View menu. Click the View menu and select Filters from the Filters submenu.

Applying Filters

Apply filters to a project to specify the data you want to display. You can add user-created filters or select from the list of standard filters.

To apply filters:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page:
   a. Click the **Views** list and select a view to which you will add the filters.
   b. Click **Customize View**.
3. In the **Customize View** dialog box, click the **Filtering** tab.
4. On the **Filtering** tab:
   a. Select to match **all applied** or **any applied**.
   b. In the filter list, select the option for each filter you want to apply.
   c. Click **Save and Apply**.

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Tip

- If you have Contributor module access, either assigned as a resource or activity owner, applying the My Activities filter will have no affect on the activity list display because your access is already restricted to your assigned and owner activities.
- You can also click the View menu and select Filters from the Filters submenu to open the Customize Filters dialog box. You can apply filters from this dialog box.
- If you want to save the application of these filters to the view, click Yes in the Primavera P6 dialog box which opens when you navigate away from the page.

Creating Filters

Create filters to narrow activity or project information to a specific data group.

To create filters:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page:
   a. Click the **Views** list and select a view to which you will add the filters.
   b. Click **Filters** and select **Manage Filters...**.
   c. In the **Manage Filters** dialog box:
      - Click **Context** and select **Add**.

Note

You can add new global or user filters. You cannot add new standard filters.

- Configure the fields and lists for one or more filter statements.
- Click **Save**.

Tip

To add more criteria statements, click **Add another filter condition...**. To remove criteria, click **Context** and select **Delete**. To nest criteria, click **Context** and select **Add Filter Group Above**, **Add Filter Group Below**, or **Move into New Group**.

Configuring Filters

You can configure the detailed statements of a filter and who can use it.

To configure filters:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.

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2. On the **Activities** or **EPS** page:
   a. Click the **Views** list and select a view to which you will add the filters.
   b. Click **Filters** and select **Manage Filters...**.
   c. In the **Manage Filters** dialog box:
      - In the filter list, select a filter.
      - Configure the fields and lists to edit the filter statements.
      - Click **Save**.

> **Tip**
>
> - You can not edit Standard Filters.
> - To add more criteria statements, click **Add another filter condition...**. To remove criteria, click **Context** and select **Delete**. To nest criteria, click **Context** and select **Add Filter Group Above**, **Add Filter Group Below**, or **Move into New Group**.
> - You can also click the View menu and select Filters from the Filters submenu to open the Customize Filters dialog box. You can configure filters from this dialog box.

Configuring Activity View Gantt Chart Bars

Configure the bar settings for the Gantt chart view on the Activities page.

To configure activity view bars:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click **Customize View**
   b. In the **Manage Views** dialog box, click the **Bars** tab.
   c. On the **Bars** tab click **Configure**.
   d. Select a theme to use a pre-configured set of colors for bars.
   e. Click a bar to configure it and then:
      - Click the **Bar Type** list and choose one of the available bar types.
      - Click the **Height** list and choose a height for the bar.
      - If you chose a current bar, select the **Show Progress** option to chart progress, or actual work, along the bar.
        Select a **Progress Color**, a **Bar Color**, and a **Progress Style** to determine how progress will be shown on the bar.

        Select **Progress Color by Activity Code**, then select an activity code to show progress in a different color for activities with the selected code assigned. The color used for each activity code can be configured in the Enterprise Data page.

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- Select **Bar Color by Activity Code**, then select an activity code to show the bar in a different color for activities with the selected code assigned. The color used for each activity code can be configured in the Enterprise Data page.
- If you chose a current bar, select **Show Critical** to determine that the bar will display differently if the activity is critical.
- If you selected a User Defined bar, type a **Bar Name** and select a **Start Date Field** and **Finish Date Field** to define the dates for the bar.
- If you selected the Summary bar, select **Show Expanded Summary Bars** to show a summary bar for expanded groups as well as collapsed groups.

> **Note**
>
> Click the **Add** menu and select **Bar** or **Label** to add a new bar or label. Select a bar or label and click to delete it.

f. Click a label to configure it and then:

- In the **Label Field** list, select a field. For summary bars, the rolled up value of the field or the value at the group level will be shown as the bar label.
- In the **Color** field, select a text color.
- In the **Height** list, select a height.

> **Note**
>
> Click **Preview** to see how the bars and labels you have configured will look when shown with other bars.

g. Click **Apply**.

> **Tip**
>
> - The Gantt chart only prints if it is displayed.
> - A Late Bar does not display if the project has not been scheduled.

Configuring Activity View Gantt Chart

Configure Gantt chart options to determine how the chart will display.

To configure Gantt chart options:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click **Customize View**.
   b. In the **Manage View** dialog box, click the **Gantt** tab.
   c. On the **Gantt** tab:

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- Select the **Data date line** option to show the data date on the Gantt.
- Select the **Relationship lines** option to show lines between activities on the Gantt.
- Select the **Non-driving relationships** option to draw lines between activities on the Gantt even where the relationship doesn't affect the successor's dates.
- Select the **Sight Lines** option to show vertical lines between each segment of the timescale.
- Select the **Non-work time shading** option to have non-work time shaded on the Gantt.
- Select a **Timescale**.

d. Click **Apply**.

Tip

- The Gantt chart only prints if it is displayed.
- You can right click on the timescale to change the timescale of the Gantt.

Configuring Activity Network

Configure an Activity Network to determine how the network displays.

To configure an Activity Network:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click **Customize View**.
   b. In the **Manage View** dialog box, click the **Activity Network** tab.
   c. On the **Activity Network** tab:
      - Select the **One field per line** option to show each field on a separate line in the box. Clear this option to show two fields on each line in the box.
      - Select the fields to show in activity network boxes.
   d. Click **Apply**.

Tip

This page does not affect the boxes in the Trace Network detail panel.

Configuring Activity View Access

Configure activity view access to define which users will have access to a particular view.

To configure access:

- On the **Navigation Menu**, expand **Projects** and click **Activities**.
  1. On the **Activities** page:

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- Click the **Activity View** list and select a multiple user activity view to configure.
- Click **Customize View**.

2. In the **Manage Views** dialog box, click the **Access** tab.
3. On the **Access** tab, move users from the **Available Users** list to the **Selected Users** list to assign those users access to the view.

Tip

- Unless you specify otherwise, Current User is the default access.
- If you select List of Users, search for the user, or select users from the Available Users list.
- When you copy and paste a user, you also copy the user's Activity Views and any multi-user assigned to that user.

Converting Classic Views to Standard Views

From release 18, classic views are no longer available in P6. You can export classic views to import them as standard views. When you import the exported classic views, they are imported as user views. To make the newly imported views accessible to other users, you can cut or copy and paste the views to the Global or Multiple Users groups.

Note

Although classic views can no longer be used from release 18, they are not removed from the database during the upgrade process and can still be exported after upgrade.

To convert classic views to standard views:

1. On the **Navigation Menu**, expand **Projects** or **Resources**.
   - If you expanded **Projects**, click **Activities**, **EPS**, or **Assignments.**
   - If you expanded **Resources**, click **Assignments**.
2. Click the **Views** menu and select **Import/Export Views...**.
3. In the **Import/Export Views** dialog box:
   a. Click **Export**.
   b. Select the **Classic Views** option.
   c. Select the views you want to export.
   d. Click **Export**.
4. Click the **Views** menu and select **Import/Export Views...**.
5. In the **Import/Export Views** dialog box:
   a. Click **Import**.

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b. In the **File** field, click **Browse** and select the file you exported.

c. Select the views to import.

d. Click **Import**.

Tip

- When you export classic views, they are exported to a file in your default download location. The file name includes the name of the page the views were exported from, your user name, and the date and time the file was exported. The file extension is .json.
- You can export classic views from the EPS, Activities, and Assignments pages and convert them to standard views on each of those pages. You cannot export views from multiple pages into one file.
- Some classic view settings cannot be converted to standard views, for example bar color coding. These settings will be lost when you convert your classic views into standard views.

About Columns (Fields)

Fields hold data. They generally either allow you to enter values or just display the current value for the field (called a *read-only field*). Pages with tables often permit you to configure the fields that make up the columns of the table. Some pages with grid views also allow you to pin columns to the start of the column list so they are always visible, even when you scroll.

The list of columns available for you to add to a view may depend on the circumstances. For example, some baseline fields (such as actual baseline cost fields, and many baseline date fields) can only be added to the view if you have assigned a baseline to the project (rather than using the current project as the baseline).

Tip

In the EPS, Activities, and Assignments pages, select **Show Hint Help (Alt+F1)** to view a description of a column when you hover over the column heading.

About Filters

A filter is a set of instructions that determines which data display in the current window. You can create filters or use the predefined filters available in the application. There are three types of filters: user-defined, global, or standard. User-defined filters can be created for multiple users or only the creator of the filter. Global filters are available to all users for all projects. Standard filters are also available to all users for all projects; however, users cannot modify standard filters. You can apply a combination of filters to narrow the data selection even further. Filters are available on the EPS, Activities, and Assignments pages.

About Grouping and Sorting

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To simplify the display of complex tables of data, you can group rows of similar data and sort the grouped bands as well as the data under them. Grouping helps you block distracting data and focus only on the information you need. It also permits you to collapse and expand hierarchical arrangements of your data rather than navigate large flat lists.

You can sort the EPS page, Assignments page, and the Activities page by any columns in your view and specify the order in which column sorts are applied. For example, you might sort by Primary Resource, then Start date, then by Planned duration, and finally by Activity ID. This would mean that if more than one activity has the same Primary Resource, Start Date, and Planned Duration, they will be in the same place in the list and sorted in order of Activity ID.

When you sort your view by multiple columns, the column headings will show numbers representing the sort order as well as an arrow showing whether the sort is ascending or descending. Hierarchies can also be sorted while maintaining the structure of the hierarchy.

About Activity Codes

Activity codes enable you to categorize activities into logical groups based on your organization's criteria. An activity code can be one of three types: Global, EPS, or Project. Global activity codes organize activities across all projects in an organization. EPS activity codes organize activities within a specific branch or node of the enterprise project structure (EPS). Project activity codes categorize activities based on specific features within a project.

Activity codes represent broad categories of information, a department or project manager for instance. You can create multiple activity codes according to specific categories, then assign different values for each code. For example, assume your organization has many departments and you want to review activities within each department. You can first create an activity code "department," then assign different values such as quality assurance, finance, and sales. You can then associate activities with specific departments.

A key characteristic of an activity code as opposed to an activity user defined field is that activity codes will only allow entries from a predefined list of values. After you create activity codes, users can assign activity code values to activities to group, sort, and filter project data based on these values.

Creating Activity Code Values for Activities

You can quickly create activity code values in the Activity Codes detail window.

To create activity code values on the Activities page:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Codes** detail window.
   a. In the **Codes** detail window, click **Assign...**.
   b. In the **Assign Activity Codes** panel:
      - Select the **Global**, **EPS**, or **Project** option for a list of activity codes.
      - Select an activity code to which you will add the value.
      - Click **Add** and select **Code Value**.
      - In the **Code Value** field, enter a value for the code.
      - In the **Code Description** field, enter a description for the code.
      - Click **Add Code Value**.

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Tip

- In the Code Value field, you must enter a value that is unique across the project.
- You can also create activity code values from the Enterprise Project Data page or the Codes Panel.

Assigning Activity Code Values to Activities

Assign activity code values to activities to group and filter data.

To assign activity code values:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select the activities to which you want to assign codes.
3. Click **Context** and select **Assign**, then select **Codes...**.
4. In the **Codes** panel:
   a. On the **Filter By:** list, select the type of Activity Code you want to assign.
   b. In the **Available Codes** list, select the code values to assign.
   c. Click **Add to Selected**.
   d. Click **Assign**.

   Note

   You can select other activities in the main grid to assign further codes without closing the Assign Codes panel.

   e. When you have finished assigning codes, click **Close**.

Tip

- You can also remove code values in the Assign Codes panel.
- You can also assign code values in the Codes detail window.

About Gantt Charts

A Gantt chart is a graphical representation of the duration and sequence of activities or projects. It is useful for planning, scheduling, and monitoring progress against a timeline.

Working with the Activity Gantt Chart

Use the Activity Gantt chart to view the progression and relationships of activities or projects on a timeline.

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Gantt chart bars and activity dates or durations

You can easily update dates and durations by resizing or moving current bars in a Gantt. When you change bar positions in a Gantt, the start and finish date columns update to reflect the new bar position. After moving a Gantt bar, when you save your changes, the remaining duration is recalculated based on the new dates and the activity or project calendar. Because this calendar is applied when you save, if you move but do not resize a Gantt bar, the duration might shorten or lengthen based on the non-work time of the calendar.

> **Note**
>
> If you click the drag bars on the Remaining Early Start date of the bar of an In Progress activity, you can move the Remaining Early Start to a later date, or to an earlier date up to and including the Actual Start date. If you click elsewhere on a bar or on a milestone marker and drag it along the timescale, you will be prompted to add a Start On or After constraint. In the Gantt chart, you can impose only a Start On or After constraint.

Customizing the Gantt chart

You can change the progress line options or the timescale for the Gantt chart in the Manage Views dialog box.

Viewing the Gantt chart

In the Gantt chart, a vertical blue line represents the current data date for the project. Vertical sightlines appear at each minor increment (bottom) of the timescale. The timescale background is shaded to indicate non-work time based on the global default calendar.

Activity highlight

To quickly locate the activities you need to update, you can use the Progress Spotlight feature, which highlights all activities that should have progressed during a specific time period. This time period is defined by the smallest increment of the current timescale since the last data date. For example, if the current timescale is set to Month/Week, Progress Spotlight highlights all activities that should have progressed during the week since the data date.

Configuring Gantt Charts

On the EPS and Activities pages, configure the Gantt chart to adjust activity beginning and finishing dates as well as constraints.

To configure the Gantt chart:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page, click **Gantt View**.
3. On the **Gantt chart**:
   a. To resize bars, select a bar and click and drag the beginning or end of it to a new date. (Only applicable on the Activities page.)
   b. To expand a specific area of the Gantt chart, hover over the timescale at the top of the Gantt chart (the pointer will become a double-headed arrow), move the pointer to select the portion of the timescale you want to expand, and click again. You can perform this step several times.

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c. To apply a Start On or After Activity Constraint, click the middle of a bar and drag it along the timescale. (Only applicable on the Activities page.)

4. On the **Activities** or **EPS** page, click **Save**.

Tip

- After resizing or moving a Gantt bar, when you save your changes, the activity remaining duration is recalculated based on the new dates and the activity's calendar. Because the calendar for the activity is applied when you save, a date you specified for an activity might change slightly if it occurs during calendar non-work time. Also, if you move, but do not resize, a Gantt bar, the duration might shorten or lengthen based on the activity calendar's non-work time.
- If you select the option Do not show this again in the Activity Constraint dialog box, it will not reappear until the next time you log in.
- You can create or configure activity relationships directly in the Gantt chart.

About Progress Spotlight

Progress Spotlight highlights the activities that should have progressed during a specific time period. A yellow curtain is dropped behind the activities to enable quick navigation to the activities in this timeperiod. Use the Progress Spotlight feature to highlight activities in the layout that have started, progressed, or finished between the previous data date and the new data date.

About Bars

Bars are used in different views to graphically represent the project timeline. They can symbolize milestones, activities, assignments, or projects. Bar type options vary depending on your current view.

Activities View

Current Bar: Spans the early remaining/actual start to the early remaining/actual finish for each activity, and indicates how the schedule is progressing according to the original plan.

Float Bar: Shows the total amount of time that an activity can be delayed without delaying completion of a project.

Free Float Bar: Shows the amount of time that an activity can be delayed without causing subsequent activities to be delayed.

Late Bar: Shows the late start to the late finish of an activity.

Percent Complete Bar: Shows the completion percentage of an activity.

Plan Bar: Shows the forecasted status of planned activities, and is used for simulating the outcome of the project schedule as part of project planning.

Project Baseline Bar: Shows the project baseline start and finish dates of an activity, and indicates how the schedule is progressing according to the original plan.

User's Primary Baseline Bar: Shows the primary baseline start and finish dates of an activity, and indicates how the schedule is progressing according to the original plan.

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UDF Bar: Shows the amount of time spanning the selected Activity UDF start date and the Activity UDF finish date. UDF bars can be used to show a risk adjusted schedule using dates imported from Oracle Primavera Risk Analysis.

Pre Response Bar: Shows the pre response pessimistic dates of activities calculated by Oracle Primavera Cloud.

Post Response Bar: Shows the post response pessimistic dates of activities calculated by Oracle Primavera Cloud.

Assignments View

Current Bar: Spans the early remaining/actual start to the early remaining/actual finish for each activity, and indicates how the schedule is progressing according to the original plan.

Late Bar: Shows the late start to the late finish of an activity.

Plan Bar: Shows the forecasted status of planned activities, and is used for simulating the outcome of the project schedule as part of project planning.

EPS View

Current Bar: Spans the early remaining/actual start to the early remaining/actual finish for each activity, and indicates how the schedule is progressing according to the original plan.

Project Baseline Bar: Shows the project baseline start and finish dates of an activity, and indicates how the schedule is progressing according to the original plan.

Forecast bar: Shows the forecast start to the forecast finish dates, and indicates how the schedule is progressing according to the original forecast dates.

About Work Breakdown Structures (WBS)

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

When creating a project, the project manager typically develops the WBS first. The manager assigns documents to each WBS element, and then defines activities to complete that element. In addition to document and activity assignments, each WBS element can also have specific earned value calculation settings, issue assignments, and notebook topics.

Each project has its own WBS hierarchy with the top-level WBS element equal to that of each enterprise project structure (EPS) node or project. Each WBS element can contain more detailed WBS levels, activities, or both.

Working with WBS Elements

If you have the Add/Edit/Delete WBS Except Costs/Financials project privilege, you can add, copy and paste, cut and paste, modify, move, or delete WBS elements.

Before you begin

To add, copy and paste, cut and paste, edit, or delete WBS elements, whether you are working with a single project or a group of projects, the grouping in your view must be configured to have the **Level 1 Field** list set to *WBS*. Either select this type of view from the **ActivityView** list or, if necessary, modify the grouping, customize the view, or create a new view.

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Add WBS elements

Except for the top level element of the WBS hierarchy, which represents the project, you can add a WBS element at the same level as an existing element (sibling) or at a subordinate level (child). At the top level of the WBS, you can add only child elements.

In addition to creating a brand new WBS element, you can create one from a template, or by copying a current WBS element and modifying the content.

Copy and Paste WBS elements

When you copy WBS elements, all activities and child WBSs are also copied.

When you copy WBS elements and paste them into the same project, all data except the following is copied:

- Summary data
- Activity feedback
- Relationships to activities that were not included in the copied WBS
- Documents from the content repository
- Status update history (for P6 Team Member interfaces)

When you copy WBS elements from one project and paste them into another, all data except the following is copied:

- Summary data
- Activity feedback
- Relationships to activities that were not included in the copied WBS
- Project and EPS activity codes
- Risk assignments
- Documents from the content repository
- Work products and documents (WP & docs)
- Status update history (for P6 Team Member interfaces)

You cannot copy a WBS if any of the following is true:

- All open projects are checked out in P6 Professional or are opened exclusively by another user.
- You do not have the required security privileges.
- You have Contributor project module access.

Cut and Paste WBS Elements

You cannot cut WBS elements from one project and paste them to another project. If you need to move WBS elements to a different project, copy the WBS elements and paste them to the new location, and then delete the original entries.

You cannot cut a WBS if any of the following is true:

- All open projects are checked out in P6 Professional or are opened exclusively by another user.
- You do not have the required security privileges.
- You have Contributor project module access.

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Move WBS Elements

You can move WBS elements within the same project by changing the Parent value in the Activities grid. You can also fill values down in the Parent column to move multiple WBS elements quickly and easily.

Delete WBS Elements

If you attempt to delete a WBS that has activities associated with it, you must specify what you want to do with the activities:

- To delete the WBS, but reassign its activities to the parent WBS, select **Merge**.
- To delete both the WBS and its associated activities, select **Delete**.

> **Note**
>
> 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.

About Siblings and Children

Siblings and children represent levels in a hierarchy. Elements at the same level are siblings, and are of equal importance. A subordinate element is a child.

Creating a WBS

Create a work breakdown structure (WBS) to divide a project into levels. You can create sibling WBSs to represent WBSs that are hierarchically equal, or child WBSs to represent WBSs that are subordinate to projects or other WBSs.

To create a WBS:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select a WBS or project.

      The WBS can act as a sibling or a parent. The project will always act as a parent.

   b. Click **Context**.
      - To add a sibling, select **Add Sibling WBS**.
      - To add a child, select **Add Child WBS**.
      - To add a WBS from a template, select **Add WBS from Template**.

   c. Click **Save**.

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> **Tip**
>
> The WBS will automatically be assigned a name based upon the project or WBS you select. For example, if the project or WBS is named *WBS: Business Project 1.5*, the application will automatically name the new *WBS: Business Project 1.6*.

Creating a WBS from a Template

You can add a predefined WBS element from a template to a project.

To add a WBS from template:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. In the **Activity Table**, select a project or WBS element and select **Context** then select **Add WBS from Template**.
   b. In the **Select WBS** dialog box, select a WBS from the list of templates and click **Select**.
   c. In the **Copy WBS Options** dialog box, select the data items you want to include with the pasted WBS element and click **OK**.

> **Tip**
>
> - The application automatically assigns the WBS element a name based upon the selected WBS.
> - The new WBS element is created and saved automatically as a child of the selected WBS element.

Configuring General WBS Information

Configure WBS information in to account for any updates or changes made to the WBS.

To configure general WBS information:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select a WBS and click the **General** detail window.
3. In the **General** detail window:
   a. Add or remove columns as needed to configure to the detail window.
   b. Select an option or enter a value for each field.
   c. Save your changes.

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Moving WBS Elements

You can move individual WBS elements within the same project using the Move Up, Move Down, Move Right, and Move Left items on the **Context** menu in the Activities grid. However if you need to move multiple WBS elements, you can use Fill Down in the Parent column of the Activities grid to change the parent WBS of groups of WBS elements.

To move a group of WBS elements:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. If it is not already present, add the **Parent** column to the grid.
   b. In the Parent column, select the new parent WBS element for the group of WBS elements you want to move.
   c. Hold down the **Ctrl** or **Shift** key while selecting the WBS elements you want to move.
   d. Click **Context** and select **Fill Down**.
   e. Click **Save**.

> **Tip**
>
> If the WBS elements you want to move are contiguous (or separated only by activity rows) in the view, you can instead use the **Fill Down** drag point to copy the new WBS parent value to the required rows.

Defining Earned Value Calculations for WBS Elements

Earned value is a technique for measuring project performance according to both project costs and the schedule. This technique compares the planned cost of the work to the actual cost. While earned value analysis is typically performed for WBS elements, you can also perform an earned value analysis for activities, groups of activities, or one or more projects.

You can define the technique used to calculate the **Performance Percent Complete** and **Estimate to Complete** used in the earned value calculation:

Earned Value =**Performance % Complete** x **Budget At Completion (BAC)**

To define the default P6 technique for computing earned value calculations:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Earned Value**.

To define the technique for computing earned value calculations for a WBS:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select an activity view that is grouped by WBS, or group by WBS.

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b. Expand the project and any parent WBS elements.

c. Select a WBS to define the technique used for computing earned value.

d. Click the **Earned Value** detail window.

3. In the Earned Value detail window:

   a. In the Technique for computing performance percent complete section, select the technique you want to use for calculating an activity's earned value.

   b. In the Technique for computing Estimate to Complete (ETC) section, select the technique you want to use for calculating ETC.

4. Click **Save** or **Save and Close**.

Working with WBS Milestones

You can add an almost unlimited number of WBS milestones, which can be used instead of activities to calculate earned value. WBS milestones are assigned at the WBS level, and each milestone is given a weight representing its importance in the project schedule. When you mark a WBS milestone as complete, P6 uses its weight to calculate the performance percent complete of all activities included in the WBS level. That is, the performance percent complete is applied to all activities under that WBS level and then aggregated to the WBS.

For example, suppose a particular level of the WBS includes ten activities, and actual finish dates have been entered for five of these activities. The same WBS is also assigned four WBS milestones having equal weights, but only one of these milestones is marked as complete. P6 uses the completed WBS milestone to calculate the WBS level's performance percent complete as 25%, even though 50% of the activities included in the WBS level are finished.

In the initial stages of project planning, decide how you want P6 to calculate earned value, percent complete, resource use, and financial data. You might choose to use WBS milestones when higher-level task increments comprise a body of activities and you want to control the activities at the WBS level. For example, to control the design of a new product, you might assign WBS milestones to the major steps required to complete the design such as drafting the requirements, writing the design specifications, and so on. Each of these milestones would contain the detailed activities required to complete it.

Working with WBS Categories

Use WBS categories to define custom work breakdown structure (WBS) categories. Categories are not project-specific; you can assign them to any WBS elements in the EPS. WBS categories help reflect your organization's terminology and unique requirements. You can also use categories to group, sort, and filter WBS elements. You can create new WBS categories on the WBS Categories tab of the Enterprise Data page.

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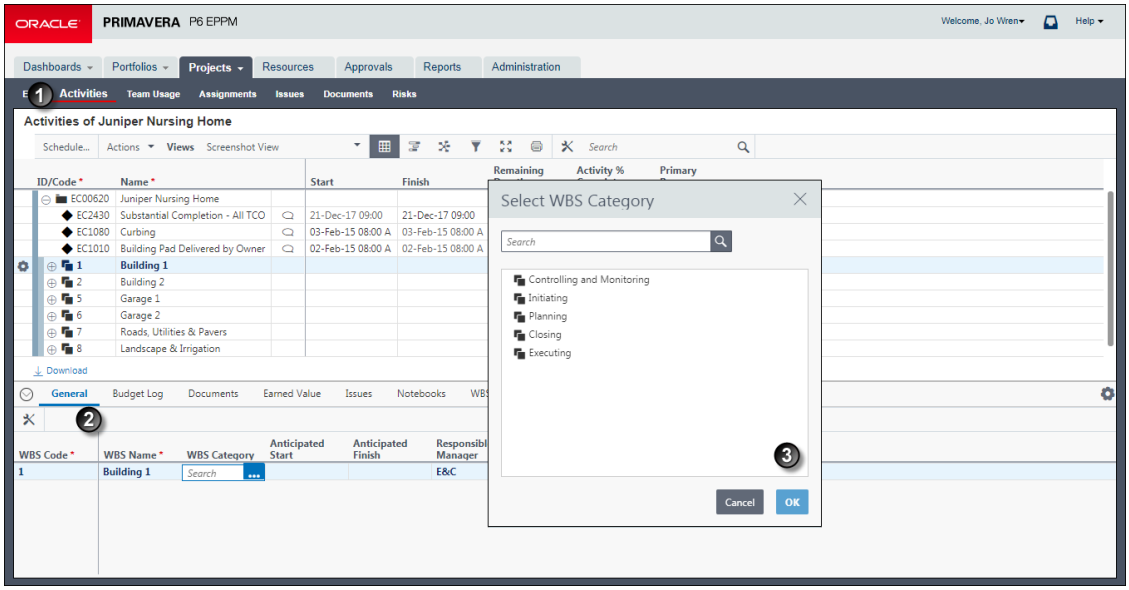


Table of WBS Category Assignment

Item	Description
1	**Activities page**: On the **Activities** page, use the **General** detail window to select the WBS category you want to assign.
2	**General Detail Window**: In the **General** detail window, you can assign a WBS category by clicking in the **WBS Category** field. If the **WBS Category** field is not visible, click **Customize View** and move **WBS Category** from the Available Columns to the Selected Columns list. The category you assign helps organize the WBS element within the project. For example, a WBS category called *Design* would indicate that this WBS will focus on design tasks.
3	**Select WBS Category dialog box**: Use the **Select WBS Category** dialog box to assign a WBS category. You can select only one category. If you are assigning a WBS category to a parent WBS, you will be asked if you also want to assign that category to the child WBS elements. Choose yes or no as needed.

About Baselines

A baseline is a copy, or snapshot, of project data at a given time. Because a baseline is a static representation of a project plan, it can be used as a benchmark against which to measure performance as a project progresses.

You can create multiple baselines to establish metrics throughout the project life cycle. Typically, you would want to create an initial baseline once the project plan is approved, then you would create additional baselines according to your organization's requirements. For example, you could create new baselines at specific reporting intervals.

Although many baselines can be created for a project, only four baselines can be used at any given time to display and compare data. These are known as the Project Baseline and User's

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Primary Baseline, User's Secondary Baseline, and User's Tertiary Baseline. The current project can also be used as the baseline, for example, in situations where no other baseline yet exists.

The Project Baseline is a single metric for comparison that enables all members of a team to have a shared and consistent set of data against which to evaluate project progress. There is only one Project Baseline at any time. All pages that display summarized data compare and display data against the Project Baseline. As a project progresses, you can update baseline data.

The User's Primary, Secondary, and Tertiary Baselines are optional personal baselines that are used to evaluate project progress.

Note

- How Are Baseline Dates Calculated In P6? [VIDEO] [KB333624]
- How Baseline Dates Are Calculated in P6 [KB617147]

Working with Baselines

Before you update a schedule for the first time, you should create a baseline plan. 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. You can save a copy of the current project to use as the baseline or you can convert another project in the EPS hierarchy to a baseline for the current project.

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*, *customer sign-off*, or *midproject baseline*.

Regardless of the number of baselines you store for a project, at any given time you can only select at most two baselines for use in making comparisons in P6. The project-level baseline is used for project/activity usage spreadsheets and profiles. You can choose which baseline to use for earned value calculations in the project preferences.

You can convert another project in the EPS hierarchy to a baseline for use in comparisons with the current project. 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, in order to modify it or update it.

If you choose to update a baseline, you have control over which data items are updated. For example you can choose to add new activities from the project to the baseline, but not to delete activities from the baseline which have been deleted from the project. You can also control which activities to update using a filter.

Note

You must have the Edit Project Details Except Costs/Financials and Assign Project Baseline project privileges to set the project baseline.

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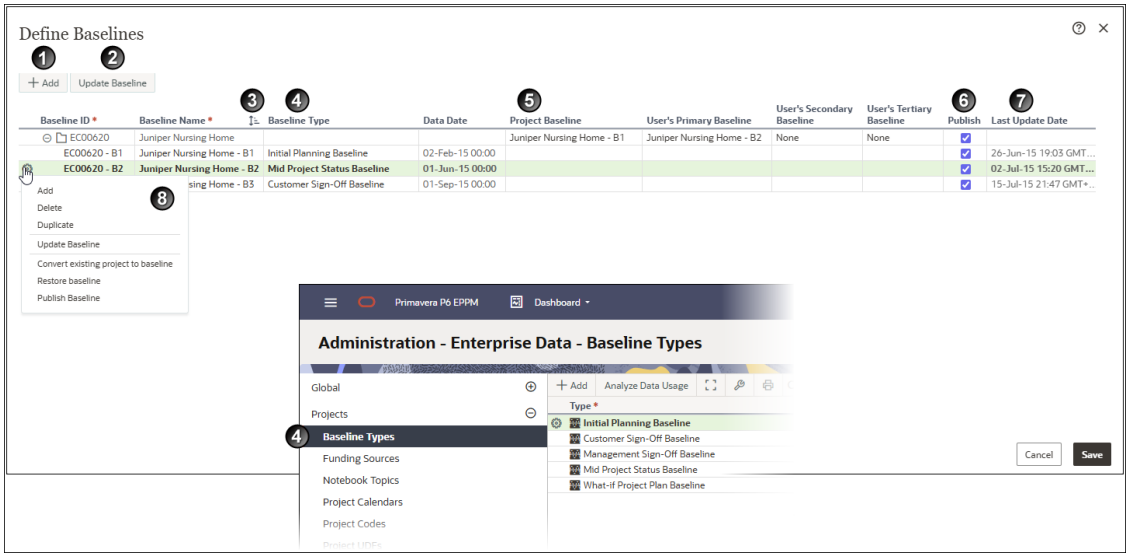


Table of Working with Baseline Elements

Item	Description
1	**Add Baselines**: When you add a baseline, give it a name, assign it a type, and decide if you want to make it the Project Baseline or one of the User's baselines for the currently selected project.
2	**Update Baselines**: Update the baseline with the latest data from the project. You can select which data to update.
3	**Sorting**: Click on a column heading to sort the list by that column.
4	**Baseline Type**: Assign baseline types to baselines to help categorize multiple baselines for a single project. Configure the available baseline types along with your other Enterprise Data settings.
5	**Assigned Baselines**: Assign the baselines to use as the Project, Primary, Secondary, or Tertiary baseline. **Project Baseline**: Lists the available baselines for the selected project. Select the baseline to use as the project baseline. If a baseline does not exist, the current project is the default value. **User's Baselines**: Select your primary, secondary, and tertiary baseline from the list of available baselines. If a baseline does not exist, the current project is the default value.
6	**Publish**: Select this option for any baselines that you want to publish for reporting purposes. You must publish a project before you can publish any of its baselines.
7	**Last Update Date**: The date that the baseline was last updated.

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Item	Description
❽	**Context Menu**: Click the **Context** menu against any baseline to access further options, including: **Convert Existing Project to Baseline**: Save a copy of the baseline before you convert it. Convert a project to use it as a baseline for a current project. **Restore Baseline**: Use restore a baseline to modify a baseline project. You must first unlink a baseline 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.

> **Note**
>
> You can define up to three user baselines for a project in P6 Professional.

Creating Baselines

Create baselines to measure project performance.

To create a baseline:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page
   a. Click the **Actions** menu and select **Define Baselines...**.
   b. In the **Define Baselines** dialog box:
      - Select the project to which you will add the baseline.
      - Click **Context** and select **Add**.
      - Enter a name in the **Baseline Name** field.
      - Select a type from the **Baseline Type** list.
      - Click **Save**.

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Tip

- The application automatically assigns the baseline a name based on the selected project. For example, if you select Project A, the application will name the newly created baseline "A - B1".
- Specify the default **Project Baseline** and **User's Primary Baseline** by selecting from the list of available baselines for each project in the table on the Baselines dialog box.
- Click **Convert a Project to Baseline** and select a project to convert a project into a baseline.
- Select a baseline and click **Restore a Baseline** to remove the baseline and make it a project.
- When you create a new baseline, the **Publish** option is switched off by default.

About Scheduling Projects

Schedule is the order in which activities occur over the course of a project. A schedule follows the constraints imposed by activity relationships and the date types to which an activity must adhere. A good project schedule can serve as a key management tool for making decisions and predicting whether the project will finish on time and within budget. When there are updates to activities or resources, you can reschedule projects to account for these changes. Regularly updating schedules and comparing them with baseline schedules ensures that you are using resources effectively, monitoring project costs against budget, and keeping track of actual durations and costs.

Scheduling Projects

Schedule projects to keep track of activities, actual durations, and costs. Knowing where these stand will help you when making decisions and predictions about the project.

To schedule projects:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click **Schedule...** (F9).
   b. In the **Schedule** dialog box:
      - Configure the options and fields.
      - Click **Schedule Now**.

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Tip

- This schedules all open projects at the same time. If you do not have scheduling privileges for all the open projects, Scheduler is disabled.
- If multiple projects are open, all projects will be scheduled with the options applied to the project you choose in the Use scheduling options from list on the Advanced tab of the Schedule dialog box.
- Use the Project Scheduled Services page to configure options to schedule projects automatically.
- These services are removed from the database based on the ASAP Cleanup Rate your P6 administrator specifies on the Configurations tab in P6 Administrator application. Once the time is met all ASAP jobs that have a status other than running or delegated will be removed from the table automatically. Running and delegated jobs will be removed if they are older than the cleanup rate or if they are older than one day, whichever is greater.

Configuring General Scheduling Options

Configure general scheduling options to define general defaults used when scheduling projects.

To configure general scheduling options:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page
   a. Click **Schedule...**.
   b. In the **Schedule** dialog box, click the **Settings** tab.
   c. On the **Settings** tab:
      - Select or clear the options.
      - If your selections enable a field or list, enter a value or select an option from the list.
      - Click **Save**.

Tip

- When multiple projects are open, the scheduling options that display by default are the options defined for the first project listed.
- Activities whose float does not exceed the value you specify in the Total Float less than or equal to field are considered critical. The value you specify in this field is automatically converted to hours, regardless of your Display Durations in display setting in My Preferences.

Configuring Advanced Scheduling Options

Configure advanced scheduling options to define float paths.

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To configure advanced scheduling options:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click **Schedule...**.
   b. In the **Schedule** dialog box, click the **Advanced** tab.
   c. On the **Advanced** tab:
      - Select the **Calculate Multiple Float Paths** option.
      - Select **Total Float** or **Free Float**.
      - Enter or select a value for each field.
      - Click **Save**.

Tip

- You can select any activity in the Display Multiple Float Paths ending with activity dialog box; however, typically this activity is a milestone or some other major activity in the project schedule.
- To optimize performance, type a low number (10 or less) in the Specify the number of paths to calculate field.

About Float

Float is a discretionary measure of a schedule's flexibility or slack. While managers are most often concerned with overall network float variance along the critical path (Total Float), the float time for a single activity (Free Float) is also helpful in managing day to day operations. For example, if an activity has ten days of free float, management may decide to assign its intended resource to another task.

Free Float is the maximum number of hours or days an activity can be delayed without also delaying the early start dates of any immediate successor activities.

Total Float is the total maximum number of hours or days an activity can be delayed without also delaying the project finish date or another scheduling constraint. Total Float is calculated using the critical path method to determine the variance between early finish and late finish dates.

About Critical Path Activities

Critical path activities are project tasks that must start and finish on time to ensure that a project ends on schedule. A delay in any critical path activity will delay completion of the project, unless the project plan can be adjusted so that successor tasks finish more quickly than planned. Critical activities can be one of two types: float and longest path.

Float is a measure of schedule flexibility. The application uses the Critical Path Method (CPM) to generate a project schedule. This method calculates four dates for each activity in the project plan: Early Start, Late Start, Early Finish, and Late Finish. If the Early Start date and Late Start date for an activity are the same, the activity is said to have zero float. Activities that have zero float must start on time to prevent the schedule from slipping. When an imposed finish date creates a schedule that is shorter than the duration calculated to complete the

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activities on the critical path, a project has negative float. A project with negative float is behind schedule.

To meet the specific requirements of your project, you can specify the float tolerance used to identify activities as critical. For example, in some situations you might want critical activities to be those with zero or negative float. In other situations, activities with float of three days or less might be identified as critical.

Longest path defines the sequence of driving activities that determine the project end date. Longest path calculation includes interproject relationships. Therefore, activities designated as on the longest path might change depending on whether you schedule a project alone or with its related projects. If a project has interproject relationships and you schedule it alone, the interproject relationships are treated as scheduling constraints. The longest path is broken when activities are no longer driven by relationships; that is, when activity dates are driven by constraints or resource leveling.

Working with Critical Activities

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 might also affect the project schedule. For example, if you choose to identify critical activities based on a maximum total float threshold, P6 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, P6 will identify the critical path of activities but will not identify sub-critical paths that affect the critical path.

After you schedule a project, you can display the Float Path and Float Path Order columns in the table on the Activities page. 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.

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 on the General tab of the Scheduling 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.

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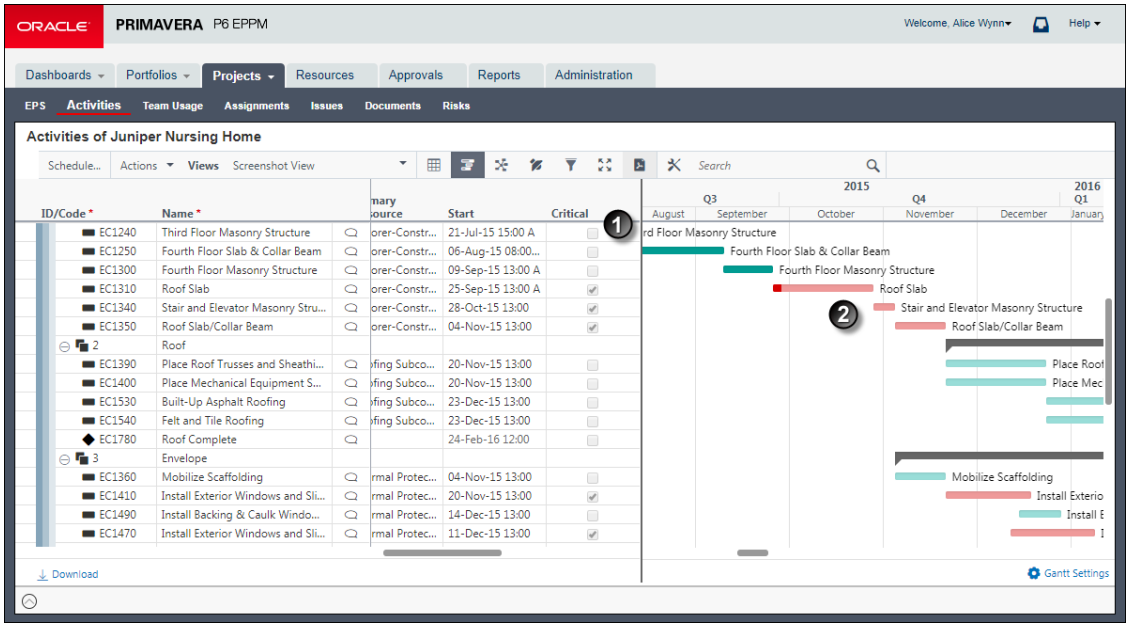


Table of Key Elements for Critical Activities

Item	Description
1	**Critical option**: This check box is checked for all activities that are calculated as being critical.
2	**Red bars**: Critical activities are indicated in the Activity Gantt with red bars.

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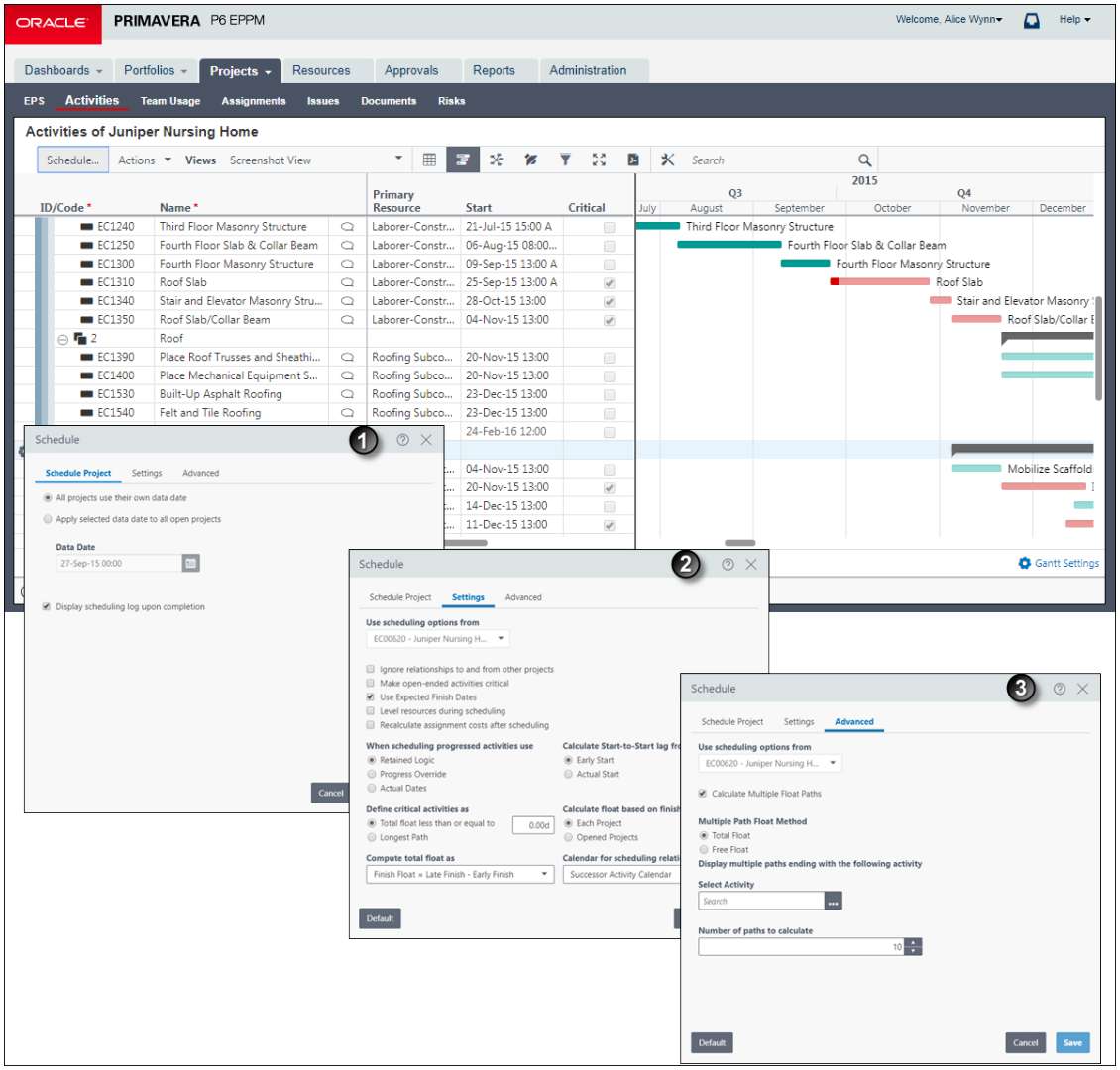


Table of Key Options for Critical Activities

Item	Description
1	**Scheduling Options**: On the **Activities** page, select **Schedule**. On the resulting **Schedule Project** dialog box, click the **Options** button to open the **Scheduling Options** dialog box.
2	**Settings tab**: Use the **Settings** tab of the **Schedule** dialog box to define critical activities according to a maximum float time or by longest path.

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Item	Description
3	**Advanced tab**: On the **Advanced** tab of the **Schedule** dialog box, 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, P6 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, P6 identifies other float paths (sub-critical float paths) that affect the most critical float path and numbers the paths based on their criticality in ascending order beginning with 2.

Creating Baselines

Create baselines to measure project performance.

To create a baseline:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page
   a. Click the **Actions** menu and select **Define Baselines...**.
   b. In the **Define Baselines** dialog box:
      - Select the project to which you will add the baseline.
      - Click **Context** and select **Add**.
      - Enter a name in the **Baseline Name** field.
      - Select a type from the **Baseline Type** list.
      - Click **Save**.

Tip

- The application automatically assigns the baseline a name based on the selected project. For example, if you select Project A, the application will name the newly created baseline "A - B1".
- Specify the default **Project Baseline** and **User's Primary Baseline** by selecting from the list of available baselines for each project in the table on the Baselines dialog box.
- Click **Convert a Project to Baseline** and select a project to convert a project into a baseline.
- Select a baseline and click **Restore a Baseline** to remove the baseline and make it a project.
- When you create a new baseline, the **Publish** option is switched off by default.

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About Resource Leveling

Resource leveling is an automated process that can change the start date of activities. Level resources in your project schedule to ensure that resource demand does not exceed resource availability. 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, a backward pass might be necessary to recalculate late dates.

During resource leveling, the resource requirements of all scheduled activities are compared to the maximum quantity available at the time of leveling, and an activity is only scheduled to occur when its resource demands can be met. To accomplish this, tasks can be delayed to resolve resource availability conflicts.

Configuring Resource Leveling Options and Priorities

Level resources in your project schedules to ensure that resource demand does not exceed resource availability. To handle scheduling conflicts that might occur during leveling, you can add priorities that specify which project or activity is leveled first. Before leveling, configure the options and priorities specified in the steps below.

To configure resource leveling options and priorities:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click **Customize View** and click **Columns**.
   - On the **Columns** tab, expand the **General** section in the **Available Columns** list and double-click **Project Leveling Priority** to add it to the **Selected Columns** list and click **Save and Apply**.
3. On the **EPS** page:
   a. Enter a value in the **Project Leveling Priority** field for each project.

      > **Note**
      >
      > Enter a value from 1, the highest priority, to 100, the lowest. The default is 10.

   b. Click **Save** when you are done.
4. On the **Navigation Menu**, expand **Projects** and click **Activities**.
5. On the **Activities** page, click **Customize View** and select **Columns**.
   - On the **Columns** tab, expand the **General** section in the **Available Columns** list and double-click **Activity Leveling Priority** to add it to the **Selected Columns** list and click **Save and Apply**.
6. On the **Activities** page:
   a. Enter a value in the **Activity Leveling Priority** field only for those activities that require a specific change to their leveling priority. For example, a **Normal** activity might become a **Top** priority.

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b. Click **Actions** and select **Leveler**.

c. In the **Level Resources** dialog box:

- Select the **Consider assignments in other projects with priority equal or higher than** option and select a value from the list to include in the leveling process projects that are not currently open, but that do fit the required priority level.
- Select or clear the **Preserve scheduled early and late dates** option to determine if the leveling process can alter activity dates or not. If you select this option, configure the options it enables.
- Select or clear the **Recalculate assignment costs when leveling** option to determine if the application should automatically recalculate assignment costs if they are affected by the leveling.
- Select the **Display leveling log upon completion** option if you would like to see a summary of activities delayed by leveling and exceptions made for critical activities.

d. On the **Resources** tab, choose whether to level **All resources** or **Selected resources**. If you choose to level **Selected Resources**, double click the resources you want to level in the **Available** list to add them to the **Selected** list.

e. On the **Prioritization** tab, specify priorities that will be used to level the activities. Add priorities in the order in which you want the application to consider them. For each priority you add, repeat the following steps:

- Click **Context** and select **Add Above** or **Add Below**.
- In the **Field Name** list, select **Project Leveling Priority**, **Activity Leveling Priority**, or another field.
- In the **Sort Order** list, select *Ascending*, *Descending*, or, for some fields, *Hierarchy*.

f. Click **Save**.

Tip

You cannot edit the **Project Leveling Priority** of a project if you do not have the appropriate security privileges or if the project is checked out or opened exclusively by another user.

Leveling Project Resources

Level one or more projects whenever the required shared or critical resources have limited supply or availability or to generally keep resource usage at a constant level. For example, when a resource has been assigned to more than one activity during the same time period, level the projects to eliminate potential resource over-allocation. Once you have performed resource leveling against your project or projects, you will be able to see where resources are overallocated and make decisions about whether work assigned to some resources should be redistributed to other available resources.

To level resources in one or more projects:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.

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2. On the **Activities** page:
   a. Click **Actions** and select **Leveler**.
   b. In the **Level Resources** dialog box:
      - Configure resource leveling options.
      - Select the **Resources** tab to specify which resources should be leveled.
      - Select the **Prioritization** tab to specify which assignments are leveled first when a conflict exists.
      - (Optional) Click **Save** to save your settings and close the dialog box.
      - Click **Level Now**.

Tip

- Using the **Project Scheduled Services** page, you can configure scheduled services to have the application level resources automatically.
- These services are removed from the database based on the ASAP Cleanup Rate your P6 administrator specifies on the Configurations tab in P6 Administrator application. Once the time is met all ASAP jobs that have a status other than running or delegated will be removed from the table automatically. Running and delegated jobs will be removed if they are older than the cleanup rate or if they are older than one day, whichever is greater.

About Activity Progress

An activity's status is a brief representation of its progress or condition at any given time. An activity's status might include its duration, beginning and ending dates, percent complete, units and costs, and associated constraints. Team members should periodically update the status of their assigned activities in order for their project managers to adequately assess both individual and overall progress.

About Updating Progress

To determine how a project is performing and what work remains to be done, update its progress weekly, daily, or as frequently as required.

You can record work progress in a number of ways: you can record progress for individual activities or resources by entering "live" status data you have collected; you can use P6 Team Member Web to collect data from resources, activity owners, or users who have been assigned Team Member work distribution filters, with the option to turn on reviews for status updates or allow the system to automatically approve the updates; you can use P6 Team Member Web to collect data from resources using timesheets and then approve or reject those timesheets; or you can automatically calculate progress based on the schedule plan.

P6 supports the following platforms for directly updating "live" status: web browsers using P6 and P6 Team Member Web, mobile devices and tablets using the P6 for iOS and P6 for Android apps, and email applications exchanging messages using Email Statusing Service. Your team may decide to use one method or some combination of these methods.

Working with Updating Progress in a Browser Running P6

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To determine how a project is performing and what remains to be done, update its progress. Updating a project to reflect the actual work performed to date can be achieved using any of the following methods:

- **Manually record progress**: Record progress for individual activities or resources by entering status data from each member of the team. You can update progress to units and costs manually in the financial period columns in the activities grid.

  > **Note**
  >
  > While an activity does not have a labor or non-labor resource assigned, you can update the relevant resource type's costs and units in the financial period columns in the activity grid. If a labor or non-labor resource is assigned to an activity, you cannot update the relevant resource type's units and costs at the activity level. Instead update the units and costs for the resource in the Assignments detail window.

- **Automatically calculate progress**: For individual activities, resources, and expenses, use the convenient *Auto-Compute Actuals* feature to estimate work progress based on the schedule plan. Then, run the *Apply Actuals* feature. Using these features, the application calculates and applies the expected progress from the previous data date to the new data date you specify. To regularly update a project so that it reflects current actual and remaining values, run the *Apply Actuals* process using the **Scheduled Services** page.

Updating the Progress of Activities Using P6

Update status to define percent complete and start and finish dates.

To update status:

- On the **Navigation Menu**, expand **Projects** and click **Activities**.
  1. On the **Activities** page, select an activity and click the **Status** detail window.
  2. In the **Status** detail window:
     - Select or clear the **Started** and **Finished** options.
     - If you select an option, click **Select Date** and select a date from the calendar.
     - Enter a percentage in the **Activity % Complete** field.
  3. Click **Save**.

> **Tip**
>
> - You can update the progress for resources working on an activity on the Assignments detail window.
> - You can also update units, costs and other fields for an activity in the activity grid if you add the relevant columns to the grid.

About The Apply Actuals Feature

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After progress is recorded by approving timesheets, entering actual data, or setting the **Auto Compute Actuals** option, you can run the *Apply Actuals* feature to update the schedule. The *Apply Actuals* feature runs as a service and schedules activities with progress and/or activities that have the **Auto Compute Actuals** option set.

When you run *Apply Actuals*, you can move the data date. P6 schedules activities only within the specified time period (between the current data date and new data date) and calculates progress for those activities that are set to automatically calculate actuals.

Working with the Apply Actuals Feature

Before you run the **Apply Actuals** command, decide which method you will use to update progress, *Auto Compute Actuals* or P6 Team Member timesheets. If using the *Auto Compute Actuals* method, ensure project managers have marked the **Auto Compute Actuals** option for select activities, resources, and expenses. If using timesheets, make sure all project resources have recorded their timesheets in P6 Team Member and those timesheets have been approved.

When you run **Apply Actuals**, both methods are invoked to determine the actuals that are applied to a given project:

1. **Auto Compute Actuals method**: Actual values and dates are progressed for the activities (and their resources and expenses) that are scheduled to occur between the last data date and the new one. This method acts on activities, resources, and expenses that have their **Auto Compute Actuals** option selected.
2. **Timesheets method**: Actual timesheet hours from P6 Team Member are applied. This method acts on resource assignments for resources with **Timesheets** module access. In P6 Team Member you also have the option of updating the following, depending on what fields are being updated:
   a. Actual units
   b. Actual and Remaining Units
   c. Actual and Percent Complete

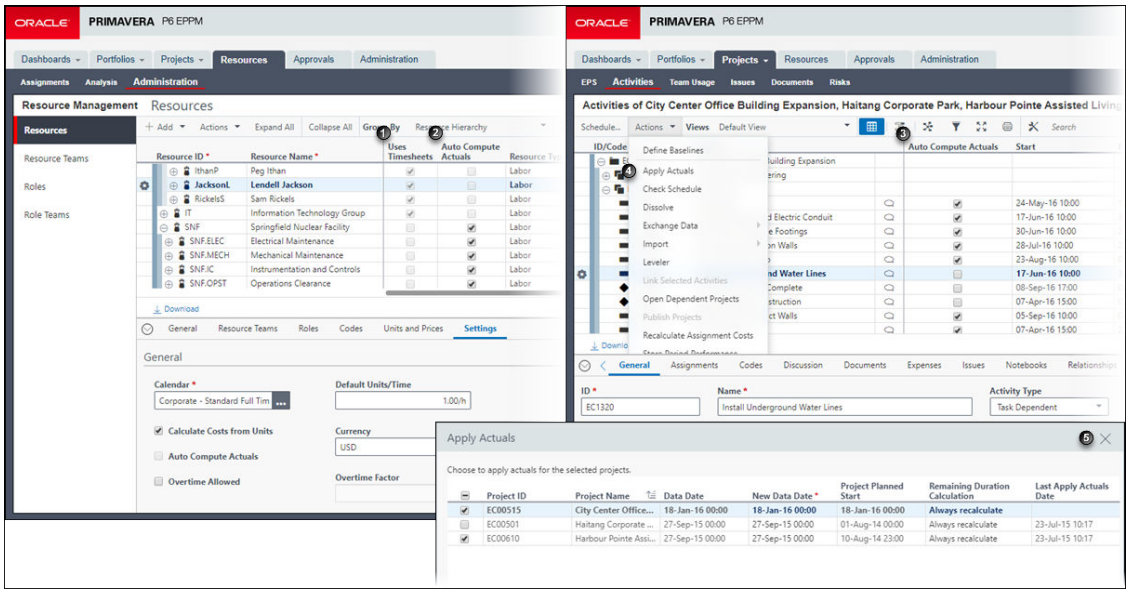


Table of Key Elements When Applying Actuals

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Item	Description
1	**Uses Timesheets** option: Select this option to indicate you want to allow this resource to enter hours using timesheets provided by P6 Team Member. When applying actuals to the schedule, actual duration units (e.g., hours) for all the selected resource's assignments will be updated based on timesheet data.
2	**Auto Compute Actuals** option: Select this option to indicate you want actual hours to be updated for resources (shown in this example), activities, and/or expenses when project actuals are applied.
3	**Auto Compute Actuals** option: Select this option to indicate you want actual hours to be updated for activities (shown in this example), resources, and/or expenses when project actuals are applied.
4	**Apply Actuals** item: Select **Apply Actuals** from the **Actions** menu to open the Apply Actuals dialog box.
5	**Apply Actuals** dialog box: From the list of open projects, select the ones you want actuals to be applied to. You can also apply a new data date. Select a method for calculating the remaining durations in the **Remaining Duration Calculation** field.

Example (Labor Resource): Sarah enters her hours for the most recent timesheet period in P6 Team Member. She then submits her timesheet for review and approval. Once approved, the timesheet hours are ready to be applied to the project. Paul, the project manager, runs Apply Actuals. P6 looks for all approved timesheets that fall within the timesheet period and that are less than or equal to the New Data Date value Paul entered on the Apply Actuals dialog box. Only Sarah's approved actuals that fall within the timesheet period will get posted. If she enters actuals in timesheets for 5 weeks but the timesheet period is set for every 2 weeks, the entries that were entered for the 5th week will not get posted until the next timesheet period. Her approved actual hours will be applied to the Actual Units field for the appropriate Labor or Non-Labor assignment which will then trigger the Remaining Units, Actual Duration and Percent Complete fields to be recalculated.

Example (Non-Labor Resource): A special pump is listed as a non-labor resource for a project. Since non-labor resources cannot enter actual hours per day in a timesheet, a designated user defined as a resource enters a lump sum amount of hours used for the non-labor resource per timesheet period in the Prior Actuals field. When the Apply Actuals command runs against the project, P6 determines if a value appears in this field, and if it does, it applies this value to the Actual Units field.

Applying Actuals to a Project

Apply actuals to update progress on the currently selected projects as of the specified data date.

To apply actuals:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click **Actions** and select **Apply Actuals**.
   b. In the **Apply Actuals** dialog box:

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- Select the projects to which you want to apply actuals.
- Select a date from the **New Data Date** calendar.
- Select an option from the **Remaining Duration Calculation** list.
- Click **Apply**.

Tip

- Using the Project Scheduled Services page, you can configure scheduled services that have the application apply actuals automatically.
- These services are removed from the database based on the ASAP Cleanup Rate your P6 administrator specifies on the Configurations tab in P6 Administrator application. Once the time is met all ASAP jobs that have a status other than running or delegated will be removed from the table automatically. Running and delegated jobs will be removed if they are older than the cleanup rate or if they are older than one day, whichever is greater.

About Email Statusing Service

As a team member with assignments in P6, you can request a list of your assigned activities directly from the P6 server using Email Statusing Service. Only activities from active projects in which you (the requesting user) are assigned as a resource, activity owner, or if you are assigned a Team Member work distribution filter will be returned.

As a project manager with team members assigned to activities on the projects, you can send your team members an email request for status updates using Email Statusing Service. The email request includes a list of activities for the projects you specify. Team members can provide updates by replying to the email and updating their status in the body of the email.

Sending a Welcome Email to Email Statusing Service Users

If Email Statusing Service is configured at your organization, send your team members who will be updating their activities through email a Welcome email. This email includes the email address to the Email Statusing Service, and instructions for requesting an activity list and updating the list through email.

To send team members a Welcome email:

1. Log into the email account uniquely associated with your P6 user account.
2. Create a new email to send to the Email Statusing Service address provided to you by your P6 administrator.
3. In the email subject line, enter **Welcome**.
4. In the body of the email, identify a list of team members to send a Welcome email to by entering their email addresses, separated by a comma, semi colon, space, or by entering one address per line. If the body of the message is blank, the service will send an email to every team member assigned to the projects for which you have access rights.

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> **Note**
>
> When listing multiple email addresses, use only one type of separator. Do not mix separators in the list. For example, if you choose to use a comma to separate email addresses, use a comma to separate every email address in the list.

5. Send the email.

Sending Team Members Their Assigned Activities using Email Statusing Service

If Email Statusing Service is configured at your organization, you can send your team members an email request for status updates using Email Statusing Service. The email request includes a list of activities for the projects you specify. Team members can provide updates by replying to the email and updating their status in the body of the email.

To send team members an email with their activity list:

1. Log into the email account uniquely associated with your P6 user account.
2. Create a new email to send to the Email Statusing Service address provided to you by your P6 administrator.
3. In the email subject line, enter **Notify** and the *Email Statusing Service Activity Filter Options*Email Statusing Service Activity Filter Options for the activity list you want to send to team members, using the following format:

   ```
   Notify <Activity Status> <Time Frame, optional> <Project, optional>
   ```

4. In the body of the email, identify the list of team members to send activities to by entering their email addresses, separated by a comma, semi colon, space, or by entering one address per line. If the body of the message is blank, the service will send an email to every team member assigned to the projects identified for which you have access rights.

   > **Note**
   >
   > When listing multiple email addresses, use only one type of separator. Do not mix separators in the list. For example, if you choose to use a comma to separate email addresses, use a comma to separate every email address in the list.

5. Send the email message.

   After you send the message, each team member will receive an email with their activity list and you will receive a confirmation message with a list of all team members who were sent an email.

> **Tip**
>
> For help sending notification emails, send an email to the Email Statusing Service address provided by your P6 administrator with the words **Notify Help** in the subject line.

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Supporting Email Updates with Email Statusing Service

Projects may require that P6 users temporarily work in remote locations without access to the private network where the P6 server resides. Diverse project teams may also exist with some members updating their activities using P6, and others using email.

In order to support the updating of assignment status by email, you will need to verify the following requirements have been met.

To support email updates for your team at your organization:

1. Verify with your administrator that support for email activity updates has been deployed with your P6 application server.
2. Verify that the following prerequisites have been fulfilled in P6:
   a. You have a valid user account in P6.

      > **Note**
      >
      > With a P6 user account, you can be assigned to activities as a resource assignment if your user account is associated with a labor resource, assigned to an activity as an activity owner, or assigned a Team Member work distribution filter.

   b. Your user account is configured with at least one module access option.
   c. Your user account must specify your own unique email address.
   d. You have one or more activity assignments for at least one active project. The email will show activities that have not yet started, active activities in progress, and activities you completed in the last 180 days.

      > **Note**
      >
      > OBS access to a project is not required in order for you to make status updates on your assigned activities unless you are assigned a Team Member work distribution filter.

3. Download and install any email client application or browser to access web mail.
4. Plan your activity status by email process with your team and manager. For example, consider details such as the timing of updates by email versus updates made in P6, P6 mobile, or other P6 Team Member interfaces to avoid conflicts.

- Yahoo and Hotmail web clients are not supported. If your email address is assigned to one of these accounts, access your account within an SMTP email client.
- When project managers use the Notify email request to send a list of activities to team members, the following time frame options are not supported:
  – Active Today, Due Today, or Completed Today
  – Active Tomorrow, Due Tomorrow, or Starting Tomorrow
  – Completed Yesterday

  Instead, you can use:

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- Active in next 1 day, Due, or Completed in last 1 day
- Active in next 2 days or Due in next 2 days
- Completed in last 1 day

You may receive error messages when updating activities if your email application is set to return email messages in HTML format.

One of the following situations will occur:

- An email will be returned with the message "Date or unit format specified was invalid or missing."
- If there is an error in the Time Spent, Time Left, or Remaining Duration fields, an email will be returned with a message that the updated value is incorrect because only part of the updated value was parsed by the Email Statusing Service.

The following methods can be used to avoid this issue:

- When entering activity updates, delete the original value in its entirety before entering an updated value.
- Set the email application to reply to messages in text format.
- Click the **Update this activity** link to update activities individually.

Updating the Progress of Activities Using Email Statusing Service

If Email Statusing Service is configured at your organization, you can request a list of your assigned activities using email. Then, you can reply with your status updates.

To update your status using email:

1. Log into the email account uniquely associated with your P6 user account.
2. Create a new email to send to the Email Statusing Service address provided to you by your P6 administrator.
3. Request a list of activities from P6 by specifying the *Email Statusing Service Activity Filter Options*Email Statusing Service Activity Filter Options in the subject line using the format:

   ```
   <Activity Status> <Time Frame, optional> <Project, optional>
   ```

   Send the email.
4. When you get the list of your assignments as a message in your inbox, open it.
5. (Optional) To update the status of only a single activity:
   a. Click on the **Update this activity** link.
   b. In the resulting form, enter your updates.
   c. Click **Send**.

   > **Note**
   >
   > To save time, try to update the status of all your activities at the same time. If your email application does not support inline email editing in your reply message, use the **Update this activity** step for each activity.

6. To update the status of one or more activities at the same time, click **Reply**.

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7. In the reply message:
   a. Enter your status updates using the approved formatting.

> **Note**
>
> - To avoid potential errors, delete the original value in its entirety before entering an updated value.
> - If the same activity is listed twice in your activity list, you are assigned as a resource to this activity and you are also either assigned as the activity owner or you are assigned a Team Member work distribution filter that is capturing the same activity. Update only one of the two activities per email update. If you need to update both activities, request another activities list and then update the second activity.

   b. Click **Send**.

A confirmation message will be sent to you after your updates have been processed.

> **Note**
>
> If you need assistance with the options, syntax, or required formatting of these messages, send an email message with only the word "Help" or a question mark in the subject line to receive more detailed instructions.

Email Statusing Service Activity Filter Options

As a team member or project manager, you must follow the syntax and formatting for the filter options below when sending a request to Email Statusing Service.

Filter Options

There are three types of request filters: *Status*, *Time Frame*, and *Project*. A status request is a minimum requirement; a time frame and project request are optional extensions to the status request.

For team members, a valid request for an activity list would appear in the email subject line as:

```
<Status> <Time Frame, optional> <Project, optional>
```

> **Note**
>
> If you need assistance with the options, syntax, or required formatting of these messages, send an email message with only the word "Help" or a question mark in the subject line to receive more detailed instructions. In addition, if your status request message is ever invalid, you will be notified by email.

For project managers, a valid request to send a notification email to team members would appear in the subject line as:

```
Notify <Status> <Time Frame, optional> <Project, optional>
```


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Status Options

Active

Activities that are in progress or have not started.

Due

Activities scheduled to finish today.

Overdue

Activities that were scheduled to finish prior to today.

Completed

Activities where the finished date is today's date.

Starting

Activities that are scheduled to start today.

Starred

Activities team members marked as important. This filter can only be combined with a Project ID or Project Name filter. The starring feature is not available to users assigned Team Member work distribution filters.

Time Frame Options

Requests by status can optionally be filtered based on a specified number of days, weeks, or months, or by specifying today, tomorrow, or yesterday.

Active in next <number> <units of time>

Activities that are in progress or scheduled to start in the next number of days, weeks, or months.

Example: Active in next 3 weeks

Active Today

Activities that are in progress or are scheduled to start on or before today's date.

Active Tomorrow

Activities that are in progress or are scheduled to start on or before tomorrow's date.

Due in next <number> <units of time>

Activities that should be completed in the next number of days, weeks, or months.

Example: Due in next 5 days

Due Today

Activities scheduled to finish today.

Due Tomorrow

Activities that are scheduled to finish tomorrow.

Completed in last <number> <units of time>

Activities that were completed in the last number of days, weeks, or months.

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Example: Completed in last 3 days

> **Note**
>
> - There is a 180 day limit to viewing completed activities . Any completed activity with a Finished Date more than 180 days in the past will not be returned.
> - If the completed activity was updated with a Finished Date within the past 180 days and the last approved Finished Date is more than 180 days in the past, the activity will not be sent to you regardless of the updated Finished Date. (This only applies if Team Member status updates require approval.)

Completed Today

Activities where the finished date is today's date.

Completed Yesterday

Activities where the finished date is yesterday's date.

Starting in next <number> <units of time>

Activities that are scheduled to start in the next number of days, weeks, month.

Example: Starting in next 1 month

Starting Today

Activities that are scheduled to start today.

Starting Tomorrow

Activities that are scheduled to start tomorrow.

Project Options

Requests by status can optionally be filtered based on an active project name or project ID.

on Project <Project ID or Name>

Restricts the results of the requested status and optional time frame filter to the activities that belong to the specified active project. If no project is specified, all active projects for which you have access rights will be included.

Examples:

- Overdue on project MFG00925
- Due in next 5 days on project Plant Expansion and Modernization

Fields Available for Activity Status Updates

The fields available in the email are assigned by the project manager in P6. Also, in P6, team members are assigned as either a resource assignment, an activity owner, or a user with a Team Member work distribution filter. Project managers should let team members know what fields are assigned to them and whether they are a resource assignment, an activity owner, or a user with a Team Member work distribution filter because some of the status fields depend on their role.

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The updates you can make to the fields that are returned depend on the activity status (Not Started, In Progress, or Completed). Use the following table to determine which fields can be updated for a Not Started, In Progress, or Completed activity.

Table of Activity Status Fields Available by Email

Resource Assignment

Field	Status: Not Started	Status: In Progress	Status: Completed	Sample Value
Start/Started Date	Yes	Yes	Yes	15-APR-2012
Finish/Finished Date	Yes	Yes	Yes	18-APR-2012
Time Spent	Yes	Yes	Yes	1d 2h
Time Left	Yes	Yes	No	2d 6h
Remaining Duration	Yes	Yes	No	5d
Finished (Y/N)	Yes	Yes	No	N
Starred (Y/N)	Yes	Yes	No	N

Activity Owner or User Assigned a Team Member Work Distribution Filter

Field	Status: Not Started	Status: In Progress	Status: Completed	Sample Value
Start/Started Date	Yes	Yes	Yes	15-APR-2012
Finish/Finished Date	No	No	Yes	18-APR-2012
Activity % Complete (see notes)	Yes	Yes	No	25%
Expected Finish	Yes	Yes	No	30-APR-2012
Time Spent (Labor/ Nonlabor)	Yes	Yes	Yes	1d 2h
Time Left (Labor/ Nonlabor)	Yes	Yes	No	2d 6h
Remaining Duration	Yes	Yes	No	4d
Finished (Y/N)	Yes	Yes	No	N
Starred (Y/N) (see notes)	Yes	Yes	No	N

Note

- The calculation of the **Activity % Complete** field depends on the settings your project manager configured in P6. The field is either calculated using units or duration, calculated using the percentage complete from steps, or a value you enter based on your own perception of the work you completed on this activity.
- When you enter **100%** to indicate your work is complete, you must also enter **Y** for **Finished (Y/N)** to mark this activity complete.
- The starring feature is not available to users assigned Team Member work distribution filters.

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Updating the Progress of Activities Using P6 Team Member Web

If configured at your organization, P6 Team Member Web provides a way for team members to view, update progress, and communicate about their assignments. See the *P6 Team Member Help*.

Updating the Progress of Activities Using the P6 Team Member Mobile Apps

If configured at your organization, the P6 Team Member mobile apps provides a way for remote users to view, update progress, and communicate about their assignments. See the *P6 Team Member Help*.

About P6 Team Member Status Updates

Project managers might need a way to view team member status updates before the updates are committed to the schedule. The team member status updates feature enables you to view, update, approve and reject activity progress captured by users of the P6 Team Member interfaces.

When setting up team member status reviews in Project Preferences, you enable reviews for the project, choose the required reviewers, choose the review type, and choose whether to require reviews for all activity updates in the project. Status updates can be turned on and off for individual activities on the Activities page. In addition to setting reviewers for all activities, you can set reviewers for all activities within a specific WBS on the Activities page.

- Users assigned as a status reviewer for a WBS node can view, edit, approve, and reject the status updates for all activities in that WBS node only, but not any of its child, sibling, or parent WBS nodes.
- Users assigned as a status reviewer for a project can, by default, view, edit, approve, and reject status updates for activities in the top level of the project and also for any activities in WBS nodes of the project that do not have status reviewers assigned.

> **Note**
>
> When you assign a status reviewer at project level, P6 prompts you to choose whether to assign that status reviewer to all WBS nodes in the project. If you choose No, the user cannot view, edit, approve or reject status updates for activities in WBS nodes to which they are not explicitly assigned as a status reviewer, unless there are no other status reviewers assigned to that WBS node.

- Users assigned the Project Superuser project security profile against a project can view, edit, approve, and reject status updates for all activities in that project, regardless of whether they are explicitly assigned as a status reviewer to specific WBS nodes in the project.
- Users assigned the Admin Superuser global security profile can view, edit, approve, and reject status updates for activities in any WBS node of any project.

If you do not assign any status reviewers for a project, only users assigned the Project Superuser project security profile against that project or users assigned the Admin Superuser global security profile can view, edit, approve, and reject the status updates for activities in that project.

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When a team member assigns an activity or saves a change in a P6 Team Member interface, the change appears in the Status Updates page.

The history of all activity updates made in P6 Team Member interfaces is captured in the Update History detail window on the Activities page.

Working with P6 Team Member Status Updates

If you are assigned the appropriate privileges, you can view, update, approve and reject status updates made by team members using P6 Team Member interfaces.

View only pending status updates to see the new updates requiring your attention. The number in the bubble shows how many updates are currently pending for the selected projects.

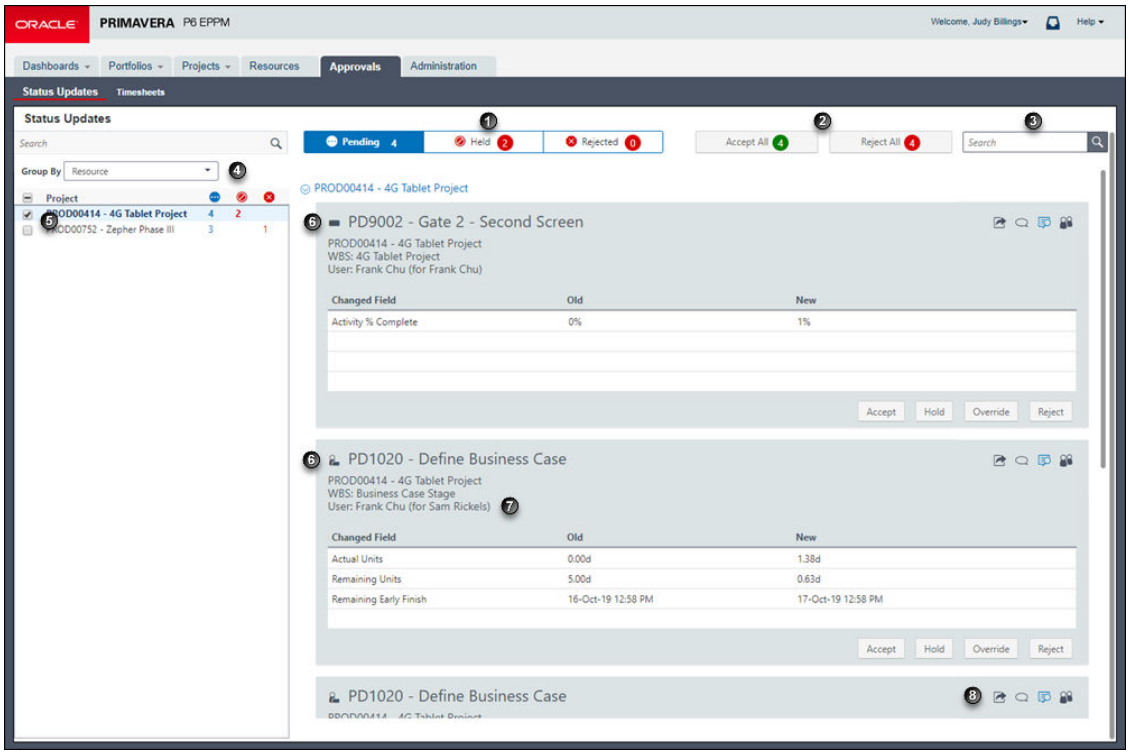


Table of Screen Elements

Item	Description
1	**Pending**: View only pending status updates to see the new updates requiring your attention. The number in the bubble shows how many updates are currently pending for the selected projects. **Held**: View only held updates to focus on updates which were not approved when they were initially made. The number in the bubble shows how many updates are currently held for the selected projects. **Rejected**: View only rejected updates to see which updates were not approved and have not yet been modified and resubmitted by team members

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Item	Description
2	**Accept All**: When you have reviewed all the updates in the view and are satisfied that the updated data is correct, select **Accept All** to apply the updated information to the activities. When you select **Accept All**, only the status updates in the view are approved. The number in the bubble shows how many updates will be accepted. **Reject All**: When you have reviewed all the updates in the view and the remaining updates are all updates which must be resubmitted, select Reject All to reject the status updates and provide feedback to the team members about what needs to be changed. When you select **Reject All**, only the status updates in the view are rejected. The number in the bubble shows how many updates will be rejected.
3	**Search**: Use search as another way to filter the status updates visible on the page. You can search using any field name in the view. For example, to view all status updates for a single resource, search on the name of the resource. When you select **Accept all updates**, only the status updates in the view are approved.
4	**Group By**: You can choose to group the page by None, Resource, or Review. You must be an Admin Superuser or Project Superuser to view this option.
5	**Project Filter**: To reduce the number of status updates displayed on the page, choose to view only some projects. The status update cards are grouped by project.
6	 **Assignment** or  **Owner** or **Team Member work distribution filter**: These icons indicate whether the activity is assigned to a resource assignment, an activity owner, or a user with a Team Member work distribution filter assigned.
7	**User (for Resource)**: If the project level setting to allow users to status other resources is selected, you can see the resource which was updated by the user who submitted the status update.

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Item	Description
8	**Accept**: If you see that all the information in the status update is correct, accept the update to allow the data to be integrated into the activity or resource assignment. **Hold**: If you need more information before you approve the status update, place the update on hold. After you click **Hold**, the status update will move to the **Held** category. Team members can continue to make updates to their activities even when the update is in the held state. If a team member makes another update while the initial status update is in the held state, the data is updated and a message displays indicating a change was made. **Override**: If you see incorrect information in the status update and know what the correct data is, override the update to correct the incorrect information. **Reject**: If you see incorrect information in the status update, reject the update to have the team member review the data and resubmit the update. Team members can continue to make updates to their activities even after an update is rejected. If a team member makes another update while the initial status update is in the rejected state, the data is updated and a message displays indicating a change was made.

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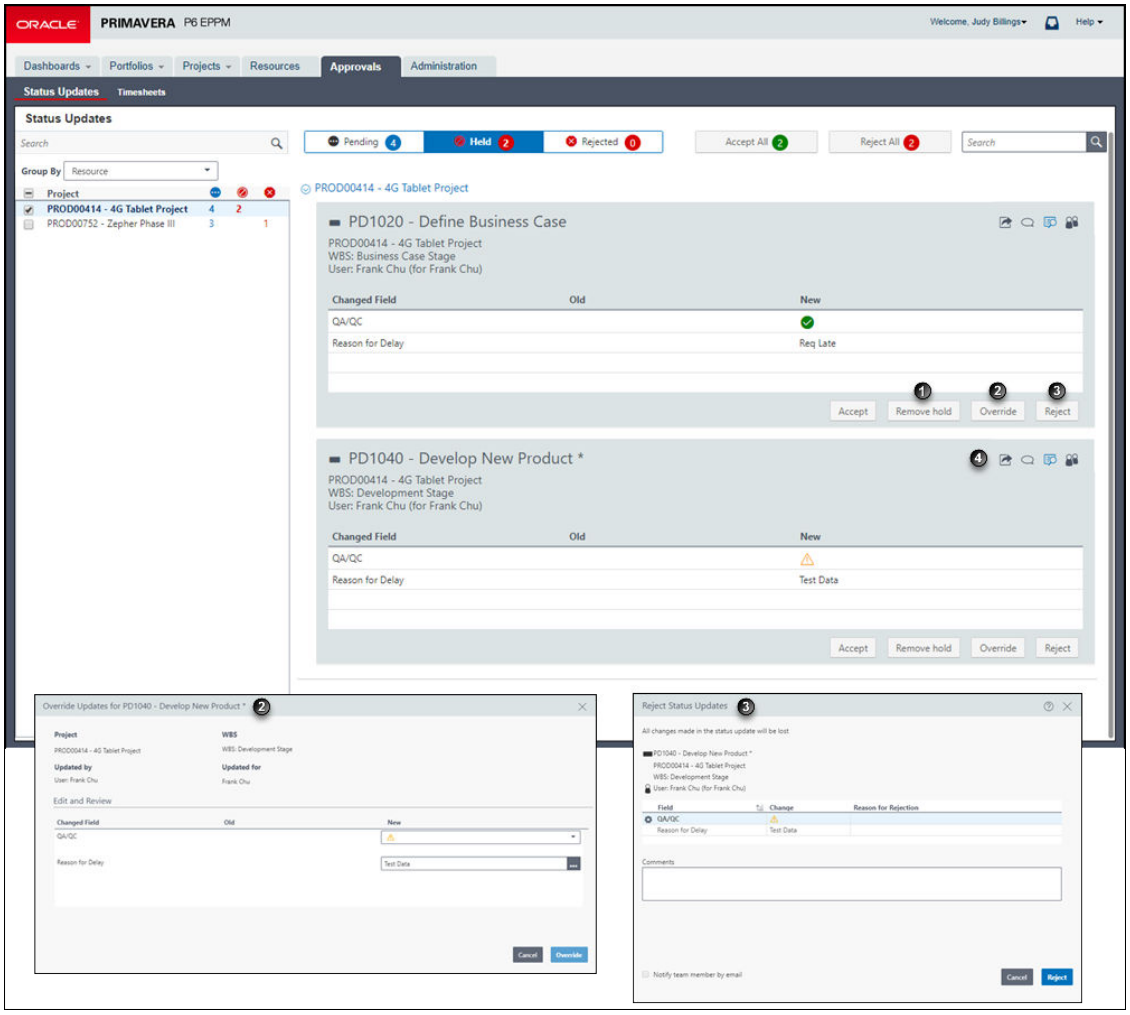


Table of Screen Elements

Item	Description
1	**Remove Hold**: When you are ready to approve a status update in a held state, select **Remove Hold** to return the card to the **Pending** list. The status update will be approved when you select **Accept All** in the **Pending** list. Alternatively you can select **Accept** on the card in the **Held** list to accept the status update.
2	**Override**: If you need to make a correction to a status update, click **Override**. The updated values will be saved to the activity once you click **Accept**.
3	**Reject**: If you see incorrect information in the status update, reject the update to have the team member review the data and resubmit the update. Enter your reason for rejection for each of the fields which is incorrect and an overall comment for the team member. Select the option to **Notify team member by email** that their update was rejected.

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Item	Description
4	**Send Email**: To email the team member about an assignment, select Send Email to open a dialog box with a preformatted message. You can edit the email before you send it. **Discussion**: Launches a dialog box where you can communicate with the team member assigned to the activity. A number by the discussion icon indicates the number of unread messages. **More...**: Launches a dialog box which provides information about the submitted date, held date, activity codes, and UDFs assigned to the activity. **Reviewers**: launches a dialog which provides information about the reviewers for this task and the type of review. **Documents**: launches a dialog which enables you to view any attachments to the status update that have been uploaded from P6 for Android and P6 for iOS. If a content repository has been configured, you can view all documents uploaded to the content repository for the project on the **Project** tab of the Documents window. The **Work Product Documents** tab shows documents that have been linked to the project and provide a file path.

Assigning a Status Reviewer to a WBS

Assign status reviewers to a WBS to enable them to view team member activity updates, make changes to the updates, and approve or reject the updates for the selected activities in the selected WBS only. If a user is a required status reviewer for multiple WBS nodes in a project, you must assign the user as status reviewer to each WBS node individually. If a user is a required status reviewer for all activities in a project, assign the user as a status reviewer at the Project level and select yes when you are prompted to choose whether to assign the user as a status reviewer to all WBS nodes in the project.

You do not need to assign a required status reviewer to a WBS if the user is assigned the Project Superuser project security profile for that project or the Admin Superuser global security profile.

To assign status reviewers to a WBS:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select a WBS.
   b. In the **General** detail window, double-click the **Status Reviewer** field.

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> **Note**
>
> If the **Status Reviewer** field is not displayed, click **Customize View** and select **Status Reviewer** in the Available Columns list then click **Add column to Selected Columns** (Ctrl + Shift + Right Arrow).

3. In the **Select Status Reviewers** dialog box, select the reviewers and click **OK**.
4. If the WBS contains child WBSs, you are prompted with a choice to assign the status reviewers to all child WBSs in the project. Choose **Yes** or **No**.
5. Click **Save**.

> **Tip**
>
> Team member status reviews must be enabled in Project Preferences to edit the Status Reviewers field.

Selecting an Activity for Review

Select an activity for review to enable the project manager or assigned status reviewers to approve the activity when updated by a team member before the status updates are applied to the project.

To select an activity for review:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select an activity.
   b. Select the **Review Required** option.

   > **Note**
   >
   > If the Review Required option is not displayed, click **Customize View** and select the Columns tab, then select Review Required from the General category.

   c. Save your changes.

> **Tip**
>
> - Team member status reviews must be enabled in Project Preferences.
> - If the Review Required option is not selected, status updates made by team members are approved automatically. View updates for each activity assigned to a team member in the Update History detail window.

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Reviewing Team Member Status Updates

Review updates your team members made to activities. While reviewing updates, you can modify the data, approve or reject the status updates, or place a hold on a status update to reconcile at a later time. You can view status updates for all projects that you are assigned as a reviewer, or choose to view status updates only for some projects.

> **Note**
>
> Only the fields updated by a team member using one of the P6 Team Member interfaces are displayed in the **Status Updates** page.

To view status updates:

1. On the **Navigation Menu**, expand **Approvals** and click **Status Updates**.
2. On the **Status Updates** page:
   a. Select whether to group the view by **Resource**, **Review ,**or **None**.

      You must be assigned the Admin Superuser or Project Superuser global security profile to group by review status.

   b. To see the assigned reviewers for a status update and the type of the review, select **Reviewers**.

> **Tip**
>
> - A status update might have more than one reviewer and might require that any reviewer approves the update or that all assigned reviewers approve ir.
> - Team members can continue to make updates to activities that have not been approved yet or are on hold. The status updates will reflect the latest team member updates.
> - Pending updates for a project checked out in P6 Professional or opened exclusively are not displayed until the project is checked in or the exclusive lock is released.
> - When team members update Actual Units, the updated value for Remaining Units is displayed when the field is updated by the team member or calculated automatically. The Remaining Units field is displayed even when the field is not selected for editing in the Project Preferences dialog box.
> - Steps that are added or deleted by team members do not go through the approval process.

Accepting Team Member Status Updates

To accept status updates:

1. On the **Navigation Menu**, expand **Approvals** and click **Status Updates**.

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2. On the **Status Updates** page:
   a. To accept a single update, on the status update card, select **Accept**.
   b. To accept all status updates, including any override updates you made, select **Accept All**.

> **Tip**
>
> Pending updates for a project checked out in P6 Professional or opened exclusively are not displayed until the project is checked in or the exclusive lock is released.

Rejecting Team Member Status Updates

To reject status updates:

1. On the ☰ **Navigation Menu**, expand ✓ **Approvals** and click **Status Updates**.
2. On the **Status Updates** page:
   a. On the status update card, select **Reject**.
   b. In the **Reject Status Updates** dialog box, enter a Reason for Rejection against each of the fields you require to be changed.
   c. In the **Comments** field, enter your overall comments to the team member about this status update.
   d. Select the **Notify team member by email** option if you want the team member to receive an email about the rejected status update.

> **Tip**
>
> - To reject all status updates visible in the view, including any override updates you made, select Reject All.
> - Pending updates for a project checked out in P6 Professional or opened exclusively are not displayed until the project is checked in or the exclusive lock is released.

Overriding Team Member Status Updates

To make changes to status updates:

1. On the ☰ **Navigation Menu**, expand ✓ **Approvals** and click **Status Updates**.
2. On the **Status Updates** page:
   a. Select **Override**.
   b. In the **Override Updates for Activity** dialog box:
      - Enter new values for the fields you want to override.
      - Select the **Notify team member by email** option if you want the team member to receive an email about the rejected status update.
      - Select **Override**

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> **Note**
>
> If you select to override values in an activity update and a team member later updates those values by resubmitting a status update, the values you enter here will be lost.

> **Tip**
>
> Pending updates for a project checked out in P6 Professional or opened exclusively are not displayed until the project is checked in or the exclusive lock is released.

Placing or Removing a Hold Team Member Status Updates

To place or remove a hold on status updates:

1. On the **Navigation Menu**, expand **Approvals** and click **Status Updates**.
2. On the **Status Updates** page:
   a. To place a hold:
      i. Select **Pending**.
      ii. On the status update card, select **Hold**.
   b. To remove a hold:
      i. Select **Held**.
      ii. On the status update card, select **Remove hold**.

> **Tip**
>
> - Pending updates for a project checked out in P6 Professional or opened exclusively are not displayed until the project is checked in or the exclusive lock is released.
> - Team members can continue to make updates to activities that have not been approved yet or are on hold. The status updates will reflect the latest team member updates.

Viewing Team Member Status Updates History

You can see the history of team member status updates in the detail window for each updated activity. From the Update History detail window, you can view the history for all activities, assignments, steps, activity codes, and UDFs.

To view the history for status updates:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select an activity.

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b. Click the **Update History** detail window.

3. In the **Update History** detail window:

   a. In the **Show updates for** list, choose **Activity**, **Activity Codes**, **Assignments**, **Notebooks**, **Steps**, or **UDFs**.

   b. Optionally, to show only recent updates, choose to view all approved updates in the last week, month, or last 3 months on the **Filter** list.

> **Note**
>
> Pending and held updates will display regardless of the filter applied.

> **Tip**
>
> - Only the data fields updated by a team member are displayed in the detail window.
> - Fields that were overridden by a project manager show the original value entered by the team member in parentheses next to the new value. However, when a project manager overrides the Actual Finish date and clears the Actual Finish field, the Actual Finish field will remain blank. If the entire row is blank, then you know the Actual Finish field was cleared.

About the Auto Compute Actuals Feature

Instead of manually recording actual progress or collecting data from P6 Team Member Web users' timesheets, you can automatically calculate expected progress based on the schedule plan. This technique, which uses an option called auto-compute actuals, is a quick and convenient way to update your project.

Working with the Auto-Compute Actuals Feature

You can use the auto compute actuals option to automatically calculate expected progress based on the schedule plan. The auto compute actuals feature is available for individual activities, resources, or expenses. Because the auto-compute actuals option is available for these individual elements, you can choose to selectively perform automatic progress calculations as needed for your project.

Activities

If you select to compute actuals automatically for an activity, the application calculates the actual dates, percent complete, remaining duration, and actual and remaining units for all assigned resources and for the activity expenses.

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> **Caution**
>
> **Caution** If you are collecting timesheet data for an activity, you should not choose the auto-compute actuals option. If you auto-compute actuals for an activity, when you update the project, actual and remaining units/costs are automatically updated for all of the activity's assigned resources. If assigned resources have existing actuals that they reported for the activity through timesheets in P6 Team Member Web, their reported data is overwritten by the auto-compute calculations.

If you want to update progress automatically for some, but not all, of an activity's resource assignments, clear the **Auto Compute Actuals** option for the activity and select the option for the specific resources you want to update automatically.

Resources

If you select to compute actuals automatically for a resource, the application calculates the actual and remaining units for all of the resource's assignments.

> **Note**
>
> To turn on the **Auto Compute Actuals** option for individual resources, you must have access to the features available through the **Resources** section of P6 and have access to the specific resources through 'Resource Security' privileges.

Expenses

If you select to compute actuals automatically for an expense, the application will automatically calculate the estimated expenditure for an expense, based on the schedule plan.

Applying Auto Compute Actuals to Activities

Apply auto compute actuals to activities and P6 will calculate the actual dates, percent complete, remaining duration, and actual and remaining units for assigned resources and activity expenses.

To apply auto compute actuals:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click **Customize View**.
   b. In the **Customize View** dialog box, click the **Columns** tab.
      - On the **Columns** tab, expand **General** in the **Available Columns** list and double-click **Auto Compute Actuals** to add it to the **Selected Columns** list.
      - Click **Save and Apply**.
   c. On the **Activities** page, select the **Auto Compute Actuals** option for one or more activities.
   d. Click **Save**.

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> **Caution**
>
> **Caution** If you are collecting timesheet data for an activity, you should not select the auto compute actuals option. If you auto compute actuals for an activity, when you update the project, actual and remaining units/costs are automatically updated for all of the activity's assigned resources. If assigned resources have existing actuals that they reported for the activity through timesheets in P6 Team Member Web, their reported data is overwritten by the auto compute calculations.

About Store Period Performance

Using the Store Period Performance feature, you can track actual to date units and costs. 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. Users can store period performance for any predefined period in the Financial Period Calendar assigned to the project.

Storing Period Performance

Use the Store Period Performance feature, to track actual units and costs to date. This feature allows you to track previous periods and compare current and future trends.

To store period performance:

- On the **Navigation Menu**, expand **Projects** and click **Activities**.
  1. On the **Activities** page, click **Actions** and select **Store Period Performance**.
  2. In the **Store Period Performance** dialog box, select projects for which you want to store performance and click **Store**.

> **Tip**
>
> - To select or clear all projects, select or clear the option at the top of the options column.
> - These services are removed from the database based on the ASAP Cleanup Rate your P6 administrator specifies on the Configurations tab in P6 Administrator application. Once the time is met all ASAP jobs that have a status other than running or delegated will be removed from the table automatically. Running and delegated jobs will be removed if they are older than the cleanup rate or if they are older than one day, whichever is greater.
> - P6 includes only data in spreads. To see up to date spread data, select Actions, Run, Store Period Performance and then ensure that the project has been republished.
> - Stored period data is always spread evenly across the entire period, even when Units Spread is selected under Cost Spread on the General page of Application Settings.

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About Importing and Exporting Data

Import/Export features allow you to bring data into P6 as well as export data to other tools when needed. Global and Project level privileges control the ability to import and export data.

When you export projects to XML or XER format, P6 adds a SHA-256 checksum to the exported files. P6 validates the checksum during import to detect files that might have changed or been damaged after export. If the checksum doesn't match on import, P6 will stop the import, warn you that the file might have changed or been damaged, and ask whether you still want to import the file.

Available Import Options:

- Import projects from other P6 EPPM users or Microsoft Project
- Import multiple projects in a single XML or XER file
- Import multiple projects in a single XML file contained within a single zip file
- Import activities
- Import resources
- Import locations
- Import appointments as personal non-work exception time from Microsoft Outlook and other applications that support the iCalendar format
- Move activity codes and calendars to projects
- Remove codes, UDFs, and calendars from projects
- Rename codes, UDFs, and calendars
- Specify resource hierarchical position for importing into the resource breakdown structure
- Map resources to generic resource names
- Save import options in a template
- Import views
- Import enterprise data

Available Export Options:

- Export projects
- Export multiple projects in a single XML or XER file
- Export multiple projects in a single zip file containing a single XML or XER file
- Export baselines
- Export activities
- Export resources
- Export resource allocation and cost
- Export risks
- Export views
- Export enterprise data

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> **Note**
>
> For best practices on exporting data from P6 EPPM to be imported into Oracle Primavera Cloud, see: *Primavera Cloud P6 EPPM XML Import Guide.*

Importing Activities

You can import new activities into a P6 project from a Microsoft Excel (.xlsx) file. Create an import template, fill in the data you want to import, and save the file before before completing these steps.

To import activities:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click the **Actions** menu and select **Import** and then select **Import from Excel**.
   b. In the **Import Activities** dialog box:
      - Click **Browse** in the **Import File** field and select a file from the dialog box.
      - Click **Select** in the **Select Project** field and select a project from the dialog box.
      - Click **Import**.
   c. On the **Activities** page, click **Save**.

> **Tip**
>
> The import file must be in Microsoft Excel (.xls or .xlsx) format.

Exporting Activities to Excel

You can export activity data to a Microsoft Excel (.xlsx) file.

To export activities:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click **Customize View**.
   b. In the **Customize View** dialog box:
      - Click the **Columns** tab.
      - Move the columns you want in the import template to the Selected Columns list.
      - Click **Apply**.
   c. In the **Activities** page, click **Save View**.

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d. Click **Download**.

e. When prompted, choose whether to open or save the file.

> **Tip**
>
> All data, including grouping row information, is exported as it appears in the activity table or the activity grid.

Creating Import Templates for Importing Activities

Create a Microsoft Excel template to use when importing new activities into a P6 project.

To create import templates:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click **Customize View**.
   b. In the **Customize View** dialog box:
      - Click the **Columns** tab.
      - Move the columns you want in the import template to the Selected Columns list.
      - Click **Apply**.
   c. In the **Activities** page, click **Save View**.
   d. Click the **Actions** menu and select **Import** and then select **Create Import Template**.
   e. When prompted, choose whether to open or save the file.

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Tip

- The import template is created as a Microsoft Excel file with the default file name, *ExportDataToSpreadsheet*.
- When you select columns for your activity view, include **Activity ID** or **Activity Name** to ensure that these fields are added to the import file spreadsheet. These fields are required in the spreadsheet to ensure that activities added during import are uniquely identified in your project when the import has completed.
- If a duplicate activity name exists, it will be added again as a new activity.
- In the import file, column order is irrelevant and the data fields you import are not required to match the columns in your current activity view. Data for import is identified by the internal names of the data fields in the first row of the spreadsheet.
- The import process will start at the first tab of the import file, regardless of the tab name.
- Blank rows are ignored.
- The import file contains two rows of column headings that match the columns you previously selected to display in the table or Gantt chart. The first row of headings identify the data to be imported into each column of your activity view. Do not change the content in columns of the first row. The second row contains descriptive information that is not used by the import process. You can modify the content in the second row.
- If values are not provided for mandatory fields, such as the date field, a default value will be set and corresponding data will be imported.
- Although the activity view is limited to 30 columns, you can add columns to your spreadsheet to import more than 30 fields of data.
- All activity fields except for non-editable fields are available for import. Examples of non-editable fields include: expenses, notebook topics, predecessors, resource IDs, resource names, role IDs, steps, and successors. Non-editable columns display an asterisk (*). You cannot import data for these fields. At least one editable field must be provided in a row of the import file for an activity to be imported.
- If an Enterprise Data field value does not exist for a Global Activity Code, Enterprise Project Structure (EPS) Activity Code, Project Activity Code, Calendar, Cost Account, or Primary Resource, the assignment will not be added.
- Secure activity codes are not imported, even if the column exists in the spreadsheet.
- Durations with abbreviations that match the abbreviations set on the **Time Periods** page of the **Application Settings** page are imported.

About Relationship Lines

Relationship lines graphically illustrate the links between activities in Gantt charts and Activity Networks. Whether the relationship line is connected to the beginning or end of an activity bar determines the type of relationship. See About Relationships for more information on relationships.

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About Progress Lines

A progress line is a way to graphically trace progress on activities and see how a project is performing with regard to its scheduled deadlines. When a progress line is drawn to the left of the data date, the activity is behind schedule. When a progress line is drawn to the data date, the activity is on schedule. When a progress line is drawn to the right of the data date, the activity is ahead of schedule.

Progress lines can be either progress point lines or variance lines. 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. Progress points are determined by calculating the difference between current and baseline dates for each activity, or based on actual progress determined by each activity's remaining duration or percent complete. As a variance line, the progress line can represent an inconsistency between the planned and actual start dates or finish dates of a task.

About Resources

A resource is any quantifiable item in limited supply and of sufficient value to justify tracking and assigning to specific activities for a project. Resources include general or specialized labor, non-labor items such as equipment, and material items such as bricks.

Resources perform roles, if defined. Resources are indirectly assigned to activities by first planning the role required. It is also possible to directly assign resources to activities. For example, Chris, a level 2 contractor with the confirmed skills and status, is directly assigned to activity 01. However, a technician level 4 role is assigned to activity 02. The project will proceed while management determines the best available resource to fulfill this role.

When you assign a resource to an activity, if that resource has a primary role, the assignment includes the resource's primary role.

> **Note**
>
> Exercise extreme caution when deleting resources. When a resource is deleted, all historical data for that resource 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 you should not delete resources, but clear the Active option for the resource on the Resources tab on the Resources Administration page.

Assigning Resources to an Activity

Perform these steps to assign one or more resources to an activity.

To assign resources to an activity:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Assignments** detail window.
   a. In the **Assignments** detail window, click **Assign...** and select **Resource**.

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b. In the **Select a Resource** dialog box:
   - Select one or more resources.

> **Note**
>
> Click **Show Usage** » to show the usage spreadsheet and histogram for the selected resource and optionally change the Start and Finish fields to customize the visible portion of the usage chart. The usage spreadsheet and histogram show the first resource you selected if you select multiple resources.

   - Click **Assign**.

c. Confirm whether you want to send an email notification to the affected resources.

> **Tip**
>
> - When you assign a resource to an activity that does not have any resource assignments, the resource is identified as the primary resource. If you subsequently assign more resources to the same activity, you can change the primary resource assignment for the activity by selecting the Primary Resource option for one of the resources in the Assignments detail window. If the Primary Resource option is not displayed in the Assignments detail window, click **Customize View** to add the column to the window.
> - When you assign a resource to an activity, if that resource has a primary role, the assignment includes the resource's primary role.
> - When you create, delete, or modify a resource assignment, your changes are automatically saved when you select another activity. You will not be able to undo the changes after selecting a different activity.

Assigning Resources to Multiple Activities

Perform these steps to assign resources to multiple activities at one time.

To assign resources to multiple activities:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select the activities to which you want to assign resources.
   a. Click **Context** and select **Assign Resource**.
   b. In the **Select Resource** dialog box select one or more resources.

> **Note**
>
> Click **Show Usage** » to show the usage chart for the selected resource and optionally change the Start and Finish fields to customize the visible portion of the usage chart. If you select more than one resource, the usage chart only shows usage for the first resource you selected.

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c. Click **Select**.

Tip

- To view all resources assigned to an activity, click the Assignments detail window.
- When you assign a resource to an activity that does not have any resource assignments, the resource is identified as the primary resource. If you subsequently assign more resources to the same activity, you can change the primary resource assignment for the activity by selecting the Primary Resource option for one of the resources in the Assignments detail window. If the Primary Resource option is not displayed in the Assignments detail window, click **Customize View** to add the column to the window.
- When you assign a resource to an activity, if that resource has a primary role, the assignment includes the resource's primary role.

Configuring Activity Resources

You can configure resource information for activities, including the Planned Units/Time, Proficiency, or Rate Type for a resource.

To configure activity resources:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Assignments** detail window.
3. In the **Assignments** detail window:
   a. Select a resource.
   b. Add or remove the columns you need to configure to the detail window.
   c. Select an option or enter a value for each field.

Tip

- You can also configure activity resources from the **Open Requests forResources** portlet of the **Dashboards** page.
- When you create, delete, or modify a resource assignment, your changes are automatically saved when you select another activity. You will not be able to undo the changes after selecting a different activity.

Adding Activity Resource Estimates

You can plan resource usage by adding resource estimates to activities.

To add resource estimates:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Assignments** detail window.
3. In the **Assignments** detail window:

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a. Assign a resource or role to the selected activity.
b. Add the **Planned Units/Time**, **Planned Units**, **Planned Cost**, and **Planned Duration** columns to the detail window.
c. Select an option or enter a value for each field.

Specifying Resource Assignment Rates

You can set rate information for resources or roles.

To specify resource assignment rates:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity in the table and click the **Assignments** detail window.
3. In the **Assignments** detail window:
   a. Add the **Rate Type** and **Rate Source** columns.
   b. Select an option for the type and source.
   c. Save your changes.

> **Tip**
>
> When you save your changes, costs for the assignment are recalculated based on the new rate: Cost equals Units times Price/Unit. You can add the **Price/Unit** column to the detail window to view the price used. To manually specify a price/unit, select **Override** in the **Rate Source** field and type a value in the **Price/Unit** field.

Assigning Resource Curves to Resource or Role Assignments from the Activities Page

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.

To assign a resource curve:

- On the **Navigation Menu**, expand **Projects** and click **Activities**.
  1. On the **Activities** page, to set the **Duration Type** to **Fixed Duration and Units/Time** or **Fixed Duration & Units**, click **Customize View** and click the **Columns** tab.
  2. On the **Columns** tab:
     - Expand **General** in the **Available Columns** section.
     - Double-click **Duration Type**.
     - Click **Save and Apply**.
  3. On the **Activities** page:

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- Select **Fixed Duration and Units/Time** or **Fixed Duration & Units** from the **Duration Type** list for the activity whose curve you want to configure.
- Click the **Assignments** detail window.

> **Note**
>
> You must assign a resource or role to the activity.

4. In the **Assignments** detail window, double-click the **Curve** field, and click **Select**.
5. In the **Select a Resource Curve** dialog box, select a curve and click **OK**.

> **Tip**
>
> - If you assign a resource curve to an assignment with a manual curve, the manually-entered future period values will be overwritten.
> - Resource curves do not support expenses. The **Accrual Type** will continue to spread the expenses.
> - If the **Curve** column is not available, add it to the detail window.
> - You can also assign resource curves to resource or role assignments from the **Resources Assignments** page.

Assigning Resources to Unstaffed Activities

You can assign resources to activities that currently have no resources.

To assign resources to unstaffed activities:

1. On the **Navigation Menu**, expand **Projects** and click **Team Usage**.
2. On the **Team Usage** page:
   a. Click **Role**.
   b. Expand a project and select a role.
3. In the **Role Activities for Project** dialog box, select the **Select** option next to an assignment and click **Assign Resource...**.
4. In the **Select Resource** dialog box:
   a. Select an option on the **View Resources By** list.
   b. Select a resource.
   c. Click **Select**.
5. In the **Assignment Settings** dialog box:
   a. Select whether to **Use the Price per Unit from the** resource or assignment.
   b. Select whether to **Use the Units Per time and Overtime Factor from** resource or assignment.
   c. Click **OK**.
6. Click **Close**.

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Tip

- The list of resources you can select from is determined by your resource access privileges and individual resource's current project association.
- To review allocation details before assigning, in the **Select Resource** dialog box, select a resource and click **Show Usage** ».
- To save time, you can search for resources who meet specific requirements.
- You can also assign resources to activities from the **Assignments** detail window of the **Activities** page, the **Open Requests for Resources** portlet of a dashboard, or the **Assignments** page of the **Resources** section.

About the Recalculate Assignment Costs Feature

Whenever any of the five possible price per unit values changes for a resource or role already assigned to activities, run the *Recalculate Assignment Costs* feature. This feature recalculates any changed assignment costs.

You should also run this feature during scheduling or leveling because dates will change and resources might be using time varying rates. This means their activities can shift into periods with different effective prices. Therefore, the costs would have to be recalculated.

The *Recalculate Assignment Costs* feature only applies to currently open projects. This provides project managers with control over recalculating costs only when prices have changed.

When another user changes prices for resources or roles, P6 will display a message indicating that the *Recalculate Assignment Costs* feature should be run in order for project assignments to use the new values.

This feature can be run at any time from the Activities page or scheduled as a service.

Recalculating Assignment Costs

Recalculate assignment costs to update price per time values on activities. This ensures that project costs reflect any updates.

To recalculate assignment costs:

1. On the ☰ **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select an activity.
   b. Click **Actions** ▾ and select **Recalculate Assignment Costs**.
   c. In the **Recalculate Assignment Costs** dialog box:
   d. (Optional) Select the **Synchronize overtime factor while recalculating costs** option to synchronize the overtime factor defined for each resource when recalculating costs.
   e. Click **Recalculate**.

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Tip

- When activity dates change, run Recalculate Assignment Costs to update resource costs based on the new dates.
- These services are removed from the database based on the ASAP Cleanup Rate your P6 administrator specifies on the Configurations tab in P6 Administrator application. Once the time is met all ASAP jobs that have a status other than running or delegated will be removed from the table automatically. Running and delegated jobs will be removed if they are older than the cleanup rate or if they are older than one day, whichever is greater.

Configuring Resource Leveling Options and Priorities

Level resources in your project schedules to ensure that resource demand does not exceed resource availability. To handle scheduling conflicts that might occur during leveling, you can add priorities that specify which project or activity is leveled first. Before leveling, configure the options and priorities specified in the steps below.

To configure resource leveling options and priorities:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click **Customize View** and click **Columns**.
   - On the **Columns** tab, expand the **General** section in the **Available Columns** list and double-click **Project Leveling Priority** to add it to the **Selected Columns** list and click **Save and Apply**.
3. On the **EPS** page:
   a. Enter a value in the **Project Leveling Priority** field for each project.

      Note

      Enter a value from 1, the highest priority, to 100, the lowest. The default is 10.

   b. Click **Save** when you are done.
4. On the **Navigation Menu**, expand **Projects** and click **Activities**.
5. On the **Activities** page, click **Customize View** and select **Columns**.
   - On the **Columns** tab, expand the **General** section in the **Available Columns** list and double-click **Activity Leveling Priority** to add it to the **Selected Columns** list and click **Save and Apply**.
6. On the **Activities** page:
   a. Enter a value in the **Activity Leveling Priority** field only for those activities that require a specific change to their leveling priority. For example, a **Normal** activity might become a **Top** priority.
   b. Click **Actions** and select **Leveler**.
   c. In the **Level Resources** dialog box:

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- Select the **Consider assignments in other projects with priority equal or higher than** option and select a value from the list to include in the leveling process projects that are not currently open, but that do fit the required priority level.
- Select or clear the **Preserve scheduled early and late dates** option to determine if the leveling process can alter activity dates or not. If you select this option, configure the options it enables.
- Select or clear the **Recalculate assignment costs when leveling** option to determine if the application should automatically recalculate assignment costs if they are affected by the leveling.
- Select the **Display leveling log upon completion** option if you would like to see a summary of activities delayed by leveling and exceptions made for critical activities.

d. On the **Resources** tab, choose whether to level **All resources** or **Selected resources**. If you choose to level **Selected Resources**, double click the resources you want to level in the **Available** list to add them to the **Selected** list.

e. On the **Prioritization** tab, specify priorities that will be used to level the activities. Add priorities in the order in which you want the application to consider them. For each priority you add, repeat the following steps:

- Click **Context** and select **Add Above** or **Add Below**.
- In the **Field Name** list, select **Project Leveling Priority**, **Activity Leveling Priority**, or another field.
- In the **Sort Order** list, select *Ascending*, *Descending*, or, for some fields, *Hierarchy*.

f. Click **Save**.

> **Tip**
>
> You cannot edit the **Project Leveling Priority** of a project if you do not have the appropriate security privileges or if the project is checked out or opened exclusively by another user.

Leveling Project Resources

Level one or more projects whenever the required shared or critical resources have limited supply or availability or to generally keep resource usage at a constant level. For example, when a resource has been assigned to more than one activity during the same time period, level the projects to eliminate potential resource over-allocation. Once you have performed resource leveling against your project or projects, you will be able to see where resources are overallocated and make decisions about whether work assigned to some resources should be redistributed to other available resources.

To level resources in one or more projects:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:

   a. Click **Actions** and select **Leveler**.

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b. In the **Level Resources** dialog box:
   - Configure resource leveling options.
   - Select the **Resources** tab to specify which resources should be leveled.
   - Select the **Prioritization** tab to specify which assignments are leveled first when a conflict exists.
   - (Optional) Click **Save** to save your settings and close the dialog box.
   - Click **Level Now**.

Tip

- Using the **Project Scheduled Services** page, you can configure scheduled services to have the application level resources automatically.
- These services are removed from the database based on the ASAP Cleanup Rate your P6 administrator specifies on the Configurations tab in P6 Administrator application. Once the time is met all ASAP jobs that have a status other than running or delegated will be removed from the table automatically. Running and delegated jobs will be removed if they are older than the cleanup rate or if they are older than one day, whichever is greater.

About the Check Resource Overallocation Service

Project managers and resource managers need a way to easily identify resource bottlenecks that could jeopardize the outcome of a project. The Check Resource Overallocation service provides an efficient way to identify and resolve overallocated resources.

The Check Resource Overallocation services populates data in the Overallocated Resources view of the Assignments page in the Projects section. You can edit the resource assignments in the Overallocated Resources view of the Assignments page in the Projects section, in the Assignments page in the Resources section, or from the Activities page.

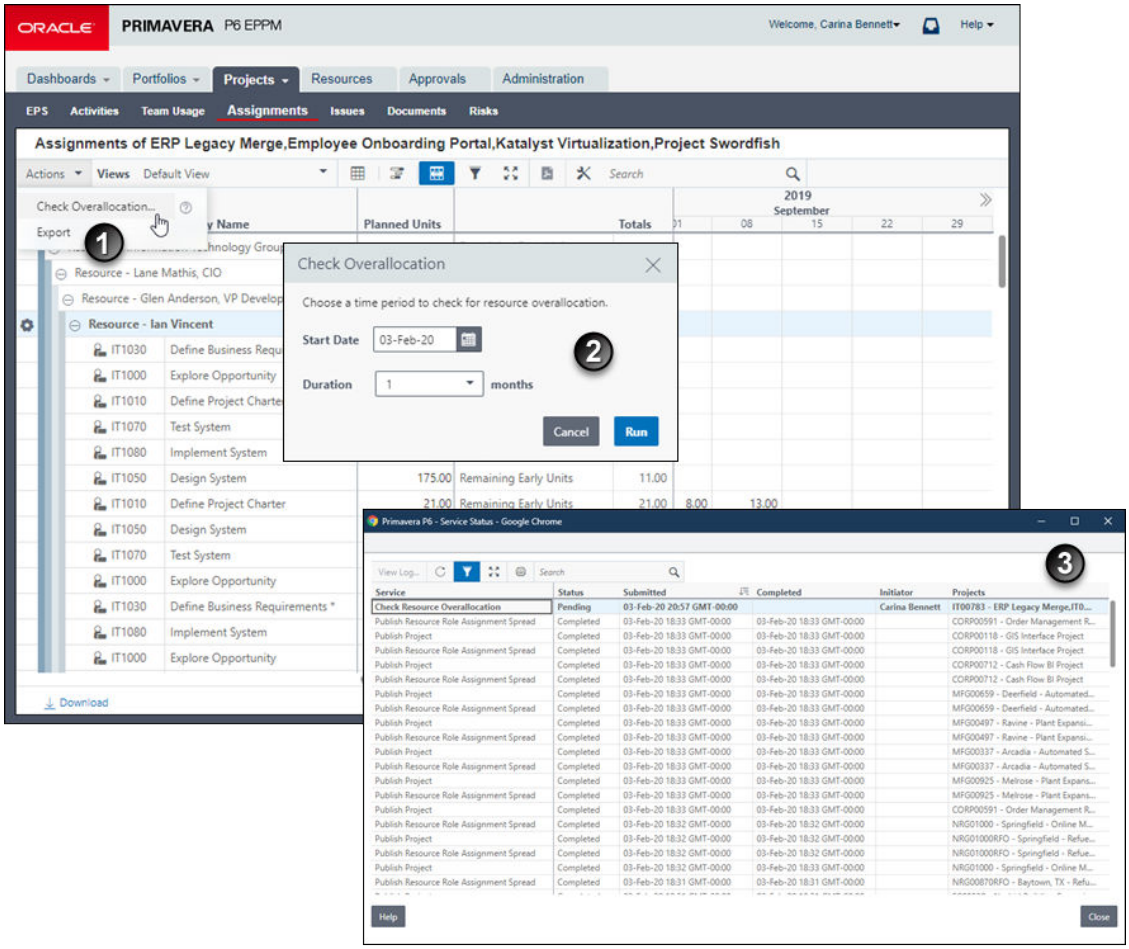
Note

- Template projects and Requested projects are not included in the Check Resource Overallocation service.
- If resources have been added to projects, or resource assignments have been modified since the last time the Check Resource Overallocation service ran, run the service again to ensure that the data you view in the Overallocated Resources view and the Overallocation Report dialog box is up to date.
- After creating new resources, run the Publish Enterprise Data Global service with the Resource option selected before running the Check Resource Overallocation service.

Working with the Check Resource Overallocation Service

Use the Check Resource Overallocation service to identify resources that are overallocated during a specified time period.

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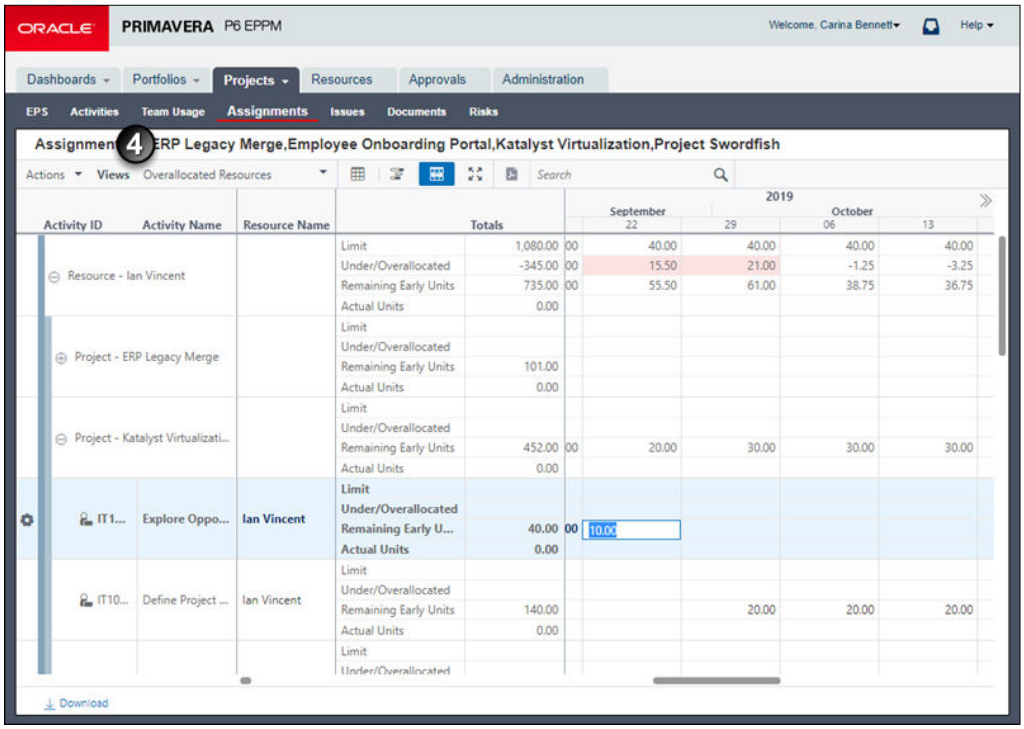


Table of Check Resource Overallocation Service Elements

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Item	Description
1	On the Assignments page in the Projects section, click the Actions menu and select **Check Overallocation...** to initiate the service. The Publish Project service runs on all projects open in your view to ensure the latest project data is used when calculating resource utilization. If a resource is assigned to a project that is not open in the current view, the resource data as of the last publish project run date is used.
2	Select a date from which to calculate overallocation and a number of months to calculate the overallocation for. Overallocation is calculated from the beginning of the week, even if the date you select is not the first day of the week.
3	To view the status of the Check Resource Overallocation service, click **View Service Status...** on the Administer menu to open the Service Status dialog box.
4	The results of the Check Resource Overallocation service are displayed in the Overallocated Resources view of the Assignments page in the Projects section. You can make updates directly in this view, including reassigning resources, changing assignment dates, updating units, or updating the remaining time/units.

Checking for and Resolving Overallocated Resources

Run the Check Resource Overallocation service to identify where resource demand exceeds availability. You can resolve overallocation by adjusting the Remaining Units/Time on the assignment, changing the Start or Finish date on the assignment, or by selecting a different role or resource. On the Assignments page in the Projects section you can also resolve overallocation by adjusting the remaining units on the assignment.

> **Note**
>
> - Template projects and Requested projects are not included in the Check Resource Overallocation service.
> - If resources have been added to projects, or resource assignments have been modified since the last time the Check Resource Overallocation service ran, run the service again to ensure that the data you view in the Overallocated Resources view and the Overallocation Report dialog box is up to date.
> - After creating new resources, run the Publish Enterprise Data Global service with the Resource option selected before running the Check Resource Overallocation service.

To run the Check Resource Overallocation service:

1. On the **Navigation Menu**, expand **Projects** and click **Assignments**.
2. On the **Assignments** page, click **Actions** and select **Check Overallocation**.

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3. In the **Check Resource Overallocation** dialog box:
   a. Select a date to begin the overallocation check.
   b. Select the number of months to include in the overallocation check.
   c. Click **Run**.
4. After the service has completed, select **Views** and then select **Overallocated Resources**.

Tip

- The Check Resource Overallocation service checks from the beginning of the week. If you do not select the first day of the week, the service will automatically begin on the first day of the selected week.
- Enable Publication must be turned on for all projects you want to include in the Check Resource Overallocation service run. On the EPS page, select a project, click **Context** and select **Set Project Preferences**. Click **Analytics and Services** and select **Enable Publication**.
- To check the status of the Check Resource Overallocation service, click the **User** menu and select **View Service Status...**.
- If Check Resource Overallocation is not enabled, either:
- none of the projects in your view have Enable Publication turned on, or
- the Enable Publish Projects application setting is not enabled. Contact your administrator.

About Roles

Roles represent personnel job titles or skills needed to execute projects. Architect, general laborer, quality assurance tester, and engineer are all examples of possible roles. You can create a standard set of roles that you then assign to labor and non-labor resources and activities for all projects in the organization. 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 multiple price per unit rates and unit per time limits for each role to accurately plan future costs and allocation.

You can assign one or more roles to individual resources. When you assign roles to a resource, you also indicate their proficiency in that role and identify which role is their primary role. A primary role is the main role the resource is currently performing. The proficiency level describes the resource's skill level in that role. For example, Joe is a resource and fills the role of both software engineer and manager. He has been a software engineer for 20 years and is *1 - Master* in that role; however, his primary role is manager, which he has been for 5 years and his proficiency level is *3- Skilled*.

Assign roles to activities as you would resources during project schedule and cost planning. When your plans are finalized, you can replace roles with resources, based on each activity's role and skill requirements.

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Assigning Roles to an Activity

Assign roles to an activity to show which roles are needed to perform the work required for an activity. Perform these steps to assign one or more roles to an activity.

To assign roles to an activity:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Assignments** detail window.
   a. In the **Assignments** detail window, click **Assign...** and select **Role**.
   b. In the **Select a Role** dialog box:
      - Select a role.
      - Click **Show Usage** to view the role usage and optionally change the Start and Finish fields to customize the visible portion of the usage chart.
      - Click **Assign**.

Tip

- The Assignments detail window enables you to see all resources and roles assigned to any activity. You can also assign roles to an activity from the Actions menu on the Activities page.
- A setting in your preferences determines whether the role limit includes the limits of resources assigned that role as a primary resource, but that are currently set as inactive.

Assigning Roles to Multiple Activities

Perform these steps to assign roles to multiple activities at one time.

To assign roles to multiple activities:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select one or more activities to which you want to assign roles.
   a. Click **Context** and select **Assign Role**.
   b. In the **Assign Role** dialog box select one or more roles and click **Select**.

Tip

- To select more than one item, use Shift+click to select contiguous items or Ctrl+click to select individual items.
- To view all roles and resources assigned to an activity, select the activity, then click the **Assignments** detail window.

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Configuring Activity Roles

You can configure role information for activities.

To configure activity roles:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Assignments** detail window.
3. In the **Assignments** detail window:
   a. Select a role.
   b. Add or remove the columns you need to configure to the detail window.
   c. Select an option or enter a value for each field.

> **Tip**
>
> You can also configure activity roles from the **Open Requests forResources** portlet of the **Dashboards** page.

About Activity Owners

Users in P6 can be designated as activity owners. An activity owner who has Projects module access and the required privileges can update the status and other details for their assigned activities.

When adding an activity to a project, the activity can be assigned an activity owner or a resource assignment. Activity owners are typically used when resource assignments are not used for reporting status on activities, or when one person is responsible for reporting for a team or a crew. For example, a construction foreman is assigned as an activity owner and is responsible for reporting status on the progress for the entire crew.

This feature can be used in combination with Reflection projects in P6 Professional to enable controlled merging of contractor schedules with activity owner schedules.

Activity Owners can report status on activities in P6 or in P6 Team Member interfaces. If status is reported in P6 Team Member interfaces, project managers can turn on Team Member status reviews and review, update, and approve the activity updates in P6.

Assigning an Activity Owner to an Activity

Assign an activity owner to an activity to designate a user who is responsible for reporting status on the activity.

To assign an activity owner to an activity:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select the activity to which you want to assign the activity owner.
   b. Double-click the **Owner** field.

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3. In the **Select Owner** dialog box, select a user and click **OK**.

> **Tip**
>
> An activity owner must be a P6 user with Projects module access and the required privileges.

About Documents

A document is a file or work product that you create and add to your Primavera work environment. The application provides document management capabilities that enable you to store, organize, manage, and access documents in a secure environment. The available document management functionality depends on your configuration. When the content repository is configured, the complete set of advanced document management capabilities is available, including uploading images from P6 for Android and P6 for iOS, check in, check out, and document reviews. When the content repository is not configured, a limited set of document management features is available, such as adding, deleting, and relating items to documents.

When an optional content repository is installed, P6 supports different classes of documents: project and private. Project documents are documents that you relate to a project via P6. Only users with the necessary securities can edit project documents. Private documents are documents that you add to P6 for your own use. Private documents are not associated with any project and are available only to you.

> **Note**
>
> Cloud only. Documents are scanned for viruses on upload to the content repository. If a virus is detected, the document is removed, a notification is displayed, and the uploading user is emailed the details. If a virus is detected during check-in, only the infected version of the document is removed.

When the content repository is not configured for use with P6, you can perform limited actions on project documents only, and private documents are not available.

Assigning Documents to Activities

You can assign relevant documents to activities, projects, and WBSs.

To assign documents:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Documents** detail window.

> **Note**
>
> To assign a document to a project or WBS, select a project or WBS in place of an activity.

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a. In the **Documents** detail window, click **Assign...**.
b. In the **Select Document** dialog box, select a document and select **Select**.
c. On the **Activities** page, click **Save**.

About Expenses

Expenses are non-resource costs associated with a project and assigned to a project's activities. An expense is typically a one-time expenditure for non-reusable items. Expenses are project-specific and not time-based. Some examples include facilities, travel, consulting, and training. Each expense has an actual, remaining, and at completion value for both cost and units that is either budgeted or planned.

Expense categories classify and standardize expenses, and organize and maintain your expense information.

Creating Expenses

Create expenses to show costs that you expect each activity to accrue.

To create expenses:

1. On the ☰ **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Expenses** detail window.
   a. In the **Expenses** detail window:
      - Click + **Add**.
      - Enter a name in the **Expense Item** field.
   b. Click **Save**.

Configuring Expenses

Configure expenses to update costs associated with an activity.

To configure expenses:

1. On the ☰ **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Expenses** detail window.
3. In the **Expenses** detail window:
   a. Select an expense.
   b. Add or remove columns as needed to configure to the detail window.
   c. Select an option or enter a value for each field.

Configuring Auto Compute Actuals for Expenses

You can configure auto compute actuals for activity expenses.

To configure auto compute actuals:

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1. On the ☰ **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Expenses** detail window.
3. In the **Expenses** detail window:
   a. Select an expense item.
   b. Select the **Auto Compute Actuals** option in the **Auto Compute Actuals** column.

> **Tip**
>
> If the Auto Compute Actuals column is not displayed, add it to the detail window.

About Team Collaboration on an Activity

P6 enables project managers to collaborate with members on the project team about activities using the Discussion detail window on the Activities page. Discussions are visible in P6, P6 Team Member Web, P6 for Android, and P6 for iOS.

About Discussions

The Discussion detail window on the Activities page provides a way for project managers using P6 to communicate with team members who are using P6, P6 Team Member Web, P6 for Android, or P6 for iOS.

A discussion is an exchange of information, such as a question, answer, or general information that is specific to an activity. The messages to and from team members are saved with the activities and are available to anyone who has access to the project. If more than one team member is assigned to the same activity, all messages are captured in the same dialog box for that activity.

Having a Discussion with Team Members

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 a team member:

1. On the ☰ **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click the activity that relates to the message you want to post to a team member.
   b. Click the **Discussion** detail window.
3. In the **Discussion** detail window:
   a. Click + **Add**
   b. In the **Notes** window, enter a message.
   c. Click **Apply**.

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Tip

- To determine which activities have unread comments, review the Unread Comments column in your Activities view. If the Unread Comments column is not displayed, click **Customize View** and select the Columns tab, then select Unread Comments from the General category.
- To delete discussion items, click **Context** and select Delete.

About Duration Types

Duration type is the basis for estimating an activity's completion time. It determines whether the schedule, resource availability, or costs are most important when updating activities. The duration type applies only when you have at least one resource assigned to the activity. Select one of the following duration types based on which factor is most important (least flexible) in planning your project: Fixed Duration & Units/Time, Fixed Duration & Units, Fixed Units/Time, or Fixed Units.

- **Fixed Duration & Units/Time** or **Fixed Duration & Units**: Indicate that the schedule is a limiting factor in your project. The activity's duration does not change regardless of the number of resources assigned when you modify or update activities. You usually select one of these duration types when you are using task-dependent activities. When you update the remaining duration for the activity, you can select to calculate either the remaining units or the units per timeperiod. The duration type enables you to control which variables of an equation are calculated when you change a value.
  If you want to recalculate the remaining units and keep the units/time for the resource constant, select Fixed Duration & Units/Time. The application uses the equation: Remaining Units = Units/Time x Remaining Duration. For example, if a resource is assigned to an activity for 8 hours/day for 5 days, the remaining units or work is calculated as 40 hours.

  If instead you want to keep the remaining units constant and recalculate the units/time, select Fixed Duration & Units. The application uses the equation: Units/Time = Remaining Units/Remaining Duration. For example, if a resource is assigned to work 40 hours in 5 days, the units/time is calculated as 8 hours/day.
- **Fixed Units/Time**: Indicates that resource availability is the most critical aspect of your project. In this case, the units/time or rate of the resource remains constant, even if the activity's duration or work effort changes. You most often use this duration type when you are planning resource-dependent activities.
- **Fixed Units**: Indicates that the budget (units or cost) is a limiting factor; that is, the total amount of work is fixed. When you update activities, the work effort required to complete the activity does not change, even if the activity's duration or the resource rate changes. Typically, you would use this type in conjunction with resource-dependent activities. Increasing resources can decrease the activity duration.

Working with Duration Types

Duration type options

Duration type determines whether the schedule, resource availability, or cost is most inflexible when calculations are performed to reflect activity progress. Duration type affects update calculations only when resources are assigned to an activity.

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Choose a duration type based on which factor is the most important, or least flexible, in planning your project.

- If schedule is most important, choose **Fixed Duration and Units/Time** or **Fixed Duration and Units**.
- If resource availability is most important, choose **Fixed Units/Time**.
- If total work effort or fixed costs are most important, choose **Fixed Units**.

About Constraints

Constraints are recognized real-world restrictions that affect project performance. Any factor that potentially delays when an activity can be scheduled is a constraint. The most typical constraints are date restrictions. Constraints can apply to the entire project or only to individual activities and can even reflect external project requirements that cannot be built into the network logic. You can apply up to two constraints to activities in the Status detail window of the Activities page. You can also apply constraints to activities by dragging the start or end of a bar in the Gantt view of the Activities page.

A hard constraint prevents activities from being moved. In P6, the hard constraints available are Mandatory Start and Mandatory Finish. A soft constraint does not prevent activities from being moved, but it can distort float. In P6, 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.

Working with Activity Constraints

P6 supports the following types of activity constraints:

Start On: Imposes the specific start date you select. The Start On constraint can delay an activity's early start or move forward an activity's late start to satisfy the constraint date.

Start On or Before: Defines the latest date an activity can start. This constraint only affects late dates and can decrease total float. When calculating a schedule, P6 imposes the start on or before constraint in the backward pass only if the calculated late start date will be later than the imposed date.

Start On or After: Defines the earliest date an activity can begin. This constraint affects only early dates. When calculating a schedule, P6 imposes the start on or after constraint in the forward pass only if the calculated early start date will be earlier than the imposed date.

Finish On: Imposes the specific finish date you select. The Finish On constraint can delay an activity's early finish or move forward an activity's late finish to satisfy the constraint date.

Finish On or Before: Defines the latest time an activity can finish. The finish on or before constraint affects only late dates.

Finish On or After: Defines the earliest date an activity can finish. 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 with few predecessors that must finish before the next phase of a project.

As Late As Possible: Imposes a restriction on an activity with positive float to allow it to start as late as possible without delaying its successors. When calculating a schedule, P6 sets the activity's early dates as late as possible without affecting successor activities. This option disables the calendar icon.

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Mandatory Start: Imposes the early and late start dates you select. P6 uses the mandatory early start date 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.

Mandatory Finish: Imposes the early and late finish dates you select. P6 uses the mandatory finish date 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.

About Issues

Issues are perceived problems within a schedule that require attention or corrective action. When you create them in the Activities section, you can associate them with a single project and assign them to a responsible manager in the OBS for follow-up based on priority. You can also associate issues with a single activity. You can choose to receive email notifications when new issues of a certain priority are added, when existing issues are modified, or when issues are assigned a specific issue code.

You can also think of issues as impediments, action items, open items, punch lists, logs, or concerns. Over time, if you do not resolve or close open issues or issues placed on hold, they can become risks.

For example, you can create an issue code titled *Severity*, and subsequently create issue code values: *High*, *Medium*, and *Low*. You can assign each of these code values to issues across multiple projects, enabling you to categorize each issue according to how severe it is. Similarly, you can create codes to categorize issues by responsibility, subproject, or any other classification you require to organize issues. Assigning issue codes enables you to quickly search for and view issues according to specific criteria.

Creating Activity Issues

Create activity issues to identify problems that must be addressed before a project can be completed.

To create activity issues:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Issues** detail window.

> **Note**
>
> To create a project or WBS issue, select a project or WBS in place of an activity.

3. In the **Issues** detail window:
   a. Click **Add**.
   b. Enter or select a value for the **Issue Name**, **Priority**, **Status**, and **Responsible Manager** fields.
4. On the Activities page, click **Save**.

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Tip

- You cannot add an issue to a project that is checked out or locked.
- The application automatically names the issue *New Issue*. Update the issue so it has a unique name.

Configuring Activity Issues

Configure activity issues to account for changes since the last update on the issue.

To configure activity issues:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Issues** detail window.

Note

To configure a project or WBS issue, select a project or WBS in place of an activity.

3. In the **Issues** detail window:
   a. Select an issue.
   b. Select an option or enter a value for each field.
4. On the **Activities** page click **Save**.

About Notebooks

A notebook is another name for a log or binder of electronic details about an activity, WBS, project, or EPS element. All the notes users enter or paste into the notebook, including email messages, web links, tables, and other entries, share a single common theme called a notebook topic. See About Notebook Topics.

Working with Notebooks

Notebook topics are created by the administrator on the **Enterprise Data** page of the **Administer** menu. These topics are then assigned to activity, WBS, project, or EPS node notebooks.

About Notebook Topics

Notebook topics help multiple users apply a common theme or label to shared information about an activity, WBS, project, or EPS element such as its purpose, completion instructions, or other helpful notes. For example, you might copy an email message, a web link, a table of observations, and a series of text notes into a notebook topic called *Budget Recommendations* to capture the ongoing cost impacts of a recurring project.

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When you delete notebook topics from the Enterprise Data page, you can choose to append their descriptions to a replacement notebook topic. For example, you might have a notebook topic called *Budget Recommendations* and another called *Budgetary Recommendations*. In this case, you might choose to delete the *Budgetary Recommendations* notebook topic and copy the descriptions from all instances of it to the *Budget Recommendations* notebook instead.

Assigning Notebook Topics

Depending on the page you are working on, you can assign notebook topics to a selected project or activity.

To assign a notebook topic to a project:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select a project or EPS node and click the **Notebooks** detail window.
   a. In the **Notebooks** detail window, click **Assign...**.
   b. In the **Select Notebook Topic** dialog box, select a notebook topic then click **OK**.
   c. On the **EPS** page, click **Save**.

Tip

- You can also create notebook topic descriptions. In the **Notebooks** detail window, double-click the **Description** field and click . Enter a description in the dialog box.
- You can also assign notebook topics to activities from the **Notebooks** detail window of the **Activities** page or the **Activity Details** page of the **Open Requests forResources** portlet of the **Dashboards** page.

About Relationships

A relationship defines how an activity relates to the start or finish of another activity or assignment. An activity can have as many relationships as necessary to model the work that must be done. These relationships are used together with activity durations to determine schedule dates. Relationships can also exist between activities in different projects; this type of relationship is referred to as an external relationship. You can enter comments about a relationship, for example to explain the need for the relationship or how it is configured.

Activities that are dependent on one another are known as predecessors and successors, where the first activity is the predecessor and the second is the successor. Between these two types of activities, there are four possible relationship types:

Finish to Start: The successor activity cannot start until its predecessor finishes.

Finish to Finish: The successor activity cannot finish until its predecessor finishes.

Start to Start: The successor activity cannot start until its predecessor starts.

Start to Finish: The successor activity cannot finish until its predecessor starts.

A permitted modification to these logical relationships is called lag. Lag values can be positive numbers (a delay, slower, deceleration of progress) or negative numbers (lead time, faster,

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acceleration of progress). For example, in a Finish to Start relationship, if you specify a ten-day lag (+10), the successor activity cannot start until ten days after the predecessor has finished. Likewise, if you specify a negative ten-day lag (–10), the successor activity could start ten days before the related predecessor activity finishes.

> **Note**
>
> Lag entered in a unit other than hours is converted to hours based on the predecessor activity's calendar.

Creating Activity Relationships

You can create activity relationships in the Gantt chart to show interdependencies between activities.

To create an activity relationship:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click **Gantt View**.
   b. Click **Gantt Settings** and select to show relationships.
   c. Hover either to the left or right of a bar.
   d. Drag the circle to the left or right end of a bar representing the activity you want to link.

      > **Note**
      >
      > Where you drag the relationship on each bar determines the type of relationship.

   e. Click **Save**.

> **Tip**
>
> - You can scroll through the Gantt chart while while dragging a relationship to find a related bar.
> - To delete a relationship, right-click the relationship line and select **Delete Relationship.**
> - If multiple projects are open, you can create external relationships.
> - You can also create new relationships and view or configure existing predecessor or successor relationships, from the Relationships detail window.

Configuring Activity Relationships

Configure activity relationships to adjust interdependencies between different activities.

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To configure activity relationships:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click **Gantt View**.
   b. Click **Gantt Settings** and select to show relationships.
   c. Right click the relationship line of the relationship you want to configure and click **Edit Relationship**.
      - In the **Edit Relationship** dialog box, configure the type and lag and click **Apply**.
   d. On the **Activities** page, click **Save**.

Tip

You can also configure predecessor and successor relationships from the Relationships detail windows.

Assigning Predecessor Relationships

You can assign predecessor relationships to the activities in a project.

To assign a predecessor relationship:

- On the **Navigation Menu**, expand **Projects** and click **Activities**.
  1. On the **Activities** page, select the activities to which you want to assign predecessors.
  2. Click **Context** and select **Assign Predecessors**.
  3. In the **Assign Relationships** panel:
     - Select one or more activities from the **Assign Predecessors** list and click **Assign Predecessors**.
     - Click **Close**.
  4. On the **Activities** page, click **Save**.

Tip

- Only Finish to Start relationships are created in the Assign Relationships panel. To create other types of relationships create the relationships in the Gantt View. Alternatively you can create the relationships in the Assign Relationships panel and then change the relationship type manually in the Relationships detail window.
- When selecting a predecessor or successor activity, you can choose from activities in the open projects only.

Configuring Predecessor Relationships

Configure predecessor relationships to define lag or relationship type.

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To configure predecessor relationships:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity whose predecessor relationships you want to configure and click the **Relationships** detail window.
3. In the **Relationships** detail window:
   a. Select a predecessor relationship.
   b. Add or remove columns as needed to configure to the detail window.
   c. Select an option or enter a value for each field.
   d. Click **Save**.

Assigning Successor Relationships

You can assign successor relationships to the activities in your project.

To assign a successor relationship:

- On the **Navigation Menu**, expand **Projects** and click **Activities**.
  1. On the **Activities** page, select the activities to which you want to assign successors.
  2. Click **Context** and select **Assign Successors**.
  3. In the **Assign Relationships** panel:
     - Select one or more activities from the **Assign Successors** list and click **Assign Successors**.
     - Click **Close**.
  4. On the **Activities** page, click **Save**.

Tip

- Only Finish to Start relationships are created in the Assign Relationships panel. To create other types of relationships create the relationships in the Gantt View. Alternatively you can create the relationships in the Assign Relationships panel and then change the relationship type manually in the Relationships detail window.
- You can also change an existing relationship in the Successors detail window. To choose a different successor, select the Activity ID field in an existing relationship and choose a different activity from an open project. The Relationship type and lag will be maintained if you select a new successor.
- When selecting a predecessor or successor activity, you can choose from activities in the open projects only.

Configuring Successor Relationships

Configure successor relationships to define lag or relationship type.

To configure successor relationships:

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1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity whose successor relationships you want to configure and click the **Relationships** detail window.
3. In the **Relationships** detail window:
   a. Select a successor relationship.
   b. Add or remove columns as needed to configure to the detail window.
   c. Select an option or enter a value for each field.
   d. Click **Save**.

About Risks

Risks are any uncertain events or conditions that, if they occur, have a positive or negative effect on project objectives. Risks are also known as threats, warnings, imperatives, escalation notices, or jeopardies. Positive risks are often classified as opportunities which, if they occur, are realized as rewards. Thorough documentation and analysis of risks over multiple projects offer lessons, and potentially cost and time savings, for all future projects.

You can document risks in P6 and perform quantative analysis of the data in the P6 risk register in Oracle Primavera Cloud. Once that analysis is complete, you can see the results in the Activities view in P6.

Working with Project Risks

The risk register on the Risks page is the main area of the application where you identify and manage risks for a project. Additionally, you can add risks to a project from the EPS page, and add risks to a project and assign the risks to activities from the Activities page.

Once you add a risk to the risk register, you can perform further analysis on the risk and create one or more risk response plans which include activities to reduce the negative impact of the risk.

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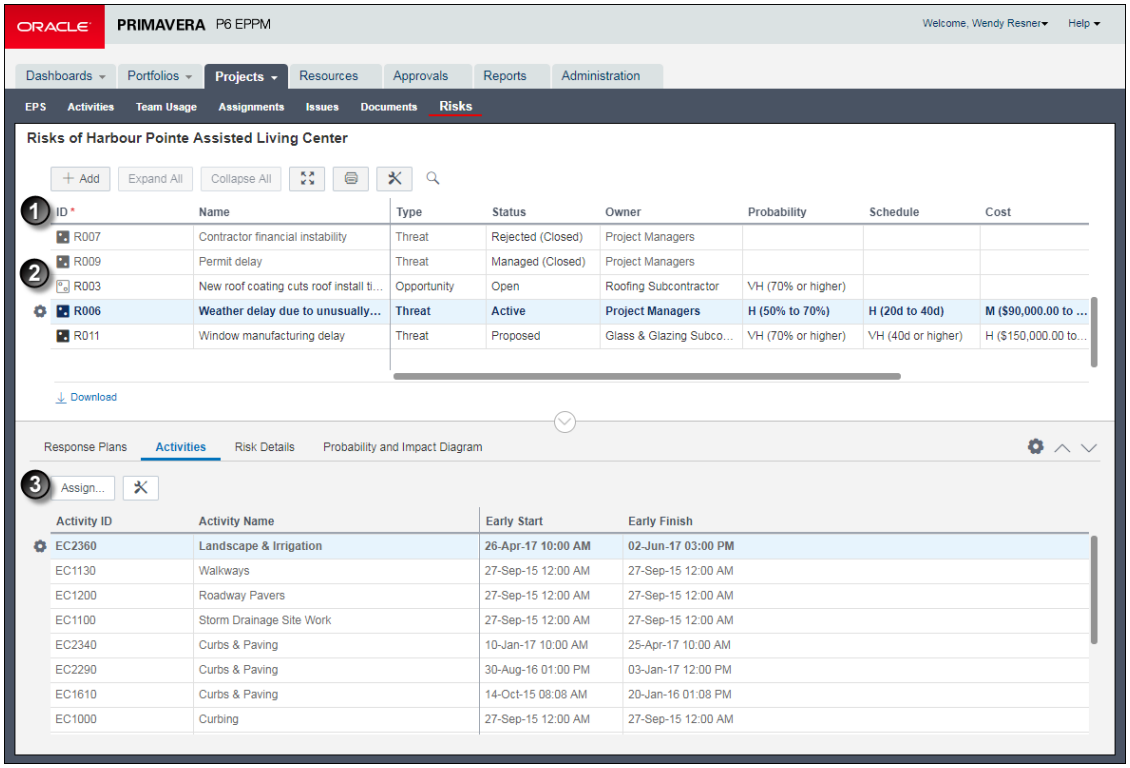


Table of Project Risks Elements

Item	Description
1	**Risks register:** Risks for all the projects you have open display in the risk register. You can group by field name, such as project name, to view all risks organized by project, or create a filter to view only the risks that interest you. When adding a risk to the risk register, you supply a name for the risk, identify the risk as a threat or an opportunity, identify the current status of the risk, identify the owner of the risk, and then assign the values for probability, schedule, cost, and any other applicable user-defined impacts. The values for probability, schedule, cost, and additional user-defined impacts are used to calculate the risk score. The values for probability and cost are used to calculate risk exposure. If the Probability, Cost, and Schedule fields are disabled, a risk scorning matrix has not been assigned to the project. You can still use the risk register to track your risks; however, you cannot use the qualitative risk analysis features in the application until you create a risk scoring matrix and assign it to the project.
2	**Risks and Opportunities**: The risk register can show both risks and opportunties. A **Risk** usually has a negative impact on a project. An **Opportunity** usually has a positive impact.

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Item	Description
3	**Risks detail windows**: **Response Plans**: The area where you add response plans and response plan action items. **Activities**: The area where you associate scheduled activities in your project to an identified risk. Refer to the example above to see a list of the project activities impacted by risk R001: Concrete supply constrained. **Risk Details**: The area used to provide a detailed explanation of the risk, explain why this risk is occurring, and describe the impact this risk has on this project. **Probability and Impact Diagram**: The Probability and Impact Diagram (PID) is a graphical representation of the probability and impact thresholds assigned to the risk scoring matrix associated with the project.

Assigning a Risk to an Activity

Assign a risk to an activity to explicitly identify the activity impacted by the risk.

You can assign a risk to an activity while you are adding project risks on the Risks page or while managing your activities on the Activities page.

To assign a risk to an activity from the Risks page:

1. On the **Navigation Menu**, expand **Projects** and click **Risks**.
2. On the **Risks** page, click a risk.
3. Click the **Activities** detail window and click **Assign...**.
4. In the **Select Activity** dialog box:
   - Select one or more activities and click **Select**.
5. On the **Risks** page, click **Save**.

To assign a risk to an activity from the Activities page:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
   a. On the **Activities** page, select the activity you want to assign a risk.
   b. On the **Risks** detail window, click **Assign...**.
   c. In the **Select Risk** dialog box select a risk and click **Assign**.
   d. On the **Activities** page, click **Save**.

About Steps

Steps make it possible to describe and report progress for activity work at a granular level by breaking an activity into its component parts.

Steps can have a step weight that quantifies the portion of an activity's total work that each step represents. On a project per project basis, you can use step weights to calculate Activity Percent Complete. For example, three steps are assigned to an activity; the first step has a

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weight of 2, and the second and third steps each have a weight of 1. When you mark the first step (weight of 2) as complete, the percent complete is 50. When you mark the first and second steps complete, the percent complete is 75. When all three steps are marked complete, the percent complete is 100.

Working with Activity Steps

How can I use activity steps?

Activity steps make it possible to describe and report progress for activity work at a more granular level of detail. If you have privileges to edit activities, you can add individual steps to activities, or you can add predefined groups of steps based on templates that have been defined for your organization. You can specify a weight for each step to show how much work for the activity is contained in a step.

Activity step templates

Step templates enable an organization to define groups of steps that can be shared by many projects. By creating templates for groups of activity steps that are relevant in many projects, an organization can streamline data entry and ensure that work is identified consistently throughout the organization.

In P6, when adding steps to an activity, you can choose from a list of available templates. You can use more than one template, but you can add steps from only one template at a time.

If you use a template to add steps to an activity, you can edit the step details but not the step name.

Weighted activity steps

To indicate the portion of activity work that a single step represents, you can assign it a numerical value, or weight. Once work for a step is underway, Primavera can use the step weight and the reported progress of step work (*Step Percent Complete*) to calculate the percentage of total work that has been completed for the activity (*Activity Percent Complete*).

Creating Activity Steps

Create steps to break activities down into their component parts.

To create steps:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity you want to break down into smaller parts and click the **Steps** detail window.
3. In the **Steps** detail window, repeat the following for each step you want to add to the activity.
   a. Click **Add**.
   b. Enter a value in the **Step Name**, **Step % Complete**, and **Step Weight** fields.
   c. Click **Save**.

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Tip

- You can also create steps on the Activity Details page of the Open Requests for Resources portlet of the Dashboards page.
- You can also create steps by clicking **Context** and selecting Add.

Configuring Activity Steps

Configure steps to show percent complete and to give a description of the step.

To configure steps:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Steps** detail window.
3. In the **Steps** detail window, repeat the following for each step you need to configure:
   a. Select a step.
   b. Add the columns you need to configure to the detail window if they are not already available, or hide columns, if necessary.
   c. Select an option or enter a value for each field.

Tip

- Select the Completed option if the step is finished.
- You can also configure steps from the Activity Details page of the Open Requests for Resources portlet of the Dashboards page.

About Step Templates

Step templates enable you to define a group of steps common to multiple activities, and then assign the template to different activities. By creating templates for groups of activity steps that are relevant in many projects, an organization can streamline data entry and ensure that work is identified consistently throughout the organization.

Adding Activity Steps from a Step Template

You can add steps from a step template to add a group of predefined steps to an activity.

To add steps from a step template to an activity:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Steps** detail window.
   a. In the **Steps** detail window, click **Assign...**.
   b. In the **Select Activity Step Template** dialog box, select a templates and click **Assign**.

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> **Tip**
>
> Step templates are created on the **Enterprise Data** or **Enterprise Project Data** page.

About Trace Logic

Trace logic provides a graphical display of dependency relationships for an activity. You can step forward or backward through a sequence of activities to focus on predecessor and successor relationships. This alternative viewing format enables you to examine a path of relationships while still viewing the entire project.

Trace logic provides visual cues to help you read the diagram. The selected activity is highlighted in blue. Activity boxes with a red border represent critical activities. Activity boxes to the left of the selected activity are predecessors. Activity boxes to the right are successors. Solid lines represent driving relationships, while dashed lines represent non-driving relationships.

You can manage activity relationships using the detail windows or Gantt chart on the Activities page. You can view activity relationships in the Trace Logic detail window on the Activities page. You can use Trace Logic to determine why an activity is scheduled at a particular time. It also helps answer questions such as:

- Were any of the predecessors of an activity delayed?
- Do any 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?

Viewing Relationships with Trace Logic

Use trace logic to follow activity relationships throughout a project.

To view relationships with trace logic:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Trace Logic** detail window.
3. In the **Trace Logic** detail window:
   a. The selected activity is shown with its predecessor and successor activities.
   b. Click another activity in the detail window to see its connections to predecessor and successor activities.

> **Tip**
>
> - Click the top edge of the **Trace Logic** detail window and drag upward to make the window larger.
> - You can click and drag the detail window contents.

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About Budgets

Budgets help you track the total estimated effort or quantity of resources or materials and the cash flow required to complete a project. Before a project starts, the resource/cost manager, along with the operations executive, program manager, and project manager, determine scope and budget requirements, and set these high-level budget estimates at the EPS level. As requirements change, resource and financial support are adjusted to compensate for those changes. The individuals involved in project planning, funding, and financial support can estimate their budgets from the top down and log changes to the budget at any time from as early as the project planning stage to well after the project is underway. P6 tracks these changes, while retaining the original amounts.

Budget change logs help you keep track of budget alterations as they occur. The **Current Budget** field (original budget plus approved budget changes) and **Proposed Budget** field (original budget plus approved and pending budget amounts) incorporate changes so you have up-to-date and accurate budget information for each EPS node or project. These logs also provide a clear indication of the who, what, when, where, and why behind the approved or denied request.

Change amounts are not incorporated in the current budget until these amounts have an **Approved** status. Only authorized project participants can issue budget changes and mark them as approved. You can post a change amount as **Pending**; the program manager of the affected EPS node, or the project manager of the affected project, must then mark the amount as **Approved** or **Not Approved**. P6 recalculates the new budgeted amount and adjusts the current budget based on approved changes to the log.

Creating Budget Change Requests

Create budget change requests when seeking approval to proposed changes to an EPS, project, or WBS budget.

As projects progress, changes in scope, resource reallocation, funding additions/withdrawals, or other factors that affect original budgeted amounts, often occur. The **Budget Log** detail windows enable you to track modifications that affect the budget. This log also provides a clear indication of the who, what, when, where, and why behind the change.

To create a budget change request:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select an EPS or project and click the **Budget Log** detail window.
   a. In the **Budget Log** detail window:
      - Click **Add** to add a budget log line item.
      - In the **Date** field, select a date.
      - In the **Amount** field, enter a currency value.
      - In the **Responsible** field, enter the name of the responsible person or department.
      - In the **Status** list, select a status value for the proposed change.
   b. On the **EPS** page, click **Save**.

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Tip

- You can also create budget change requests for a project or WBS element from the **Budget Log** detail window of the **Activities** page.
- In general, you should contact the person listed in the **Responsible** field to determine if the request is *Approved* or *Not Approved*.
- Enter a reason for the proposed change in the **Reason** field. The program manager of the affected EPS node or the project manager of the affected project can append this field with a reason for approval or denial.

Approving or Denying Budget Change Requests

If you have the authority, you can approve or deny a budget change request for a WBS, project, or entire EPS element.

To approve or deny a budget change request:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select the EPS or project with a budget change request and click the **Budget Log** detail window.
3. In the **Budget Log** detail window:
   a. Select and review the budget change request.
   b. In the **Status** list, select **Approved** or **Not Approved**.
   c. In the **Reason** field, enter an explanation for the new status.
   d. Save your changes.

Tip

- You can also approve or deny budget change requests for a WBS or project from the **Budget Log** detail window on the **Activities** page.
- To update the original budget, enter a new amount in the **Original Budget** field and click **Save**. The **Current Budget** and **Proposed Budget** are updated with the new value.
- Only authorized project participants can issue budget changes and mark them as **Approved**.

About Earned Value

Earned Value Project Management, or EVPM, is the best practice concerned with early comparisons between baseline or planned project data and actual or earned project data to arrive at an accurate assessment of true schedule and cost performance. The basic concepts are rooted in early Twentieth Century industrial engineering and factory productivity techniques.

You have probably already practiced at least a basic form of this technique. If you have ever verified that the work performed was actually accomplished prior to paying a contractor's

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invoice, you were utilizing a simple form of Earned Value. Whenever you measure the physical work performed against a baseline project plan, you are employing basic principles of EVPM. When you need a reliable way to predict the true cost performance of a project including its final costs, scheduling, and resource requirements, you will use Earned Value calculations.

Spanning industries and decades, Earned Value is also known by any of the following titles:

- Planned Value of Work Accomplished (PVWA)
- Budgeted Cost of Work Performed (BCWP)
- Cost/Schedule Control Systems Criteria (C/SCSC)
- PERT/Costs
- Earned Value Management (EVM)
- Performance Measurement

Example: Executive management wants to assess a critical project early in its schedule. The project has a planned value of 10 million dollars for 10 WBS units of equal value and is expected to last 1 year. At the end of 3 months, its actual costs are 3 million dollars, however, it has only completed 20% of the work, namely 2 units or 2 million dollars of earned value. This project is behind its baseline schedule by 1 million dollars. It is performing at 67%. The project will require a 50% increase in funding or 5 million dollars to complete the work. This is calculated based on its 10 million dollar budget divided by .67 to yield 15 million. If the project is required to return to its original time schedule, it will require additional resources and/or overtime.

> **Note**
>
> For a video tutorial about Earned Value calculations, please visit the following knowledge article: How Is Earned Value Calculated In P6? [Video] [KB325210]

Configuring WBS Earned Value

Configure earned value to define the techniques and settings used for earned value computations.

To configure WBS earned value:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select a WBS and click the **Earned Value** detail window.
3. In the **Earned Value** detail window:
   a. Select one option for each technique section.
   b. If your selections enable fields, selectors, or options, select an option or enter a value for each field.
   c. Save your changes.

> **Tip**
>
> To view WBS detail windows, group your view by all levels of the WBS.

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About Milestones

A milestone represents any significant event, goal, or gate in a project. Although P6 considers them a type of activity, milestones have zero duration; at any given moment they are either achieved or not. Some examples of milestones in an office building addition project might include the following:

- project definition complete
- structure complete
- end bidding process

Milestones can also be assigned at the WBS-level, and each one given a weight which indicates its importance to the project schedule. When you mark a milestone as complete, the weight is used to calculate the performance percent complete of all activities included in the WBS level.

During project planning, you will want to identify the major milestones as they will help you monitor the project's progress. You can also assign an activity owner or a primary resource to a milestone.

Creating WBS Milestones

Create WBS milestones to specify goals for a project.

To create WBS milestones:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select a project or WBS and click the **WBS Milestones** detail window.
   b. In the **WBS Milestones** detail window, repeat the following steps for each milestone you want to add:
      - Click **Add**.
      - Enter a value in each field.
   c. On the **Activities** page, click **Save**.

Tip

- The **Percent Complete** field within the **WBS Milestones** detail window indicates the percentage of tasks completed toward achieving the milestone.
- Use the **Move Up** and **Move Down** arrows to arrange the milestones.
- The weight you apply to a milestone is used to calculate the earned value of the percent of activities completed in achieving the milestone.

Team Usage

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About Team Usage

Team usage is the display of cost or usage data at the team level and for individual roles and resources assigned to a project. You can view this data in a graphical (histogram) or numeric (spreadsheet) timescale. This page uses published data.

You can choose to view rolled up values for assignments in projects you do not have permission to access. This option does not give you access to those projects or any of their data. Instead it provides totals for the units and costs each resource contributes to those other projects.

Customizing Team Usage

Customize team usage to define timescale, limits, and display.

To customize team usage:

1. On the **Navigation Menu**, expand **Projects** and click **Team Usage**.
2. On the **Team Usage** page, click **Customize View**.
3. In the **Customize View** dialog box, configure the team usage lists and options and click **Apply**.

Assigning Resources to Unstaffed Activities

You can assign resources to activities that currently have no resources.

To assign resources to unstaffed activities:

1. On the **Navigation Menu**, expand **Projects** and click **Team Usage**.
2. On the **Team Usage** page:
   a. Click **Role**.
   b. Expand a project and select a role.
3. In the **Role Activities for Project** dialog box, select the **Select** option next to an assignment and click **Assign Resource...**.
4. In the **Select Resource** dialog box:
   a. Select an option on the **View Resources By** list.
   b. Select a resource.
   c. Click **Select**.
5. In the **Assignment Settings** dialog box:
   a. Select whether to **Use the Price per Unit from the** resource or assignment.
   b. Select whether to **Use the Units Per time and Overtime Factor from** resource or assignment.
   c. Click **OK**.
6. Click **Close**.

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Tip

- The list of resources you can select from is determined by your resource access privileges and individual resource's current project association.
- To review allocation details before assigning, in the **Select Resource** dialog box, select a resource and click **Show Usage** ».
- To save time, you can search for resources who meet specific requirements.
- You can also assign resources to activities from the **Assignments** detail window of the **Activities** page, the **Open Requests for Resources** portlet of a dashboard, or the **Assignments** page of the **Resources** section.

Exporting Team Usage Spreadsheets

You can export project team allocation and cost data to a Microsoft Excel *.xlsx file.

To export team usage spreadsheets:

1. On the **Navigation Menu**, expand **Projects** and click **Team Usage**.
2. On the **Team Usage** page:
   a. Choose whether to view **Resource** or **Role** data.
   b. Select an option from the **Show usage for** list.
   c. Select an option from the **Display** list.
   d. Expand the roles or resources you want to show in the spreadsheet.
   e. Click **Download**.
3. In the **File Download** dialog box, click **Open** or **Save**.

Note

If you select Save, navigate to a file location in the Save As dialog box and click Save.

Sending Email to a Project Manager

You can send email to the manager of a particular project.

To send email to a project manager:

1. On the **Navigation Menu**, expand **Projects** and click **Team Usage**.
2. On the **Team Usage** page:
   a. Click **Resource**.
   b. In the left pane, expand a resource and click a project.
3. In the **Activities for Project** dialog box, click **Send Email**.

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4. In the **Send Email** dialog box:
   a. Edit the recipient list, message, subject, and body as needed.
   b. Click **Send**.

> **Tip**
>
> You must have an email address listed in you user profile to send an email.

Issues

About Issues

Issues are perceived problems within a schedule that require attention or corrective action. When you create them in the Activities section, you can associate them with a single project and assign them to a responsible manager in the OBS for follow-up based on priority. You can also associate issues with a single activity. You can choose to receive email notifications when new issues of a certain priority are added, when existing issues are modified, or when issues are assigned a specific issue code.

You can also think of issues as impediments, action items, open items, punch lists, logs, or concerns. Over time, if you do not resolve or close open issues or issues placed on hold, they can become risks.

For example, you can create an issue code titled *Severity*, and subsequently create issue code values: *High*, *Medium*, and *Low*. You can assign each of these code values to issues across multiple projects, enabling you to categorize each issue according to how severe it is. Similarly, you can create codes to categorize issues by responsibility, subproject, or any other classification you require to organize issues. Assigning issue codes enables you to quickly search for and view issues according to specific criteria.

Working with Issues

Issues are known problems within an activity, WBS, or project that require attention or corrective action. You can view issues from several areas within the application:

- In the Dashboards section, use the My Issues portlet to view issues you are associated with in the context of the filter criteria selected for the dashboard.
- In the Projects section:
  - From the Issues page, you can access all issues for any open project.
  - From the Activities page or EPS page, use the Issues detail window to view issues associated with an activity, WBS, or project.

You can customize how issues are presented. For example, you can choose to view issues in either a list or chart format. You can also configure column, group, sort, and filter options to focus on issue data that is most important to you. Additionally, you can add, revise, or delete issues from each of these areas.

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Note

- The issue name must be unique relative to the names of any other issues assigned to the same project, WBS, or activity. P6 will prompt you when it is not.
- Issues cannot be created for template projects.

To help organize and manage issues for your project additional issue management features are available, depending on your security privileges. To organize issues, you can assign enterprise-level issue codes, which enable you to categorize issues in a way that is meaningful to you. The features for organizing and managing issues are accessible on the Enterprise Data page. Use the issues options in the Enterprise Data page to add, edit, and delete issue codes and issue user-defined fields. These options appear only if you have the required privileges.

Creating Project Issues

Create project issues to identify problems within a schedule that must be addressed before the project can be completed.

To create a project issue:

1. On the **Navigation Menu**, expand **Projects** and click **Issues**.
2. On the **Issues** page click **Add**.
3. In the **Select Project** dialog box, select a project for the issue and click **Select**.
4. On the **Issues** page, configure the issue fields and click **Save**.

Tip

- The issue name must be unique relative to the names of any other issues assigned to the same project, WBS, or activity.
- You cannot add an issue to a project that is checked out or locked. You also cannot create issues for template projects.
- You can also create project issues from the Issues detail window of the Activities page or EPS page, or the My Issues portlet of the Dashboards page.

Configuring Project Issues

Configure project issues to update issues that have been identified for a project.

To configure project issues:

1. On the **Navigation Menu**, expand **Projects** and click **Issues**.
2. On the **Issues Management** page, expand a project and click an issue:
   a. In the **General** detail window, configure the fields and lists.
   b. In the **Codes** detail window assign issue codes.
   c. In the **Related Documents** detail window assign related documents.

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d. In the **Related Issues** detail window assign related issues.

e. Click **Save**.

> **Tip**
>
> You can also configure issues from the My Issues portlet of the Dashboards page.

Customizing Project Issues

Customize the display of project issues to define how their available columns, filters, grouping, and sort options appear in the user interface.

To customize project issues:

1. On the **Navigation Menu**, expand **Projects** and click **Issues**.
2. On the **Issues** page, click **Customize**.
3. In the **Customize Project Issues** dialog box:
   a. Click the **Columns** tab and use the common controls to configure the **Selected Columns** list.
   b. Click the **Filtering** tab and show all available issues or define a filter.
   c. Click the **Grouping** tab and configure the grouping lists and options.
   d. Click the **Sorting** tab and configure the sorting lists and order.
   e. Click **Save**.

> **Tip**
>
> You can also customize project issues from the My Issues portlet of the Dashboards page.

Assigning Related Items to Issues

You can assign related documents and issues to an issue.

To assign related items to an issue:

1. On the **Navigation Menu**, expand **Projects** and click **Issues**.
2. On the **Issues Management** page, expand a project and select an issue.
   - In the **Relate Documents** detail window, click **Assign...** and select documents from the dialog box.
   - In the **Relate Issues** detail window, click **Assign...** and select issues from the dialog box.

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Tip

- To remove a document or issue, click **Context** next to the name of the item and select **Delete**.
- The instructions in this topic assume that the content repository is configured.
- The Related Documents dialog box will only display documents of the selected project.

Sending Email about Issues

You can send emails about project issues that include basic information, such as project, issue name, priority and due date.

To send issue emails:

1. On the **Navigation Menu**, expand **Projects** and click **Issues**.
2. On the **Issues** page, expand a project, click **Context** and select **Email Issue Details** for one of the issues.
3. In the **Send Email** dialog box:
   a. Edit the fields as needed.
   b. Click **Send**.

Tip

- You must have an email address listed in you user profile to send an email.
- You can also send issue emails from the My Issues portlet on the Dashboards page.

About Issue Codes

For example, you can create an issue code titled *Severity*, and subsequently create issue code values: *High*, *Medium*, and *Low*. You can assign each of these code values to issues across multiple projects, enabling you to categorize each issue according to how severe it is. Similarly, you can create codes to categorize issues by responsibility, subproject, or any other classification you require to organize issues. Assigning issue codes enables you to quickly search for and view issues according to specific criteria.

Assigning Issue Codes

You can assign issue codes to organize and categorize issues in a way that is meaningful to you.

To assign an issue code:

1. On the **Navigation Menu**, expand **Projects** and click **Issues**.

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2. On the **Issues Management** page, expand a project and select an issue.
3. In the **Codes** detail window click **Assign...**.
4. In the **Select Issue Code** detail window, select a code and click **Select**.
5. Click **Save**.

Tip

- You can only assign one issue code at a time. Click **Assign...** again to assign another code.
- You can also assign issue codes from the My Issues portlet on the Dashboards page.

Risks

About Risks

Risks are any uncertain events or conditions that, if they occur, have a positive or negative effect on project objectives. Risks are also known as threats, warnings, imperatives, escalation notices, or jeopardies. Positive risks are often classified as opportunities which, if they occur, are realized as rewards. Thorough documentation and analysis of risks over multiple projects offer lessons, and potentially cost and time savings, for all future projects.

You can document risks in P6 and perform quantative analysis of the data in the P6 risk register in Oracle Primavera Cloud. Once that analysis is complete, you can see the results in the Activities view in P6.

Risk Enterprise Data

Working with Risks Enterprise Data

Risk Enterprise data is used to setup categories, risk scoring matrices, and thresholds that are standard across your company. The categories and matrices that are assigned to a project can be displayed in the risk register, which is located on the Risks page in the Projects section.

Risk Categories page: Risk categories are used to categorize and organize project risks. They are global across the enterprise and are a mechanism to group risks across multiple projects to see risk trends across the organization as well as a single project. Technical, Operational, and External are examples of risk categories that might apply to a typical project. The risk categories are created in the Risks Enterprise Data area and assigned on the Risks page in the Projects section.

Risk Scoring Matrices page: Create a risk scoring matrix to perform qualitative risk analysis on your project risks. When creating a risk scoring matrix, you must define the probability, tolerance, cost, and schedule impacts. Additionally, you can add user-defined impacts to the matrix. You must also assign a risk scoring method (Highest Impact, Average Impact, and Average Individual Impact) to the matrix. A probability and impact diagram is created based on the information assigned in the matrix. Click on the Probability and Impact Diagram detail window to view the diagram.

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To use the risk scoring matrix, you must add the projects you want to use the matrix to the risk scoring matrix from the Projects detail window. You can also assign a risk scoring matrix to a project on the EPS page in the Projects section.

> **Note**
>
> You can add risks to a project without a risk scoring matrix; however, you cannot perform qualitative risk analysis and will not be able to assign probability or impact thresholds without a risk scoring matrix. You can add a risk scoring matrix to the project at any time.

Risk Thresholds page: Create risk thresholds, including probability, tolerance, cost impact, schedule impact, and any additional user-defined impacts, for use in the risk scoring matrix.

Risk UDFs page: Risk user-defined fields (UDFs) are used to track additional information about the risk that is not provided by the standard risk fields. Create Risk UDFs when it is necessary to view additional data fields on the Risks page. A risk UDF can include a text string, a numerical value, start date, finish date, cost, integer, or indicator.

Configuring Risk Enterprise Data

You can configure enterprise data to include risk categories and risk UDFs, and to define the criteria for performing qualitative risk analysis using a risk scoring matrix.

To define the criteria for performing qualitative risk analysis, perform the following tasks:

1. Creating Risk Thresholds
2. Creating Risk Scoring Matrices
3. Assigning a Risk Scoring Matrix to a Project

> **Note**
>
> If you want to perform quantitative risk analysis in Oracle Primavera Cloud, you must also populate the **Minimum Duration**, **Maximum Duration**, and **Most Likely Duration** fields in the Activities view.

To configure risk categories or risk UDFs, perform the following tasks:

1. Creating Risk Categories
2. Creating Risk UDFs

Risk Thresholds

About Risk Thresholds

Risk thresholds are a range of values (monetary, time, quality, technical, etc.) used in rating or assessing the impact of the risk to the project.

These thresholds are the inputs used to create a risk scoring matrix, which is the overall scoring mechanism used to perform qualitative risk analysis on your project risks.

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Working with Risk Thresholds

From the **Risk Thresholds** page, create risk thresholds for use in risk scoring matrices.

Risk thresholds necessary for a risk scoring matrix are:

- **Probability**: The likelihood of a risk occurring.
- **Tolerance**: The acceptability or manageability of a risk on a project.
- **Schedule Impact by percentage or value**: The amount of time the risk will increase or decrease the project schedule, defined as either a percentage of the project's planned duration (by percentage) or as a duration value (by value).
- **Cost Impact by percentage or value**: The cost impact if a risk occurs, defined as either a percentage of the project's planned cost (by percentage) or as a monetary value.

Additional user-defined impacts can be added to track impacts such as Political, Environmental, or Reputation.

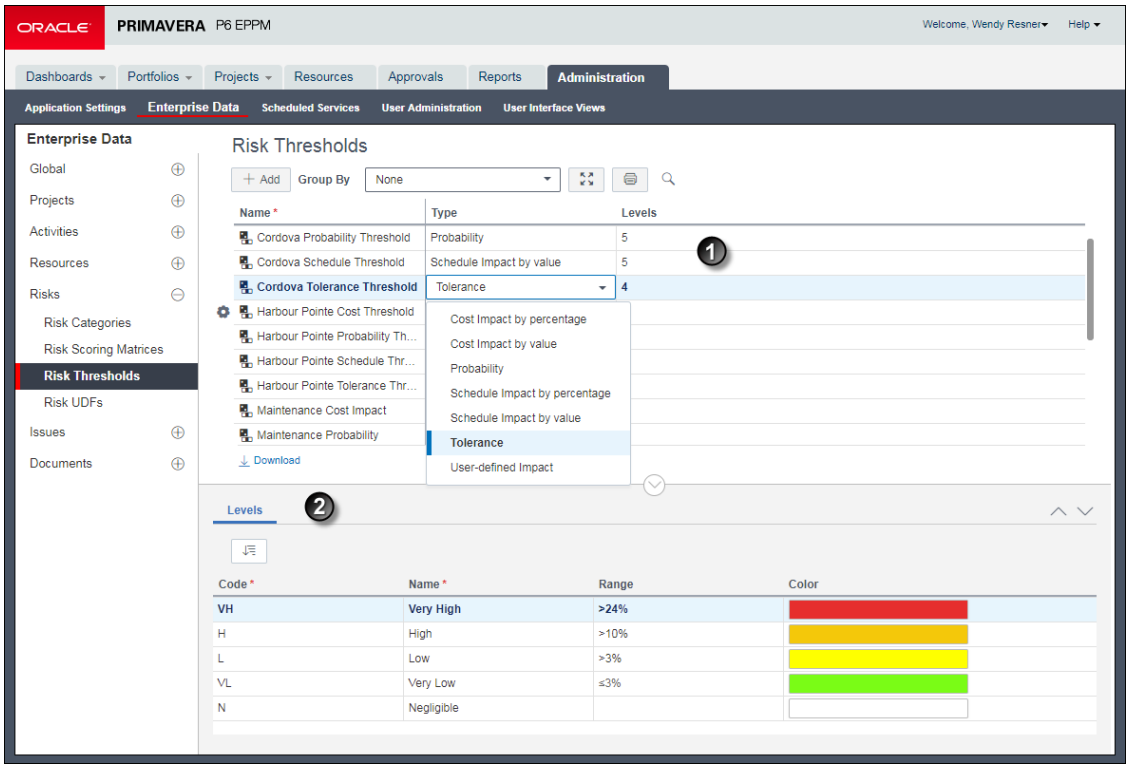


Table of Risk Threshold Elements

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Item	Description
1	**Risk Threshold** work area: Define the risk threshold name, type (Probability, Tolerance, Schedule Impact by percentage or value, Cost Impact by percentage or value, User-Defined Impact), and number of thresholds levels in this work area. Each threshold can have 2 - 9 levels; however, the cost impact, schedule impact, and any user-defined impacts must have the same number of levels for a given risk scoring matrix. In the example above, the Cost Impact by value, Schedule Impact by value, Probability, and Tolerance thresholds are defined for the Harbour Pointe Assisted Living construction project. The Cost Impact and Schedule Impact thresholds are each defined with 5 levels and the Probability threshold is also defined with 5 levels. The risk scoring matrix using these thresholds will have a matrix size of 5 x 5. For each risk scoring matrix, only one threshold for Probability, Tolerance, Schedule Impact, and Cost Impact is allowed. You can add as many user-defined impacts as necessary. You create multiple thresholds of the same type, but with different values, when you create multiple risk scoring matrices.
2	**Levels** detail window: The details for each level are defined in this window. Define a name for each level and a code, which is a short name or abbreviation for the name. Also, define the range of acceptable values for that level; the range levels could be a percentage value, dollar amount, number of days, or a text string depending on the chosen threshold. You can define a color for each threshold level; however, you should define colors for the tolerance threshold. The colors for the threshold are used to give visual representation in the risk register. The colors for the tolerance threshold are used in the Probability and Impact Diagram (PID) to visually represent the threshold values. More importantly, the colors display in the Score and Score (text) fields on the risk register on the **Risks** page. This enables you to easily identify where in the risk scoring matrix this risk falls in terms of severity. In the example above, the Tolerance threshold is defined with 3 levels (High, Medium, and Low) and each range is assigned a color. You will see the impact of the color after you create a risk scoring matrix, assign the thresholds to the matrix, and assign a risk scoring method.

Creating Risk Thresholds

Create risk thresholds to use when creating a risk scoring matrix. When creating risk thresholds, you must define the probability threshold, cost impact threshold by percentage or value, schedule impact threshold by percentage or value, and tolerance threshold. You can also define as many user-defined impacts as necessary.

To create risk thresholds:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.

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2. On the **Enterprise Data** page, expand Risks and click **Risk Thresholds**.
3. On the **Risk Thresholds** page:
   a. Click + **Add**.
   b. In the **Name** field, double-click and type a threshold name.
   c. In the **Type** field, double-click and select a type of risk from the list.
   d. In the **Levels** field, double-click and select a level number from the list.
4. In the **Levels** detail window, default values are assigned for the Code, Name, and Range values. Use the default values provided, or double-click any field to customize it.

> **Note**
>
> You can define a color for each threshold level to visually represent the values when working the risk register on the Risks page in the Projects section. However, you should define colors for the tolerance threshold. The colors for the tolerance threshold are used to color the Score field on the risk register on the Risks page. This enables you to easily identify where in the risk scoring matrix this risk falls in terms of severity.

5. On the **Risk Thresholds** page, click **Save**.

> **Tip**
>
> The *Cost Impact by percentage* and *Schedule Impact by percentage* options allow you to assess risk without having to define absolute values. This enables you to use the same risk scoring matrix across multiple projects.

Modifying Risk Thresholds

If you are going to change the type or level of a threshold that is currently assigned to a scoring matrix, you must first remove the threshold from the risk scoring matrix and assign a new threshold.

To delete a threshold from a risk scoring matrix:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Scoring Matrices**.
3. On the **Risk Scoring Matrices** page:
   a. Locate the risk scoring matrix that includes the threshold you are modifying.
   b. Double-click in the appropriate threshold field.
4. In the **Select Threshold** dialog box, choose a different threshold and click **Select**.
5. On the **Risk Scoring Matrices** page, click **Save**.

To modify a risk threshold:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Thresholds**.

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3. On the **Risk Thresholds** page:
   a. Locate the threshold you are modifying.
   b. Double-click in the field you are modifying and update the value.

> **Note**
>
> If you are modifying the number of levels assigned to a threshold, all data for existing levels are overwritten and replaced with the default values for that level.

   c. Click **Save**.

Risk Scoring Matrices

About Risk Scoring Matrices

A risk scoring matrix is a qualitative analysis tool used to calculate the impact of a risk on a project. A risk scoring matrix includes probability threshold values, cost and impact threshold values, and any additional user-defined impact threshold values, which are all used in the calculation of the risk score. The score is used to give an overall rating of a risk depending on the probability and impact thresholds assessed in the project. The scores are used to help determine if the risk should be addressed during the course of the project, or if the risk does not present a significant impact to the cost or schedule of the project.

Working with Risk Scoring Matrices

Use the Risk Scoring Matrices page to create a risk scoring matrix for one or more projects. The inputs to the risk scoring matrix are the risk thresholds, which you create on the Risk Thresholds page from the Enterprise Data section.

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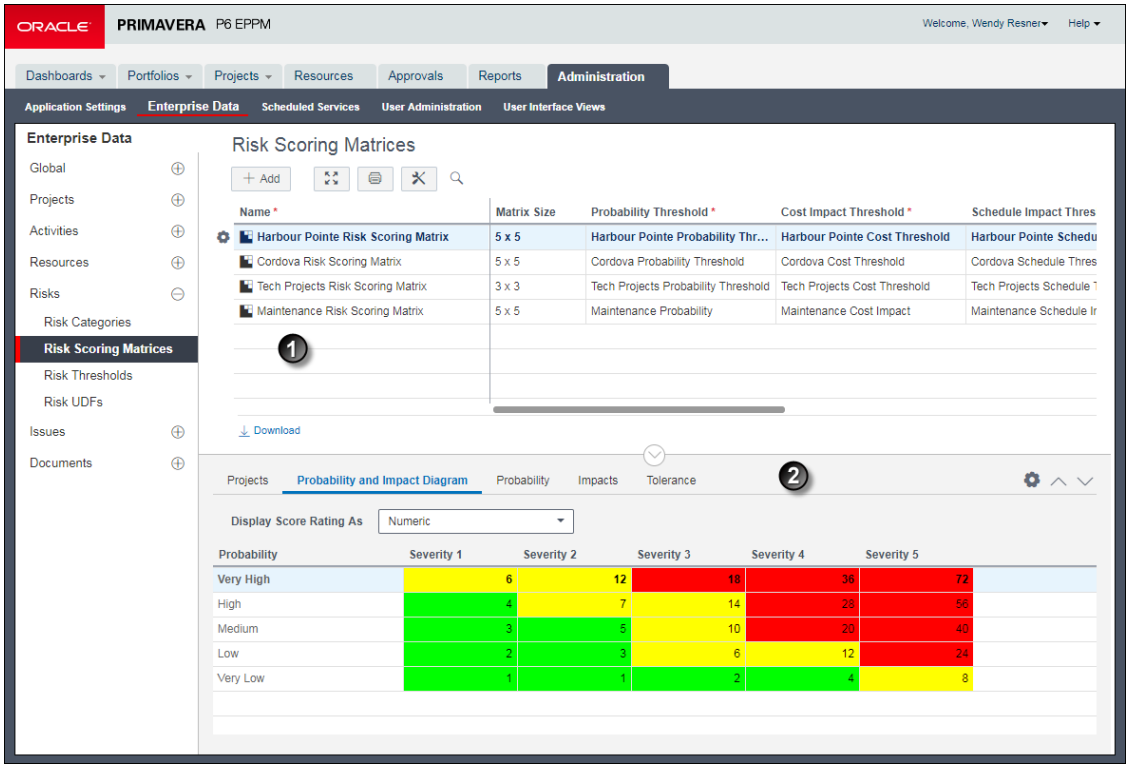


Table of Risk Scoring Matrices Elements

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Item	Description
1	**Risk Scoring Matrices** work area: This work area contains all the risk scoring matrices defined for your company. The number of risk scoring matrices you create is determined by risk analysis practices incorporated in your business. You might have one corporate-wide risk scoring matrix that is used for all projects, or you might have several matrices which are used depending on different factors, such as project size. For example, a new development project might require different cost impact and schedule impact threshold values than a project for a new feature development on an existing product. There might also be situations where a project is a joint-venture or is performed by a contractor and the prime owner's matrix must be used. However, for any project, only one matrix is assigned. In the work area above, this company has a need for multiple risk scoring matrices, including a separate risk scoring matrix for the Harbour Pointe Assisted Living construction project. When creating a risk scoring matrix, you choose a matrix size based on the number of levels assigned to your probability and impact thresholds defined on the Risk Thresholds page. Using the Harbour Pointe Risk Scoring Matrix as an example, the risk scoring matrix is 5 x 5. The first 5 represents the number of levels assigned to the probability threshold and the second 5 represents the number of levels assigned to the cost and schedule impact thresholds. Next, choose the risk scoring method to use for risk score calculations.

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Item	Description
2	**Risk Scoring Matrices** detail windows: **Description**: Describe the risk scoring matrix. Projects: Assign the matrix to one or more projects. Note that only one matrix can be assigned to a single project. If a matrix is not assigned to a project, risks can still be entered in the risk register on the Risks page; however, the probability, cost impact, and schedule impact threshold fields are disabled, and you cannot use the qualitative analysis features of the application. At any time you can create a matrix and assign it to an existing project. **Probability and Impact Diagram (PID)**: The PID is a graphical representation of the selections made in the Risk Scoring Matrices work area. The number of rows and columns is determined by the matrix size. The rows are the probability levels and the columns are the impact levels. The code and name fields for the impact threshold levels are customizable when creating a threshold; therefore, the column labels for the impacts are "Severity *n*." The number of severity columns reflects the number of levels assigned to the impact thresholds. The color coding indicates the tolerance threshold assigned to the risk scoring matrix. These same tolerance colors are also visible in the Score and Score (Text) fields on the risk register on the Risks page when risk values are entered. **Probability**: The details of the probability threshold assigned to the matrix needed to perform a qualitative assessment on project risks. This detail window is read-only. To change anything related to the threshold, navigate to the Risk Thresholds page. **Impacts**: The details for the impact thresholds assigned to the matrix. A cost and schedule impact must be defined for the matrix to perform a qualitative assessment on project risks. An unlimited number of user-defined impact thresholds can be assigned to the matrix. From this detail window, you can add or delete impacts to the matrix; however, you cannot modify the threshold values. To change anything related to the threshold, navigate to the Risk Thresholds page. **Tolerance**: The details for the tolerance threshold assigned to the matrix. This detail window is read-only. To change anything related to the threshold, navigate to the Risk Thresholds page.

Creating Risk Scoring Matrices

Create a risk scoring matrix to perform qualitative analysis on project risks. Project risk is assessed based on the thresholds defined in the risk scoring matrix.

Before creating a risk scoring matrix, you need to first define risk thresholds.

To create a risk scoring matrix:

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1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and choose **Risk Scoring Matrices**.
3. On the **Risk Scoring Matrices** page:
   a. Click **Add**.
   b. In the **Name** field, click and type a unique name.
   c. In the **Matrix Size** field, double-click and click **Select**.
4. In the **Select Matrix Size** dialog box:
   a. Choose a threshold level for the **Probability Threshold Level** and **Impact Threshold Level** fields.

      > **Note**
      >
      > You must have already defined thresholds with the number of levels you are assigning to the matrix. If you do not have a threshold with the same number of levels, you will be able to select the matrix size, but you will not be able to add a threshold.

   b. Click **Select**.
5. On the **Risk Scoring Matrices** page, double-click in the **Probability Threshold** field and click **Select**.
6. In the **Select Probability Threshold** dialog box, choose a probability and click **OK**.
7. On the **Risk Scoring Matrices** page, double-click in the **Schedule Impact Thresholds** field and click **Select**.
8. In the **Select Schedule Impact Thresholds** dialog box:
   a. Select a **Schedule Impact** and click **Select**.
   b. Select any additional impacts and click **Select**.
9. On the **Risk Scoring Matrices** page, double-click in the **Cost Impact Thresholds** field and click **Select**.
10. In the **Select Cost Impact Thresholds** dialog box:
    a. Select a **Cost Impact** and click **Select**.
    b. Select any additional impacts and click **Select**.
11. On the **Risk Scoring Matrices** page, double-click in the **Tolerance Threshold** field and click **Select**.
12. In the **Select Tolerance Threshold** dialog box, choose a tolerance and click **OK**.
13. On the **Risk Scoring Matrices page**, double-click in the **Risk Scoring Method** field and select a risk scoring method from the list.
14. In the **Description** detail window, type a description of the risk scoring matrix.
15. On the **Risk Scoring Matrices** page, click **Save**.

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Assigning a Risk Scoring Matrix to a Project

You need to assign a scoring matrix to a project before it can be used to prioritize risks. Once you assign a scoring matrix to a project, it is available for use from the risk register on the Risks page in the Projects section.

You can assign a risk scoring matrix to a project from different areas in the application, depending on the tasks you are working on at the time.

- See Assigning a Risk Scoring Matrix to a Project from the EPS Page when setting up a project.
- See Assigning a Risk Scoring Matrix to a Project from the Enterprise Data Pane when defining a risk scoring matrix and applying the matrix to multiple projects.
- See Assigning a Risk Scoring Matrix to a Project from the Portfolios Section when managing a portfolio.

Assigning a Risk Scoring Matrix to a Project from the Enterprise Data Pane

You need to assign a risk scoring matrix to a project before it can be used to prioritize risks. Once you assign a scoring matrix to a project, it is available for use from the risk register on the Risks page in the Projects section.

You can assign a risk scoring matrix to a project from multiple locations in the application. Use this method when you are defining a risk scoring matrix and need to apply the matrix to one or more projects.

To assign a risk scoring matrix to a project from the Enterprise Data pane:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Scoring Matrices**.
3. On the **Risk Scoring Matrices** page, select the matrix to assign to the project and click the **Projects** detail window.
4. In the **Projects** detail window, click **Assign...**.
5. In the **Select Project** dialog box:
   - Select a project and click **Select**.

   > **Note**
   >
   > If the project you selected is assigned to another risk scoring matrix, the threshold values you previously set for the project are removed. You will need to select values using the newly assigned risk scoring matrix.
6. On the **Risk Scoring Matrices** page, click **Save**.

Assigning a Risk Scoring Matrix to a Project from the EPS Page

You need to assign a risk scoring matrix to a project before it can be used to prioritize risks. Once you assign a scoring matrix to a project, it is available for use from the risk register on the Risks page in the Projects section.

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You can assign a risk scoring matrix to a project from multiple locations in the application. Use this method when you are setting up a project or modifying project settings.

To assign a risk scoring matrix to a project from the EPS page:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Locate the project you want to associate with a risk scoring matrix.
   b. Double-click in the **Risk Scoring Matrix** field and click **Select**.
   c. In the **Select Risk Scoring Matrix** dialog box, select a matrix and click **Assign**.
   d. On the **EPS** page, click **Save**.

Tip

- If the project you selected is assigned to another risk scoring matrix, the threshold values you previously set for the project are removed. You will need to select values using the newly assigned risk scoring matrix.
- If the Risk Scoring Matrix field is not visible, click **Customize View** and add it to the view.

Assigning a Risk Scoring Matrix to a Project from the Portfolios Section

You need to assign a risk scoring matrix to a project before it can be used to prioritize risks. Once you assign a scoring matrix to a project, it is available for use from the risk register on the Risks page in the Projects section.

You can assign a risk scoring matrix to a project from multiple locations in the application. Use this method when you are creating or modifying a portfolio.

To assign a risk scoring matrix from the Portfolios section:

1. On the **Navigation Menu**, expand **Portfolios** and select **Portfolio Analysis**.
2. On the **Portfolio Analysis** page:
   a. Click the **View** field and select a scorecard view from the list.
   b. Select a project.
   c. In the **Risk Scoring Matrix** field, double-click and click **Select**.
3. In the **Select Risk Scoring Matrix** dialog box, choose a risk scoring matrix and click **OK**.

Note

If the project you selected is assigned to another risk scoring matrix, the threshold values you previously set for the project are removed. You will need to select values using the newly assigned risk scoring matrix.

4. On the **Portfolio Analysis** page, click **Save**.

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> **Tip**
>
> If the Risk Scoring Matrix field is not visible, click **Customize** and the field.

Risk Categories

About Risk Categories

Risk categories are a classification of risk types customized to your specific project or business that are used to categorize and organize project risks. Categorizing risks enables you to analyze the types of risks occurring and see trends within the project or across multiple projects. This visibility enables you to more effectively manage risks over the long term.

Creating Risk Categories

Create risk categories and subcategories to define a risk breakdown structure (RBS), which enables you to categorize and organize project risks.

To create a risk category:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Categories**.
3. On the **Risk Categories** page:
   a. Select an existing category and click **Add** and select **Add** to create a category at the same level, or select **Add Child** to create a category below the selected level.
   b. In the **Category** field, double-click and type a unique name.
   c. Move the risk category to the correct location in the list by clicking **Context** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
   d. Click **Save**.

Risk UDFs

About Risk User Defined Fields

User defined fields allow you to create and maintain data specific to your organization. For example, you can track additional activity data, such as delivery dates and purchase order numbers. You can also track additional resource data or project cost-related data, such as profit, variances, and revised budgets. User defined fields are global, so they can be used across all projects in your organization.

Creating Risk UDFs

Create risk user-defined fields (UDFs) to store additional project risk data on the Risks page that is pertinent to your project or business and is not available from the default fields. For

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example, you might need to include a location field to identify where the risk might occur, or a ranking field to determine the order in which the risks will be handled.

UDFs can be of many types: text, start date, finish date, cost, number, integer, or indicator. Data from UDFs is not used in scoring calculations.

To create a risk UDF:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk UDFs**.
3. On the **Risk UDFs** page:
   a. Click **Add**.
   b. In the **User Defined Field**, double-click and type a name.
   c. In the **Data Type** field, choose a type from the list.
   d. Click **Save**.

Tip

- 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 create manual UDFs quickly from any UDF detail window, by clicking Assign and then clicking Add in the Assign UDFs dialog box.

Sharing Enterprise Risk Data with Oracle Primavera Cloud

After you have configured enterprise risk data you can send that data to Oracle Primavera Cloud to perform quantitative risk analysis. You can then update P6 with the results of that analysis from Oracle Primavera Cloud and see the results in the pre and post response pessimistic dates fields and pre and post response bars in the Activities view.

To share Enterprise risk data with Primavera Cloud, perform the following tasks:

1. Configuring Risk Enterprise Data
2. Linking P6 and Oracle Primavera Cloud Applications.*Linking P6 and Oracle Primavera Cloud Applications.*Linking P6 and Oracle Primavera Cloud Applications.*Linking P6 and Oracle Primavera Cloud Applications.*Linking P6 and Oracle Primavera Cloud Applications.
3. Transferring Data Between P6 and Oracle Primavera Cloud*Transferring Data Between P6 and Oracle Primavera Cloud*Transferring Data Between P6 and Oracle Primavera Cloud*Transferring Data Between P6 and Oracle Primavera Cloud*
4. Updating Projects With Data From Oracle Primavera Cloud*Updating Projects With Data From Oracle Primavera Cloud*

Linking P6 and Oracle Primavera Cloud Applications.

Perform the steps below to link P6 to Oracle Primavera Cloud. This link at the application level allows you to establish links at the project level. When the applications and projects are linked, P6 users can send data to Oracle Primavera Cloud.

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To link P6 and Oracle Primavera Cloud applications:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click the **Gateway** tab.
3. On the **Gateway** tab in the **Primavera Gateway Parameters** section:
   a. Enter the URL of the Primavera Gateway server in the **API Url** field of the Primavera Gateway Parameters section.
   b. Enter a Primavera Gateway username in the **Username** field.
   c. Enter a Primavera Gateway password in the **Password** field.
   d. Click **Test Connection**.

   > **Note**
   >
   > If the connection test fails, contact your Primavera Gateway administrator.

   e. Enter a Primavera Gateway deployment name into the **P6 Deployment** field.
4. On the Gateway tab in the Integration Parameters section:
   a. Click Add.
   b. Select an action from the **Action Type** list.
   c. Select a deployment from the **Source/Destination Deployment** list.
   d. Select a synchronization from the **Synchronization** list.
   e. Enter a name in the **Action Name** field.
5. Click **Save and Close**.

> **Note**
>
> You need the Edit Application Settings privilege to edit the settings on the Application Settings pane.

Transferring Data Between P6 and Oracle Primavera Cloud

You can send data for a linked P6 project to Oracle Primavera Cloud and retrieve data from the linked project in Oracle Primavera Cloud to update your P6 project.

To transfer data between P6 and Oracle Primavera Cloud:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. In the **Activities** page click the **Actions** menu and select **Exchange Data** and and then select the menu option for sending data to Oracle Primavera Cloud.

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Tip

- The option for sending data to Oracle Primavera Cloud will be available if your administrator has configured the integration options.
- Data can also be transferred between P6 EPPM and Oracle Primavera Cloud from within Oracle Primavera Cloud and Primavera Gateway.

Project Risks

Working with Project Risks

The risk register on the Risks page is the main area of the application where you identify and manage risks for a project. Additionally, you can add risks to a project from the EPS page, and add risks to a project and assign the risks to activities from the Activities page.

Once you add a risk to the risk register, you can perform further analysis on the risk and create one or more risk response plans which include activities to reduce the negative impact of the risk.

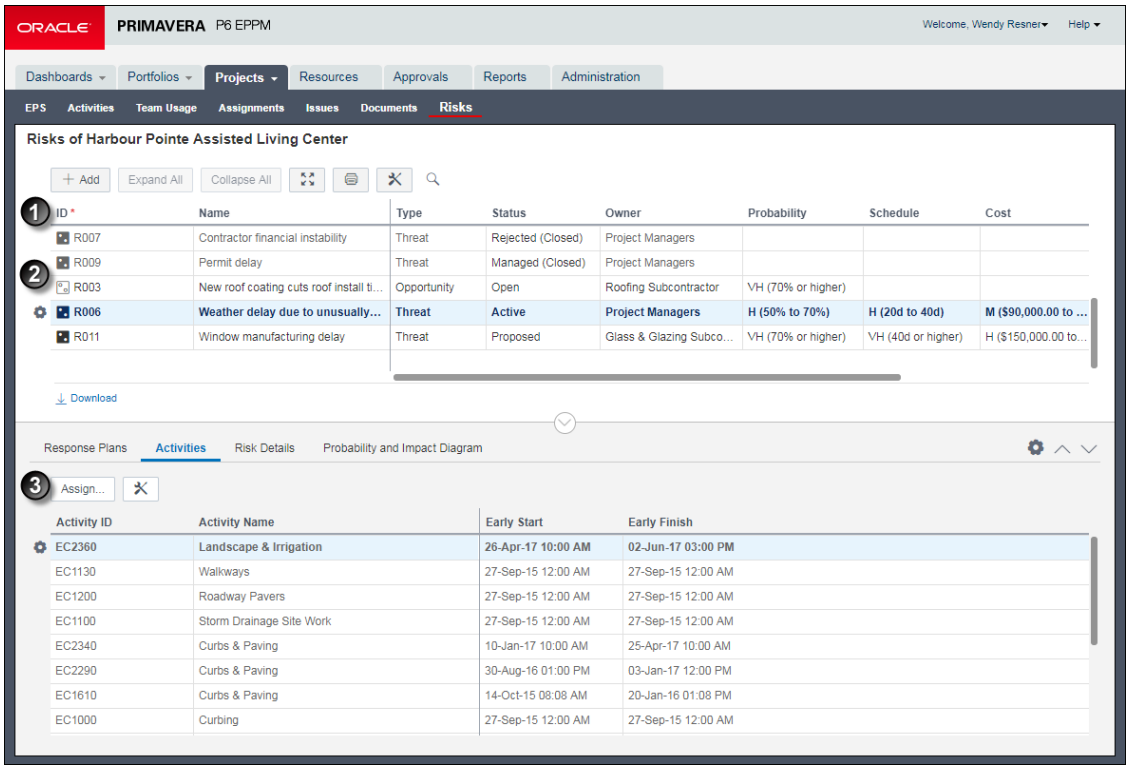


Table of Project Risks Elements

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Item	Description
1	**Risks register:** Risks for all the projects you have open display in the risk register. You can group by field name, such as project name, to view all risks organized by project, or create a filter to view only the risks that interest you. When adding a risk to the risk register, you supply a name for the risk, identify the risk as a threat or an opportunity, identify the current status of the risk, identify the owner of the risk, and then assign the values for probability, schedule, cost, and any other applicable user-defined impacts. The values for probability, schedule, cost, and additional user-defined impacts are used to calculate the risk score. The values for probability and cost are used to calculate risk exposure. If the Probability, Cost, and Schedule fields are disabled, a risk scorning matrix has not been assigned to the project. You can still use the risk register to track your risks; however, you cannot use the qualitative risk analysis features in the application until you create a risk scoring matrix and assign it to the project.
2	**Risks and Opportunities**: The risk register can show both risks and opportunties. A **Risk** usually has a negative impact on a project. An **Opportunity** usually has a positive impact.
3	**Risks detail windows**: **Response Plans**: The area where you add response plans and response plan action items. **Activities**: The area where you associate scheduled activities in your project to an identified risk. Refer to the example above to see a list of the project activities impacted by risk R001: Concrete supply constrained. **Risk Details**: The area used to provide a detailed explanation of the risk, explain why this risk is occurring, and describe the impact this risk has on this project. **Probability and Impact Diagram**: The Probability and Impact Diagram (PID) is a graphical representation of the probability and impact thresholds assigned to the risk scoring matrix associated with the project.

Managing Project Risks

You can perform qualitative analysis on your project risks. Using the tasks listed below, you can identify a risk for your project and assign probability and impact values to this risk to calculate a risk score and risk exposure values for each risk. Additionally, you can assign activities to the risk and create a risk response plan, which can include actions to mitigate the risk.

1. Creating Project Risks
2. Assigning a Risk to an Activity
3. Developing a Risk Response Plan

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Creating Project Risks

Add project risks to capture potential threats or opportunities that might impact your project.

For convenience, you can add risks to projects from different areas in the application, depending on the tasks you are performing at the time.

You can capture risks in the Projects section from the Risks, Activities, or EPS pages.

- **Adding Detailed Project-Level Risks**: The Risks page is the risk register where all risk data for the projects on which you are working is stored. You can customize the page using filters or grouping to view a specific list of project risks. From this page, you can assign probability and impact values to obtain a risk score and risk exposure value, and create risk response plans that include response plan action items to reduce or eliminate the negative impact of the risk. If you previously added risks to a project from the Activities page or the EPS page, you can use this page to add detailed information about the risk and perform qualitative analysis.
- **Adding Risks to Activities:** Use the Activities page when you are working in the detailed activity level to quickly add a risk or assign an existing risk to activity. From the Risks detail window, you can assign probability and impact values to obtain a risk score and risk exposure value. To view all risks on the project or to create risk response plans, use the Risks page.
- **Adding High-Level Project Risks:** Use the EPS page when you are working at the project level to quickly add a risk to a project. From the Risks detail window, you can assign probability and impact values to obtain a risk score and risk exposure value. To perform a more detailed analysis of your risks, such as assigning risks to activities or creating risk response plans, use the Risks page.

Adding Detailed Project-Level Risks

Add project 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.

> **Note**
>
> If a risk scoring matrix is not assigned to the project, you can add general risk information to the Risks page, but you will not be able to enter values for probability, schedule and cost, which are values used to generate the risk score.

To add detailed project-level risks:

1. On the **Navigation Menu**, expand **Projects** and click **Risks**.

   If multiple projects are open, click **Projects** and select a project.
2. On the **Risks** page, click **Add**.
3. On the **Risks** page:
   a. In the **ID** field, click and type an ID for the risk.
   b. In the **Name** field, click and type the risk name.
   c. In the **Type** field, double-click and select the type of risk from the list.

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d. In the **Status** field, double-click and select the current status for the risk.

e. In the **Owner** field, double-click then click **Select**.

4. In the **Select Owner** dialog box, select an owner for the risk and click **Select**.
5. On the **Risks** page:
   a. In the **Probability** field, double-click and select a probability from the list.
   b. In the **Schedule** field, double-click and select a schedule impact from the list.
   c. In the **Cost** field, double-click and select a cost impact from the list.
   d. Complete any additional fields on the table that are relevant for this risk.

> **Note**
>
> To display additional columns, click **Customize View** and select the column to add to the table.

6. Use the **Risk Details** detail window to provide more information about the risk.
7. On the **Risks** page, click **Save**.

> **Tip**
>
> - You can copy existing risks to create new risks. If you copy an existing risk to the same project, all data, including response plans and associated activities, is retained. If you copy an existing risk to a different project, activity associations are removed. If the project does not have the same risk scoring matrix assigned, then the probability and impact fields (schedule, cost, and user defined) are cleared.
> - Click the **Probability and Impact Diagram** detail window to view the risk scoring matrix assigned to the project.

Adding Project Risks to Activities

Add project risks to activities to capture potential threats or opportunities that might impact your project. Use this method if you want to quickly associate a risk to an activity. You can add a new project risk to an activity, or assign an existing project risk to an activity.

To add a new or assign an existing project risk to an activity:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select an activity and click the **Risks** detail window.
   a. To assign an existing risk to the activity, in the Risks detail window click **Assign...**.
      - In the **Select Risk** dialog box click on a risk and then click **Assign**.
   b. To add a new risk to an activity, in the **Risks** detail window click **Add**.

Adding High-Level Project Risks

Add project risks to capture potential threats or opportunities that might impact your project.

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Use this method to quickly add a risk to a project. You can enter basic risk information from this page, including ID, Name, Owner, Category, Type, and Status.

To add a high-level project risk:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click on a project, and then click the **Risks** detail window.
   b. In the **Risks** detail window:
      - Click **Add**.
      - In the **ID** field, click and type an ID for the risk.
      - In the **Name** field, click and type the risk name.
      - In the **Type** field, double-click and select the type of risk from the list.
      - In the **Status** field, double-click and select the current status for the risk.
      - In the **Category** field, double-click, click **Select**, then select a category from the Select Risk Category dialog box, if applicable.
      - In the **Owner** field, double-click then click **Select**.
   c. In the **Select Owner** dialog box, select an owner for the risk and click **Assign**.
   d. On the **EPS** page, click **Save**.

Assigning a Risk to an Activity

Assign a risk to an activity to explicitly identify the activity impacted by the risk.

You can assign a risk to an activity while you are adding project risks on the Risks page or while managing your activities on the Activities page.

To assign a risk to an activity from the Risks page:

1. On the **Navigation Menu**, expand **Projects** and click **Risks**.
2. On the **Risks** page, click a risk.
3. Click the **Activities** detail window and click **Assign...**.
4. In the **Select Activity** dialog box:
   - Select one or more activities and click **Select**.
5. On the **Risks** page, click **Save**.

To assign a risk to an activity from the Activities page:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
   a. On the **Activities** page, select the activity you want to assign a risk.
   b. On the **Risks** detail window, click **Assign...**.
   c. In the **Select Risk** dialog box select a risk and click **Assign**.
   d. On the **Activities** page, click **Save**.

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Risk Response Plans

About Risk Response Plans

Response planning allows you to identify and document methods you might use to manage project risks. When you identify an area with a risk, create a risk response plan to determine what actions could be taken to promote the most favorable outcome.

Working with Risk Response Plans

The Response Plans detail window is the area in the risk register where you create plans for handling the identified risks. Once you have identified which project risks need further action, create a response plan and assign response plan action items for each risk to reduce the negative impact on the project.

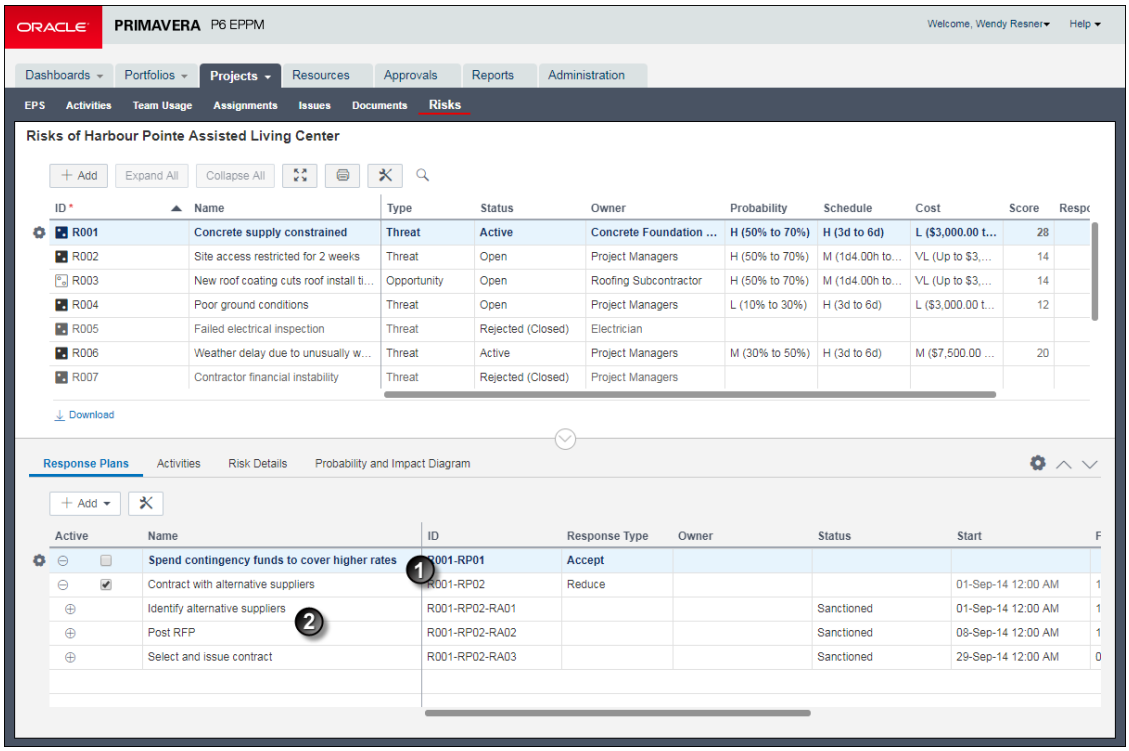


Table of Risk Response Plan Elements

Item	Description
1	**Response Planrows**: Create one or more response plans while you are in the planning phase and indicate the response type. When you have analyzed your response options, choose one response plan by selecting the **Active** option next to the appropriate response plan. In the example above, two response plans have been created for the *Concrete supply constrained* risk. The first plan is to accept the risk and take no action; the second plan is to reduce the impact of the risk by contracting with alternative suppliers. The second plan has been selected as the plan of choice.

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Item	Description
2	**Response Action Itemrows**: Each risk response plan can have multiple response plan action items. Response action items are additional activities you perform to reduce the impact of the risk. For each response action item, assign the probability, schedule impact, cost impact, and any additional user-defined impacts, which are based on the outcome of the action item, to obtain a post-mitigated score. In the example above, three activities are assigned to the risk plan. The risk score will not significantly decrease until all three response items are complete. By taking action on this risk and creating a response plan, the impact of this risk can be significantly reduced.

Developing a Risk Response Plan

Once you have identified a risk for your project, you can then create a risk response plan to help manage the project risk. A risk response plan includes a name for the plan and response plan action items. You can create multiple risk response plans for a risk each with multiple response action items. When you determine which plan will best meet the project needs, select the Active option next to the appropriate response plan. One response plan must always be active.

To develop a risk response plan, complete the following tasks:

1. Adding Risk Response Plans
2. Adding Risk Response Plan Action Items
3. Assigning Activities to Risk Response Plan Action Items

Adding Risk Response Plans

Add one or more response plans to a risk to plan alternative activities that might reduce the probability of a risk occurring, or to reduce the impact of the risk.

1. On the **Navigation Menu**, expand **Projects** and click **Risks**.
2. On the **Risks** page, click a risk, and then click the **Response Plans** detail window.
3. On the **Response Plans** detail window:
   a. Click **Add** and select **Response Plan**.
   b. In the **ID** field, type a response plan ID.
   c. In the **Name** field, type a name for the new response plan.
   d. In the **Response Type** field, select a response type from the list.
4. On the **Risks** page, click **Save**.

> **Note**
>
> After you decide which response plan you are implementing, select the Active option next to the appropriate response plan.

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Adding Risk Response Plan Action Items

Each risk response plan can include multiple response plan action items.

To add a risk response plan action item:

1. On the **Navigation Menu**, expand **Projects** and click **Risks**.
2. On the **Risks** page, click on a risk, and then click the **Response Plans** detail window.
3. Repeat the following for each response action you want to add to a risk response plan:
   a. On the **Response Plans** detail window:
      i. Click on the response plan for which you are adding a response action and click **Add** and select **Response Action**.
      ii. In the **ID** field, double-click and type an ID for the response action item.
      iii. In the **Name** field, double-click and type a name for the response action item.
      iv. In the **Owner** field, double-click and click **Select**.
   b. On the **Select Owner** dialog box, select a name and click **Assign**.
   c. On the **Response Plans** detail window:
      i. In the **Status** field, double-click and select a status from the list.
      ii. In the **Start** field, double-click and select a start date from the calendar. This is an optional field. If you assign an activity to the response action, the activity date and total cost for the activity will override the values you just entered.
      iii. In the **Probability** field, double-click and select a probability based on the response action.

      > **Note**
      >
      > If a risk scoring matrix is not assigned to your project, the Probability, Schedule, and Cost fields are disabled.

      iv. In the **Schedule** field, double-click and select a schedule impact based on the response action.
      v. In the **Cost** field, double-click and select a cost impact based on the response action.
      vi. If there are any user-defined impact fields, double-click in the field and select an impact based on the response action.
4. On the **Risks** page, click **Save**.

> **Note**
>
> After you decide which response plan you are implementing, select the Active option next to the appropriate response plan.

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Assigning Activities to Risk Response Plan Action Items

Existing activities can be assigned to a response plan action item to identify the activities necessary to respond to the risk. If you need a new activity for the response action, first create that activity, then assign it to a response plan action item.

The cost values for the assigned activity are used in the cost calculations for the response plan, and the activity start and finish dates are displayed in the response plan.

To assign an activity to a risk response plan action item:

1. On the **Navigation Menu**, expand **Projects** and click **Risks**.
2. On the **Risks** page, click a risk and then click the **Response Plans** detail window.
3. On the **Response Plans** detail window:
   a. Expand the appropriate risk response plan and click on the response plan action item for which you are adding an activity.
   b. In the **Activity** field, double-click and click **Select**.
4. On the **Select Activity** dialog box, click the activity and click **Select**.
5. On the **Risks** page, click **Save**.

Exporting Risk Data

Risk data can be saved to an Excel spreadsheet (*.xlsx). All data is exported as it appears in the current view. Customize the rows to display only the data you want to export.

To export risk data:

1. On the **Navigation Menu**, expand **Projects** and click **Risks**.
2. On the **Risks** page, click **Customize View** to configure the fields, grouping, sorting and filtering to show in the exported file.
3. Click **Download**.

About Documents

A document is a file or work product that you create and add to your Primavera work environment. The application provides document management capabilities that enable you to store, organize, manage, and access documents in a secure environment. The available document management functionality depends on your configuration. When the content repository is configured, the complete set of advanced document management capabilities is available, including uploading images from P6 for Android and P6 for iOS, check in, check out, and document reviews. When the content repository is not configured, a limited set of document management features is available, such as adding, deleting, and relating items to documents.

When an optional content repository is installed, P6 supports different classes of documents: project and private. Project documents are documents that you relate to a project via P6. Only users with the necessary securities can edit project documents. Private documents are

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documents that you add to P6 for your own use. Private documents are not associated with any project and are available only to you.

> **Note**
>
> Cloud only. Documents are scanned for viruses on upload to the content repository. If a virus is detected, the document is removed, a notification is displayed, and the uploading user is emailed the details. If a virus is detected during check-in, only the infected version of the document is removed.

When the content repository is not configured for use with P6, you can perform limited actions on project documents only, and private documents are not available.

Working with Documents without the Content Repository

Project documents are documents that a user relates to a project. You can work with project documents from the Documents page.

From the Documents page you can:

- **Add documents to a project** - You can add a document from a public and/or a private location. To enable project team members to open a document from the Public Location, make sure to store the document on a publicly accessible network server. You can store a personal copy of the document in the Private Location. For example, you can use this area to store the original copy of the document if you expect team members to update the public copy.
- **Open and edit project documents** - Click Open to view and edit the document. Since the document is stored on your network server, any saved changes will be visible to the next person who opens the document.
- **Track document versions** - You can set the version number each time you update the document if version tracking is important for the document.
- **Related items to the project document** - You can associate activities or WBSs, issues, or other documents to your project document. This enables you to see how a document relates to the project and where to find additional information.

The availability of a document and the actions you can perform on the document depend on several factors:

- Project documents are available only to users who have access to the corresponding project.
- The security policy of a project document determines which actions you can perform on that document; for example, you might only be able to view a document.

> **Note**
>
> Documents cannot be used with project templates.

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Adding Documents to a Project without the Content Repository

In standard P6 configurations without the optional content repository, you can add project documents directly from your computer or a network server to the project. These documents are available to everyone who has access to the project.

To add a document to a project:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page:
   a. Click on the project name.
   b. Click **Add Document**.
3. In the **Add Document** dialog box:
   - To add a local document, select the **File Path** option and then enter a path in the file path field.
   - To add a document stored online, select the **URL** option and enter the address of the document in the http:// field.
4. Select **Add**.

Tip

- You can also add documents in the Documents detail window of the Activities page.
- You cannot add documents to template projects.

Configuring Document Details without the Content Repository

You can view and edit detailed information for documents you have privileges to modify.

To configure document details:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page:
   a. Expand a project and select a document.
   b. Click the **General** tab and configure the fields, options, and lists as necessary.
   c. (Optional) Click the **Description** tab and enter a description in the field.
   d. Click the **Related Items** tab to assign related items to the document.
   e. Click **Save**.

Assigning Related Items to Documents without the Content Repository

You can assign related activities, WBSs, issues, and documents to a document.

To assign related items to a document:

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1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page:
   a. Expand a project and select a document.
   b. Click the **Related Items** tab.
3. On the **Related Items** tab:
   a. To relate activities or WBSs, click **Relate Activities or WBS** and select activities or WBSs from the Select an Activity or WBS dialog box.
   b. To relate issues, click **Relate Issues** and select issues from the Relate Issue dialog box.
   c. To relate documents, click **Relate Documents** and select documents from the Relate Document dialog box.
   d. Click **Save**.

Tip

- Documents assigned to activities are visible to team members using P6 Team Member.
- You can also relate activities or WBS nodes to documents in the Documents detail tab of the activities page.

Sending Email about Documents without the Content Repository

You can send Email about a project document that includes basic details and a bookmark link to the document.

To send a Email about a document:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page:
   a. Expand a project and select a document.
   b. Click **Email Document Details**.
3. In the **Email** dialog box:
   a. Edit the recipient list, message, and subject as needed.
   b. Click **Send Email**.

Tip

You must have an Email address associated with your user profile to send an Email.

Working with Documents with a Content Repository

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There are different types of documents: project and private. P6 supports document management features for project documents. When the optional content repository is installed, P6 also supports private documents.

Project documents are documents that a user relates to a project. You can work with project documents from the Documents page. It is also possible to convert a project document to a private document.

You can add private documents for your own use. Private documents are not associated with any project and are available only to you. You can add private documents to the My Documents portlet on a dashboard. All private documents are stored in the My Documents portlet on the Private Documents tab.

The content repository functionality provides advanced document management capabilities. With advanced functionality, you can use document version control features to manage shared access to documents, organize project documents into a folder hierarchy structure, and start or participate in document reviews.

Specifically, you can:

- Download documents
- Check in, check out, and undo check out documents
- Search for documents
- View a document's history
- View a document's versions
- Add, delete, and rename project folders
- Move project documents to a different folder location
- Start a document review
- Terminate a document review
- Review a document
- Send Email about a document

The availability of a document and the actions you can perform on the document depend on several factors:

- Project documents are available only to users who have access to the corresponding project. Private documents are available only to the person who adds them.
- The security policy of a project document determines which actions you can perform on that document; for example, you might only be able to view a document.

> **Note**
>
> Documents cannot be used with project templates.

About the Document Content Repository

The content repository allows users to collaboratively share and manage documents in the application. The document management functionality available to you depends on your configuration. When the content repository is configured, the complete set of advanced document management capabilities is available, including check in, check out, and document

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reviews. When the content repository is not configured, a limited set of document management features is available, such as adding, deleting, and relating items to documents.

Repository storage

Your content repository stores documents created in P6 in a folder reserved for these documents. This folder is referred to as your P6 repository. Depending on your access privileges and configured content repository, you can access documents that were created outside P6. These documents are stored in their own folders in the content repository. You can restrict the types of files which can be uploaded to a document repository in Application Settings.

> **Note**
>
> Cloud only. Documents are scanned for viruses on upload to the content repository. If a virus is detected, the document is removed, a notification is displayed, and the uploading user is emailed the details. If a virus is detected during check-in, only the infected version of the document is removed.

Repository authentication

The application offers two content repository authentication modes. Authentication can be configured for either single or multiple user authentication. In single user authentication mode, all users access the repository using a single administrator user login that is set during repository configuration. In multiple user authentication mode, each user is authenticated based on their individual login.

Single user authentication mode is useful when you want users to have full access to the content repository through P6 without having to maintain an equivalent list of users for both P6 and the repository. This allows a repository administrator to maintain one set of credentials for the repository. Single user authentication is also useful for quickly setting up test repositories that can be accessed by testers with minimal fuss.

Multiple user authentication mode is the default mode. Multiple user authentication mode provides increased security by restricting content repository access on an individual user basis. Because it uses native auditing fields it also allows a clear audit of who has created and modified files.

Creating Document Templates

If P6 is configured to use the content repository, you can create document templates that you can use as a foundation when adding new documents.

To create document templates:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab, select a project and click **Add Options** and select **Create New Template**.
4. In the **Create New Template** dialog box:
   a. Select a file and select **Open**.
   b. Select **Upload**.

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5. On the **Project** tab, click the **General** tab.
6. On the **General** tab:
   a. Enter a name in the **Title** field.
   b. In the **Security Policy** list:
      - Select **Read Only** to prevent other users from editing the template.
      - Select **Shared** to allow other users to view, move, edit, and delete the template.
      - Select **Personal** to prevent other users from accessing the template.
   c. Click **Save**.

Tip

- You can also create document templates from the My Documents portlet of the Dashboards page.
- You can make a document you have already uploaded into a template by selecting the Template Document option on the General tab.

Copying Documents from Existing Templates

If P6 is configured to use the content repository, you can copy documents from templates to add a new document based on an existing template.

To copy documents from templates:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab, select a project and click **Add Options** and select **Copy from existing template**.
4. In the **Select a Template to Copy From** dialog box, select a template and click **OK**.
5. On the **Project** tab:
   a. Click the **General** tab and enter a name in the **Title** field.
   b. Click and configure each tab as necessary.
   c. Click **Save**.

Tip

You can also create document templates from the My Documents portlet of the Dashboards page.

Adding Documents to a Project and Storing Them in the Content Repository

You can add documents from your computer or a network server to the content repository and designate them as private, read-only, or shared within the current project. When you add shared documents, they are ready for document reviews.

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> **Note**
>
> This topic assumes that you have setup the optional content repository.

To add a document to a project and store that document in the content repository:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab:
   a. Expand a project.
   b. (Optional) Expand one or more folders. If necessary, create a folder. See the related topics.
   c. Click **Add Options** and select **Add Document**.
4. In the **Upload** dialog box:
   a. Select **Browse** and browse to a document.
   b. Select **Upload**.

   > **Note**
   >
   > Cloud only. Documents are scanned for viruses on upload to the content repository. If a virus is detected, the document is removed, a notification is displayed, and the uploading user is emailed the details. If a virus is detected during check-in, only the infected version of the document is removed.

5. On the **Project** tab:
   a. Click any of the tabs and complete the data fields.
   b. Click **Save**.

> **Tip**
>
> - You can complete all available document management functions on the copy, which has no relationship to the original document.
> - To add a document to a folder, select the folder before you click the Add Options menu. You cannot add a document to a read-only folder.
> - At any time, you can privatize documents that you added to the application. To make a document private, select the document on the Documents page, click **Access Level Options** and select Make Private.
> - You can also add public documents from My Documents portlet of the Dashboards page.

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Adding Documents to a Project from the Content Repository

If your system is configured to use Oracle Web Center Content, in addition to adding documents to the repository, you can also add them to projects from the content repository. When you add an existing repository document you can decide to copy it for a fresh start within the new assigned project or simply link to it.

> **Note**
>
> This topic assumes that you have setup the optional content repository.

To add a document from the repository and copy it or link it to a project:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab:
   a. Expand a project.
   b. (Optional) Expand one or more folders. If necessary, create a folder. See the related topics.
   c. Click **Add Options** and select **Add from content repository**.
4. In the **Select Document** dialog box:
   a. Select a document. If necessary, expand any folders or use the search field.
   b. Select the **Copy selected document** or **Link to selected document** option.
   c. Click **OK**.
5. On the **Project** tab:
   a. Click any of the five tabs and complete the data fields.
   b. Click **Save**.

> **Tip**
>
> - Add a copy when you want project members to change the new document. Add a link to a content repository document when you want to preserve the original document.
> - The link displays in the folder you selected in your document view, indicating that you have created a link to the document in its location in the content repository.
> - You can also link to repository documents from the **My Documents** portlet of the **Dashboards** page.

Configuring Document Details

If P6 is configured to use the content repository, you can view and edit detailed information for private documents and documents you have privileges to modify.

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To configure document details:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab:
   a. Expand a project and select a document.
   b. Click the **General** tab and configure the fields, options, and lists as necessary.
   c. (Optional) Click the **Description** tab and enter a description in the field.
   d. Click the **Related Items** tab to assign related items to the document.
   e. Click **Save**.

Tip

You can also click Edit Details in the My Documents portlet of the Dashboards page.

Assigning Related Items to Documents

You can assign related activities, WBSs, issues, and documents to a document.

To assign related items to a document:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab:
   a. Expand a project and select a document.
   b. Click the **Related Items** tab.
4. On the **Related Items** tab:
   - To relate activities or WBSs, click **Relate Activities or WBS** and select activities or WBSs from the dialog box.
   - To relate issues, click **Relate Issues** and select issues from the dialog box.
   - To relate documents, click **Relate Documents** and select documents from the dialog box.
5. On the **Project** tab, click **Save**.

Tip

- You can also click Edit Details in the My Documents portlet of the Dashboards page. Expand the Related Items section on the Details of page of the Documents page to assign related items to documents when your content repository is not configured.
- Documents assigned to activities are visible to team members using P6 Team Member.

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Checking Out Documents

Check out a document to save a copy to your local machine or another specified location. Checking out a document locks the document to prevent others users from making simultaneous updates to it. When a document is checked out, users can still view and download the document, but they cannot modify, delete, or check it out.

To check out a document:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab, select a project and click **Check Out options options** and select **Check out**.

> **Tip**
>
> - To undo a check out, click Undo Check Out on the Check Out options menu.
> - When an item is checked out, it will have a green check mark beside it.
> - You can also check out documents from the My Documents portlet of the Dashboards page.

Checking In Documents

Check in a document when you are finished with it. You must check in a document to lift the lock that a check out places on a document.

To check in a document:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab, select a checked out document and click **Check Out options** and select **Check in**.
4. In the **Check In** dialog box:
   a. Click **Browse** then browse to the document and select **Open**.
   b. In **Comments** field enter any comments you want to include with the document.
   c. Select **Check In**.

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Note

Cloud only. Documents are scanned for viruses on upload to the content repository. If a virus is detected, the document is removed, a notification is displayed, and the uploading user is emailed the details. If a virus is detected during check-in, only the infected version of the document is removed.

Tip

- When an item is checked out, it will have a green check mark beside it.
- You can also check out documents from the My Documents portlet of the Dashboards page.

Sending Email about Documents

You can send email for a project document that includes basic details and a bookmark link to the document.

To send document Emails:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab, select a document and click **Email Document Details**.
4. In the **Email** dialog box:
   a. Edit the recipient list, message, and subject as needed.
   b. Click **Send Email**.

Tip

- You must have an Email address listed in you user profile to send an email.
- You can also send document Emails from the My Documents portlet of the Dashboards page, or the Documents page (without the content repository).

Creating Document Folders

If P6 is configured to use the content repository, you can create document folders as a method of document organization in a project.

To create document folders:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab, select a project to which you will add the folder and click **Add Options** and select **Add Folder**.

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4. In the **Add Folder** dialog box:
   a. Enter a name in the **Folder Name** field.
   b. In the **Security Policy** list:
      - Select **Read Only** to prevent other users from editing the folder.
      - Select **Shared** to allow other users to view, move, edit, and delete the folder.
      - Select **Personal** to prevent other users from accessing the folder.
   c. Click **OK**.

> **Tip**
>
> You can also create document folders from the My Documents portlet of the Dashboards page.

About Document Reviews

A document review is a process in which a specific version of a document is assigned to one or more people to review. At some organizations, reviews represent a helpful way of sharing information and gathering specific comments or feedback from others. At others, this type of collaboration is required as part of a quality process or compliance directive.

Initiate a review when you have a document that requires the approval of one or more people. For example, you might have a new document that requires that four other members of your department review it. Before making the document available to all members of the project, you have each department member review the document for accuracy.

> **Note**
>
> Document reviews require installation of the content repository with P6. Contact your P6 for more information.

When starting a document review, you can specify reviewers and select a review type. These review types determine the approval requirements and reviewer sequence:

Anyone May Review: Enables any of the listed reviewers to approve or reject the document version. Once one reviewer approves it, the review status changes to Review Approved; once one reviewer rejects it, the review status changes to Review Rejected.

Everyone Must Review: Requires each listed reviewer to respond to the document review to complete it. To change the review status to Review Approved, all reviewers must approve the document. To change the review status to Review Rejected, only one reviewer needs to reject the document.

Everyone Must Review in Sequence: Requires each listed reviewer to respond to the document review in a designated sequence to complete it. To change the review status to Review Approved, all reviewers must approve the document. To change the review status to Review Rejected, only one reviewer needs to reject the document. Once one reviewer rejects the document, the review is complete.

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Working With Document Reviews

Initiating a Document Review

Initiate a review when you have a document that requires the approval of one or more people.

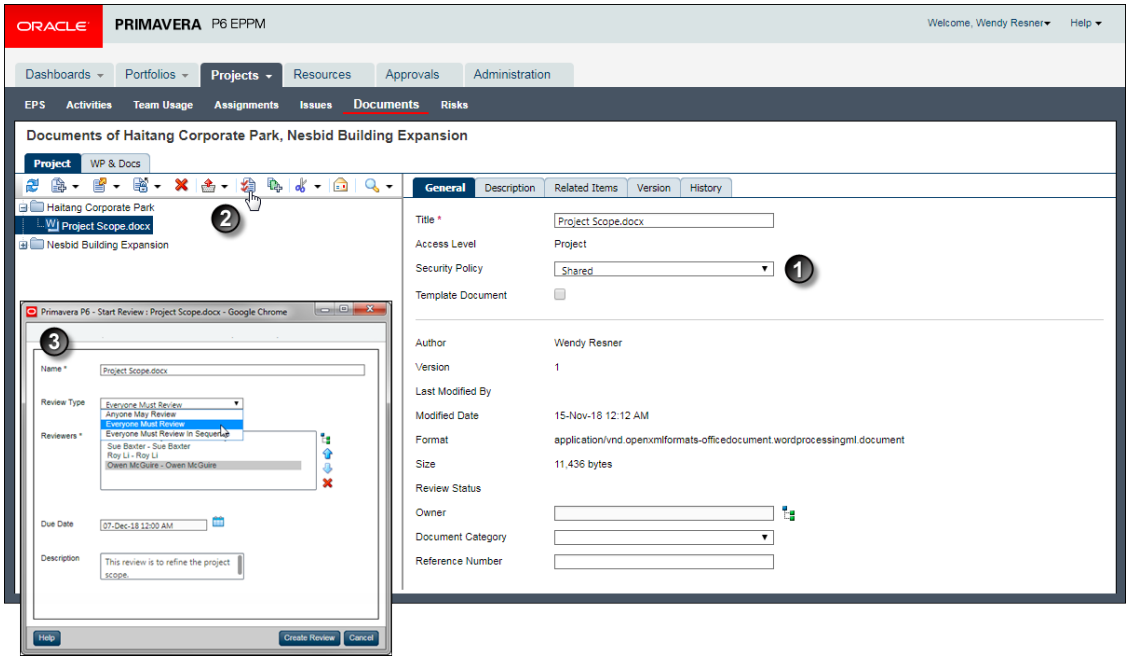


Table of Screen Highlights

Item	Description
1	Ensure the Security Policy for the document is set to Shared.
2	Click Start Review.
3	Use the Start Review dialog box to specify review details, including the name of the review, the review type to determine the approval requirements and reviewer sequence, the reviewer list, the date by which all reviewers must complete the review, and a description of the review. Click Create Review.

Participating in a Document Review

During the review, review participants can access the document from the Document Reviews portlet on the Dashboards page. The Action Required tab indicates whether you have a review to complete.

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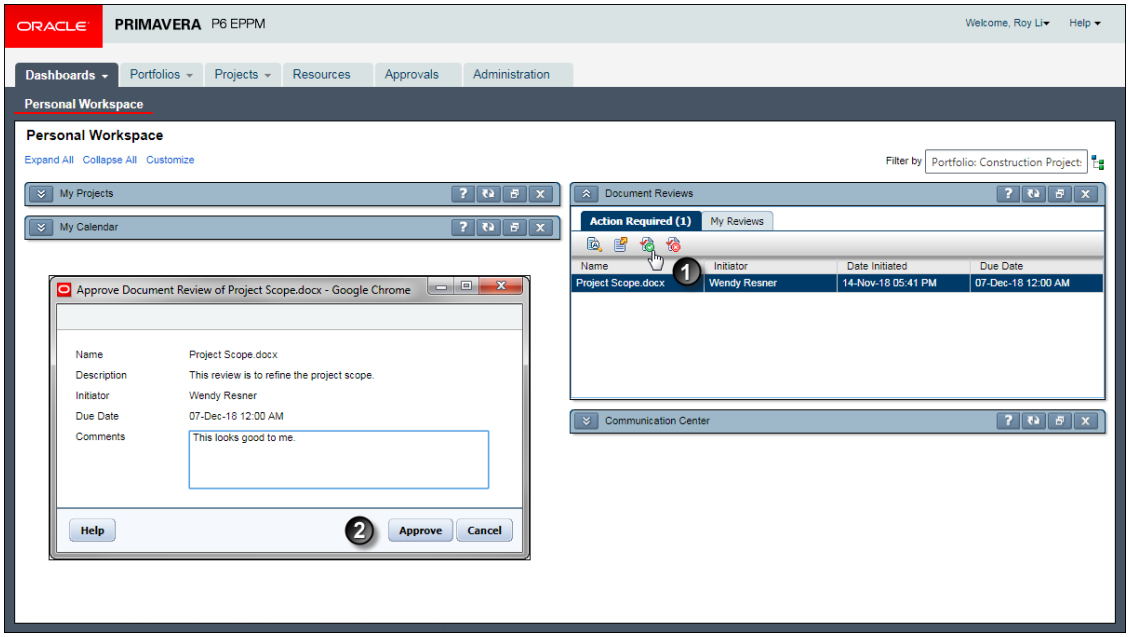


Table of Screen Highlights

Item	Description
1	Click on the document you want to approve and click Approve.
2	In the Approve Document Review dialog box, enter your review comments and click Approve.

Reviewing Documents

If you have P6 installed with configured workflow and content repositories, you can start or participate in a document review.

Select one of the links below based on whether you are starting or participating in the review:

- Creating Document Reviews
- Participating in Document Reviews

Creating Document Reviews

If you have the optional content repository installed with P6, you can initiate a document review.

To create a document review:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Projects** tab.
3. On the **Projects** tab:
   a. Select the document you want reviewed.
   b. Click **Start Review**.

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4. In the **Start Review** dialog box:
   a. Enter a value in each required field.
   b. Click **Assign Reviewers** and select one or more reviewers from the dialog box.

> **Note**
>
> If you select the review type Everyone Must Review In Sequence, use the **Up** and **Down** arrows to arrange the sequence of reviewers.

   c. (Optional) Click **Due Date** and select a date by which the reviewers must complete the review.
   d. Click **Create Review**.

> **Tip**
>
> - Reviews you have initiated appear on the My Reviews tab of the Document Reviews portlet on the dashboard. Click Details, and view a list of all reviewer responses, review details, and the names of reviewers who have not yet responded to the review. Once the review is complete, the document no longer appears in the Document Reviews portlet. You can subsequently access details for the completed review from the Document Details dialog box.
> - If the Start Review button is disabled, this indicates one of the following conditions exists, preventing the start of a new review:
>   – A template is open
> - You can also create document reviews from the My Documents portlet of the Dashboards page.
> - The current version of the document is in review or has been reviewed
> - A previous version of the document is in review
> - Multiple documents are selected (You can send only one document for review at a time)
> - The project or document is already checked out for exclusive use
> - The Security Policy for the document is set to Personal
> - You do not have the appropriate privileges
> - A template is open

Participating in Document Reviews

If you have configured the optional *Content Repository* with P6, and you are assigned as a reviewer for a specific document, you can review documents from the Document Reviews portlet on a dashboard. As a reviewer, you can access review details, add comments or attachments, and approve or reject the document.

To respond to a document review:

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1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Document Reviews** portlet and click the **Action Required** tab.
4. On the **Action Required** tab:
   a. Select a document to review.
   b. Click **View** to view the document.
   c. Click **Details** to view attachments and comments from previous reviewers.
   d. Click **Approve** or **Reject**.
5. In the Approve Document Review or Reject Document Review dialog box:
   a. Enter any supporting comments.
   b. Click **Approve** or **Reject**.

Tip

- If the review type is set to Everyone Must Review in Sequence, the review will not appear in subsequent reviewers' Action Required portlets until the document has been approved by the previous reviewer.
- If the Document Reviews portlet is not available, configure dashboard content and add it to the dashboard.

Terminating Document Reviews

You can terminate document reviews that you initiated.

To terminate a document review:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Document Reviews** portlet.
4. In the **Document Reviews** portlet, click the **My Reviews** tab.
5. On the **My Reviews** tab:
   a. Select the name of the document review you want to terminate.
   b. Click **Terminate**.

Tip

Configure dashboard content to add a portlet to the dashboard if it is not available.

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Searching for Documents

If the content repository is installed and configured, you can search for documents using a basic search with keywords and operators or you can conduct an advanced search and construct more complex search queries for documents.

To search for documents:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab, click **Search**.
4. In the **Document Search** dialog box:
   a. Enter keywords in the **Search Text** field.
   b. If you want to search document contents, select the **Search title and contents** option.

      Note

      If this option is switched off, P6 will search only against document titles.

   c. Enter a value in the **Limit results to (maximum 100)** field to specify a limit on the number of search results.
   d. If you want to search by author or creation date, click the **Advanced** button and configure the fields in the **Advanced Search Options** section.

      Note

      - If you choose to search by both author and date, only documents which were created by the selected people between the selected dates are returned. If you need to search for documents created by specific people or between specific dates, run two separate searches.
      - When using the advanced search, you can only search the most recent versions of documents.

   e. Click **Search**.

Tip

- From a dashboard, you can search your private documents, and all project documents to which you have access.
- To reset all the settings in the Document Search dialog box, click the Clear Criteria button. To clear the list of documents on the Documents page, click **Search Options** and choose Clear Search Results.

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Viewing Documents

If P6 is configured to use the content repository, you can view public documents or your private documents.

To view documents:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab:
   a. Expand a project and select a document.
   b. Click **View Options** and click either **View** or **Open**.

Tip

- If P6 is configured with a content repository and you have the appropriate privileges, you can view documents with AutoVue.
- You can also view documents from the Documents detail window of the Activities page or the My Documents portlet of the Dashboards page.

Downloading Documents

If P6 is installed with a configured content repository and workflow repository, you can download a read-only copy of a document to your local machine or another specified location.

Downloading enables you to keep a personal copy of the document and make modifications to it in the document's native application. Any changes you make to the document are saved locally and do not affect the original document in P6.

To download documents:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, select the **Project** tab.
3. On the **Project** tab, expand a project, select a document, and click **View Options** **Download**.

Tip

You can also download documents from the My Documents portlet of the Dashboards page.

About Project Scheduled Services

Project Scheduled Services runs a service at the time and frequency that you select for the projects, EPS nodes, project code values, and portfolios that you choose. You can run a

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scheduled service against both filtered and manually created portfolios. You can schedule the following types of services: apply actuals, export (XER or XML), import (XER or XML), level, project checker, publish, schedule, summarize, and send to schedule sheet. Use this feature to schedule services so you do not have to run them manually.

Creating Project Scheduled Services

You can schedule services to run at intervals you choose on projects that you select. Available services include apply actuals, delete published data, export, import, level, project checker, publish, schedule, summarize, and send to schedule sheet.

To create project scheduled services:

1. On the **Navigation Menu**, expand **Administration** and click **Scheduled Services**.
2. On the **Scheduled Services** page, click **Project**.
3. Click **Add** and select the type of service to add.
4. Enter a name for the new service.
5. In the **Project Settings** detail window:
   a. Select **Add** to add projects, EPS nodes, project code values, or portfolios to the Project table.

      > **Note**
      >
      > You cannot select projects for Import Primavera XML services.

   b. Enter or select a value for every field.
   c. For Export XML and Publish services, optionally, in the Baselines field, click **Select** to select the baselines to export or publish.
6. Select or clear the **Enabled** option to determine whether the service will run.
7. Select **Save**.

> **Tip**
>
> You cannot schedule services for project templates.

Selecting Baselines for Scheduled Services

Select baselines for scheduled Publish and Export Primavera XML services to control which baselines the service includes for projects selected directly or resolved from EPS nodes, portfolios, or project code values.

Before you can select the baselines to include with a scheduled service, you must select the projects to include, either by selecting projects individually, selecting an EPS node, or selecting a project code that identifies the projects the service will include.

To select baselines for a scheduled service:

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1. On the ☰ **Navigation Menu**, expand **Administration** and click **Scheduled Services**.
2. On the **Scheduled Services** page, click **Project**.
3. Select the Export Primavera XML or Publish scheduled service for which you want to select the baselines to include.
4. Click the **Project Settings** detail tab.
5. Select the project, EPS, or Project Code for which you want to specify baselines to include, and in the Baselines field, click **Select**.
6. In the **Select Baselines** dialog box:
   - Select the **Project Baselines** option to include each projects assigned Project baseline.
   - Select the **User Baselines** option to include all of the baselines you have selected as your primary, secondary, or tertiary baseline.
   - Clear the **User Baselines** option and select the **Primary**, **Secondary**, and **Tertiary** options to include only certain assigned user baselines.
   - In the **Baselines to export:** grid, expand individual project rows and select or clear specific baselines to include or exclude individual baselines.
7. Click **Select**.

Configuring Project Scheduled Services

You can configure the name, time, frequency, projects, and settings for a scheduled service.

To configure scheduled services:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Scheduled Services**.
2. On the **Scheduled Services** page, select **Project**.
3. Select a service.
4. Select or clear the **Enabled** option.
5. In the **Project Settings** detail window:
   - Configure the fields and lists.
6. Click **Save**.

> **Tip**
>
> Services for project templates cannot be scheduled, they must be run manually.

Deleting Published P6 Project and Baseline Data

Perform the steps below to delete published project data. This is useful when you no longer need to report on projects which are completed, but you need to retain the projects in your database.

You can choose to delete published data for a set of projects or all projects.

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> **Note**
>
> When you delete published data for a project, P6 also deletes the published data for its associated baselines.

To manually delete all P6 project data:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   - On the **Actions** menu, click **Delete Published Data**.

To manually delete P6 project data for a set of projects:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Open all the projects whose published data you want to delete.
3. On the **Navigation Menu**, expand **Projects** and click **Activities**.
4. On the **Activities** page:
   a. On the **Actions** menu, click **Delete Published Data**.

> **Tip**
>
> - Only Admin Superusers or users with the Delete Published Project Data privilege assigned can delete published data.
> - You can delete published baseline data without deleting published project data in the Define Baselines dialog of the EPS or Activities pages.

Deleting Published P6 Data for Baselines Only

You can delete published baseline data. This is useful when you no longer need to report against older baselines.

To manually delete published data for baselines:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page:
   - On the **Actions** menu, click **Define Baselines**.
3. In the **Define Baselines** dialog box:
   a. Select the baselines whose published data you want to delete.
   b. Click **Context** and select **Delete Published Data**.

About Publication Services

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Before you can generate reports or view data in some areas of P6, data must be refreshed and calculations must be made in precisely arranged tables and fields. *Publication Services* address these needs, gathering and calculating data as close as possible to real-time. To make this happen, you can configure P6 to publish data to specific tables used for these features. An administrator must configure settings for Publication Services before you can publish data. For reports, depending on the type of data published, P6 tables may still be used to generate reports, or a combination of P6 and reporting tables may be used to generate them.

Your organization's P6 EPPM published data has two categories: *project* data and *global* data.

- **Published project data** includes all information about your projects, including aggregates, calculations, and auditing data. Most pages that use published data use published project data.
  You can publish project data on an ad-hoc basis using the Publish Projects item on the Actions menu of the EPS or Activities pages, allow P6 to publish automatically on the basis of how much the project has changed, or you can schedule a service to publish project data automatically.
- **Published global data** includes enterprise data for projects (for example, codes and UDFs), activities (for example, codes and UDFs), resources, and calendars as well as the enterprise data dictionary and security data. Reports use published global data as well as published project data.
  Global data is published by services which are usually scheduled to run automatically.

P6 tracks all projects enabled for publishing and determines when each project will be published on the basis of the number of changes made to the project and the time since its data was last published. You can configure the settings guiding this process on the Services page of Application Settings.

- **Publish a changed project when the... Number of changes exceeds**: P6 tracks the combined number of changes to the project itself as well as its WBS, activities, relationships, resource and role assignments, risks, project codes, activity codes, and UDFs.
- **Publish a changed project when the... Time since last publication exceeds**: P6 also considers when the project was most recently published and whether that period exceeds the Time since last publication setting.

If both the number of changes is great enough and the published data is old enough, as stipulated by these two settings, P6 creates a job to publish the data.

> **Note**
>
> P6 has checks in place to ensure that publishing jobs cannot impair system performance, no matter how many jobs are created at any given time.

Working with Publication Services

To achieve near real-time reporting, usage, and analysis date, you can configure P6 to publish to tables that store updated data, including calculations and summary data. These tables also create views for generating reports. The P6 data is split into two general categories: *project* data and *global* data. Project data includes all information about your projects, including aggregates and calculations. Global data includes enterprise data, as well as resource and role, portfolio, and security data. The image below encapsulates the key concepts in the publication and reporting process.

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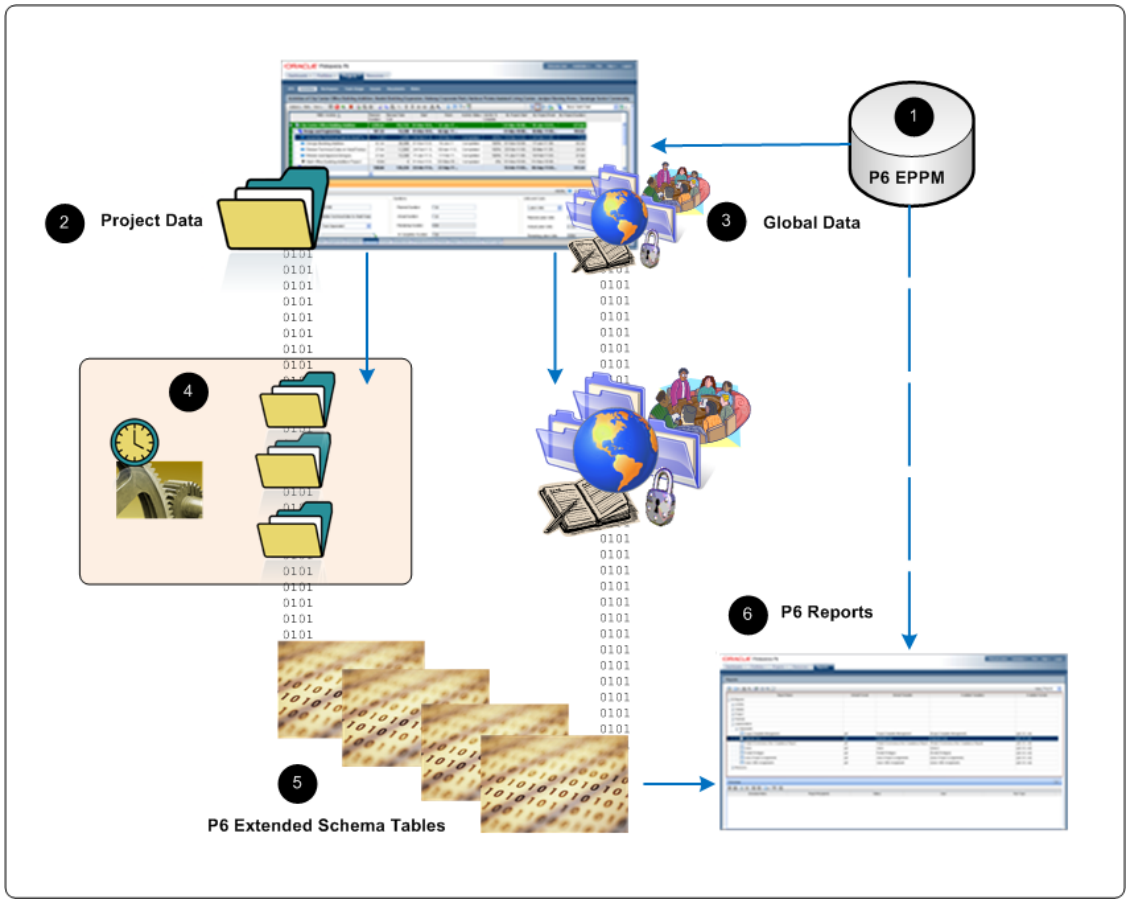


Table of Key Publication Services Concepts

Item	Description
1	**EPPM Database**: The EPPM database captures all the data your organization generates every second of every day. However, the raw data in the EPPM database is not structured for immediate reporting.
2	**Project Data**: You can configure P6 to publish a project based on publication thresholds. Based on the options you select, you can prioritize projects for publication in a queue. If necessary, you can manually add a project to the queue.
3	**Global Data**: You can configure services in P6 to schedule the publication of global data based on recurring intervals that you specify. If necessary, you can also immediately publish this data manually.
4	**Project Queue**: Projects publish in sequential order based on priority. Your administrator can control which projects are added to the publishing queue, when, and in what order. These options ensure the project data you need most is available for P6 in near real-time.

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Item	Description
5	**P6 Extended Schema Tables**: The project and global services recalculate certain logical fields in the P6 EPPM database and store them as physical fields in the P6 Extended Schema tables so they are available for reporting and other purposes. Some fields in P6, such as durations, are calculated in real time as related field data is changed and are not stored in the database. Publication services recalculate these fields and store their values in the extended schema tables. Other fields, such as notebook topics, are not stored in the database in a format suitable for reporting. For these fields, publication services will convert them to a format more suitable for reporting. For information about which tables are updated by the Publication Services, see the following knowledge management document: What PX tables are updated when running Global Scheduled Services or Publish Project (KB495991)
6	**P6 Reports**: You can run reports directly against P6 Extended Schema table views.

Configuring Publication

Before data can be published, you must configure the settings that control publishing in P6.

1. Specify the timeframe for which data should be published and the distribution interval for the published data.

   See Defining Publication Periods.

2. Enable publication and specify how often data will be published.

   See Enabling Automatic Publishing of P6 Project Data*Enabling Automatic Publishing of P6 Project Data*Enabling Automatic Publishing of P6 Project Data.

3. Determine the types of enterprise and project data to publish.

   See Enabling Automatic Publishing of P6 Global Data*Enabling Automatic Publishing of P6 Global Data*Enabling Automatic Publishing of P6 Global Data.

4. Specify which projects should be published and the relative priorities of projects for publishing.

   See Configuring Publication Service Settings for Projects.

5. Optionally set up services to publish project data at scheduled intervals.

   See Creating Project Scheduled Services.

Publishing P6 Data

Reports based on P6 data require timely access to the most current data in order to be accurate. For example, report recipients expect to see updated enterprise data and project data including any calculations.

Some other areas of P6 also rely on published data to provide accurate information.

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In order to provide this data, P6 generates and stores data in reporting tables (the *P6 Extended Schema*). You can configure P6 to publish essential data to the tables automatically, schedule the publication of project data to happen at specific times of day, or you can choose to generate it on demand so that the most current data is available. You can select to be notified by email if publication services fail.

The data is split into two general categories: *project* data and *global* data. Project data includes all information about your projects, including baselines, summaries, calculations, and audit data. Global data includes enterprise data, project, activity, resource, calendar, enterprise data dictionary, resource and role data, security and audit data. Most pages that use published data access project data. Reports can use both project and global data.

> **Note**
>
> In areas of the software that show published data, a user who has the right to view costs and financials at WBS level but not at Project level will not see financial data at the WBS level. Although the user has the privilege to view cost and financial data at WBS level, the data is only published at project level.

Defining Publication Periods

Before publishing global or project data for reporting, define the publication period. The publication period you define should be large enough to capture all the project data you need to include in reports. Data before or after the defined publication period range is assigned to the period before or after the publication period range (respectively).

> **Caution**
>
> **Caution** You can perform these steps again at any time to modify your settings. However, if an *Admin Superuser* modifies the Start date, Time distributed interval, or Finish date is current date plus fields, all data will be fully recalculated. Oracle recommends that you only reconfigure publication options on weekends or during off-peak hours to prevent the disruption of other P6 features.

To define the publication period:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Services**.
3. On the **Services** page, in the Publication Periods section:
   a. In the **Start date** field, click **Select Date** to select the exact month, day, year, and time to mark the initial start of the data publication period. Select any date in the past that represents a reasonable amount of historical spread data for your organization. For example, in order for users to be able to produce time-distributed reports for any date range, enter the earliest project start date at your organization.
   b. In the **Finish date is current date plus** field, select a numeric quantity and unit of time to construct a dynamic period of time. Whenever a publication service runs, this period of time is added to the current date to determine the finish date for the publication of data. For example, if the value is 5 years, time-distributed data will always be

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published covering the period of time that begins with the value in the Start Date field and extends five years into the future each time a service runs.

c. In the **Time distributed interval** field, select the unit of time in which time distributed data will be recalculated and published. Time distributed interval is set to Week by default. Set this to Day if you need to see daily data.

d. Click **Save**.

Enabling Automatic Publishing of P6 Project Data

Perform the following procedure to enable projects for publication, and to set options for automatic project publication. Then, as you work, P6 automatically detects the changes to your projects that trigger the publication of their data.

To enable Publication Services for project data:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, select **Services**.
3. On the **Services** page, in the Project Publication section:
   a. Select **Enable Publish Projects** to enable automatic project publication based on defined thresholds. Selecting this option also allows users to publish projects on demand.
   b. In the **Publish projects every** field, select an interval by which projects are polled to be published.
   c. Enter a number in the **Number of changes exceeds** field. This threshold setting determines the number of edits users can make to the project data before P6 publishes its data. Assuming a constant rate of change among projects, a lower value will result in more frequent publication of project data. If you enter a value of 0, projects with tracked changes will be automatically published.
   d. Enter a time period for the **Time since last publication exceeds** field. This threshold setting determines how often the publication of project data should occur. For example, if you enter 12 hours, the project data will be published every 12 hours unless the threshold for the number of changes has already been reached.
   e. Select **Publish idle projects** to add projects to the service queue that are enabled for publication but have not been changed during the time threshold. This setting is only valid for the initial run of the service.
   f. In the **Maximum number to publish** field, enter the maximum number of pending idle *Publish Project* services that can be present at once in the service queue. This prevents performance problems during peak demand when enabling the publication of a large number of projects. For example, if the service runs and queues 40 projects that have exceeded specified thresholds and must be published, or that have been published on demand by users, and you have set the maximum to 100, P6 will schedule up to 60 idle projects for publication.
   g. Select **Publish resource and role data** if you want to be able to publish resource and role spread data.
   h. Select **Enable Baseline Publication** if you want to be able to publish baseline data.
   i. Select **Enable Notification Email** and type an email address in the **Notification Email address** field if you want to receive an email if publication services fail.

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j. Click **Save**.

Tip

- You can also schedule project data to be published at specific times of day.
- If your organization is upgrading to P6, select Publish idle projects to add your migrated projects to the service queue after your database is upgraded. This will publish all your projects in the queue and refresh the available data for reporting. After an upgrade, this setting is no longer applicable, and projects will be submitted to the service queue based on threshold values specified on the Application Settings page.
- Clear the Publish idle projects option if your organization does not report against completed projects.
- The Maximum number to publish field is only applicable immediately following an upgrade, when all projects are considered idle. When all projects have been published, the service queue will no longer be constrained based on this setting.
- A project will be automatically submitted to the service queue if you change the project baseline, calendar, or data date. Projects are also automatically submitted to the queue if you select or clear Calculate Activity % Complete from activity steps option, or modify the default price/unit value for assignments without activities, from the Set Project Preferences dialog box.
- For threshold settings, projects are added to the service queue based on tracked changes to data. Only changes to activities, resource/role assignments, relationships, risk assignments, UDF values, activity code assignments, project code assignments and the WBS are tracked.
- You can delete published project data by selecting **Delete Published Data** on the **Actions** menu of the EPS page.

Enabling Automatic Publishing of P6 Global Data

Perform the steps below to configure P6 to automatically publish any of the following types of global data to reporting tables.

- Enterprise Data
  - Project Data
  - Activity Data
  - Resource Data
  - Calendar Data
  - Enterprise Data dictionary definitions
- Enterprise Summary Data including portfolio data
- Resource Management Data
- Security Data
- Audit Data

To automatically publish P6 global data:

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1. On the **Navigation Menu**, expand **Administration** and click **Scheduled Services**.
2. On the **Scheduled Services** page, select **Global**.
3. On the **Global** page:
   a. Select a service, then configure its settings in the **Service Settings** detail window. For example, you might specify that the service runs daily with a start time of 08:00 AM.

      > **Note**
      >
      > Oracle recommends running the Publish Security service first if the Run After Previous option is selected in the Run Service list for other publication services. Running the Publish Security service first will ensure that security data updates in the extended schema as soon as possible and ensures that the security restrictions are in place before you run the report.

   b. Select the **Enabled** option for any of the global services listed.
   c. If you choose to run one or more services with the relative frequency value of *After previous service*, click **Move Up** or **Move Down** to arrange the services in your preferred sequence.
   d. Click **Save**.

Configuring Publication Service Settings for Projects

After enabling automatic publishing or adding a job to publish project data on a scheduled basis, perform the following procedure to configure settings for each individual project in *Publication Services*. Then, as you work, P6 automatically detects the changes to your project that trigger the publication of its data in the service queue.

To configure Publication Service settings for a project:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project.
   b. Click **Context** and select **Set Project Preferences**.
   c. In the **Project Preferences** dialog box, select **Analytics &Services**.
   d. On the **Analytics &Services** page, in the Publication section:
      - Select the **Enable Publication** option.
      - Adjust the relative **Publication Priority** up or down between 1 and 100 with 50 being the default priority value, 1 being the highest priority, and 100 being the lowest.
   e. Click **OK**.

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Tip

- By default, all projects are enabled for publication. You only need to modify the Enable Publication setting if you want to disable publication for a project or re-enable publication of a previously disabled project.
- Clearing the Enable Publication setting does not delete previously published data. You can delete published project data by selecting Delete Published Data on the **Actions** menu in the EPS page.
- If you wish to modify publication settings for many projects at one time, you can display the Enable Publication, Last Published On, and Publication Priority fields as columns in your EPS view.
- If you want to publish Baseline data, you must also publish project data for the relevant projects.

Configuring Publication Service Settings for Baselines

After enabling automatic publishing or adding a job to publish project data on a scheduled basis, perform the following procedure to configure settings for each individual project's baselines in Publication Services. If you chose to publish project data on a scheduled basis, you can select the baselines to publish on the basis of their assignment as the project baseline or as the user's primary, secondary, or tertiary baseline and select or exclude specific baselines to publish. Then, as you work, P6 automatically detects the changes to your baselines that trigger the publication of its data in the service queue.

To configure Publication Service settings for a baseline:

1. In the context selector, select **Projects**.
2. Click **Open Projects**.
3. In the **Open Projects** dialog box:
   - Open one or more projects whose baselines you want to enable for publication.
4. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
5. On the Activities or EPS page, click **Actions** and select **Define Baselines**.
6. **Note**

   The selections you make here control the baselines that will be published if you use the Publish Projects item on the Actions menu of the EPS or Activities page. The baselines published by a scheduled service must be selected in the Baselines field of the Project Settings detail tab of the service on the Project Scheduled Services page.

   In the Define Baselines dialog box:

   a. If you want to switch on publication for all the configured baselines for a project, select the **Publish** option in the project band.

   b. If you want to switch on publication for only some baselines for a project, expand the project band and select the **Publish** option for the baselines you want to publish.

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c. Click **Save**.

Publishing P6 Project Data On Demand

You can publish the data from projects on demand. Projects are added to the queue of projects being processed for publication the next time the Publish Projects service runs. You can check the status of the Publish Projects service after it has been added to the service queue by selecting View Service Status from the User menu. When you publish projects on demand, any of the projects' baselines which is enabled for publishing will also be published. Only projects enabled for publication are published.

To publish P6 project data on demand:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   - On the **Actions** menu, click **Publish Projects**.

> **Tip**
>
> - In order to manually project data from the EPS page on demand, *Publication Services* must be enabled and configured.
> - You can publish all open projects by clicking Publish Projects on the **Actions** menu of the Activities page. Alternatively, you can publish projects by selecting one or more projects on the EPS page, and then using the right-click menu. You can also delete published data for all open projects by selecting Delete Published Data on the Actions menu of the Activities page.
> - If you have permission to view application settings, you can see the settings for the Publish Projects service, including how often the service runs, on the Global tab of the Secheduled Services page.
> - A project will be automatically submitted to the service queue if you change the project baseline, calendar, or data date. Projects are also automatically submitted to the queue if you select or clear the Calculate Activity % Complete from activity steps option, or modify the default price/unit value for assignments without activities from the Set Project Preferences dialog box available from the **Actions** menu the EPS page.

Deleting Published P6 Project and Baseline Data

Perform the steps below to delete published project data. This is useful when you no longer need to report on projects which are completed, but you need to retain the projects in your database.

You can choose to delete published data for a set of projects or all projects.

> **Note**
>
> When you delete published data for a project, P6 also deletes the published data for its associated baselines.

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To manually delete all P6 project data:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   - On the **Actions** menu, click **Delete Published Data**.

To manually delete P6 project data for a set of projects:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Open all the projects whose published data you want to delete.
3. On the **Navigation Menu**, expand **Projects** and click **Activities**.
4. On the **Activities** page:
   a. On the **Actions** menu, click **Delete Published Data**.

Tip

- Only Admin Superusers or users with the Delete Published Project Data privilege assigned can delete published data.
- You can delete published baseline data without deleting published project data in the Define Baselines dialog of the EPS or Activities pages.

Deleting Published P6 Data for Baselines Only

You can delete published baseline data. This is useful when you no longer need to report against older baselines.

To manually delete published data for baselines:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page:
   - On the **Actions** menu, click **Define Baselines**.
3. In the **Define Baselines** dialog box:
   a. Select the baselines whose published data you want to delete.
   b. Click **Context** and select **Delete Published Data**.

Publishing P6 Global Data On Demand

You can publish any of the following types of global data to the reporting tables on demand.

- Enterprise Data
  - Project Data
  - Activity Data
  - Resource Data

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  - Calendar Data
  - Enterprise Data dictionary definitions
- Enterprise Summary Data including portfolio data
- Resource Management Data
- Security Data
- Audit Data

To publish P6 global data on demand:

1. On the **Navigation Menu**, expand **Administration** and click **Scheduled Services**.
2. On the **Scheduled Services** page, select **Global**.
3. On the **Global** page:
   a. Select a global service.
   b. Click **Run Service**.
   c. In the resulting message box, click **OK**.

Tip

- If the service listed under the manually selected service is configured to run After previous service, it will run automatically when the selected service finishes.
- You must have the *Administer Global Scheduled Services* global security privilege to run a global scheduled service.

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5

Resources

Roles

About Roles

Roles represent personnel job titles or skills needed to execute projects. Architect, general laborer, quality assurance tester, and engineer are all examples of possible roles. You can create a standard set of roles that you then assign to labor and non-labor resources and activities for all projects in the organization. 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 multiple price per unit rates and unit per time limits for each role to accurately plan future costs and allocation.

You can assign one or more roles to individual resources. When you assign roles to a resource, you also indicate their proficiency in that role and identify which role is their primary role. A primary role is the main role the resource is currently performing. The proficiency level describes the resource's skill level in that role. For example, Joe is a resource and fills the role of both software engineer and manager. He has been a software engineer for 20 years and is *1 - Master* in that role; however, his primary role is manager, which he has been for 5 years and his proficiency level is *3- Skilled*.

Assign roles to activities as you would resources during project schedule and cost planning. When your plans are finalized, you can replace roles with resources, based on each activity's role and skill requirements.

Creating Roles

Create a standard set of roles that you can assign to labor and nonlabor resources and activities.

To create roles:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Roles**.
3. On the **Roles** tab:
    a. Click **Add**, or click an existing role and click **Context** then select **Add Child Role** to add a role in a hierarchy.
    b. In the **ID** field, click and type a unique identifier for the new role.
    c. In the **Name** field, click and type a role name.
    d. In the **Description** field, click and type a description of the role's responsibilities

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e. To create or modify a hierarchy of roles, click **Context** and select **Move Up**, **Move Down**, **Move Left**, or **Move Right** to position the new row.

4. Click the **Units and Prices** detail window.
5. In the **Units and Prices** window:
   a. Click **Add** to add a new row to the table.
   b. In the **Effective Date** field, double-click and select the effective date on the calendar.
   c. In the **Max Units/Time** field, double-click and type the maximum work units per time for this role.
   d. Configure the rate and price per unit fields fields for the new effective date.
6. Click **Save**.

Assigning a Resource to a Role

The set of roles you assign to a resource describes the resource's skill capabilities. These role assignments make it easy to assign resources to activities according to role. You can also assign roles to activities directly when you are unsure of the actual resources available to work on the activities. You can later replace the roles with the applicable resources.

To assign a role to a resource from the Roles tab:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Roles**.
3. On the **Roles** tab:
   a. Click the name of the role.
   b. Click the **Resources** detail window.
4. In the **Resources** detail window, click **Assign...**.
   - In the **Select Resource** dialog box, select the resource you want to assign to the role, and click **Select**.

     You can use Ctrl+click or Shift+click to select multiple resources.
5. In the **Resources** detail window:
   a. To change the proficiency level for that resource, double-click the **Proficiency** field and select a level.
   b. If this is the primary role for the resource, select the **Primary Role** option for the resource.
6. Click **Save** .

Tip

- You can assign more than one resource to a role.
- You can also assign a role to a resource from the **Resources** tab. Use this method if you want to view all roles assigned to a single resource.

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Assigning a Role Team to a Role

Using role teams can simplify resource planning. You can do this from either the Roles tab or the Role Teams tab in the Resource Administration area. Use this method if you want to view all role teams assigned to a particular role.

To assign a role to a role team:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Roles**.
3. On the **Roles** tab:
   a. Click the role you are assigning to a role team.
   b. Click the **Role Teams** detail window.
4. In the **Role Teams** detail window, click **Assign...**.
5. In the **Assign Role Team** dialog box:
   - Expand either the **Global** or **User** category, choose a role team, and click **Select**.
6. Click **Save**.

> **Tip**
>
> You can also assign a role to a role team from the Role Teams tab. Use this method if you want to view all roles assigned to a particular role team.

Assigning Role Codes

With potentially hundreds of roles in use across the enterprise, role codes provide an efficient means for tracking and sorting roles for reporting or analysis.

Use this procedure to assign role codes to roles. Once assigned, you can categorize roles using codes.

To assign resource codes:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Roles**.
3. On the **Roles** tab:
   a. Click a role.
   b. Click the **Codes** detail window.
4. On the Codes detail window, click **Assign...**.
5. In the **Select Role Code** dialog box:
   a. Expand a role code.
   b. Select a code value and click **Assign**.
6. Click **Save**.

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Assigning Role Rates

Use this procedure to assign rates to roles. You can assign multiple rates to roles to reflect price changes over time. You can assign time-varying rates for roles to more accurately determine total resource (and activity) costs. You can also assign role work limits to define the maximum amount of work units the selected role can perform in a single work period.

To assign role rates:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Roles**.
3. On the **Roles** tab:
   a. Click a role.
   b. Click the **Units and Prices** detail window.
4. In the **Units and Prices** detail window:
   a. Click **Add**.
   b. In the **Effective Date** field, double-click to open the calendar and choose a date and time to start the new rate.
   c. In the **Max Units/Time** field, double-click and type the maximum work units per time for this resource.
   d. In the appropriate price fields, double-click and type an amount. The default time period is price per hour unless you specify another time period.
5. Click **Save**.

Role Teams

About Role Teams

A role team is a collection of roles that are often needed on the same project or the same activities. Role teams are useful when you want to categorize and view allocation for related roles. Role teams allow you to categorize and group roles so you can readily find data relating to a particular role. A role can be assigned to more than one role team. When working with tabs and pages that display role data, you can choose to organize the hierarchy by role team. You can view team data such as total team units or individual unit values. If you have the required security privilege, you can create global role teams. All users that have access rights to view resource data can create user role teams.

Creating Role Teams

Use this procedure to create role teams. Role teams let you categorize roles so you can view and analyze data that relates to a specific group that interests you. When working with tabs and pages that display role data, you can choose to organize the hierarchy by role team, then choose to view team data, such as total units for the team, or individual unit values for each team member.

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1. On the ☰ **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Role Teams**.
3. On the **Role Teams** tab:
   a. Click either **Global** or **User**.
   b. Click + **Add**.
   c. In the **Name** field, click and type a role name.
   d. Click **Save**.
4. Assign roles to the role team.

Assigning a Role to a Role Team

Perform these steps to assign a role to a role team. You can assign a role to a role team from the **Role Teams** tab or the **Roles** tab. Use this method if you want to view all roles assigned to a particular role team.

To assign a role to a role team:

1. On the ☰ **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Role Teams**.
3. On the **Role Teams** tab:
   a. Expand either the **Global** or **User** category, and click the role team for which you are assigning a role.
   b. Click the **Roles** detail window.
4. In the **Roles** detail window, click **Assign...**.
5. In the **Assign Role** dialog box:
   a. Choose a role and click **Select**.

      Press **Shift+click** or **Ctrl+click** to select multiple roles.
   b. Click **Close**.
6. Click **Save**.

> **Tip**
>
> To view all role teams assigned to a particular role, assign a role team to a role from the **Roles** tab.

Resources

About Resources

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A resource is any quantifiable item in limited supply and of sufficient value to justify tracking and assigning to specific activities for a project. Resources include general or specialized labor, non-labor items such as equipment, and material items such as bricks.

Resources perform roles, if defined. Resources are indirectly assigned to activities by first planning the role required. It is also possible to directly assign resources to activities. For example, Chris, a level 2 contractor with the confirmed skills and status, is directly assigned to activity 01. However, a technician level 4 role is assigned to activity 02. The project will proceed while management determines the best available resource to fulfill this role.

When you assign a resource to an activity, if that resource has a primary role, the assignment includes the resource's primary role.

> **Note**
>
> Exercise extreme caution when deleting resources. When a resource is deleted, all historical data for that resource 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 you should not delete resources, but clear the Active option for the resource on the Resources tab on the Resources Administration page.

Adding Resources

Perform these steps to add resources to the resource pool. Resources include the personnel and equipment that perform work on activities across all projects. Resources are generally reused between activities and/or projects. Resources can be distinguished as either labor, material, or nonlabor. Labor and nonlabor resources are always time-based, and material resources, such as consumable items, use a unit of measure you can specify.

To add a resource:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab:
   a. Click **Add** and select **Sibling Resource** or **Child Resource**.
   b. In the **Resource ID** field, type an ID for the new resource.
4. In the **General** detail window:
   a. Type a **Resource Name** for the resource.
   b. Select the **Active** option if the resource is available.
   c. Enter any other information in the appropriate fields.
5. In the **Units and Prices** detail window:
   a. Click **Add**.
   b. Configure the **Effective Date**, **Max Units/Time**, and **Standard Rate**.
   c. Enter any other information in the appropriate fields.
6. Click **Save**.

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> **Tip**
>
> - 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 importing resource data from a Microsoft Excel (.xlsx) spreadsheet.

Assigning a Role to a Resource

The set of roles you assign to a resource describes the resource's skill capabilities. These role assignments make it easy to assign resources to activities according to role. You can also assign roles to activities directly when you are unsure of the actual resources available to work on those activities. You can later replace the roles with the applicable resources.

To assign a role to a resource:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab:
   a. Click the resource.
   b. Click the **Roles** detail window.
4. In the **Roles** detail window, click **Assign...**.
5. In the **Assign Role** dialog box:
   - Select the roles you want to assign to the resource and click **Select**.

     You can use Ctrl+click or Shift+click to select multiple roles.
6. In the **Roles** detail window:
   a. To change the proficiency level for that role, double-click the **Proficiency** field and select a level.
   b. A resource can have many roles but only one primary role. The first role added is marked as the primary role. To change this, select the **Primary Role** field for the appropriate role.
7. Click **Save**.

> **Tip**
>
> Assign a resource to a role from the **Roles** tab to view all resources assigned to a particular role.

Assigning a Resource Team to a Resource

Perform these steps to assign a resource team to a resource. You can do this from either the **Resources** tab or the **Resource Teams** tab. Use this method if you want to view all the resource teams assigned to a single resource.

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To assign a resource to a resource team:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab:
   a. Click the name of the resource you are assigning to a resource team.
   b. Click the **Resource Teams** detail window.
4. In the **Resource Teams** detail window, click **Assign...**.
5. In the **Select Resource Team** dialog box:
   a. Expand either the **Global** or **User** category, and select a resource team.
   b. Click **Select**.
6. Click **Save**.

> **Tip**
>
> To view all resources assigned to a particular resource team, assign a resource to a resource team from the **Resource Team** tab.

Configuring Resource Settings

Use the Settings detail window available from the Administration Resources tab to define settings for the resource, such as the resource calendar and default units/time, as well as P6 Team Member settings. If you subsequently change a setting, it affects only new assignments, not existing ones.

To configure resource settings:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab, select the resource for which you want to define general settings.
4. Click the **Settings** detail window, review the following options and make selections based on your project needs.

   Calendar: Click **Select** to assign a calendar to the resource that is different from the default calendar. Click **Create Personal Calendar** to create a unique calendar for the resource, or select an existing calendar, and click **Select**.

   Calculate Costs from Units: Select this option to indicate that any new assignment for this resource will have its cost recalculated whenever any quantity changes occur, such as changing an activity's remaining duration.

   Auto Compute Actuals: Select to automatically calculate the selected resource's actual quantity of work according to the project plan rather than reported hours in the **Timesheets** tab of P6 Team Member. Clear this option if the user will use timesheets.

   Overtime Allowed: Select to enable the labor resource to record overtime hours for activities.

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Default Units/Time: Use the default value or change the default units/time value. Enter these values as units per duration or as a percentage, depending on your choice in the Units/Time Format area of the My Preferences page.

Currency: Click ••• **Select** to select a currency that is different from the default currency, and click **Select**.

Overtime Factor: Type the number by which the resource's standard price should be multiplied to determine the resource's overtime price.

Team Member: Configure timesheet settings for the selected resource.

5. Click **Save**.

Setting Overtime Policy

To set overtime policy, which enables users to enter overtime in their timesheets:

1. On the ☰ **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab, click the **Settings** detail window.
4. In the **Settings** detail window, select the **Overtime Allowed** option.
5. In the **Overtime Factor** field, type the overtime factor by which the resource's standard price is multiplied to determine the overtime price (standard price * overtime factor = overtime price).

> **Note**
>
> In P6 and P6 Team Member, resources can enter overtime using separate overtime fields.

Assigning Calendars to Resources

Assign a global or resource calendar to a resource to determine when the resource is available to work.

To assign a calendar to a resource:

1. On the ☰ **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab:
   a. Click a resource.
   b. Click the **Settings** detail window.
4. In the **Settings** detail window, click ••• **Select** in the **Calendar** field.
5. In the **Select Calendar Name** dialog box:
   a. In the **View calendar type** list, choose to view either global or resource calendars.

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b. Select a calendar.

c. Click **Select**.

> **Note**
>
> If you want a personal calendar for the resource, click **Create Personal Calendar**. You can also create personal or resource calendars from the **Enterprise Data** page.

6. Click **Save**.

> **Tip**
>
> - You can perform the same procedure from the Calendars field on the Resources tab.
> - Configure **My Calendar** to edit exceptions to your personal calendar. To view a personal calendar, the resource must be a user in the system.

Assigning Locations to Resources

Assign locations to resources so you can report on resources by location in Primavera Analytics.

To assign a location to a resource:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab, click the **General** detail window.
   a. In the **General** detail window, click **Select** in the **Location** field.
   b. In the **Select Location** dialog box, select the appropriate location and click **Assign**.
4. Click **Save**.

> **Tip**
>
> - You must create locations before you can assign them.
> - You must have the Edit Resources global privilege to assign locations to resources.

Configuring Timesheet Reporting for Resources

Configure timesheet reporting if some users will report progress using the **Timesheets** tab in P6 Team Member Web.

To configure timesheet reporting for a resource:

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1. If the resource is not already defined as a user in the system:
   a. Add the user.
   b. Assign the resource to the new user.
2. Enable access to P6 Team Member Web by selecting the **Team Member** module access options.
3. Enable access to timesheets by selecting the **Timesheet** module access option.
4. Configure timesheet options for the resource if you are implementing non-automatic approval.

> **Tip**
>
> For faster setup of timesheet reporting, configure settings on the **Timesheets** page of the **Application Settings** pane, located on the **Administer** menu. Use these options to designate a default approval manager whenever you create a new resource.

Configuring Resource Settings for Timesheet Reporting

Configure timesheet reporting settings if some users will report progress using the Timesheets tab in P6 Team Member Web and you are implementing non-automatic approval.

To configure resource settings for timesheet reporting:

> **Note**
>
> You must perform these steps in order when configuring these settings for the first time for each new resource.

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. In the **Users** pane, select the user and click the **Module Access** detail window.
4. In the **Module Access** detail window, select **Timesheet**.
5. On the **Navigation Menu**, expand **Resources** and click **Administration**.
6. On the **Resources** page, click **Resources**.
7. On the **Resources** tab, select the resource and click the **Settings** detail window.
8. In the **Settings** detail window:
   a. Click **Select** in the **User Login** field.
   b. In the **Select User** dialog box, select the resources name from the list and click **OK**.
9. In the **Settings** detail window:
   - In the **Timesheet Approval Manager** field, click **Select**.
10. In the **Select User** dialog box, choose a manager to assign to the resource and click **OK**.

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11. Click **Save**.

> **Note**
>
> Users designated as timesheet approval managers are not automatically granted access to P6 Team Member Web, even if they are assigned the required module access. To enable timesheet approval managers to access timesheets in P6 Team Member Web, you must configure them as timesheet resources, as you would any other resource that requires access to timesheets in P6 Team Member Web. Configuring timesheet approval managers as timesheet resources enables approval managers to log into P6 Team Member Web to edit the timesheets of their reporting resources.

Assigning Resource Codes

With potentially hundreds of resources in use across the enterprise, resource codes provide an efficient means for tracking and sorting resources for reporting or analysis.

Use this procedure to assign resource codes to resources. Once assigned, you can categorize resources using codes.

To assign resource codes:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab:
   a. Click a resource.
   b. Click the **Codes** detail window.
4. On the **Codes** detail window, click **Assign...**.
5. In the **Select Resource Code** dialog box:
   a. Expand a resource code.
   b. Select a code value and click **Select**.

> **Note**
>
> - The top levels of the hierarchy in the Select Resource Code dialog box represent resource codes. All lower levels of the hierarchy represent resource code values.
> - You can only assign one value from each code to a resource. If you try to assign a second value from the same code, the first value will be replaced with the new value.

6. Click **Save**.

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Assigning Resource Rates

Use this procedure to assign rates to resources. You can assign multiple rates to resources to reflect price changes over time. For example, suppose the price per unit for a group of resources was $20.00 per hour for the months January through June, but the price rate increases to $30.00 starting in July through December. You can assign time-varying rates for resources to more accurately determine total resource (and activity) costs.

To assign resource rates:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab:
   a. Click a resource.
   b. Click the **Units and Prices** detail window.
4. In the **Units and Prices** detail window:
   a. Click **Add**.
   b. In the **Effective Date** field, double-click to open the calendar and choose a date and time to start the new rate.
   c. In the **Max Units/Time** field, double-click and type the maximum work units per time for this resource.
   d. In the appropriate price fields, double-click and type an amount. The default time period is price per hour unless you specify another time period.
5. Click **Save**.

Creating Import Templates for Importing Resources

Create a Microsoft Excel template to use when importing resource data.

To create an import template:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab:
   a. Click **Customize View**.
   b. In the Customize View dialog box, add the columns you want available in the import template to the **Selected Columns** list. The following fields are available for import:
      - Resource ID
      - Resource Name
      - Resource Type
      - Active
      - Parent Resource

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> **Note**
>
> Enter the ID for the Parent Resource.

- email
- Office Phone
- Other Phone
- Employee ID
- Title
- Overtime Factor
- Overtime Allowed
- Calculate Costs from Units
- Resource Codes
- User-Defined fields

> **Note**
>
> Fields that are not in this list, but are visible in the table are exported to the spreadsheet and marked with an asterisk. You can edit the fields in the spreadsheet; however, the data in these fields is not imported into the resources table.

c. Click **Apply**.

4. Click **Actions** ▾ and select **Create Import Template**.
5. In the **Opening File** dialog box, click **Open** to modify the template or click **Save** to save and close it, then click **OK**.

> **Note**
>
> Do not move or change the first two rows in the spreadsheet.

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Tip

When entering resource data in the Excel spreadsheet:

- Be sure to include a Resource ID and Resource Name for each resource, otherwise all data for that resource is excluded from the import.
- For fields that include a check box in the application, enter the values **true**/**false**, or **y**/**n**. The default system setting values are applied to these fields if no value is entered. The following is a list of the check box fields available for import along with their default values:
- Active = true
- Calculate Costs from Units = true
- Overtime Allowed = false

Importing Resource Data

Use this procedure to import resource data from a Microsoft Excel (.xlss) spreadsheet.

You must create an import template and populate the Excel file with resource data before you can perform this procedure.

To import resource data:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab, click **Actions** and select **Import from Excel**.
4. In the **Import Resources** dialog box, click **Browse** in the **Import File** field.
5. In the **File Upload** dialog box, browse to the file you want to import and click **Open**.
6. In the **Import Resources** dialog box, click **Import**.

   If errors are detected during the import, click **View the log file for more details** in the **Information** dialog box. If you want to save the log file, click **Save File**.

Deleting Resources

When you delete a resource, you also delete all historical data for that resource, including 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. You should exercise extreme caution when deleting resources.

Deleting a resource deletes the resource, all child resources, and all assigned activities.

Note

In most circumstances you should not delete resources. Instead, clear the Active option for the resource on the Resources tab on the Resources Administration page.

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To delete a resource:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Administration** page:
   a. Select the resource.
   b. Click **Context** and select **Delete**.
   c. If the resource has assignments, you are prompted to reassign the assignments to another resource or delete the resource without reassigning the resource's assignments. Make your selection and click **OK**.

> **Note**
>
> Reassigning the assignments to another resource will replace the resource for all activity assignments, regardless of the activity status (Not Started, In Progress, Completed) or the status of the project (Planned, Active, Inactive, What if).

   d. In the **Confirm** dialog box, click **Yes**.
3. Click **Save**.

Resource Teams

About Resource Teams

Resource teams provide a convenient way for you to associate personnel into smaller, more meaningful groups within an organization. Using resource teams increases efficiency in staffing activities, tracking allocation, and communicating project progress and performance. When working with pages and tabs that display resource data, such as the Resources Planning, Assignments, or Analysis pages, you can choose to organize by resource team. You can then choose to view team data, such as total units for the team, or view individual unit values for each team member. For example, the Resource Usage tab available from the Analysis page provides total allocation data for the team, as well as for each team resource when the tab is grouped by Resource Team.

Global resource teams are available to all users. User resource teams are only accessible to the user currently logged in. You can create and modify user resource teams for your personal use. A resource can be assigned to more than one resource team. If you have the required security privilege, you can also create and modify global resource teams.

In addition to viewing Resource Teams from the Resources section, you can view the resources that belong to a team, including each resource's primary role and number of active projects, by viewing the Resource Team Summary portlet on the Dashboards page.

Creating Resource Teams

Create resource teams to reduce potentially large resource pools into smaller, more meaningful and manageable groups.

To create a resource team:

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1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resource Teams**.
3. On the **Resource Teams** tab:
   a. If you are creating a global resource team, select the **Global** group and click **Add**.

      If you are creating a team only for your use, select the **User** group and click **Add**.
   b. In the **Name** field, double-click and type a resource team name.
4. In the **Resources** detail window, click **Assign...**.
5. In the **Select Resource** dialog box:
   - Select a resource and click **Select**

     Use Ctrl+click or Shift+click to select multiple resources.
6. Click **Save**.

Assigning a Resource to a Resource Team

Perform these steps to assign a resource to a resource team. You can assign a resource to a resource team from the **Resource** tab or the **Resource Teams** tab. Use this method if you want to view all resources assigned to a particular resource team.

To assign a resource to a resource team:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resource Teams**.
3. On the **Resource Teams** tab, expand either the **Global** or the **User** group and click a resource team name.
4. In the **Resources** detail window, click **Assign...**.
5. In the **Select Resource** dialog box:
   - Select a resource and click **Select**

     Use Ctrl+click or Shift+click to select multiple resources.
6. Click **Save**.

> **Tip**
>
> To view all resource teams assigned to a particular resource, assign a resource team to a resource from the **Resources** tab.

Resource Planning

About Resource Planning

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The Planning page enables you to establish resource and role demand on a proposed project without the need to perform time-consuming resource and role loading on a detailed project plan. You can maintain the high-level allocation data throughout the life of the project and reference these high level plans when you assign resources and roles at a more detailed level. Although resources and roles might not be assigned to specific activities early in the project lifecycle, the Planning page enables you to plan time commitments against a project. Assigning resources and roles to projects in the early stages of project development can help to prevent overallocation.

You can use the spreadsheet on the Planning page to specify, view, or modify project-level and WBS-level allocation data for individual resources and roles across a project life cycle. For each resource or role assignment, you can record total allocated units, that P6 distributes across the project timescale. You can also record individual timescale allocated values, that P6 sums to provide total allocation units. For resource assignments, you can base your allocation decisions on the resource's current availability, that P6 recalculates live as you edit allocated values.

You can filter the Planning page to view the assignments for a single project, a group of projects assigned to a portfolio or project code, a single resource or role, a group of resources assigned to a code or team, or a group of roles assigned to a code or team. You can view resource planning data for any project you have access to, but you can only add, modify, and delete resource or role assignments if you have the required project-level security privileges. Because the security privileges can be applied down to the WBS level, you can choose to assign resources and roles to some, but not all, WBS elements within a project.

The spreadsheet uses published and summary data to calculate availability, so it reflects values as of the last date that the project was published and summarized. Assignment changes within a project after that date will not be reflected until the project is next published and summarized.

A project setting on the Analytics & Services tab of the Project Preferences dialog box enables you to specify whether allocation assigned on the Plan Resources spreadsheet is included in other allocation-related pages, such as Resource Usage, after you summarize and publish the project.

> **Note**
>
> When you open the Planning page, it is automatically filtered to the last saved data you were using. To see other data, change the filter applied to the page.

Assigning Resources or Roles to Projects or WBS Elements

You can assign labor resources or roles to projects and their WBS elements during the planning phase of the project. You can assign resources if you know who will most likely be performing the work. When you assign a resource to a project or WBS element, the resource is assigned without a role allocation.

In long-range planning, you may choose to assign a role to a project or WBS and then staff the role with a specific resource at a later date after the activities have been defined.

To assign a resource or role to a project or WBS element:

1. On the **Navigation Menu**, expand **Resources** and click **Planning**.
2. On the Planning page, expand a project, and click the project or WBS row.

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3. Click **Assign...** .
   - Select **Resource** if you know which resource you want to assign.
   - Select **Role** if you know which role you want to assign.
   - Select **Assign Resource using Search** if you want to search for a resource to assign.
4. On the Planning page, clear the **Committed** option if the assignments are not definitely committed to the project.

> **Note**
>
> When calculating resource availability for high level resource planning, only the committed assignments are considered.

5. Click **Save**.

> **Tip**
>
> - You cannot assign material resources on the Planning page.
> - Once a role is assigned, you can then define search criteria for the assignment to assist with future staffing of the role. Defining search criteria enables you to more accurately identify the type of resource required to staff the role. To define search criteria, click the *Yes* or *No* link in the Search Criteria field. The *Yes* or *No* link indicates whether saved search criteria exist for the assignment.

Searching for a Resource to Assign

You can specify search criteria to select a suitable resource to assign to a project or WBS element. When you assign a resource using a search, the Search Criteria column on the Planning page provides a link to the search criteria used to assign the resource.

To search for a resource to assign:

1. On the **Navigation Menu**, expand **Resources** and click **Planning**.
2. Select a project or WBS element.
3. Click **Assign...** and select **Search For a Resource to Assign**.
4. In the **Assign by Search** dialog box:
   a. In the **Start** and **Finish** fields, select the start and finish of the time frame you want to search for resource availability.
   b. In the **Requested Units** field, enter the number of units you require the resource to work.
   c. On the grid, select the roles and proficiency levels for each role that you require the resource to be able to fulfill.

      If you select multiple search criteria, select whether to Match all applied or any applied criteria.

      You can also specify a resource and a resource code.

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> **Note**
>
> You can save your search criteria to a template if you might need to use them again. To assign other resources using the same criteria, you can copy the search criteria from the template.

d. Click **Run Search**.

5. In the **Assign by Search** results:
   a. Select the resource to assign.
   b. Select **Assign**.

Assigning Projects or WBS Elements to Resources or Roles

You can assign a project or WBS elements to resources on the Planning page when the spreadsheet is filtered by resource, resource team, or resource code. You can also assign a project or WBS to roles when the spreadsheet is filtered by role or role team.

To assign a project or WBS to a resource or role:

1. On the **Navigation Menu**, expand **Resources** and click **Planning**.
2. On the Planning page, select a resource or a role.
3. Click **Assign...** , and select **Project**.
4. In the Select Project dialog box:
   - To assign a project, select the project you want to assign, then click **Assign**.
   - To assign a WBS, select the project from the projects list, then click **Assign WBS**. In the **Select Parent** dialog box, select the WBS you want to assign, then click **OK**.
5. On the Planning page, click **Save**.

Allocating Units to Resources or Roles

Use the Plan Resources spreadsheet to allocate a number of available units to resources or roles for a project or WBS.

To allocate units:

1. On the **Navigation Menu**, expand **Resources** and click **Planning**.
2. Expand a project and click the resource or role for which you want to allocate the units.
3. Click the **Total Units** field, then enter the total units you want to allocate to the selected resource or a role.
4. Click **Save**.

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Tip

- If the Committed option is selected for the resource, the allocated units are subtracted from the under or overallocated units.
- The calendar used to determine the number of work hours for each time period depends on the Use assigned calendar to specify the number of work hours for each time period option on the Time Periods page of Application Settings. If the option is selected, the calendar assigned to the resource is used to determine the number of work hours per time period. If the option is cleared, the hours per time period specified on the Time Periods page of Application Settings is used.
- When you edit a spreadsheet interval allocated value, P6 recalculates the resource's availability and the total allocated units for the resource or role. If the spreadsheet interval you edit is earlier than the current assignment start date or later than the current assignment finish date, P6 adjusts the corresponding assignment date to reflect the change.

Allocating Units by Spreading Units Across a Time Period

When planning resource allocation for a project, you can use the spreadsheet to spread work units evenly across a selected time period.

To spread units across a time period:

1. On the **Navigation Menu**, expand **Resources** and click **Planning**.
2. Expand a project and click the resource or role for which you want to allocate units.
3. Select the time period to spread units.
   - To specify start and finish dates, click the **Start Date** and **Finish Date** fields and select the dates from the calendar.
   - To spread units between the Project Forecast Start and the Forecast Finish date of the project, select **Life of Project**.
4. Click the **Total Units** field and enter the number of units to spread between the Start and Finish dates you selected.
5. On the **Actions** menu, select **Synchronize Resources**.
6. Click **Save**.

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Tip

- You can also edit any Allocation cell for the assignment in the spreadsheet columns to have the total units field updated accordingly.
- If you are spreading units for a resource, you can use the % Allocation field instead of specifying total units. When calculating the spread of % allocated values for resource assignments, to determine total working hours for the time period, the application uses the resource's calendar and the hours/day setting defined in the Global Preferences. For example, if a resource's Max Units/Times is 8h/day or 40h/week, type 25% in the % Allocation field to assign the resource to 2 h/day or 10h/week.
- If the Committed option is selected for the resource, the allocated units are subtracted from the under or overallocated units.

Splitting Resource Assignments

During your planning, you might find that some resources become overloaded with work. One way to resolve overallocation of units to a resource is to assign some of its total units to another resource.

To split resource assignments:

1. On the **Navigation Menu**, expand **Resources** and click **Planning**.
2. For the overloaded resource, select **Context** menu, select **Split Resource Assignments**.
3. In the Split Resource Assignments dialog box
   a. Select a resource from the list.
   b. In the **Percentage allocation to new Resource** field, enter a percentage of the original resource's total units to re-assign.
   c. Click **Assign**.

Exporting the Planning Spreadsheet

You can export the resource and role allocation data displayed in the spreadsheet to an Excel file. The data is exported as it appears in the current view.

To export the spreadsheet:

1. On the **Navigation Menu**, expand **Resources** and click **Planning**.
2. On the **Planning** page, click **Customize View** to customize the spreadsheet. The fields that are visible on the page are the fields that are exported to the Excel spreadsheet.
3. Click **Actions** and select **Export**.

Resource Assignments

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About Resource Assignments

The Resources Assignments area enables you to view a customized list of resource or role assignments based on the filters you assign to the view. Using this view, you can analyze assignment unit and cost values and make any necessary modifications to the assignment data. You can also view unit and cost values in a spreadsheet based on a specified timescale using the spreadsheet. In addition, you can extend your customized view by displaying the Gantt chart, which is a graphical display of the start and end dates for the resource assignments.

About Assignments Views

Assignments Views are the visual layout of resource assignment and role assignment information. You can customize each view according to your needs, including changing the grouping, column selection, column label, and visual display options. Selecting an appropriate view, or customizing a view can facilitate the process of recording resource assignment data. For example to ensure resources are being used effectively, you might include units columns in a table view grouped by resource or role.

Exporting Views

Export views to share them with colleagues working in another P6 system.

To export views:

1. On the **Navigation Menu**, expand **Projects** or **Resources**.
   - If you expanded **Projects**, click **Activities**, **EPS**, or **Assignments**.
   - If you expanded **Resources**, click **Assignments**.
2. Click the **Views** menu and select **Import/Export Views**.
3. Click the **Export** tab.
4. On the **Export** tab:
   a. Select whether to export **Classic Views** or **Standard Views**.
   b. Select the views to export.

      > **Note**
      >
      > Use the **Select All / Deselect All** option to select all views available to you. You cannot export both classic and standard views to the same file.

   c. Click **Export**.
5. In the download window, specify a location and name for the file.

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Importing Views

Import views to see the EPS, Activities, and Assignments views used by colleagues in another system.

1. On the **Navigation Menu**, expand **Projects** or **Resources**.
   - If you expanded **Projects**, click **Activities**, **EPS**, or **Assignments** then in the Activities or EPS pages.
   - If you expanded **Resources**, click **Assignments.**
2. Click the **Views** menu and select **Import/Export Views**.
3. Click the **Import** tab.
4. On the **Import** tab:
   a. Select **Select** in the **Import File** field and select the file to import..
   b. Select the views to import from the file.
   c. Click **Import**.

> **Tip**
>
> Global and user views are always imported as user views. Multiple user views are imported as multiple user views. If you have sufficient privileges, you can make views global after you have imported them by copying or moving them to the Global section in Manage Views.

Applying the Progress Spotlight

To quickly locate the activities you need to update, you can use the Progress Spotlight feature, which highlights all activities that should have progressed during a specific time period. This time period is defined by the smallest increment of the current timescale starting with the data date. For example, if the current timescale is set to Month/Week, Progress Spotlight highlights all activities that should have progressed during the week starting with the data date.

To show or hide the Progress Spotlight:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click **Gantt View**, if the Gantt view is not selected.
   b. Click **Progress Spotlight (Ctrl+Alt+S)**.
3. Click **Save View**.

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Tip

- In the Gantt chart, Progress Spotlight displays a yellow background, or curtain, to indicate the time period during which progress should have occurred. You can drag the end point of the highlighted area to extend or compress the time period.
- In the table, all activities that should have progressed are highlighted. You can use Ctrl+ the Up or Down arrow key to navigate to each highlighted activity in sequence, recording progress in the appropriate data columns.
- You can make the Progress Spotlight visible or hide it using the **Gantt Settings** menu.

Working with Resource Assignments in the Gantt Chart

The Resources Assignments area enables you to view a customized list of resources based on the filters you assign to the view. You can extend this customized view by displaying the Gantt chart, which is a graphical display of the start and end dates for the resource assignments.

To customize the resource assignments view in the Gantt chart, you can:

- Customize the Gantt bar type, height, color, label, and position.
- Set the timescale and gray scale for non-worked hours.
- Modify the start and end dates for assignments.

Viewing Resource Assignments in a Gantt Chart

View the Gantt chart for a graphical display of the start and end dates for resource assignments.

To view resource assignment activities in a Gantt chart:

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. On the **Assignments** page, click **Gantt View**.
   - To view the start and end dates of assignments for a particular resource, double-click the Gantt next to the row in the resource table that contains the resource.
   - To change the timescale on the Gantt, right-click the dates at the top of the Gantt and choose another timescale.

Tip

To customize the list of resources displayed in the table, click the **Filters** menu and choose to use an existing filter, or create a new filter.

Configuring the Resources Assignments Gantt Chart Bars

Configure the bar settings for the Gantt chart view on the Resources Assignments page. You can set features for up to three bars per assignment.

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To configure the resource assignments Gantt chart bars:

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. On the **Assignments** page, click **Customize View**.
3. In the **Customize View** dialog box:
   a. Click **Bars**.
   b. On the **Bars** tab click **Add** and select **Bar** or **Label**.
   c. Select a bar or label.
   d. If you selected a bar:
      - Click the **Bar Type** list and choose one of the available bar types.

      > **Note**
      > You can configure multiple bars. Set at least one bar to Current.

      - In the **Height** field, select the height for the bar.
      - In the **Bar Color** field, select a color.
      - Select **Show Progress** to show progress on the bar.
      - If you chose to show progress, select a Progress Color and Progress Style.
   e. If you selected a label:
      - In the **Label Field** field, select a bar label.
      - In the **Height** field, select the font size for the label.
      - In the **Color** field, select a color for the bar label.
      - Click **Apply**.

Setting the Resources Detailed Assignments Gantt Chart Timescale

Set the timescale interval of the Gantt chart and apply shading for non-work time.

> **Note**
> If you only want to change the timescale, right-click the date bar in the Gantt chart and choose another timescale.

To set the timescale interval and apply shading for non-work time:

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. On the **Assignments** page, click **Customize View**.
3. In the **Customize View** dialog box:
   a. Click **Gantt**.

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b. On the **Gantt** tab:
   - Click the **Timescale** list and select the timescale for the Gantt chart.
   - Select **Non-work time shading** to apply shading to non-work time represented in the Gantt.

c. Click **Apply**.

> **Tip**
>
> If you select the Week/Day timescale, the following fields are not applicable: Period Actual Units, Period At Completion Units, Period Actual Cost, Period Actual Completion Cost.

Viewing Assignment Unit and Cost Spreads

Use the spreadsheet to view live unit and cost spreads for an activity assignment for a resource or role.

To view the assignments usage spreadsheet:

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. On the **Assignments** page:
   a. Click **Spreadsheet View**.

   > **Note**
   >
   > To customize the list of resources displayed in the table, click **Customize View** and either use an existing filter or add a new filter.

   b. Click **Customize View** and then click **Spreadsheet**.
   c. On the **Spreadsheet** tab of the **Customize View** dialog box:
      - Choose the columns to display in the view.
      - Choose the **Start Date** and **Finish Date** to define a range for the spreadsheet.
      - Select **Calculate average for units and costs** if you are dividing the unit and cost fields by a value, and then type a value in the **Divide values by** field.
      - Select a **Timescale** for the view.
   d. Click **Apply**.

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> **Tip**
>
> - P6 includes only data in spreads. To see up to date spread data, select Actions, Run, Store Period Performance and then ensure that the project has been republished.
> - An application level setting determines whether cost spreads account for changes in resource and role rates over time.
> - You can export the data on this page to a Microsoft Excel file by clicking Export.

Assigning a Resource to an Activity Assignment

Perform these steps to assign a resource to an assignment that has a role designated, but currently no resource. You can also perform these steps to designate a different resource for an assignment.

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. On the **Assignments** page:
   a. Click on one or more assignments. To select more than one assignment, use **Ctrl+click**.
   b. Click **Context** and select **Assign Resource** to view the full list of resources, or click **Assign Resource by Role** to view the list of resources whose primary role is currently selected for the assignment.
   c. In the **Select Resource** dialog box, select a resource and click **Assign**.
      - If you are assigning by resource and have roles of different types selected, the resource you select will be assigned regardless of the selected role for the assignment. The role for the assignment is not updated to reflect the role for the selected resource.
      - If you are assigning a resource by role and have chosen assignments that have more than one type of role assigned, the **Select Resource** dialog box displays resources for all the role types assigned to the multiple assignments. When you select a resource and click **Assign**, the resource is assigned to the assignment with the selected role type.

        > **Note**
        >
        > If more than one assignment with the same role type is selected, you are given the option to assign to the first assignment selected or all selected assignments with the same role type.

      - Select a resource from another role type and click **Assign** to add a resource to the unassigned role.
   d. If the **Assignment Settings** dialog box appears, choose to use settings from the resource or assignment and click **OK**.

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Tip

The **Assignment Preferences** dialog box appears if either of the following **Resource Assignments** settings in **My Preferences** are set to **Ask me to select each time I assign:**

- When assigning a resource to an existing activity assignment.
- When a resource and role share an activity assignment.

If you select the **Do not show** option on the **Assignment Preferences** dialog box, the **Resource Assignments** settings in **My Preferences** are changed to the options that are set in the dialog box. The **Assignment Preferences** dialog box will appear again only if you reset one of the options above back to **Ask me to select each time I assign**.

- You cannot reassign a resource if the assignment has Actual Units, a project is opened exclusively, or if the project is checked out.
- When you select a resource, you can see the details for the resource, including primary role, contact information and location.

Assigning Resource Curves to Resource or Role Assignments from the Resources Assignments Page

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.

To assign a resource curve:

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. On the **Assignments** page:
   a. Display the **Curves** column if it is not visible on the table. To display the **Curves** column, click **Customize View** and click **Columns,** expand the **General** grouping and double-click **Curve** to move it to the **Selected Columns** list.
   b. On the **Assignments** page:
      - Click the row with the resource or role.
      - Double-click the **Curve** field, and click **Select** .
   c. In the **Select Curves** dialog box, choose a curve and click **OK**.
   d. On the **Assignments** page, click **Save**.

Tip

You can also assign resource curves to resource or role assignment from the **Activities** page.

About Future Period Planning

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Future Period Planning allows you to represent work patterns which cannot be represented by a linear spread of units or by applying a curve to an assignment. You can enter the planned and remaining resource or role allocation per assignment in the Spreadsheet, then compare the planned future period resource distribution to actual units and costs in the Resource Usage Spreadsheet, Activity Usage Profile, and time-distributed reports.

Future Period Planning is possible for assignments to activities with a duration type of Fixed Duration and Units or Fixed Duration and Units/Time.

Working with Future Period Planning

You can edit the planned resource or role allocation per assignment in the timescale unit you choose (days, weeks, months, quarters, years, or financial periods). You can compare the planned future period resource distribution to actual units and costs in the Resource Usage Spreadsheet, Activity Usage Profile, and time-distributed reports. 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 past period actuals of the project.

For example, let us assume an activity has a planned duration of 28 days and 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; instead, the planned units will be spread as follows:

Week 1	Week 2	Week 3	Week 4
10h	30h	15h	25h

By editing the planned resource or role distribution in future periods, you can create an accurate baseline plan to measure against current project progress. Edited future period values are stored in the baseline when you save a copy of the current project as a new baseline. When you restore a baseline, the edited future period values are also restored. As the current project schedule progresses and you apply actuals, you can track how the project is performing by comparing the planned future periods of the project or baseline to the current actuals.

If work on an activity is not proceeding according to plan, you can update the remaining units for the future periods of an assignment. Then you can measure the remaining work for an assignment without changing the original plan. Alternatively, if you choose to change the estimates for future work based on changes to the project schedule, you can edit the future period planned units for an assignment while the activity is in progress. If you need to change the estimates for many assignments, you can create a new baseline plan based on your changes.

Note

- You must have the Edit Future Periods and Add/Edit Activities Except Relationships project privileges to edit period data.
- Activity costs, including earned value and planned value, are calculated using the planned future period resource distribution you define for activity assignments.
- P6 includes only data in spreads. To see up to date spread data, select Actions, Run, Store Period Performance and then ensure that the project has been republished.

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Creating a Future Period Planning Layout

You can plan future period resource or role assignments in the Spreadsheet view of the Assignments page. Once an assignment is in progress, if work is not being performed according to plan, you can adjust the remaining early units as necessary. Alternatively if you choose to reestimate the remaining work for an assignment, you can adjust the planned units.

To create a layout for future period planning:

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. On the **Assignments** page:
    a. Click **Spreadsheet View**.
    b. Click **Customize View**.
    c. In the **Customize View** dialog box:
    d. On the **Columns** tab:
        - Expand **General** in the **Available Columns** list and double-click **Curve**, **Start,** and **Finish** to add them to the **Selected Columns** list.
        - If you want to be able to assign total units to assignments which do not yet have units assigned, add the **Planned Units** and **Remaining Early Units** columns.
    e. On the **Spreadsheet** tab:
        - Expand **Units** in the **Available Columns** list and double-click **Planned Units** and **Remaining Early Units** to add them to the **Selected Columns** list.
        - If you want to be able to compare planned work against the actuals, add the **Actual Units column**.
        - If you want to be able to view costs related to the assignments as you plan, add the **Planned Cost** and **Actual Cost** columns.
        - Select a **Timescale**.
    f. Click **Apply**.

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Tip

- Group and sort your view in a way that allows you to identify roles and resources, the activities to which they are assigned, and the project to which the activities are assigned (because the same activity may appear in different projects). For example, you can group and sort the resource usage spreadsheet by project and by resource.
- Future period planning only supports a single line in the timescale. See: Future Period Planning: Settings.
- When you enter a value into a future period column for an assignment, P6 assigns the value Manual to the resource curve, so adding the **Curve** column to your view allows you to identify the assignments you have modified. Adding **Start** and **Finish** to your view makes it easier to identify the periods which you can plan.
- If you enter a value in the planned units or remaining early units columns for an assignment which does not yet have total units assigned, the units will be spread evenly over the duration of the assignment.

Editing Period Values for Assignments

You can enter or edit future period values for assignments of labor, non-labor, and material resource, as well as for role assignments.

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. On the **Assignments** page:
   a. Click **Spreadsheet View**.
   b. For each resource assignment you want to plan, enter or edit the **Planned Units** and the **Remaining Early Units** for each time period.
   c. Click **Save**.

Tip

- When you modify period values, the curve changes to Manual.
- You can apply a resource curve to an assignment before you edit period values for the assignment. When you apply the resource curve, P6 will spread period values across the planned duration of the activity according to the resource curve distribution. You can then modify the period values as necessary.

Resource Analysis

About Resource Analysis

The Resources Analysis section enables you to compare resource utilization between resource teams, project resources, and department resource all from one central location using the Role and Resource views.

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The chart area offers the option to view data as a histogram, stacked histogram, or area chart to help you examine allocation data for individual resources, as well as total values for resource teams and resource codes.

You can view resource allocation as a spreadsheet (of resource allocation values by project). You can view totals for an entire resource grouping (for example, primary role, resource code value, or resource team) or for individual resources.

You can also choose to view rolled up values for assignments in projects you do not have permission to access. This option does not give you access to those projects or any of their data. Instead it provides totals for the units each resource contributes to those other projects and indicates whether the resource contributes to the costs of the other projects.

You can customize the view on these tabs to view resource information specific to your needs.

Analyzing Resource Allocations

Use this procedure to analyze resource allocations. The Resource Analysis page offers chart options to help you examine allocation data for individual resources, as well as total values for resource teams and resource codes. Chart data reflects remaining plus actual summary values.

You can customize options, along with filtering and grouping capabilities, to help you focus on the data you want to see.

To analyze resource allocation:

1. On the **Navigation Menu**, expand **Resources** and click **Analysis**.
2. On the **Analysis** page, click the **Resource** button.
3. On the **Resource** view:
   a. In the **Group By** list, choose to group by **Resource Hierarchy**, **Resource Code**, **Primary Role**, **Resource Team**, or **Assignment Code**.
   b. Click the resource, resource code, primary role, resource team, or assignment code for which you want to analyze allocation.

      When you organize by resource team or resource code and select a team node or resource code value, the selected chart displays total usage for all resources you have access to that are associated with that team or code value. Selecting an individual team member or resource who has the code value assigned displays their allocation data. When you organize by resource hierarchy, selecting a parent resource node does not aggregate and display total usage for all child resources. The hierarchy lists only those resources you have access to.
   c. In the **Display Chart** list, select the type of chart you want to view (Histogram, Stacked Histogram, or Area Chart).

> **Note**
>
> If you select a resource team or resource code that includes either all material resources, or a mix of material and labor/nonlabor resources, no chart data displays for Units. Since these resource types use varying units of measure, for example, time units for labor versus gallons for a material resource, total data values for the team or code would not be meaningful.

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d. In the **Group By** list, select to group the data by Projects, Project Code, Assignment Code, or None. If you select to group by project code or assignment code, select a code from the code list.

e. Click **Customize View**.

4. In the **Customize View** dialog box:

   a. On the **General** tab:

      - Select whether to display unit or cost data.
      - Select the timescale.
      - Select the date range.
      - Configure a filter for the data.

   b. On the **Chart** tab:

      - Select the fields to display.
      - Choose to display limit or allocation limit lines.
      - Choose to display horizontal lines.
      - Choose to display a legend.

   c. Click **Apply**

> **Tip**
>
> In a histogram or area chart, move the mouse over the corresponding area or bar to display numeric allocation totals for a project or project code.

Assigning Resources to Unstaffed Activities

Use this procedure to assign resources to activities to fulfill staffing requests. Resources include the personnel and equipment that perform work on activities across all projects. Resources are generally reused between activities and/or projects.

1. On the **Navigation Menu**, expand **Resources** and click **Analysis**.
2. On the **Analysis** page, click the **Role** button.
3. In the **Role** view:

   a. Click the **Group By** list and select **Role Hierarchy**, and then select a role.

   b. Expand the role in the spreadsheet area and click the name of a project that has unstaffed units.

4. In the **Role activities for Project** dialog box, select the check box next to each unstaffed activity you want to staff with the same resource and click **Assign Resource...**.
5. In the **Assign Resource** dialog box, select a resource.

   To review resource allocation before assigning a resource, click **Show Usage** . If you want to assign the selected resource to the activity, click **Select**.

6. In the **Assignment Settings** dialog box, choose which **Price per Unit**, **Units Per Time**, and **Overtime Factor** to use and click **OK**.

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7. Click **Close**.

> **Tip**
>
> - Resource usage is are based on published data. The project must be republished before changes made to assignments within a project are reflected.
> - You can also configure dashboard content to display the Open Requests for Resources portlet, which enables you to view staffing requests.
> - The list of resources you can select from is determined by your resource security privileges and the current project association of individual resources.

Viewing Role Usage

Use the **Role** view to view detailed role assignment information in histogram and spreadsheet format.

1. On the **Navigation Menu**, expand **Resources** and click **Analysis**.
2. On the **Analysis** page, click the **Role** button.
3. In the **Role** view:
   a. In the **Group By** list, choose to view roles by **Role Hierarchy**, **Role Team**, or by a role or assignment code.
   b. Click a role name.
   c. Click **Customize View.**
4. In the **Customize View** dialog box:
   a. On the **General** tab:
      - In the **Display** list, choose the display format (units or costs).
        Choose units to view role use over the selected timescale interval; choose costs to view how much money is being spent over time.
      - In the **Timescale** list, choose a timescale interval.
        Choose a calendar interval (for example, Month/Week), or choose Financial Period to display the range of financial periods if financial periods are defined.
      - Select the **Include assignments in restricted projects** option to include a row in the view providing rolled-up data of the units and costs assigned in projects you are not permitted to access.
   b. On the **Chart** tab:
      - Choose to show or hide a **Limit** line.
        The Limit line shows maximum availability based on the resource's calendar and Max units/time setting, along with application settings for hours per time period.
      - Choose to show or hide the **Allocation Limit** line.
        This line shows the role's maximum availability based on Allocated planning values specified in the Resource Planning spreadsheet. Use this limit line to evaluate whether detailed activity assignments are in line with what was planned.
   c. Click **Save**.

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Tip

- The role usage data displayed on the Role Usage tab is based on published data, so it reflects values as of the last date the project was published. Assignment changes within a project after that date will not be reflected until the project is republished. However, an option on the My Preferences page allows you to display stored financial period data in this chart.
- A setting in your preferences determines whether the role limit includes the limits of resources assigned that role, but that are currently set as inactive.
- An application level setting determines whether cost spreads account for changes in resource and role rates over time.

Viewing Resource Usage

Use the Resource view to view resource allocation as a histogram (total allocation across time) or as a spreadsheet (of resource allocation values by project). You can view totals for an entire resource grouping (role, resource code, or resource team) or for individual resources.

1. On the **Navigation Menu**, expand **Resources** and click **Analysis**.
2. On the **Analysis** page, click the **Resource** button.
3. In the **Resource** view:
   a. In the **Group By** list, choose to view resources by **Resource Hierarchy**, **Resource Code**, **Primary Role**, **Resource Team**, or **Assignment Code**.
   b. Click a resource name, resource code, primary role, resource team, or assignment code.

      Note

      When you select a resource code, resource team, or primary role, data for the entire node displays. You can select a resource name below the node to display data for a single resource or choose a resource from the Resource Hierarchy list.

   c. Click **Customize View**.
4. In the **Customize** dialog box:
   a. On the **General** tab:
      - In the **Display** list, choose the display format (units or costs).
        Choose units to view resource use over the selected timescale interval; choose costs to view how much money is being spent over time.
      - In the **Timescale** field, choose a timescale interval.
        Choose a calendar interval (for example, Month/Week), or choose Financial Period to display the range of financial periods if financial periods are defined.
      - Select the **Include assignments in restricted projects** option to include a row in the view providing rolled-up data of the units assigned in projects you are not permitted to access.

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b. On the **Chart** tab:

- Choose to show or hide a **Limit** line.
  The Limit line shows maximum availability and allocation based on the resource's calendar and Max units/time setting, along with application settings for hours per time period.

c. Click **Save**.

Tip

- An application level setting determines whether cost spreads account for changes in resource and role rates over time.
- The resource usage data displayed on the Resource Usage tab is based on published data, so it reflects values as of the last date the project was published. Assignment changes within a project after that date will not be reflected until the project is republished. However, an option on the My Preferences page allows you to display stored financial period data in this chart
- The resource usage summary data displayed in this view is based on either detailed activity-level assignments or high-level (project, WBS) planning assignments, depending on an option setting on the Analytics & Services page of the Project Preferences dialog box accessed from the EPS page.
- To evaluate activity level assignments against planned allocations, choose the Detailed activity resources assignments option in the Publication section. You must have user access to the project, appropriate module access, and required security privileges to specify this setting. When a project is published at the detail level, the date range for the timescale is derived from activity start and finish dates. If the selected resource only has high-level assignments outside that date range, the Allocation Limit line might not appear. Changing to a larger timescale increment, for example from Month/Week to Year/Quarter, might cause the Allocation Limit to appear.

Exporting Resource or Role Usage Data

Perform these steps to save customized resource or role usage data from the Resources Analysis section to a Microsoft Excel spreadsheet (*.xlsx). All spreadsheet rows and the entire visible timescale are exported.

To export resource or role usage data:

1. On the **Navigation Menu**, expand **Resources** and click **Analysis**.
2. On the **Analysis** page, click the **Resource** button or the **Role** button.
3. In the **Resource** view or the **Role** view:
   a. Click the **Group By** list and select a group type option.

      The resources available depend on your selection, along with your resource security settings. If you select an individual resource, the spreadsheet displays allocation data for that resource. If the resource is a parent resource, you can select the resource's children (if any); if the resource is a child resource, no other resources are available.

      If you select a resource code, resource team, or primary role on the Resource Usage tab, the spreadsheet displays summary allocation data for the code, team, or role; you can select an individual resource belonging to the code, team, or role. When you

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select a code, team, or role, you can only view allocation data for resources that you have access rights to view; resources you do not have access rights to view are not listed.

b. Click a resource, role, code, or team name.

c. In the spreadsheet expand the roles or resources to show all the data you want to export.

> **Note**
>
> Only data which is visible in the spreadsheet will be exported.

d. Click **Customize View**.

4. In the **Customize View** dialog box:

   a. On the **General** tab:

      - In the **Display** list, choose whether to display units or costs.
      - In the **Timescale** list, select a timescale.
      - Configure a date range for the spreadsheet.

   b. On the **Spreadsheet** tab:

   c. Configure the **Display Fields** for the resource or role data

   d. Choose whether to show the **Allocation Limit**.

   e. Choose whether to show the **Limit**.

> **Note**
>
> A setting in your preferences determines whether the role limit includes the limits of resources assigned that role, but that are currently set as inactive.

   f. Click **Apply**.

5. In the **Resource** or **Role** view, click **Download**.

   When prompted, choose whether you want to open or save the export file.

> **Tip**
>
> - An application level setting determines whether cost spreads account for changes in resource and role rates over time.
> - For units display, if a resource code or resource team consists only of material resources with differing units of measure or a mix of labor, nonlabor, and material resources, the spreadsheet summary row displays dashes instead of totals. Summing unit values for mixed resource types does not provide an accurate total because labor and nonlabor resources are usually associated with time (such as hours or days), and material resources are often expressed in non-time units of measure.

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6

Administration

Managing Personal Information in P6 EPPM

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 EPPM 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 EPPM 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 EPPM

View the details below for information on cookies in P6 and P6 Team Member Web.

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Oracle might use cookies for authentication, session management, remembering application behavior preferences and performance characteristics, and to provide documentation support.

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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 EPPM.

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 EPPM

PI may be visible in multiple areas of P6 EPPM including but not limited to user administration, resource and role administration, assignments, work products and documents, reports, issues, risks, user defined fields, codes, and timesheets.

PI may be at risk of exposure in multiple areas of P6 EPPM including but not limited to project export, downloaded tables, reports, documents, P6 Integration API (on-premises only), P6 EPPM Web Services and P6 mobile.

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.

Configuring Consent Notices for P6

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To configure consent notices for P6:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. In the **Application Settings** pane, click **Consent Notice**.
3. On the **Consent Notice** page, click **P6 EPPM and P6 Professional**.
4. In the **P6 EPPM and P6 Professional** tab:
   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 which actions will show the consent notice to users from the **Enable Consent Notice** list.
5. Click **Save**.

Configuring Consent Notices for P6 Team Member

To configure consent notices for P6 Team Member:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. In the **Application Settings** pane, click **Consent Notice**.
3. On the **Consent Notice** page, click **Team Member and P6 Mobile**.
4. In the **Team Member and P6 Mobile** tab:
   a. Select **Copy P6 EPPM and P6 Professional message** or 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 which actions will show the consent notice to users from the **Enable Consent Notice** list.
5. Click **Save**.

Configuring Consent Notices for P6 Professional

To configure consent notices for P6 Professional:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. In the **Application Settings** pane, click **Consent Notice**.

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3. On the **Consent Notice** page, click **P6 EPPM and P6 Professional**.
4. In the **P6 EPPM and P6 Professional** tab:
   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 which actions will show the consent notice to users from the **Enable Consent Notice** list.
5. Click **Save**.

Auditing Consent Status

You can see the status of consent acceptance for users. You can also reset consent acceptance for all users if there is a need to regain consent after a consent notice has changed.

To audit consent status:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. In the **Application Settings** pane, click **Consent Notice**.
3. On the **Consent Notice** page, click a tab to select the product to audit.
   - To see the consent status of each user, view the column for each of the consent notice trigger actions.
   - To force the consent notice to be displayed again for all users the next time they access an area of the software, click **Forget all user acceptance**.
4. Click Save.

About Administration

Administration allows you to control access to features and configure global preferences for all application users in P6 and P6 Professional. The Administration Page allows you to configure:

> **Note**
>
> Many of the features described in this section require additional settings to be configured in the P6 Administrator application. See the *P6 EPPM System Administration Guide*.

Application Settings: Presents options to specify default administrative preferences established by the P6 Administrator.

Enterprise Data: Presents options to configure the essential application framework your users will need to manage all projects and is established by the P6 Administrator.

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Scheduled Services: Presents options to configure services that run at scheduled intervals to perform certain functions against the database or specific projects. You can configure the time and frequency that Global Services run and you can enable or disable each global service individually. You can also create Project services to perform specific actions, such as summarizing, publishing, exporting, or scheduling specific projects.

User Administration: Presents options to add users, configure what features a user can access and view as established by the P6 Administrator, assign Organizational Breakdown Structures (OBS) to users, configure module access to P6 EPPM applications, and add project and global security profiles to users.

User Interface Views: Presents options to configure how users see the interface view so the user can view only the selected features established by the P6 administrator.

About My Preferences

My Preferences offers options for you to customize the data display format across all sections of P6. The options you customize are exclusively yours. You can alter global preferences, including formats for time units, dates, and currencies. You can also customize view preferences if the P6 Administrator gives you access to do so. Some view preferences you can customize include menu items and pages. You can also change your password.

Customizing My Preferences Global Preferences

Customize global preferences to create a working environment that suits your needs. The global preferences you select affect only your interaction with the application; other users are not affected by your changes.

Global preferences is broken down into several sections. To see how to customize a section, use any of the tasks listed below.

Customizing Global Currency Preferences

Customize currency preferences to determine how currency is displayed in the application.

To customize currency preferences:

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Global** tab.
3. On the **Global** tab, select **Display Format**.
4. In the **Currency** field, select ••• **Select**.
5. In the **Select Currency** dialog box, select a currency and click **Select**.
6. On the **Global** tab, select the **Show decimal places** and **Show currency symbol** options to suit your needs.
7. Click **Save**.

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> **Tip**
>
> You can double-click the Currency field and type a currency name rather than search for a currency.

Customizing Global Date Format Preferences

Customize date format preferences to determine how dates are displayed in the application.

To customize date format preferences:

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, select **Display Format**.
3. On the **Display Format** tab:
   a. Click the **Date format** list, and choose a format.
   b. Select **Four digit year**, **Month name**, **Leading zeros**, and **Separator** options to suit your needs.
   c. Click the **Time format** list, and choose a format.
   d. Select the **Show minutes** option if you want minutes to display.
4. Click **Save**.

Customizing Email Notification Preferences

Customize email notification preferences to enable sending an email to users when issues are created or modified, and sending an email to resources upon adding or removing assignments.

> **Note**
>
> The P6 Administrator must setup an email server for this functionality to work.

To customize general preferences:

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Global** tab.
3. On the **Global** tab, select **Email Notifications**.
4. In the **Issues** section, configure when you want to receive email notifications about issues.
5. In the **Resource Assignments** section, configure whether you want to send email notifications to resources when adding or removing resource assignments and whether you want to receive a prompt before sending those emails.
6. On the **Global** tab, click **Save**.

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Customizing Global Performance Threshold Preferences

Customize performance threshold preferences to specify parameters for Performance, Earned Value, and Index values that appear in dashboard Project Performance portlets and on the Portfolios Performance Status tab.

To customize performance threshold preferences:

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Global** tab.
3. On the **Global** tab, select **Performance Thresholds**.
4. In the **Performance Thresholds s**ection:
   a. In the **Performance** subsection select a value for each field.
   b. In the **Earned Value** subsection select a value for each field.
   c. In the **Index** subsection select a value for each field.
5. On the **Global** tab, click **Save**.

Customizing Project Score Preferences

You can customize your own project score preferences to determine how the project will be scored in the application.

To customize project score preferences:

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Global** tab.
3. On the **Global** tab, select **Project Score**.
4. Select the option to **Calculate Project Score based on selected Project Codes** if you want to specify which codes P6 uses to calculate Project Score. If you select the option:
   a. Select **Assign...**.
   b. In the **Select Project Code** dialog box, select a project code and select **Select**.
   c. Assign more project codes if required.

> **Note**
>
> If you do not select the **Calculate Project Score based on selected Project Codes** option, all Project Codes assigned to the project will be used to calculate the Project Score.

5. In the **High is greater than or equal to** field, enter a value.
6. In the **Medium is greater than or equal to** field, enter a value that is also less than the High is greater than or equal to field.
7. On the **Global** tab, click **Save**.

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Customizing Global Resources Preferences

Customize resources preferences to determine how resources will be displayed in the application.

To customize resources preferences:

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Global** tab.
3. On the **Global** tab, select **Resources**.
4. In the **Resource Assignments** subsection, select one option for each of the statements.
5. In the **Resource Staffing** subsection, select the options.
6. In the **Number of available items to search for Roles, Resources, and Resource Codes** field, enter a value.
7. On the **Global** tab, click **Save**.

Customizing Global Row Number Preferences

Customize row number preferences to determine the maximum number of rows that can be displayed in the application.

To customize row number preferences:

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Global** tab.
3. On the **Global** tab, select **General**.
4. In the **Maximum number of rows displayed in each section** field, enter a value.

> **Note**
>
> The value you place in the Maximum number of rows displayed in each section setting will not apply to view or dictionary grids.

5. In the **Maximum number of rows displayed in trees and pick lists** field, enter a value.
6. Click **Save**.

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Tip

- If the number of items exceed the maximum you specify for Maximum number of rows displayed in each section, a Next link appears for you to navigate to the next page of the list.
- If the number of items available to display exceeds the maximum you specify for Maximum number of rows displayed in trees and pick lists, a message appears to inform you that you are viewing a partial list.
- The Maximum number of rows displayed in each section setting is used to determine the maximum number of rows in Earned Value Performance dashboards, the Index Performance dashboard, and the Schedule Performance dashboard portlet. The Maximum number of rows displayed in trees and pick lists setting is used to determine the maximum number of rows in the Open Project dialog box, the Global Calendar page of Enterprise Data, and the Resource and Resource Team pickers in Resource Administration.

Customizing Global Time Units Format Preferences

Customize time units format preferences to determine how time will be displayed in the application.

To customize time units format preferences:

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Global** tab.
3. On the **Global** tab, select **Display Format**.
4. In the **Duration Format** section:
   a. Select a duration unit in the list.
   b. Select whether to show duration labels.
   c. Select whether to show sub units.
   d. Select how many decimal places to show.
5. In the **Time Units Format** section:
   a. Select a time unit in the list.
   b. Select whether to show unit labels.
   c. Select whether to show sub units.
   d. Select how many decimal places to show.
6. Select whether to show units/time as a percentage or as units/duration.
7. On the **Global** tab, click **Save**.

Tip

You must select Show duration label or Show unit label to select the corresponding Show sub units option.

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Sending Email Notifications about Resource Assignments

An automatic notification feature can be configured to send Email to the affected resources when you add, change, or remove a resource assignment.

To configure P6 to automatically send Email about resource assignments:

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Global** tab.
3. On the **Global** tab, expand the **General** section.
4. In the **General s**ection:
   a. Select the **Send Email to resources upon adding or removing assignments** option.
   b. The system automatically selects the Prompt before sending Email option. Clear the option if you do not want prompts.
5. On the **Global** tab, click **Save and Close**.

Tip

- The address and subject line for the Email are generated based on the specific assignment circumstances. For example, when you first assign a resource to an activity, the Email subject line tells the resource they have been assigned and provides the activity name. In all cases, the message text includes the project name, resource start and finish dates, planned units, and planned units/time.
- When the automatic Email option is on, confirmation messages are sent to you, indicating the names of the recipients.
- If a resource does not have an Email address specified on the Resources tab of the Administration page, no Email can be sent.
- When a resource is replaced on an activity, an Email is sent to the removed resource and to the replacement resource.

Customizing My Preferences View Preferences

Customize view preferences to specify the items that appear in the Dashboards, Portfolios, Projects, Resources, Administration, and Approvals sections. You can edit only your view preferences if you have been assigned edit rights. If you do not have edit rights, the options are disabled.

To customize view preferences:

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **View** tab.
3. On the **View** tab, select **Dashboards**.
4. In the **Dashboards** section:
   a. Expand the **Menu Items** subsection and select the options.
   b. Expand the **Displayed Dashboards** section to view the dashboards.

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5. On the **View** tab, select **Portfolios**.
6. In the **Portfolios** section:
   a. Expand the **Menu Items** subsection, and select the options.
   b. Expand the **Pages** subsection, and select the options.
7. On the **View** tab, select **Projects**.
8. In the **Projects** section:
   a. Expand the **Menu Items** subsection, and select the options.
   b. Expand the **Pages** subsection, and select the options.
   c. Optionally select views to open when the EPS, Activities, and Assignments pages are opened.
9. On the **View** tab, select **Resources**.
10. In the **Resources** section:
    a. Expand the **Menu Items** subsection, and select the options.
    b. Expand the **Pages** subsection, and select the options.
    c. Optionally select a view to open when the Assignments page is opened.
11. On the **View** tab, select **Approvals**.
12. In the **Approvals** section:
    - Expand the **Pages** subsection, and select the options.
13. On the **View** tab, select **Administration**.
14. In the **Administration** section:
    - Expand the **Pages** subsection, and select the options.
15. On the **View** tab, click **Save**.

Tip

- Select the option next to Menu Items or Pages to select all the options in the list. Clear the option to clear all the options in the list.
- Click the **Move Up** or **Move Down** arrows to arrange the menus items.

Changing Your Own Password

Users can change their own password at any time.

Note

You cannot change passwords if P6 EPPM is running in LDAP or SSO authentication mode.

To change your own password:

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1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Password** tab.
3. On the **Password** tab:
   a. In the **Current Password** field, enter the current password.
   b. In the **New Password** field, enter a new password.

> **Note**
>
> - When the **Password Policy** is enabled, the password must be between 8 and 20 characters and contain at least one number and one letter. The policy is enabled by default.
> - When the **Password Policy** is disabled, the password must be between 1 and 20 characters. The application does not allow blank passwords.

   c. In the **Confirm New Password** field, enter the new password again for verification.
   d. Click **Save**.

Unlocking Your Account

If you forget your P6 password and exceed the number of attempts allowed to log in, the system will lock your account.

You can request a reset code that will be emailed to the account associated with your P6 user. After your account is unlocked, P6 will prompt you to change your password.

To unlock your account:

1. On the login screen, click the **Unlock Account/Forgot Password** link.
2. In the **Unlock Account and Reset Password** dialog box:
   a. In the **Username** field, type your username.
   b. Click **Next**.
3. Check your email for the one-time code.
4. In the **Unlock Account and Reset Password** dialog box:
   a. In the **One Time Code** field, type the one-time code you received.
   b. Click **Next**.
   c. In the **Password** field, type a new password.
   d. In the **Confirm Password** field, re-type the new password.
   e. Click **Save**, then click **Close**.

- Even if your account has not yet been locked, you can follow these steps to reset your password using the Forgot Password? link on the login page.
- Check your email's spam folder if you do not receive the one-time code.
- You cannot change passwords if P6 EPPM is running in LDAP or SSO authentication mode. If you are unable to unlock your account, contact your system administrator.

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About My Calendar

My Calendar allows you to customize your own personal resource calendar. Use My Calendar to add or modify work and nonwork days. Mark your planned vacation days and update other personal nonwork exception days and times so your project manager is able to more accurately assign activities and track your availability for current and upcoming projects.

> **Note**
>
> You will only see **My Calendar** in the **User** menu if you have been assigned a personal resource calendar.

Configuring My Calendar

If you are assigned a personal resource calendar, you can perform the following tasks:

Setting Work Hours Per Time Period for My Calendar

Configure the work hours per time period settings to specify the default number of hours in a work period for a calendar. The values you specify here are used as conversation factors when displaying time units in increments other than hours. Any resource-dependent activity that uses this resource calendar will use these values as conversion factors for these activities.

To use this feature, the **Use assigned calendar to specify the number of work hours for each time period** option must be selected in on the **Time Periods** page in **Application Settings**.

To set the number of work hours for each time period:

1. Click the **User** menu and select **My Calendar**.
2. On the **My Calendar** page, select the **Summary** tab.
3. On the **Summary** tab, in the **Time Periods** area, enter an hour value in each field.
4. Click **Save**.

Configuring the Standard Work Week for My Calendar

Configure the standard work week for the calendar to set the work and nonwork days and hours.

To configure the standard work week:

1. Click the **User** menu and select **My Calendar**.
2. On the **My Calendar** page, click the **Standard Work Week** tab.
3. On the **Standard Work Week** tab, enter a number of hours for each work day in the total hours field.
4. Configure the work periods in the chart:

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- Create a new work period by clicking and dragging on the chart.
- Create multiple work periods for each day.
- Drag a work period on the chart to have it start earlier or later in the day.
- Make a work period longer or shorter by clicking and dragging the lower edge of the work period on the chart.
- Delete a work period by selecting the work period in the chart and selecting ✕ **Close**.

5. Click **Save**.

Modifying Calendar Days on My Calendar

Modify calendar days to account for work or nonwork days or hours that are different from the standard hours defined on the Standard Work Week tab. For example, you might choose to specify vacation days by setting the standard working days to nonworking days.

To modify work or nonwork calendar days:

1. Click the **User** menu and select **My Calendar**.
2. On the **My Calendars** page, click the **Calendar** tab.
3. On the **Calendar** tab navigate to the day or days you want to change.
   a. Select the **Date** ▾ menu.
      - Select **Nonwork** to set the day to be a non work day.
      - Select **Set to Standard** return the day to the standard hours
   b. To create an exception period, click and drag on the chart.
   c. To delete an exception period, select the period and select ✕ **Delete**
4. Click **Save**.

Importing Events to My Calendar

You can import special events into My Calendar. The imported time appears in your calendar as nonwork exception time. For example, an organization might distribute a file of holidays or special travel events that it wants all employees to import into their personal calendars.

The following conditions must be met before you import the events:

- The duration of the event must exceed the total standard worktime for a given day; or, it must represent an all day event.
- The events you import must be formatted in the iCalendar (.ics) file format. This means you might have to export your appointments in another scheduling application to an .ics file.

To import special nonwork events into My Calendar:

1. Click the **User** menu and select **My Calendar**.
2. On the **My Calendars** page, click **Import Calendar Events**.
3. On the **Import Calendar Events** tab:
   a. Click ••• **Browse** to browse iCalendar files.

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b. Select a file and then click **Open**.

c. Select the check boxes for the events you want to import. Select the check box in the column header to import all events.

d. Click **Import**.

4. A message box will appear alerting you when the import is complete. Click **OK**.

5. On the **Calendars** tab:

a. Scan through the calendar to verify the exception time appears on days where it is expected.

b. Click **Close**.

About Application Settings

Application Settings enables your organization to define a series of application-wide parameters and values that apply globally and to all projects in an enterprise project structure (EPS). Use these settings to customize the application to meet specific project management requirements and standards. The P6 Administrator can choose to hide Application Settings from users. If users can view Application Settings, they must have the proper security privileges to edit them.

Working with Application Settings

Use Application Settings to specify default administrative preferences established by the P6 Administrator. The P6 Administrator must give you access to Application Settings to view them and the Edit Application Settings privilege for you to adjust them.

- **Audit**: Specify the tables to audit and the operation to audit against each table.
- **Consent Notice**: Specify the consent notice to be shown to users and the actions which will trigger consent.
- **Data Limits**: Specify the maximum number of levels for hierarchical structures, the maximum number of codes and baselines, the maximum number and size of stored images, as well as several other maximum limits.
- **Earned Value**: Specify default settings for calculating earned value.
- **Eventing**: Specify connection information and parameters for working with events and configure the Business Objects and Special Operations which can trigger events.
- **Gateway**: Specify connection information and parameters for working with Primavera Gateway.
- **General**: Specify general default options, such as the weekday on which the calendar week begins.
- **ID Lengths**: Specify the maximum number of characters for IDs and codes.
- **Integration & Allow Lists**: Specify connection information and parameters for working with document management systems and Primavera Unifier and configure the list of sites that can be used with P6 and the client IP addresses that have permission to connect to P6 EPPM Web Services.
- **Notifications**: Specify the types of email notification to send and configure an alternate email address to use for notifications about issues.

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- **Reports**: Specify the headers and footers available for reports in Oracle Primavera P6 Visualizer.
- **Services**: Specify publication and summarization periods and configure project publication options.
- **Timesheets**: Specify default setup options when using the Timesheets tab in P6 Team Member.
- **Time Periods**: Define the default number of hours in a workday, workweek, workmonth, and workyear, or specify that the default number of work hours for each time period is defined per calendar.

Configuring Audit Settings

Configure Auditing in P6 so that you can produce reports about incremental changes to projects and project related data. You can view audit data collected by this process on the Audit panel of the EPS page, or by running reports to retrieve audit data from the database. See: *P6 EPPM Reporting Guide*.

> **Note**
>
> Table auditing involves an increased amount of interaction between P6 and the database, which can affect performance.

To configure Auditing:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Audit**.
3. On the **Audit** page:
   a. In the **Interval to store user login information (in days)** field, enter a number of days.
   b. In the **Interval to store audit information (in days)** field, enter a number of days.
   c. In the Select the tables and operations to audit list, select a table or operation to audit and click **Add**.
   d. In the Audit Tables section:
      - Select **Audit Insert** to audit insertions to the table.
      - Select **Audit Update** to audit updates to data in the table.
      - Select **Audit Delete** to audit deletions of data in the table.

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> **Note**
>
> - Select **Audit Insert** to see when new rows have been added to that table. For example, auditing inserts on the PROJECT table will show you when someone has created a new project.
> - Select **Audit Update** to see when data in a table has been edited. For example, auditing updates on the PROJECT table will show you when someone has changed the name or other properties of a Project.
> - Select **Audit Delete** to see when data in a table has been deleted. For example, auditing deletes on the PROJECT table will show you when someone has deleted a project.

e. Select **Enable auditing for all tables**.

4. Click **Save**.

> **Tip**
>
> - Table auditing records data about changes to projects and project related data items to the PAUDIT table. To be able to view audit data, you must also configure and enable the Publish Audit Data service.
> - To stop auditing on a particular table, remove it from the list by selecting ✕ **Remove**, or by clearing all three audit options for that table.
> - If you need to suspend all auditing without changing the configuration of the actions and tables which will be audited, clear the **Enable auditing for all tables** option.

Configuring Clickable Websites

You can create a list of URLs that P6, P6 Team Member, and P6 Professional will allow users to launch from notebook topics, UDFs, and other text felds. You can also create a list of files and file locations that P6 Professional will allow users to launch. In P6 Team Member Web, users launch sites from the dropdown icon next to the site. When a URL matches a selected Site Allow List entry, P6 EPPM opens it. If the URL does not match a selected entry, P6 EPPM copies it to your clipboard so you can paste it into a browser.

To configure a website to be clickable:

1. On the ☰ **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Integration & Allow Lists**.
3. On the **Integration & Allow Lists** page, in the Site Allow List section, click **Edit List**.
4. In the **Site Allow List** dialog box:
   - To add a website to the list, click + **Add (Ins)** then enter the website URL.
   - To allow users to open a website from its link, mark the ☑ **Selected** option on that row.

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- To delete a website from the list, click **Context** and select **Delete**.

5. When you have finished configuring the list, click **Save**.

Tip

Here are some rules on how to specify websites:

- Website and file 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://file://` (P6 Professional only) `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`.

  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.

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Configuring Data Limits Settings

Data limits allows you to specify the maximum number of levels for hierarchical structures. You can also specify the maximum number of baselines and activity codes that can be included in a project, the maximum number and size of stored images and various other maximum limits.

To configure data limits settings:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Data Limits**.
3. On the **Data Limits** page:
   a. Click the up and down arrows for each item to set maximums.
   b. Click **Save and Close**.

Configuring Earned Value Settings

Configure earned value settings to specify defaults for calculating earned value.

To configure earned value settings:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Earned Value**.
3. On the **Earned Value** page:
   a. In the Technique for computing performance percent complete section, select an option.

      Note

      If you select the **Custom % Complete** option, use the up and down arrows to select a percent.

   b. In the Technique for computing estimate to complete (ETC) section, select the first option or select one of the other four options to define a formula.

      Note

      If you select the **PF =** option, click the field and type a value to be equal to PF.

   c. In the Earned Value Calculation section, choose an option from the list.
   d. Click **Save and Close**.

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> **Tip**
>
> You can select only one option in each section.

Defining Earned Value Calculations for WBS Elements

Earned value is a technique for measuring project performance according to both project costs and the schedule. This technique compares the planned cost of the work to the actual cost. While earned value analysis is typically performed for WBS elements, you can also perform an earned value analysis for activities, groups of activities, or one or more projects.

You can define the technique used to calculate the **Performance Percent Complete** and **Estimate to Complete** used in the earned value calculation:

Earned Value =**Performance % Complete** x **Budget At Completion (BAC)**

To define the default P6 technique for computing earned value calculations:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Earned Value**.

To define the technique for computing earned value calculations for a WBS:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select an activity view that is grouped by WBS, or group by WBS.
   b. Expand the project and any parent WBS elements.
   c. Select a WBS to define the technique used for computing earned value.
   d. Click the **Earned Value** detail window.
3. In the Earned Value detail window:
   a. In the Technique for computing performance percent complete section, select the technique you want to use for calculating an activity's earned value.
   b. In the Technique for computing Estimate to Complete (ETC) section, select the technique you want to use for calculating ETC.
4. Click **Save** or **Save and Close**.

Configuring Eventing Settings (On Premises Only)

Configure eventing settings to specify the destination security and directory services and to configure which business objects and special operations should trigger events.

To configure eventing settings:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Eventing**.
3. On the **Eventing** page, click the **General** tab.

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4. In the Eventing Section:
   a. Select the option to enable the eventing feature.
   b. Select an Interval.
   c. Select a Max Queue Size.
   d. Select whether to Show Costs.
   e. Select whether to use JMS Destination Security.
   f. If you selected to use JMS Destination Security:
      - Double-click the field and type the JMS Connection Factory.
      - Double-click the field and type the JMS Connection Name.
      - Double-click the field and type the JMS Connection Username.
      - Double-click the field and type the JMS Connection Password.
      - Click **Test Connection**.
5. In the Directory Services section:
   a. Double-click the field and type the Provider URL.
   b. Double-click the field and type the Initial Context Factory.
   c. Double-click the field and type the Lookup Name.
   d. Double-click the field and type the Security Principle.
   e. Double-click the field and type the Security Credentials.
   f. Double-click the field and type the Security Level.
   g. Click **Test Connection**.
6. On the Eventing page, click the **Configuration** tab.
   a. On the Configuration tab, click Business Objects.
      - Select or clear the Create option for each business object.
      - Select or clear the Update option for each business object.
   b. On the Configuration tab, click Special Operations.
      - Select or clear the Enabled option for each operation.
7. Click **Save and Close**.

Configuring General Settings

Perform the steps below to configure general application settings including calendar and activity duration defaults, to enable the optional password policy setting, and to change the location for online help.

To configure general settings:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **General**.
3. On the **General** page:

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a. In the Starting Day of Week section, click the list and choose a day of the week.

b. In the Activity Duration section, double-click the field and type the duration.

> **Note**
>
> Include the time unit in the field. For example, 5.0d for 5 days.

c. In the Code section:

- Double-click the field and type a separator.
- Select how to display code values.

d. In the Industry Selection section, click the list and choose an industry.

e. In the What's New Dialog section, select whether users see a description of new features when they log in for the first time after an upgrade.

f. In the Password Policy section, clear the option to disable the policy.

> **Note**
>
> - You cannot change passwords if you are running P6 EPPM in LDAP or SSO authentication mode.
> - When the **Password Policy** is enabled, the password must be between 8 and 20 characters and contain at least one number and one letter. The policy is enabled by default.
> - When the **Password Policy** is disabled, the password must be between 1 and 20 characters. The application does not allow blank passwords.

g. In the Online Help section:

- Double-click the field and type the URL.
- Select the option to ensure that the most up to date help files are available for users.

h. In the P6 Professional Applications section:

- Select the option to ensure that the Update Baseline, Schedule Compare, and XML Import features are performed by P6 Professional using the API.
- Double-click the field and type the URL.

i. Click **Save and Close**.

> **Tip**
>
> Triple-click a field to select an entire URL.

Configuring ID Lengths Settings

Configure ID lengths settings to specify the maximum number of characters allowed for IDs and codes.

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To configure ID lengths settings:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **ID Lengths**.
3. On the ID Lengths page:
   a. Click **Increment** or **Decrement** for each code or ID to specify maximum lengths.
   b. Click **Save and Close**.

> **Tip**
>
> ID lengths cannot exceed 40 characters. Code lengths cannot exceed 32 characters.

Configuring Integration & Allow Lists Settings

Configure integration settings to connect a document management system, connect to Primavera Unifier, specify the sites P6, P6 Team Member, and P6 Professional users can access from the application, the files P6 Professional can open directly from the application, and the web services that can interact with P6 EPPM.

To configure integration settings:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Integration & Allow Lists**.
3. On the **Integration & Allow Lists** page:
   a. In the Document Management section:
      - Click the **P6 URL** field and type the P6 URL.
      - Select a default **Security Policy** from the list.
      - Optionally, click the **Invalid Document Types** field and enter a comma separated list of the file formats to prohibit from upload.
        For example, `.exe,.com,.bat,.cmd,.vbs,.js,.msi`.
   b. In the Primavera Unifier section:
      - Double-click the **Primavera Unifier URL** field and type the URL of your Primavera Unifier environment.
      - Double-click the **Integration User Name** field and type the user name for integration with Primavera Unifier .
      - Double-click the **Password** field and type the password for the user for integration with Primavera Unifier.
   c. In the Site Allow List section:
      - Click **Edit List** to add, remove, or enable sites from the list P6, P6 Team Member, and P6 Professional allows users to launch from supported text fields. You can also add, remove, or enable files and file locations P6 Professional allows users to launch.

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d. In the Web Service Allow List section:
   - Select **Enable Web Services** to allow IP addresses and ranges to interact with P6 EPPM.
   - Click **Edit Site List** to add or remove IP addresses and ranges from the allow list.

e. Click **Save and Close**.

> **Tip**
>
> Enter IP addresses in Internet Protocol version 4 form format. Enter IP Address ranges using Classless Inter-Domain Routing (CIDR) notation

Linking P6 and Primavera Unifier Applications Using Schedule Sheets

Perform the steps below to link P6 to Primavera Unifier using schedule sheet integration. This link at the application level allows you to establish links at the project level. When the applications and projects are linked, P6 users can send data to Primavera Unifier schedule sheets.

To link P6 to Primavera Unifier using schedule sheet integration:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click the **Integration & Allow Lists** tab.
3. On the **Integration & Allow Lists** tab:
   a. Enter a URL in the **Primavera Unifier URL** field of the Unifier section.
   b. Enter a Primavera Unifier integration user name in the **Integration User Name** field.
   c. Enter the Primavera Unifier password for the integration user name in the **Password** field.
   d. Click **Save and Close**.

> **Tip**
>
> You need the Edit Application Settings privilege to edit the settings in the Application Settings page.

Configuring Clickable Websites

You can create a list of URLs that P6, P6 Team Member, and P6 Professional will allow users to launch from notebook topics, UDFs, and other text felds. You can also create a list of files and file locations that P6 Professional will allow users to launch. In P6 Team Member Web, users launch sites from the dropdown icon next to the site. When a URL matches a selected Site Allow List entry, P6 EPPM opens it. If the URL does not match a selected entry, P6 EPPM copies it to your clipboard so you can paste it into a browser.

To configure a website to be clickable:

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1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Integration & Allow Lists**.
3. On the **Integration & Allow Lists** page, in the Site Allow List section, click **Edit List**.
4. In the **Site Allow List** dialog box:
   - To add a website to the list, click **Add (Ins)** then enter the website URL.
   - To allow users to open a website from its link, mark the **Selected** option on that row.
   - To delete a website from the list, click **Context** and select **Delete**.
5. When you have finished configuring the list, click **Save**.

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Tip

Here are some rules on how to specify websites:

- Website and file 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://file://` (P6 Professional only) `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`.

  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.

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Configuring Allowed Client IP Address Ranges

You can create a limited list of client IP addresses that will be permitted to call P6 EPPM Web Services.

This ability is available only to P6 EPPM Web Services. The restriction is applied only when the *Enable web services* option is selected. When *Enable web services* is not selected, all clients will be permitted to connect to P6 EPPM Web Services (assuming they have valid authentication credentials), regardless of their IP address.

To add an IP address or range, complete the following steps:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Integration & Allow Lists**.
3. On the **Integration & Allow Lists** page:
4. In the Enable allow list filtering for web services section, click **Edit List**.
   a. In the **Edit Allow List** dialog box, click **Add** and enter a specific IP Address or IP Address Range.

      Note

      Enter IP addresses in Internet Protocol version 4 form format. Enter IP Address ranges using Classless Inter-Domain Routing (CIDR) notation.

   b. Select the option next to an IP address or range to allow it to interact with P6 EPPM Web Services.

      Clear the option next to an IP address or range to prevent it from interacting with P6 EPPM Web Services.

   c. To delete an IP address or range from the list, click next to it and choose **Delete**.

   d. Click **Save**.

Tip

The entire allow list can be enabled or disabled by selecting or clearing the Enable web services option.

Configuring Notifications Settings

Configure notification settings to specify who should receive email notifications about timesheets, status updates, and issues.

To configure ID lengths settings:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Notifications**.

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3. On the **Notifications** page:
   a. In the Team Member Notifications section:
      - Select which users will receive daily notifications about timesheets and status updates.
      - Select a time for the service to run.
   b. In the Issue Notifications section:
      - Select to enable issue notifications.
      - Choose whether to send notifications from an alternate email address.
      - Enter the alternate email address for notifications to be sent from.
   c. Click **Save and Close**.

Configuring Report Settings

You can define up to three sets of header, footer, and custom labels for P6 Professional reports and Visualizer diagrams.

To configure report settings:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Reports**.
3. On the the **Reports** page, in the **Report Headers and Footers** section:
   a. In the First Set area,
      - Type the customized header for a report or diagram in the **Header Label 1** field.
      - Type the customized footer for a report or diagram in the **Footer Label 1** field.
      - Type the custom label for a report or diagram in the **Custom Label 1** field.
   b. Repeat this step for the Second and Third Set, as applicable.
   c. Click **Save and Close**.

> **Note**
>
> These labels can be used by choosing them as variables in Page Setup. Variables can be set in Visualizer on the Title Block tab of the Page Setup tab. Variables can be set in P6 Professional on the Header and Footer tabs of the Page Setup dialog box.

Configuring Summarization Periods

Perform the steps below to specify the interval by which to summarize and store resource spreads.

To configure summarization period settings:

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1. On the ☰ **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Services**.
3. In the Summarization Periods section:
   a. Select the **By Calendar** option, the **By Financial Periods** option, or both.
   b. If you select By Calendar, select a time interval value for the **WBS Level** and **Resource/Role Assignment Level** fields.
   c. Click **Save**.

> **Tip**
>
> Rather than spreading units and costs evenly throughout the length of a project (when you select By Calendar), you can also view how actual units and costs were incurred by selecting By Financial Periods. You can then store and edit period performance for any predefined financial period.

Configuring Timesheets Settings

Configure timesheets settings to specify default setup options for timesheets in P6 Team Member Web. You can specify general timesheets settings and how timesheets are approved before project data is updated.

To configure timesheets settings:

1. On the ☰ **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Timesheets**.
3. On the **Timesheets** page:
   a. In the General section:
      - Select whether to **Allow resources to assign themselves to activities by default**. If you mark this option, you can also select **Outside assigned OBS access** if you want resources to be able to assign themselves to activities in projects or WBS nodes to which they do not have access according to their OBS assignments.
      - Select whether to allow users to **Assign themselves to activities with role assignments matching Team Member's role**.
      - Select whether to **Enable timesheet auditing**.
      - Select whether to **Enable email notifications** for timesheet submissions, approvals, and rejections.
      - Select whether to **Prevent users from rejecting approved timesheets**. If you mark this option, select a **Timeframe**.
      - Select an item on the **Timesheet hours display** list to determine how partial hours will be displayed.
        For example,:

        Select **Hours (decimal)** if you want four hours and twenty minutes to be shown as 4.33.

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Select **Hours : minutes** if you want four hours and twenty minutes to be shown as 4:20.

Select **Quarter-hour** if you want four hours and twenty minutes to be shown as 4:15.

b. In the Approving Timesheets section, select an approval type.

> **Note**
>
> If you select the Two approval levels option, you can also add the stipulation that the Project Manager must approve first.

c. In the **Default Resource manager approving timesheets when one or two approval levels required** field, click **Select**, then select a user from the list.

d. Click **Save and Close**.

> **Tip**
>
> In P6 Team Member Web, on the Application Settings page, there are further settings related to timesheets. For example, in P6 Team Member Web you can determine whether users can log hours on future timesheets, assignments against not-started activities, or at the activity level as well as the assignment level. The Application Settings page in P6 Team Member Web also allows you to control whether resources can log time before the activity or assignment start dates, after the activity or assignment finish dates, and whether they can log negative hours.

Configuring Time Periods Settings

Configure time periods settings to specify time period abbreviations and the default number of hours in a work period. The Hours per Time Period are used as conversion factors when users choose to display time units and durations in units other than hours. For example, if the default Hours/Day is set to 8.0, when a user enters 1d as a duration, this value is stored as 8h in the database.

To configure time periods settings:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Time Periods**.
3. On the **Time Periods** page:
   a. In the Hours per Time Period section, double-click each field and type a value.

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> **Note**
>
> If you select the Use assigned calendar to specify the number of work hours for each time period option, the Hours per Time Period values on this tab are ignored and the module converts units and durations using the Hours per Time Period values defined in the 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. You should type values for each time period even if you select this option since the Hours per Time Period values on this tab are still used in the following cases:
>
> - The Planning page of the Resources section in P6.
> - The Planning Resources tab in the project and WBS views in P6 Professional.

b. In the Time Period Abbreviations section, enter one-letter abbreviations for each time period.

c. Click **Save and Close**.

About Enterprise Data

Enterprise data is a defined 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 proper security privileges to edit them.

The P6 Administrator uses enterprise data to define standard categories and values you can apply across all projects, including custom categories and category values for projects, resources, and WBS elements.

Working with Enterprise Data

Use the **Enterprise Data** page to configure various types of data settings commonly used by other features in the application. Your settings reflect the data recognized by your industry or organization and help to meet your project management requirements and standards.

Enterprise data is split into the following groups:

- **Global**: For example, currencies, financial periods, and timesheet periods.
- **Projects**: For example, codes, user defined fields, baseline types, funding sources, project calendars, and WBS categories.
- **Activities**: For example, codes, user defined fields, cost accounts, and step templates.
- **Resources**: For example, codes, user defined fields, rate types, resource calendars, and units of measure.
- **Risks**: For example, risk categories, scoring matrices, and user defined fields.
- **Issues**: For example, codes and user defined fields.
- **Documents**: For example, document categories, statuses, and user defined fields.

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You can import and export enterprise data, for example to streamline routine data maintenance, facilitate more efficient addition of and updates to data, and simplify data creation. Importing data from spreadsheets significantly reduces manual data entry and therefore the risk of human error. Exporting this data to Excel can provide a consolidated snapshot of the data you hold, across multiple pages of dictionaries.

About Managing Enterprise Data

Over time, excess enterprise data can accumulate in P6. For example, if you import a projects using the *Insert New* import action for some data types, when data of those types in the imported file matches data already in the database P6 creates new instances of that matching data. If it is not regularly deleted, this excess data can eventually cause performance issues in the application. However, searching for and deleting excess enterprise data can be a time consuming and labor intensive task.

As an administrator user of P6 you can analyze the usage of enterprise data in the application. On the basis of this analysis, you can identify data that is underused or redundant and use that information to determine which data items are good candidates for deletion.

When you retrieve the usage statistics for enterprise data, columns are automatically added to your view to help you to identify the data you might choose to delete. These columns may include, but are not limited to:

- **Count** columns: These columns show the number of related items associated with each data item in the grid. The number in the column is usually a link to more detailed information.
- **Latest Update**: This column shows the most recent date that the data item was modified
- **Latest Assignment Update**: The most recent time the data item was assigned.
- **Latest Summarized Date**: The most recent time that a project or baseline using the data item was summarized.
- **Latest Published Date**: The most recent time that a project or baseline using the data item was published.
- **Latest Scheduled Date**: The most recent time that a project or baseline using the data item was scheduled

You can analyze the usage of enterprise data on the following pages:

The Enterprise Data page

- User Defined Fields (UDFs) for all data types
- Global and resource calendars
- Activity, assignment, issue, project, resource, role and overhead codes
- Risk, WBS, expense, and document categories,
- Baseline types
- Cost accounts
- Currencies
- Funding sources
- Locations
- Notebook topics
- Resource curves

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User Administration Page

- OBS page

Analyzing Enterprise Data Usage

Over time your organization might create large amounts of codes, user defined fields, and other enterprise level data items. Sometimes these data items are only used for a short time or might even never be used at all. When a project is imported, depending on the import options selected, duplicates of existing enterprise level data might be created. As a result, eventually the list of enterprise data items available to users might become long and confusing.

P6 can analyze the usage of enterprise data to help you find obsolete and redundant data so that you can determine whether to delete it.

To analyze enterprise data usage:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. Navigate to any page that supports analyzing usage data.
3. Click **Analyze Data Usage**.
   - To determine where the data item is being used, view the Project Count, EPS Count, Timesheet Period Count, User Count, or Resource Count columns.
     Click the number in these columns to drill down to a detailed list.
   - To determine when the data item was most recently modified, view the Latest Update column.
   - To determine when the data item was most recently assigned, view the Latest Assignment Update column.
   - To determine when a timesheet row using the overhead code was most recently updated, view the Latest Timesheet Period Update Date.
   - To determine when a project or baseline using the data item was most recently summarized, published, or scheduled, view the Latest Summarized Date, Latest Published Date, or Latest Scheduled Date columns.

Tip

You cannot analyze usage for the currently selected Global Default Calendar.

About Baseline Types

Baseline types enable you to categorize and standardize baselines across projects. Types are assigned to baselines to help categorize, or track, multiple baselines for a single project. Examples of baseline types include: Customer Sign-Off, Initial Planning, Management Sign-Off, Mid Project Status, and What-If Project Plan baselines. The P6 Administrator defines the available baseline types.

Creating Baseline Types

Create baseline types to label and standardize the use of baselines across all projects at your organization.

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To create a baseline type:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Baseline Types**.
3. On the **Baseline Types** page:
   a. Click **Add**.
   b. In the **Type** field, type a unique type.
   c. Click **Save**.

Tip

- Click **Context** and select **Move Up** or **Move Down** to adjust the sort order.
- To change the name of a baseline type, double-click it and enter a new name. The change applies to any projects with baselines of that particular type.

About Funding Sources

Funding sources are the agencies, businesses, or groups that provide funding for a project.

You can maintain a hierarchical list of funding sources as part of your enterprise project data and then assign specific funding sources to a project or EPS elements as they develop. You can assign the same funding source multiple times with varying amounts and share contributions for different levels of the EPS. The amount contributed by a specific funding source is called the fund share value.

Creating Funding Sources

Create funding sources to name and describe the agencies, businesses, or groups that provide funding for a project.

To create a funding source:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Funding Sources**.
3. On the **Funding Sources** page:
   a. Click **Add**.
   b. Move the funding source to the correct location in the list and hierarchical position by clicking **Context** and then selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
   c. In the **Name** field, double-click and type a name.
   d. In the **Description** field, double-click and click **Select**.
4. In the Description detail window, type a brief narrative about the funding source.
5. On the Funding Sources page, click **Save**.

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About Notebook Topics

Notebook topics help multiple users apply a common theme or label to shared information about an activity, WBS, project, or EPS element such as its purpose, completion instructions, or other helpful notes. For example, you might copy an email message, a web link, a table of observations, and a series of text notes into a notebook topic called *Budget Recommendations* to capture the ongoing cost impacts of a recurring project.

When you delete notebook topics from the Enterprise Data page, you can choose to append their descriptions to a replacement notebook topic. For example, you might have a notebook topic called *Budget Recommendations* and another called *Budgetary Recommendations*. In this case, you might choose to delete the *Budgetary Recommendations* notebook topic and copy the descriptions from all instances of it to the *Budget Recommendations* notebook instead.

Creating Notebook Topics

Create notebook topics to provide specified instructions or a description for performing an activity. Notebook topics can also be assigned at the EPS, project, and WBS levels.

To create notebook topics:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Notebook Topics**.
3. On the **Notebook Topics** page:
   a. Click **Add**.
   b. In the **Topic Name** field, double-click and type a name.
   c. Double-click to select the option in the appropriate column to make the new notebook available in EPS, Project, WBS, or Activity views.
   d. Click **Save.**

Tip

To change the order in which notebook topics are listed, select the notebook topic you want to move, then click the **Move Up** or **Move Down** arrows.

About Calendars

Calendars enable you to define available work days and the work hours in a day. You can also specify national holidays, recognized holidays, project-specific work/non-work days, and resource vacation days. You can establish an unlimited number of calendars to accommodate different work patterns. There are three calendar pools: global, project, and resource. The global calendar pool contains calendars that apply to all projects in the database. The project calendar pool is a separate pool of calendars for each project in the organization. The resource calendar pool is a separate pool of calendars for each resource. You can assign multiple users a resource calendar that they can share, but cannot edit. You can also assign a personal calendar to a resource that will show up in My Calendars and that the resource can customize.

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You can assign resource or global calendars to resources, and global or project calendars to activities.

Assign calendars to each resource and activity to determine time constraints in a uniform way. For example, based on its calendar, a resource might not be available; or, if the resource is available, the activity might not fit the calendar requirements.

The application uses your calendar assignments for leveling resources, scheduling, and tracking activities.

Working with Calendars

The P6 application supports three types of calendars:

- **Global**: Global calendars can be defined and applied to all projects and resources in the database.
- **Project**: Separate project calendars can be defined and applied to projects through activity assignments.
- **Resource**: Resource calendars can be defined and applied to each individual resource.

Begin by defining one or more global calendars and then link any project or resource calendars to them. Changes to a global calendar apply to all project and resource calendars linked to it.

Assign global or resource calendars to resources, and global or project calendars to activities. You can establish an unlimited number of calendars to accommodate different work patterns. For example, if some activities require a five day workweek, while others are performed part-time (such as Monday, Wednesday, and Friday), you can create different calendars and assign them to the activities and resources in your projects.

An activity's **Activity Type** field value determines whether the activity uses the calendar of an assigned resource or its project calendar.

Creating Global Calendars

Create global calendars to identify global work or nonwork days. You can use global calendars as base calendars when creating a resource or project calendar.

To create a global calendar:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Global Calendars**.
3. On the **Global Calendars** page, click **Add**.
4. In the **Select Calendar to Copy** dialog box:
   a. Select the **Global** or **Resource** option.

      > **Note**
      >
      > This determines which list of calendars you can select.

   b. Select a calendar and click **Select**.
5. On the **Global Calendars** page, click the **Calendar** tab.

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6. On the **Calendar** tab, triple-click the **Name** field and enter a name.

> **Note**
>
> The application automatically assigns the name *New Calendar*.

7. On the **Global Calendars** page, click **Save**.
8. Configure the global calendar.

Configuring Global Calendars

Perform the following tasks when creating or updating a global calendar:

Setting Work Hours Per Time Period for Global Calendars

Configure the work hours per time period settings to specify the default number of hours in a work period for a calendar.

To set the number of work hours for each time period:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Global Calendars**.
3. On the **Global Calendars** page:
   a. Click the calendar you want to modify.
   b. Click the **Summary** tab.
   c. In the **Time Periods** section, type an hour value in each field.
4. Click **Save**.

Configuring the Standard Work Week for Global Calendars

Configure the standard work week for the calendar to set the work and nonwork days and hours for a standard work week.

To modify the standard work week:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Global Calendars**.
3. On the **Global Calendars** page:
   a. Click on the calendar you want to modify.
   b. Click the **Standard Work Week** tab.
4. On the **Standard Work Week** tab:
   - Type the number of hours for each work day in the total hours field.
   - Or click and drag on the chart to create work periods for each work day.
5. Click **Save**.

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Tip

- You can create multiple work periods for each day.
- You can delete a work period by moving your mouse over the work period and clicking ✕.

Modifying Calendar Days on Global Calendars

Modify calendar days to account for work or nonwork days or hours that are different than the standard hours defined on the Standard Work Week tab.

To modify work or nonwork calendar days:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Global Calendars**.
3. On the **Global Calendars** page:
   a. Click on the calendar you want to modify.
   b. Click the **Calendar** tab.
   c. On the **Calendar** tab, click the **Date** list for a date and select **Set to Standard** or **Nonwork**.
4. Click **Save**.

Setting the Default Global Calendar

Choose a calendar to use as the default when new calendars are created.

To set the default global calendar:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Global Calendar**.
3. On the **Global Calendar** page:
   a. Click on the calendar you want to designate as the default calendar.
   b. Click **Context** and select **Set as Default Calendar**.
   c. Click **Save**.

Creating Project Calendars

Create project calendars to determine work or nonwork time for a project.

To create a project calendar:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project Calendars**.
3. On the **Project Calendars** page:

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a. Click on a project.

> **Note**
>
> If the project you need is not open, click **Open Project...**. Choose one or more projects and click **OK**.

b. Click + **Add**.

4. In the **Select Calendar to Copy** dialog box:
   a. Select the **Global**, **Resource**, or **Project** option.

> **Note**
>
> This determines which list of calendars you can select.

   b. Select a calendar and click **Select**.
5. On the **Project Calendars** page, click the **Calendar** tab.
6. On the **Calendar** tab, click in the **Name** field and enter a name for the project calendar.
7. On the **Project Calendars** page, click **Save**.

> **Tip**
>
> Configure the project calendar by modifying additional settings.

Configuring Project Calendars

Perform the following tasks when creating or updating a project calendar:

Assigning a Base Calendar to a Project Calendar

Assign a base calendar to determine holidays and exceptions for the selected project calendar.

To assign a base calendar:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project Calendars**.
3. On the **Project Calendars** page:
   a. Expand a project.

> **Note**
>
> If the project you need is not open, click **Open Project...**. Choose one or more projects and click **Open**.

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b. Select a calendar to assign a base calendar.

c. In the **Base Calendar** area, in the **Search** field click ••• **Select**.

4. In the **Select Base Calendar** dialog box, select a calendar and click **Select**.
5. Click **Save**.

Setting Work Hours Per Period for a Project Calendar

Configure the work hours per time period settings to specify the default number of hours in a work period for a calendar.

To set the number of work hours for each time period:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project Calendars**.
3. On the **Project Calendars** page:
   a. Expand a project.

> **Note**
>
> If the project you need is not open, click **Open Project...**. Choose one or more projects and click **Open**.

   b. Click the calendar you want to modify.
   c. Click the **Summary** tab.
   d. In the **Time Periods** section, type an hour value in each field.
4. Click **Save**.

Configuring the Standard Work Week for Project Calendars

Configure the standard work week for the calendar to set the work and nonwork days and hours for a standard work week.

To configure the standard work week:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project Calendars**.
3. On the **Project Calendars** page:
   a. Expand a project.

> **Note**
>
> If the project you need is not open, click **Open Project...**. Choose one or more projects and click **Open**.

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b. Click on the calendar you want to modify.

c. Click the **Standard Work Week** tab.

4. On the **Standard Work Week** tab, right-click on a working or nonworking timeslot and use the menu options to adjust the workday. You can also resize the working time to increase or decrease the work hours.

5. Click **Save**.

Modifying Calendar Days on Project Calendars

Modify calendar days to account for work or nonwork days or hours that are different than the standard hours defined on the Standard Work Week tab.

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project Calendars**.
3. On the **Project Calendars** page:
   a. Expand a project.

> **Note**
>
> If the project you need is not open, click **Open Project...**. Choose one or more projects and click **Open**.

   b. Click on the calendar you want to modify.
   c. Click the **Calendar** tab.
   d. On the **Calendar** tab, click the **Date** list for a date and select **Set to Standard** or **Nonwork**.
   e. Click **Save**.

> **Tip**
>
> The **Global Nonwork** on calendar days indicates exception days in the base calendar. You can modify these exceptions days and the globe will disappear. If you set the calendar day back to standard, the Global exception day will reset and the globe will reappear.

Changing a Project Calendar to a Global Calendar

You can turn an existing project calendar into a global calendar.

To make a project calendar a global calendar:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project Calendars**.
3. On the **Project Calendars** page:

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a. Expand a project.

> **Note**
>
> If the project you need is not open, click **Open Project...**. Choose one or more projects and click **Open**.

b. Click on the calendar you want to change to global.

4. Click **Context** and select **Promote to Global Calendar**.
5. Click **Save**.

Creating Resource Calendars

Create a resource calendar to determine when a resource can work.

To create a resource calendar:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource Calendars**.
3. On the **Resource Calendars** page:
   a. Click on **Personal Calendars** to create a private calendar for the resource, or click on **Shared Calendars** to create a calendar for multiple resources to share that the resources cannot edit.
   b. Click **Add**.
4. If you are creating a Personal Calendar, in the **Select Resource** dialog box, select a resource and click **Select**.

   If you are creating a Shared Calendar, in the **Select Calendar To Copy** dialog box:
   a. Choose **Global** or **Resource** calendar to use as the base for the new calendar.
   b. Click on a global or resource calendar.
   c. Click **Select**.
5. On the **Resource Calendars** page, click the **Calendar** tab.
6. On the **Calendar** tab, click in the **Name** field and enter a name for the personal or resource calendar.
7. On the **Resource Calendars** page, click **Save**.
8. Configure additional resource calendar settings.

Configuring Resource Calendars

Perform the following tasks when creating or updating a resource calendar:

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Assigning a Base Calendar to a Resource Calendar

Assign a base calendar to apply all the exception days (for example holidays and other work or nonwork days) from the base calendar for the selected resource calendar.

To assign a base calendar:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource Calendars**.
3. In the **Resource Calendars** pane:
   a. Expand **Personal Calendars** or **Shared Calendars** and select a calendar.
   b. Click the **Summary** tab.
   c. In the **Base Calendar** field, click **Select**.
4. In the Select Base Calendar dialog box, select a calendar.
   - Click **Select**.

Assigning a Resource to a Resource Calendar

Resources can be assigned a personal calendar or a shared calendar. A resource is assigned to a personal calendar when creating a personal calendar.

To assign a resource to a shared calendar:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource Calendars**.
3. On the **Resource Calendars** page:
   a. Expand **Shared Calendars** and select a shared calendar.

   > **Note**
   > Click the **Used By** tab to view resources currently assigned to the shared calendar.

   b. Click **Context** and select **Assign Resource**.
4. In the **Select Resource** dialog box:
   - Select the resources to assign to the calendar and click **Select**.
5. On the **Resource Calendars** page, click **Save**.

> **Tip**
> If you need to remove a resource from a shared calendar, assign a different calendar to the resource from the Resources tab on the Resources Administration page.

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Setting Work Hours Per Time Period for a Resource Calendar

Configure the work hours per time period settings to specify the default number of hours in a work period for a calendar.

To use this feature, select the **Use assigned calendar to specify the number of work hours for each time period** option, located on the **Time Periods** page of the **Application Settings** pane.

To set the number of work hours for each time period:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource Calendars**.
3. On the **Resource Calendars** page:
   a. Click the calendar you want to modify.
   b. Click the **Summary** tab.
   c. In the **Time Periods** section, type an hour value in each field.
4. Click **Save**.

Configuring the Standard Work Week for Resource Calendars

Configure the standard work week for the calendar to set the work and nonwork days and hours for a standard work week.

To configure the standard work week:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource Calendars**.
3. On the **Resource Calendars** page:
   a. Click on the calendar you want to modify.
   b. Click the **Standard Work Week** tab.
4. On the **Standard Work Week** tab:
   - Type the number of hours for each work day in the total hours field.
   - Or click and drag on the chart to create work periods for each work day.
5. Click **Save**.

> **Tip**
>
> - You can create multiple work periods for each day.
> - You can delete a work period by moving your mouse over the work period and clicking . ✕

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Modifying Calendar Days

Modify calendar days to account for work or nonwork days or hours that are different than the standard hours defined on the Standard Work Week tab. For example, if you are using a personal calendar, you might choose to specify vacation days by setting the standard working days to nonworking days.

To modify work or nonwork calendar days:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource Calendars**.
3. On the **Resource Calendars** page:
   a. Click on the calendar you want to modify.
   b. Click the **Calendar** tab.
   c. On the **Calendar** tab, click the **Date** list for a date and select **Set to Standard** or **Nonwork**.
4. Click **Save**.

> **Tip**
>
> The **Global Nonwork** on calendar days indicates exception days in the base calendar. You can modify these exceptions days and the globe will disappear. If you set the calendar day back to standard, the Global exception day will reset and the globe will reappear.

Changing the Calendar Type

You can change the type of calendar you created from a personal calendar to a global calendar or shared calendar, or a shared calendar to a personal calendar or global calendar.

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource Calendars**.
3. On the **Resource Calendars** page, expand **Personal Calendars** or **Shared Calendars** and select a calendar.
4. Click **Context** and select **Promote to Global Calendar**, **Convert to Shared Calendar**, or **Convert to Personal Calendar**.
5. Click **Yes** to confirm the calendar change.
6. Click **Save**.

> **Tip**
>
> If you promote a calendar on the Resource Calendars page to be a global calendar, it will no longer appear on the Resource Calendars page. To see the calendar, expand **Global** and click **Global Calendars**.

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Replacing Calendars

If there are many redundant and under utilized calendars in your database, you can reduce the number of calendars in use to allow the unnecessary calendars to be deleted. You can reassign activities or resources from one calendar to another quickly and easily. After the replacement, you can view, print and download a list of items that were reassigned.

To replace a calendar:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, either:
   - Expand **Global** and click **Global Calendars**.
   - Expand **Project** and click **Project Calendars**.
   - Expand **Resource** and click **Resource Calendars**.
3. On the **Global Calendars**, **Project Calendars**, or **Resource Calendars** page click the **Used By** tab.
4. On the **Used By** tab:
   a. Expand **Activities** and **Resources**.

      > **Note**
      >
      > Activities are grouped by project. To select individual activities, expand the projects to which they belong.

   b. Select the activities and resources to which you want to assign a different calendar.
   c. Click **Context** then select **Assign Global Calendar**, **Assign Project Calendar**, or **Assign Resource Calendar**.

      > **Note**
      >
      > You can only replace resource assignments on shared resource calendars.

5. In the **Select Replacement Global Calendar**, **Select Replacement Project Calendar**, or **Select Replacement Resource Calendar** dialog box:
   a. If you want to create a new calendar, select **Add Calendar**, then in the Add New Calendar area:
      i. In the **Calendar Name** field, enter a name for the new calendar.
      ii. Optionally, enter some text into the **Select Calendar to Copy** field and select a calendar type then select **Search**.
      iii. Select a calendar to copy.
      iv. Click **Select**.
   b. Select a calendar to assign to the selected activities and resources.
   c. Click **Assign**.

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About Locations

A location is a geographical reference defined by a pair of coordinates; longitude and latitude.

To create a location, you can enter its coordinates directly or enter a street address and allow P6 to find the longitude and latitude for you.

Assign locations to projects, activities, and resources so you can later use Primavera Analytics to produce powerful, interactive, graphical reports based on geographical location. In Primavera Analytics you can drill down to view data by country, region or city. This can make it easier to show large amounts of data in a relatively small area. Because the data is shown graphically, it also makes it easier for you to see trends and relationships.

You can also sort the Activities, EPS or Resources views by location and can group and filter by location in the Activities and EPS views. The assignments view cannot be grouped or filtered by location.

Creating Locations

Create locations to assign to projects, activities, and resources so that you can report by location in Primavera Analytics.

To create a location:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Locations**.
3. On the Locations page, click **Add**.
4. In the Add Location dialog box:
   a. Click the **Name** field and enter a name for the location.
   b. Enter either a street address or the latitude and longitude.

      Note

      - Input longitude and latitude in the format that is appropriate for your geolocation service. The default format for longitude and latitude is decimal degrees. Contact your P6 administrator for further details.
      - Select a country when locating using longitude and latitude to improve results.

   c. Click **Locate**.

      Note

      Latitude and longitude are required.

   d. Click **Add**.
5. Click **Save**.

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> **Tip**
>
> When you import a project in Primavera XML format, if you choose to import locations any locations assigned in the project will be imported. If any location in the project does not already exist in your database, it will be created.

Importing Locations

You can import new locations into P6 from a Microsoft Excel (.xlsx) file.

To import locations:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Locations**.
3. On the Locations page, click**Actions** and select **Import from Excel**.
4. In the Import Locations dialog box:
   a. In the Import File field, click **Select** and select a file.
   b. Click **Import**.
5. In the import confirmation message box, click **OK**.

> **Tip**
>
> - Click **Actions** and select Create Import Template to download a template file ready for you to populate with data.
> - When you import a project in Primavera XML format, if you choose to import locations any locations assigned in the project will be imported.

Creating Import Templates for Importing Locations

Create a Microsoft Excel template to use when importing location data.

To create an import template:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Locations**.
3. On the Locations page, click the **Actions** menu and select **Create Import Template**.
4. In the File Download dialog box, click **Open** to modify the template or click **Save** to save it.

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Tip

- The import template is created as a Microsoft Excel file with the default file name, *ExportDataToSpreadsheet*.
- The top two rows of the spreadsheet are required when importing data locations from a spreadsheet. Do not change the data in these rows.

About Project Codes

Project codes help you track different projects based on characteristics they share. You can use project codes to arrange projects hierarchically when your EPS contains many projects within many levels. If you have many projects in the hierarchy, project codes help you group and filter potentially vast amounts of information spanning different areas of the organization. The application supports an almost unlimited number of hierarchical project codes and values; you can establish as many as you need to meet the filtering, sorting, and reporting requirements of your organization.

Creating Project Codes

Create project codes to represent project evaluation criteria. These steps represent the minimum required to create a project code.

To create a project code:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project Codes**.
3. On the **Project Codes** page:
   a. Click **Context** and select **Add Code**.
   b. In the **Name** field, double-click and type a unique code name.
   c. In the **Secure** field, select the option to make the code read-only for users without the necessary security privileges to make changes.
   d. Move the code to the correct location in the list by clicking **Context** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
   e. In the **Maximum Length** field, double-click and click the up or down arrow to specify the maximum length for project code value names.
   f. Click **Save**.

Tip

- 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.
- Project codes at the same level are siblings. Subordinate project codes are children.

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Creating Project Code Values

Create project code values to group, sort, and filter project data.

To create project code values:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project Codes**.
3. On the **Project Codes** page:
   a. Select a code or code value.

      Note

      : You might have to expand an EPS node or Project before you see the codes and code values.

   b. Click **Context** and select **Add Code Value** or **Add Child Code Value**.
   c. In the **Name** field, double-click and type a unique code value name.
   d. In the **Description** field, double-click and type a brief narrative about the code value.
   e. Move the code value to the correct location in the list by clicking **Context** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
   f. In the **Weight** field, double-click and type a value.
   g. Click **Save**.

Tip

- Project code values at the same level are siblings. Subordinate project code values are children.
- The weight reflects the ranking of a code value against other values in the project code.

Configuring Project Codes

Configure project codes to add security, code weight, and a description to the code.

To configure a project code:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project Codes**.
3. On the **Project Codes** page:
   a. Select the code you want to configure.
   b. In the **Secure** field, select the option to make the code read-only for users without the necessary security privileges to make changes.

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c. In the **Weight** field, double-click and type the project code weight.
d. In the **Maximum Code Value Weight** field, double-click and type a value.
e. Click **Save**.

Tip

- You can designate a project code as secure only if you have the appropriate security privilege; otherwise the Secure option does not display.
- The Weight of a project code reflects the ranking of the code against other project codes.

Configuring Project Code Values

Configure project code values to describe and weigh the importance of the code value.

To configure project code values:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project Codes**.
3. On the **Project Codes** page:
   a. Expand a project code.
   b. Select the code value you want to configure.
   c. In the **Name** field, double-click and type a name for the code value.
   d. In the **Description** field, double-click and type a brief narrative about the code value.
   e. In the **Weight** field, double-click and type a value.
   f. Click **Save**.

Tip

The weight reflects the ranking of this value against other values in the project code.

About User Defined Fields

User defined fields allow you to create and maintain data specific to your organization. For example, you can track additional activity data, such as delivery dates and purchase order numbers. You can also track additional resource data or project cost-related data, such as profit, variances, and revised budgets. User defined fields are global, so they can be used across all projects in your organization.

You can also create project user defined fields. Project user defined fields track information specific to projects. For example, your organization might require a custom field to track project profit. Project user defined fields are unique in that you can define a formula or statement to automatically calculate field values, and identify graphical indicators to display for a field, based on its value.

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Working with User Defined Fields

User defined fields are available for the following entities:

- Projects
- WBS elements
- Activities
- Steps
- Expenses
- Issues
- Resources
- Resource Assignments
- Risks
- Documents

The majority of the custom fields you create will have only two main properties: a name and a data type. Project and activity UDFs will also support custom formulas and graphical indicators based on calculations.

Creating Project UDFs

Create project user defined fields (UDFs) if the predefined fields do not meet your needs. You can create formulas that automatically calculate values for project UDFs.

To create a project UDF:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project UDFs**.
3. On the **Project UDFs** page:
    a. Click **Add**.
    b. In the **User Defined Field**, double-click and type a name.
    c. In the **Data Type** field, choose a type from the list.
    d. In the UDF Type list:
        - Choose **Manual** if you want to be able to select or enter a value for the UDF field.
        - Choose **Formula** if you want the value of the UDF field to be calculated from other fields.
    e. If you chose **Formula** in the UDF Type list, in the **Formula** detail window, define a formula or statement.
    f. If you chose **Indicator** in the Data Type list, in the **Indicators** and **Summary Indicators** detail windows, define graphical indicators.
    g. Click **Save**.

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Tip

- 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 create manual UDFs quickly from any UDF detail window, by clicking Assign and then clicking Add in the Assign UDFs dialog box.
- You cannot filter views by UDFs calculated on the basis of a formula.
- UDFs calculated on the basis of a formula are visible only in P6. These UDFs are not visible in P6 Professional connected to an EPPM database.
- You cannot define a formula for fields with a data type of Indicator.
- You can edit the Indicator detail window only if you select Integer, Cost, and Number.

Defining Formulas for User Defined Fields

Define formulas to calculate values for the user defined field. You can create formulas for project user defined fields.

To define formulas for user defined fields:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project UDFs**.
3. On the **Project UDFs** page, select a UDF with the UDF Type of Formula and click the **Formula** detail window.
4. In the **Formula** detail window:
   a. Click the **Fields** list and choose a field.

      Note

      You can select any existing project-related field defined in the project management database, including project codes, or any other user defined field that exists for your organization.

   b. Click **Insert Field**.
   c. Continue to build your formula by inserting fields and using the operator buttons.

      Note

      If your formula contains a date, any numeric values used with the date in the formula are hours. For example, the result of the formula [Data Date]+20 is the data date plus twenty hours.

5. Click **Save**.

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> **Tip**
>
> If a Project UDF cannot be calculated, for example because the data used in the formula is unavailable, the column on the EPS page displays **Locked**.

Defining Indicators for User Defined Fields

Define indicators for user defined fields (UDFs) that will display based on criteria set for field values. For example, you can choose a graphical indicator to display when the value of the field equals a certain number, or when the value of the field falls between a certain range of dates.

You must create a project user defined field before defining an indicator.

> **Note**
>
> You can identify graphical indicators only for fields with a 'Cost', 'Integer', or 'Number' **Data Type**.

To define indicators for UDFs:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project UDFs**.
3. On the **Project UDFs** page, select a UDF and click the **Indicators** detail window.

   > **Note**
   >
   > You can also follow these steps for the Summary Indicators detail window

4. In the **Indicators** detail window repeat the following for each parameter statement:
   a. Click the **Select Parameter** list and choose a parameter.
   b. Select the **Value** or **Field** option.
      i. If you select the Value option, double-click the field and type a value.
      ii. If you select the Field option, click the list and select a field.

      > **Note**
      >
      > If you select a "is within the range of" or "is not in the range of" condition, use the Value field to specify the lower range value and the High Value field to specify the upper range value.

   c. Click each **Indicator** list and choose an indicator.
5. On the **Project UDFs** page, click **Save**.

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> **Tip**
>
> Click **Context** and select **Add** to add another indicator statement or **Delete** to remove a statement.

Defining Statements for User Defined Fields

Define statements to calculate values for the user defined field.

You must create a project user defined field before defining a statement.

To define statements for user defined fields:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project UDFs**.
3. On the **Project UDFs** page, select a UDF and click the **Formula** detail window.

> **Note**
>
> The UDF Type must be set to Formula to access the Formula detail window.

4. In the **Formula** detail window:
   a. Click **IF/ELSE**.

   > **Note**
   >
   > The default statement 'IF (condition) THEN (expression) ELSE (expression)' is displayed in the detail window.

   b. Highlight a (condition) or (expression) entry and its parentheses.
   c. Click the **Fields** list and choose a field.

   > **Note**
   >
   > You can select any existing project-related field defined in the project management database, including project codes, or any other user defined field that exists for your organization.

   d. Click **Insert Field**.

   > **Note**
   >
   > The selected field will replace the highlighted (condition) or (expression) entry.

   e. Continue to replace fields and use the operator, relational operator, and expression buttons to build your statement.

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> **Note**
>
> Relational operators (<, >, =, <>) are only valid for the 'IF' condition statement.

f. Click **Validate** to check the formula.

5. On the **Project UDFs** page, click **Save**.

> **Tip**
>
> - Text values must be enclosed in quotes. For example: IF [Division]="Marketing." Numeric values do not require quotes. For example: IF [Proposed Budget]>500000.
> - Only the = (equal) and <> (not equal) relational operators are valid for text values.
> - Date values must be enclosed in quotes and follow the dd-mm-yyyy format. For example, IF [Start Date]>"01-APR-2007".
> - Operator buttons include: +, -, *, /, (, and). Expression buttons include: AND, OR, and IF/THEN/ELSE.
> - You can also replace (condition) and (expression) entries by deleting the entries and their parentheses, placing the cursor in the appropriate location in the statement, and following steps 4.d. through 4.f.

Creating WBS UDFs

Create WBS user defined fields (UDFs) if the predefined fields do not meet your needs.

To create a WBS UDF:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **WBS UDFs**.
3. On the **WBS UDFs** page:
   a. Click **Add**.
   b. In the **User Defined Field**, double-click and type a name.
   c. In the **Data Type** field, choose a type from the list.
   d. Click **Save**.

> **Tip**
>
> - 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 create manual UDFs quickly from any UDF detail window, by clicking Assign and then clicking Add in the Assign UDFs dialog box.

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Creating Activity UDFs

Create activity user defined fields (UDFs) if the predefined fields do not meet your needs.

To create an activity UDF:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Activity UDFs**.
3. On the **Activity UDFs** page:
   a. Click **Add**.
   b. In the **User Defined Field**, double-click and type a name.
   c. In the **Data Type** field, choose a type from the list.
   d. Click **Save**.

Tip

- 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 create manual UDFs quickly from any UDF detail window, by clicking Assign and then clicking Add in the Assign UDFs dialog box.
- The software automatically creates a UDF called MSP Activity ID the first time anyone exports a project to Microsoft Project format. This UDF is hidden and cannot be modified. You should avoid creating a UDF with that name.

Creating Expense UDFs

Create expense user defined fields (UDFs) if the predefined fields do not meet your needs.

To create an expense UDF:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Expense UDFs**.
3. On the **Expense UDFs** page:
   a. Click **Add**.
   b. In the **User Defined Field**, double-click and type a name.
   c. In the **Data Type** field, choose a type from the list.
   d. Click **Save**.

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> **Tip**
>
> 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.

Creating Step UDFs

Create step user defined fields (UDFs) if the predefined fields do not meet your needs.

To create a step UDF:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Step UDFs**.
3. On the **Step UDFs** page:
   a. Click + **Add**.
   b. In the **User Defined Field**, double-click and type a name.
   c. In the **Data Type** field, choose a type from the list.
   d. Click **Save**.

> **Tip**
>
> 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.

Creating Risk UDFs

Create risk user-defined fields (UDFs) to store additional project risk data on the Risks page that is pertinent to your project or business and is not available from the default fields. For example, you might need to include a location field to identify where the risk might occur, or a ranking field to determine the order in which the risks will be handled.

UDFs can be of many types: text, start date, finish date, cost, number, integer, or indicator. Data from UDFs is not used in scoring calculations.

To create a risk UDF:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk UDFs**.
3. On the **Risk UDFs** page:
   a. Click + **Add**.
   b. In the **User Defined Field**, double-click and type a name.
   c. In the **Data Type** field, choose a type from the list.

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d. Click **Save**.

Tip

- 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 create manual UDFs quickly from any UDF detail window, by clicking Assign and then clicking Add in the Assign UDFs dialog box.

Creating Issue UDFs

Create issue user defined fields (UDFs) if the predefined fields do not meet your needs.

To create an issue UDF:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Issues** and click **Issue UDFs**.
3. On the **Issue UDFs** page:
   a. Click **Add**.
   b. In the **User Defined Field**, double-click and type a name.
   c. In the **Data Type** field, choose a type from the list.
   d. Click **Save**.

Tip

- 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 create manual UDFs quickly from any UDF detail window, by clicking Assign and then clicking Add in the Assign UDFs dialog box.

Creating Document UDFs

Create document user defined fields (UDFs) if the predefined fields do not meet your needs.

To create a document UDF:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Documents** and click **Document UDFs**.
3. On the **Document UDFs** page:
   a. Click **Add**.
   b. In the **User Defined Field**, double-click and type a name.
   c. In the **Data Type** field, choose a type from the list.

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d. Click **Save**.

> **Tip**
>
> 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.

Creating Assignment UDFs

Create assignment user defined fields (UDFs) if the predefined fields do not meet your needs.

To create an assignment UDF:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Assignment UDFs**.
3. On the **Assignment UDFs** page:
   a. Click + **Add**.
   b. In the **User Defined Field**, double-click and type a name.
   c. In the **Data Type** field, choose a type from the list.
   d. Click **Save**.

> **Tip**
>
> - 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 create manual UDFs quickly from any UDF detail window, by clicking Assign and then clicking Add in the Assign UDFs dialog box.

Creating Resource UDFs

Create resource user defined fields (UDFs) if the predefined fields do not meet your needs.

To create a resource UDF:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource UDFs**.
3. On the **Resource UDFs** page:
   a. Click + **Add**.
   b. In the **User Defined Field**, double-click and type a name.
   c. In the **Data Type** field, choose a type from the list.
   d. Click **Save**.

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Tip

- 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 create manual UDFs quickly from any UDF detail window, by clicking Assign and then clicking Add in the Assign UDFs dialog box.

About Work Breakdown Structures (WBS)

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

When creating a project, the project manager typically develops the WBS first. The manager assigns documents to each WBS element, and then defines activities to complete that element. In addition to document and activity assignments, each WBS element can also have specific earned value calculation settings, issue assignments, and notebook topics.

Each project has its own WBS hierarchy with the top-level WBS element equal to that of each enterprise project structure (EPS) node or project. Each WBS element can contain more detailed WBS levels, activities, or both.

Working with WBS Categories

Use WBS categories to define custom work breakdown structure (WBS) categories. Categories are not project-specific; you can assign them to any WBS elements in the EPS. WBS categories help reflect your organization's terminology and unique requirements. You can also use categories to group, sort, and filter WBS elements. You can create new WBS categories on the WBS Categories tab of the Enterprise Data page.

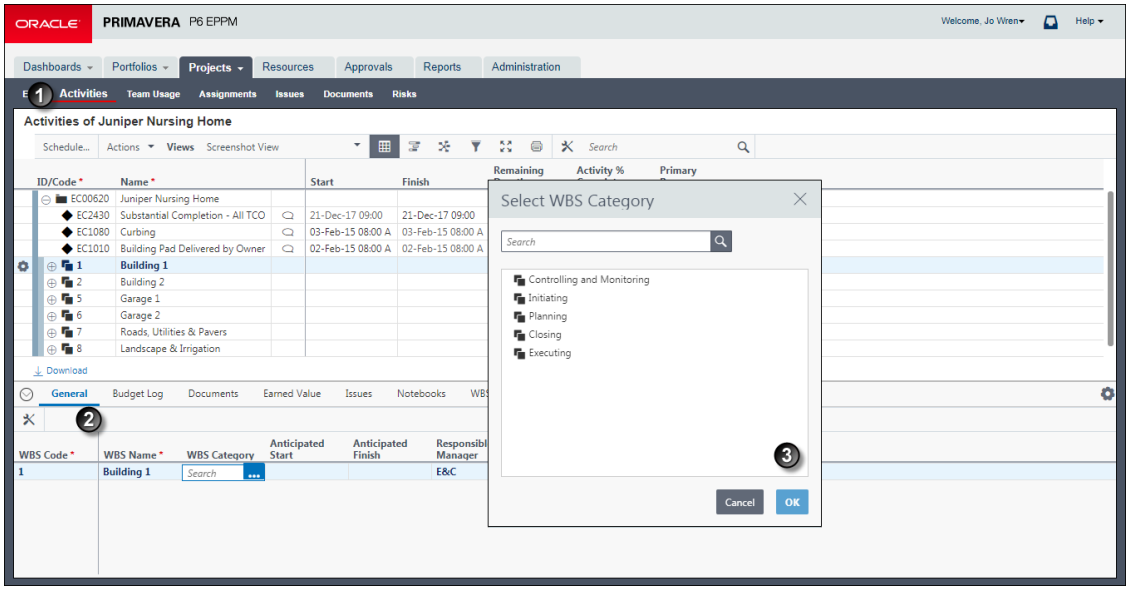


Table of WBS Category Assignment

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Item	Description
1	**Activities page**: On the **Activities** page, use the **General** detail window to select the WBS category you want to assign.
2	**General Detail Window**: In the **General** detail window, you can assign a WBS category by clicking in the **WBS Category** field. If the **WBS Category** field is not visible, click **Customize View** and move **WBS Category** from the Available Columns to the Selected Columns list. The category you assign helps organize the WBS element within the project. For example, a WBS category called *Design* would indicate that this WBS will focus on design tasks.
3	**Select WBS Category dialog box**: Use the **Select WBS Category** dialog box to assign a WBS category. You can select only one category. If you are assigning a WBS category to a parent WBS, you will be asked if you also want to assign that category to the child WBS elements. Choose yes or no as needed.

Creating WBS Categories

Create WBS categories to organize, filter, and report WBS information in all projects.

To create WBS categories:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **WBS Category**.
3. On the **WBS Category** page:
   a. Click **Add**.
   b. In the **Category** field, double-click and type a name.
   c. Click **Save**.

Tip

- To change a category value, double-click it, then type a new name. The change applies to all projects to which the WBS item is assigned.
- If you change the WBS category, the category's values or value assignments do not change.

About Activity Codes

Activity codes enable you to categorize activities into logical groups based on your organization's criteria. An activity code can be one of three types: Global, EPS, or Project. Global activity codes organize activities across all projects in an organization. EPS activity codes organize activities within a specific branch or node of the enterprise project structure (EPS). Project activity codes categorize activities based on specific features within a project.

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Activity codes represent broad categories of information, a department or project manager for instance. You can create multiple activity codes according to specific categories, then assign different values for each code. For example, assume your organization has many departments and you want to review activities within each department. You can first create an activity code "department," then assign different values such as quality assurance, finance, and sales. You can then associate activities with specific departments.

A key characteristic of an activity code as opposed to an activity user defined field is that activity codes will only allow entries from a predefined list of values. After you create activity codes, users can assign activity code values to activities to group, sort, and filter project data based on these values.

Working with Activity Codes

There are three types of activity codes: Global, EPS, and Project. Global activity codes can be used in all projects within the enterprise. EPS activity codes can only be used in projects that belong to a specific EPS, including its subordinate EPS nodes, if any. Project activity codes can be used only in their designated project. The EPS or project that an activity code is associated with is specified when the code is created. A display format setting in your preferences determines whether you see codes as the code value or the code description.

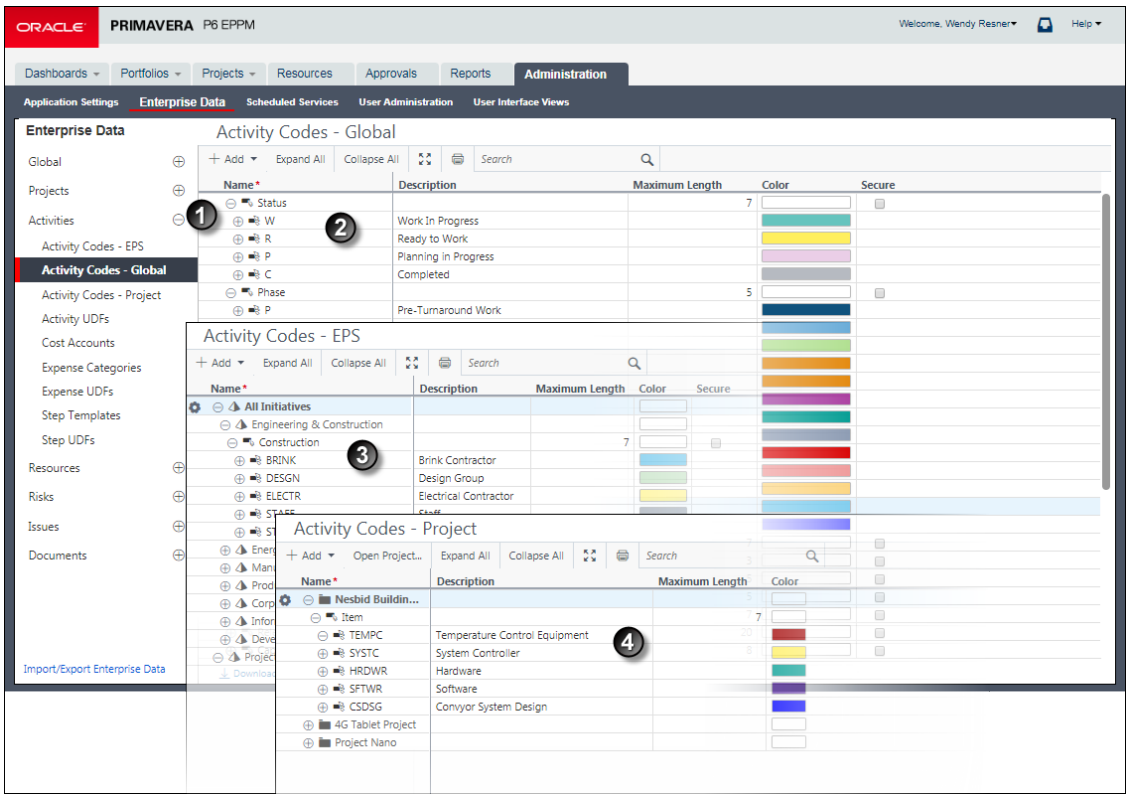


Table of Key Activity Code Administration Elements

Item	Description
1	**Navigation Controls**: Expand **Activities** and select **Activity Codes - EPS**, **Activity Codes - Global**, or **Activity Codes - Project** in the **Enterprise Data** pane to configure activity codes.

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Item	Description
2	**Activity Codes - Global page**: In this example, Phase is a global activity code. Like all activity codes, each of its values contains a short code Name, Description, and Color. For example, INSTL is the Installation Phase activity code value for the Phase activity code.
3	**Activity Codes - EPS page**: In this example, Construction is an EPS activity code. DESGN is the Design Group activity code value.
4	**Activity Codes - Project page**: This tab displays a third set of activity codes arranged by project for use only within that project.

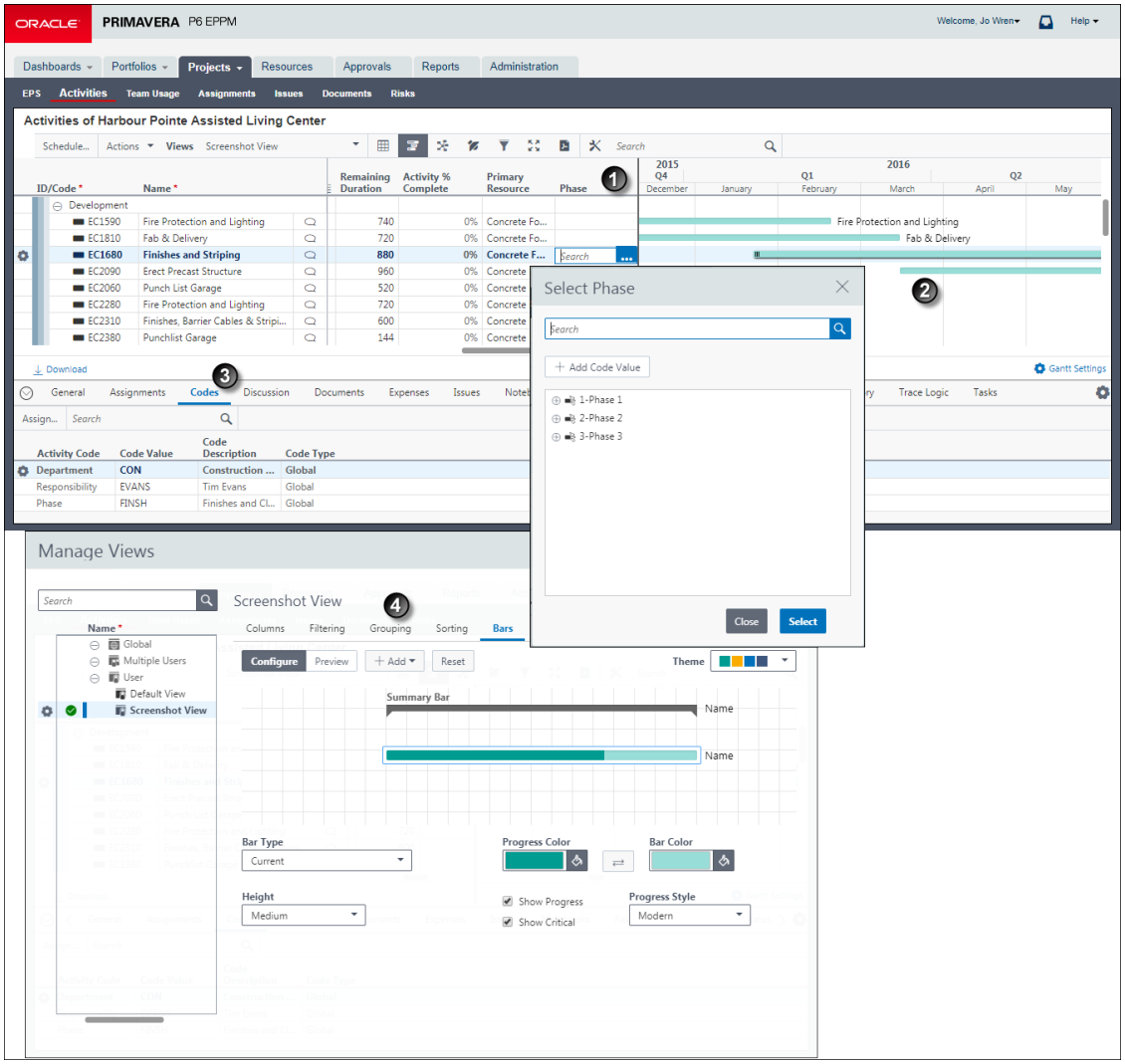


Table of Key Activity Code Assignment Elements

Item	Description
1	**Phase activity code field**: In this example, the user has added the Phase activity code field to the columns in the table and has assigned the STRUC - Structural Phase code value to the selected activity.

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Item	Description
2	**Activity Gantt chart**: The color of the bars can be configured to display the corresponding colors of the assigned activity code.
3	**Codes detail window**: Use this detail window to assign global, EPS, or project activity codes to the currently selected activity.
4	**Bars tab of the Customize Activity View dialog box**: In this example, the Phase activity code will determine the color of the bar in the Gantt chart.

Creating Activity Codes

Create activity codes to organize activities into groups. Activity codes can be one of three levels: global, EPS, or project.

To create activity codes:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Activity Codes - EPS**, **Activity Codes - Global**, or **Activity Codes - Project**.
3. On the **Activity Codes** page:
   a. Click **Context** and select **Add Code**.
   b. In the **Name** field, double-click and type a unique code name.
   c. In the **Secure** field, select the option to make the code read-only for users without the necessary security privileges to make changes.
   d. Move the code to the correct location in the list by clicking **Context** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
   e. In the **Maximum Length** field, double-click and click the up or down arrow to specify the maximum length for project code value names.
   f. Click **Save**.

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Tip

- 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.
- Project-level activity code names must be unique across a project. Enterprise-level activity code names must be unique across all EPSs. Global activity code names must be unique across the organization.
- You can designate an activity code as secure only if you have the appropriate security privilege; otherwise, this option does not display.
- Activity codes at the same level are siblings. Subordinate activity codes are children.
- You can change EPS-level or project-level activity codes into Global activity codes, and you can change project-level activity codes into EPS-level activity codes. Click **Context** and select **Move to Global** or **Move to EPS**.
- If you are working on the Activity Codes - Project page and the project you need is not visible, click **Open Project**. In the Open Projects dialog box, select a project from the Available Projects list, click › to move the project to the Selected Projects list, and click **OK**.

Creating Activity Code Values

Create activity code values to represent variations within the larger scope of the activity code. These values, not the activity codes, will be assigned to projects. You can add code values for project-level, EPS-level, and global activity codes. These steps represent the minimum required to create an activity code value. You can configure an activity code value by modifying additional settings.

To create activity code values:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Activity Codes - EPS**, **Activity Codes - Global**, or **Activity Codes - Project**.
3. On the **Activity Codes** page:
   a. Select a code or code value.

      Note

      : You might have to expand an EPS node or Project before you see the codes and code values.

   b. Click **Context** and select **Add Code Value** or **Add Child Code Value**.
   c. In the **Name** field, double-click and type a unique code value name.
   d. In the **Description** field, double-click and type a brief narrative about the code value.

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e. Move the code value to the correct location in the list by clicking **Context** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.

f. Click **Save**.

Tip

- The code value cannot exceed the Maximum Length specified by the activity code.
- Activity code values at the same level are siblings. Subordinate activity code values are children.
- You can also create activity code values from the Codes detail window on the Activities page.
- If you are working on the Activity Codes - Project page and the project you need is not visible, click **Open Project**. In the Open Projects dialog box, select a project from the Available Projects list, click › to move the project to the Selected Projects list, and click **OK**.
- Each time you update the list of projects on the Activity Codes - Project page, the application saves the list of displayed projects.

Configuring Activity Code Values

Configure activity code values to reflect changing variations within the larger scope of the activity code.

To configure activity code values:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities**, then:
   - Click **Activity Codes - EPS**, expand an EPS node, then expand a code.
   - Click **Activity Codes - Global**, then expand a code.
   - Click **Activity Codes - Project**, expand a Project, then expand a code.
3. Select an activity code value.
   a. In the **Name** field, double-click and type a name for the code value.
   b. In the **Description** field, double-click and type a brief narrative about the code value.
   c. In the **Color** field, double-click and select a color.

   Note

   In the Gantt chart and the Activity Calendar, activity status shown by activity code will display the color you apply to the activity code value.
4. Click **Save**.

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Tip

- Activity code values at the same level are siblings. Subordinate activity code values are children.
- You can also configure activity code values from the Codes detail window on the Activities page.
- If you are working on the Activity Codes - Project page and the project you need is not visible, click **Open Project**. In the Open Projects dialog box, select a project from the Available Projects list, click > to move the project to the Selected Projects list, and click **OK**.

About Cost Accounts

Cost accounts enable you to monitor project expenses, activity costs, and earned value throughout the project life cycle. Costs are attached to activities and resources so you can track the amount of work accomplished against the amount of money spent. You can assign default or created cost accounts to any project.

Cost accounts are established in a hierarchy. For example, if you created a cost account for a project component such as hardware, you would create other cost accounts beneath this component to show its parts such as coding and installation.

Creating Cost Accounts

Create cost accounts to track activity cost and earned value throughout the project life cycle. You can associate predefined cost accounts with expenses to categorize them.

To create cost accounts:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Cost Accounts**.
3. On the **Cost Accounts** page:
   a. Select a cost account and click **Context** then select **Add** or **Add Child**.
   b. In the **ID** field, double-click and type a unique ID.
   c. In the **Name** field, double-click and type a name.
   d. In the **Description** field, double-click and type a brief narrative about the cost account.
   e. Move the cost account to the correct location in the list by clicking **Context** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
   f. Click **Save**.

About Expenses

Expenses are non-resource costs associated with a project and assigned to a project's activities. An expense is typically a one-time expenditure for non-reusable items. Expenses are project-specific and not time-based. Some examples include facilities, travel, consulting, and

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training. Each expense has an actual, remaining, and at completion value for both cost and units that is either budgeted or planned.

Expense categories classify and standardize expenses, and organize and maintain your expense information.

Creating Expense Categories

Create an expense category to organize and track various expense types within an organization.

To create expense categories:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Expense Categories**.
3. On the **Expense Categories** page:
   a. Click + **Add**.
   b. In the **Category** field, double-click and type a name.
   c. Click **Save**.

Tip

- To change an expense category, double-click it, then type a new name. The change applies to all projects to which the expense item is assigned.
- To change the order in which an expense category is displayed, select it, then click **Context** and select **Move Up** or **Move Down**.

About Step Templates

Step templates enable you to define a group of steps common to multiple activities, and then assign the template to different activities. By creating templates for groups of activity steps that are relevant in many projects, an organization can streamline data entry and ensure that work is identified consistently throughout the organization.

Creating Step Templates

Create step templates to specify reusable sets of steps common to many activities. This task represents the minimum steps required to create a step template. You can also configure a step template to add, delete, or arrange the steps assigned to a template.

To create step templates:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Step Templates**.
3. On the **Step Templates** page:
   a. Click + **Add**.

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b. In the **Template Name** field, double-click and type a name.

c. Click **Save**.

Configuring Step Templates

Configure step templates to add, delete, or arrange the steps assigned to a template.

To configure a step template:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Step Templates**.
3. On the **Step Templates** page, select a template.
4. In the **Steps** detail window, you can add, delete, or arrange steps.
   a. To add steps, click **Add**.
      - In the **Step Name** field, double-click and type a name.
      - In the **Description** field, double-click and type a brief narrative about the step.
      - In the **Weight** field, double-click and type a weight value.
   b. To delete steps, click **Context** and select **Delete**.
   c. To arrange steps, click **Context** and select **Move Up** or **Move Down**.
5. On the Step Templates page, click **Save**.

About Risks

Risks are any uncertain events or conditions that, if they occur, have a positive or negative effect on project objectives. Risks are also known as threats, warnings, imperatives, escalation notices, or jeopardies. Positive risks are often classified as opportunities which, if they occur, are realized as rewards. Thorough documentation and analysis of risks over multiple projects offer lessons, and potentially cost and time savings, for all future projects.

You can document risks in P6 and perform quantative analysis of the data in the P6 risk register in Oracle Primavera Cloud. Once that analysis is complete, you can see the results in the Activities view in P6.

Working with Risks Enterprise Data

Risk Enterprise data is used to setup categories, risk scoring matrices, and thresholds that are standard across your company. The categories and matrices that are assigned to a project can be displayed in the risk register, which is located on the Risks page in the Projects section.

Risk Categories page: Risk categories are used to categorize and organize project risks. They are global across the enterprise and are a mechanism to group risks across multiple projects to see risk trends across the organization as well as a single project. Technical, Operational, and External are examples of risk categories that might apply to a typical project. The risk categories are created in the Risks Enterprise Data area and assigned on the Risks page in the Projects section.

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Risk Scoring Matrices page: Create a risk scoring matrix to perform qualitative risk analysis on your project risks. When creating a risk scoring matrix, you must define the probability, tolerance, cost, and schedule impacts. Additionally, you can add user-defined impacts to the matrix. You must also assign a risk scoring method (Highest Impact, Average Impact, and Average Individual Impact) to the matrix. A probability and impact diagram is created based on the information assigned in the matrix. Click on the Probability and Impact Diagram detail window to view the diagram.

To use the risk scoring matrix, you must add the projects you want to use the matrix to the risk scoring matrix from the Projects detail window. You can also assign a risk scoring matrix to a project on the EPS page in the Projects section.

> **Note**
>
> You can add risks to a project without a risk scoring matrix; however, you cannot perform qualitative risk analysis and will not be able to assign probability or impact thresholds without a risk scoring matrix. You can add a risk scoring matrix to the project at any time.

Risk Thresholds page: Create risk thresholds, including probability, tolerance, cost impact, schedule impact, and any additional user-defined impacts, for use in the risk scoring matrix.

Risk UDFs page: Risk user-defined fields (UDFs) are used to track additional information about the risk that is not provided by the standard risk fields. Create Risk UDFs when it is necessary to view additional data fields on the Risks page. A risk UDF can include a text string, a numerical value, start date, finish date, cost, integer, or indicator.

Configuring Risk Enterprise Data

You can configure enterprise data to include risk categories and risk UDFs, and to define the criteria for performing qualitative risk analysis using a risk scoring matrix.

To define the criteria for performing qualitative risk analysis, perform the following tasks:

1. Creating Risk Thresholds
2. Creating Risk Scoring Matrices
3. Assigning a Risk Scoring Matrix to a Project

> **Note**
>
> If you want to perform quantitative risk analysis in Oracle Primavera Cloud, you must also populate the **Minimum Duration**, **Maximum Duration**, and **Most Likely Duration** fields in the Activities view.

To configure risk categories or risk UDFs, perform the following tasks:

1. Creating Risk Categories
2. Creating Risk UDFs

About Risk Scoring Matrices

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A risk scoring matrix is a qualitative analysis tool used to calculate the impact of a risk on a project. A risk scoring matrix includes probability threshold values, cost and impact threshold values, and any additional user-defined impact threshold values, which are all used in the calculation of the risk score. The score is used to give an overall rating of a risk depending on the probability and impact thresholds assessed in the project. The scores are used to help determine if the risk should be addressed during the course of the project, or if the risk does not present a significant impact to the cost or schedule of the project.

Working with Risk Scoring Matrices

Use the Risk Scoring Matrices page to create a risk scoring matrix for one or more projects. The inputs to the risk scoring matrix are the risk thresholds, which you create on the Risk Thresholds page from the Enterprise Data section.

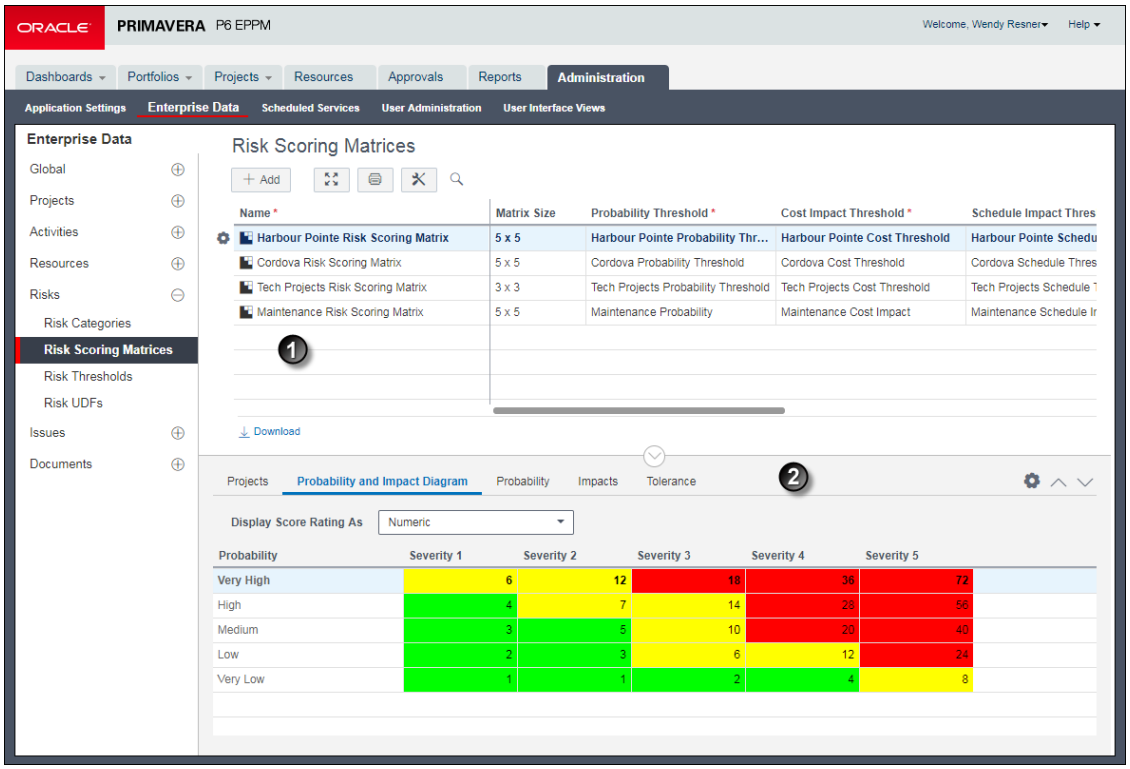


Table of Risk Scoring Matrices Elements

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Item	Description
1	**Risk Scoring Matrices** work area: This work area contains all the risk scoring matrices defined for your company. The number of risk scoring matrices you create is determined by risk analysis practices incorporated in your business. You might have one corporate-wide risk scoring matrix that is used for all projects, or you might have several matrices which are used depending on different factors, such as project size. For example, a new development project might require different cost impact and schedule impact threshold values than a project for a new feature development on an existing product. There might also be situations where a project is a joint-venture or is performed by a contractor and the prime owner's matrix must be used. However, for any project, only one matrix is assigned. In the work area above, this company has a need for multiple risk scoring matrices, including a separate risk scoring matrix for the Harbour Pointe Assisted Living construction project. When creating a risk scoring matrix, you choose a matrix size based on the number of levels assigned to your probability and impact thresholds defined on the Risk Thresholds page. Using the Harbour Pointe Risk Scoring Matrix as an example, the risk scoring matrix is 5 x 5. The first 5 represents the number of levels assigned to the probability threshold and the second 5 represents the number of levels assigned to the cost and schedule impact thresholds. Next, choose the risk scoring method to use for risk score calculations.

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Item	Description
2	**Risk Scoring Matrices** detail windows: **Description**: Describe the risk scoring matrix. Projects: Assign the matrix to one or more projects. Note that only one matrix can be assigned to a single project. If a matrix is not assigned to a project, risks can still be entered in the risk register on the Risks page; however, the probability, cost impact, and schedule impact threshold fields are disabled, and you cannot use the qualitative analysis features of the application. At any time you can create a matrix and assign it to an existing project. **Probability and Impact Diagram (PID)**: The PID is a graphical representation of the selections made in the Risk Scoring Matrices work area. The number of rows and columns is determined by the matrix size. The rows are the probability levels and the columns are the impact levels. The code and name fields for the impact threshold levels are customizable when creating a threshold; therefore, the column labels for the impacts are "Severity *n*." The number of severity columns reflects the number of levels assigned to the impact thresholds. The color coding indicates the tolerance threshold assigned to the risk scoring matrix. These same tolerance colors are also visible in the Score and Score (Text) fields on the risk register on the Risks page when risk values are entered. **Probability**: The details of the probability threshold assigned to the matrix needed to perform a qualitative assessment on project risks. This detail window is read-only. To change anything related to the threshold, navigate to the Risk Thresholds page. **Impacts**: The details for the impact thresholds assigned to the matrix. A cost and schedule impact must be defined for the matrix to perform a qualitative assessment on project risks. An unlimited number of user-defined impact thresholds can be assigned to the matrix. From this detail window, you can add or delete impacts to the matrix; however, you cannot modify the threshold values. To change anything related to the threshold, navigate to the Risk Thresholds page. **Tolerance**: The details for the tolerance threshold assigned to the matrix. This detail window is read-only. To change anything related to the threshold, navigate to the Risk Thresholds page.

Creating Risk Scoring Matrices

Create a risk scoring matrix to perform qualitative analysis on project risks. Project risk is assessed based on the thresholds defined in the risk scoring matrix.

Before creating a risk scoring matrix, you need to first define risk thresholds.

To create a risk scoring matrix:

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1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and choose **Risk Scoring Matrices**.
3. On the **Risk Scoring Matrices** page:
   a. Click + **Add**.
   b. In the **Name** field, click and type a unique name.
   c. In the **Matrix Size** field, double-click and click ••• **Select**.
4. In the **Select Matrix Size** dialog box:
   a. Choose a threshold level for the **Probability Threshold Level** and **Impact Threshold Level** fields.

      > **Note**
      >
      > You must have already defined thresholds with the number of levels you are assigning to the matrix. If you do not have a threshold with the same number of levels, you will be able to select the matrix size, but you will not be able to add a threshold.

   b. Click **Select**.
5. On the **Risk Scoring Matrices** page, double-click in the **Probability Threshold** field and click ••• **Select**.
6. In the **Select Probability Threshold** dialog box, choose a probability and click **OK**.
7. On the **Risk Scoring Matrices** page, double-click in the **Schedule Impact Thresholds** field and click ••• **Select**.
8. In the **Select Schedule Impact Thresholds** dialog box:
   a. Select a **Schedule Impact** and click **Select**.
   b. Select any additional impacts and click **Select**.
9. On the **Risk Scoring Matrices** page, double-click in the **Cost Impact Thresholds** field and click ••• **Select**.
10. In the **Select Cost Impact Thresholds** dialog box:
    a. Select a **Cost Impact** and click **Select**.
    b. Select any additional impacts and click **Select**.
11. On the **Risk Scoring Matrices** page, double-click in the **Tolerance Threshold** field and click ••• **Select**.
12. In the **Select Tolerance Threshold** dialog box, choose a tolerance and click **OK**.
13. On the **Risk Scoring Matrices page**, double-click in the **Risk Scoring Method** field and select a risk scoring method from the list.
14. In the **Description** detail window, type a description of the risk scoring matrix.
15. On the **Risk Scoring Matrices** page, click **Save**.

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Assigning a Risk Scoring Matrix to a Project

You need to assign a scoring matrix to a project before it can be used to prioritize risks. Once you assign a scoring matrix to a project, it is available for use from the risk register on the Risks page in the Projects section.

You can assign a risk scoring matrix to a project from different areas in the application, depending on the tasks you are working on at the time.

- See Assigning a Risk Scoring Matrix to a Project from the EPS Page when setting up a project.
- See Assigning a Risk Scoring Matrix to a Project from the Enterprise Data Pane when defining a risk scoring matrix and applying the matrix to multiple projects.
- See Assigning a Risk Scoring Matrix to a Project from the Portfolios Section when managing a portfolio.

Assigning a Risk Scoring Matrix to a Project from the Enterprise Data Pane

You need to assign a risk scoring matrix to a project before it can be used to prioritize risks. Once you assign a scoring matrix to a project, it is available for use from the risk register on the Risks page in the Projects section.

You can assign a risk scoring matrix to a project from multiple locations in the application. Use this method when you are defining a risk scoring matrix and need to apply the matrix to one or more projects.

To assign a risk scoring matrix to a project from the Enterprise Data pane:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Scoring Matrices**.
3. On the **Risk Scoring Matrices** page, select the matrix to assign to the project and click the **Projects** detail window.
4. In the **Projects** detail window, click **Assign...**.
5. In the **Select Project** dialog box:
   - Select a project and click **Select**.

   > **Note**
   >
   > If the project you selected is assigned to another risk scoring matrix, the threshold values you previously set for the project are removed. You will need to select values using the newly assigned risk scoring matrix.
6. On the **Risk Scoring Matrices** page, click **Save**.

Assigning a Risk Scoring Matrix to a Project from the EPS Page

You need to assign a risk scoring matrix to a project before it can be used to prioritize risks. Once you assign a scoring matrix to a project, it is available for use from the risk register on the Risks page in the Projects section.

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You can assign a risk scoring matrix to a project from multiple locations in the application. Use this method when you are setting up a project or modifying project settings.

To assign a risk scoring matrix to a project from the EPS page:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Locate the project you want to associate with a risk scoring matrix.
   b. Double-click in the **Risk Scoring Matrix** field and click **Select**.
   c. In the **Select Risk Scoring Matrix** dialog box, select a matrix and click **Assign**.
   d. On the **EPS** page, click **Save**.

Tip

- If the project you selected is assigned to another risk scoring matrix, the threshold values you previously set for the project are removed. You will need to select values using the newly assigned risk scoring matrix.
- If the Risk Scoring Matrix field is not visible, click **Customize View** and add it to the view.

Assigning a Risk Scoring Matrix to a Project from the Portfolios Section

You need to assign a risk scoring matrix to a project before it can be used to prioritize risks. Once you assign a scoring matrix to a project, it is available for use from the risk register on the Risks page in the Projects section.

You can assign a risk scoring matrix to a project from multiple locations in the application. Use this method when you are creating or modifying a portfolio.

To assign a risk scoring matrix from the Portfolios section:

1. On the **Navigation Menu**, expand **Portfolios** and select **Portfolio Analysis**.
2. On the **Portfolio Analysis** page:
   a. Click the **View** field and select a scorecard view from the list.
   b. Select a project.
   c. In the **Risk Scoring Matrix** field, double-click and click **Select**.
3. In the **Select Risk Scoring Matrix** dialog box, choose a risk scoring matrix and click **OK**.

Note

If the project you selected is assigned to another risk scoring matrix, the threshold values you previously set for the project are removed. You will need to select values using the newly assigned risk scoring matrix.

4. On the **Portfolio Analysis** page, click **Save**.

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> **Tip**
>
> If the Risk Scoring Matrix field is not visible, click **Customize** and the field.

About Risk Thresholds

Risk thresholds are a range of values (monetary, time, quality, technical, etc.) used in rating or assessing the impact of the risk to the project.

These thresholds are the inputs used to create a risk scoring matrix, which is the overall scoring mechanism used to perform qualitative risk analysis on your project risks.

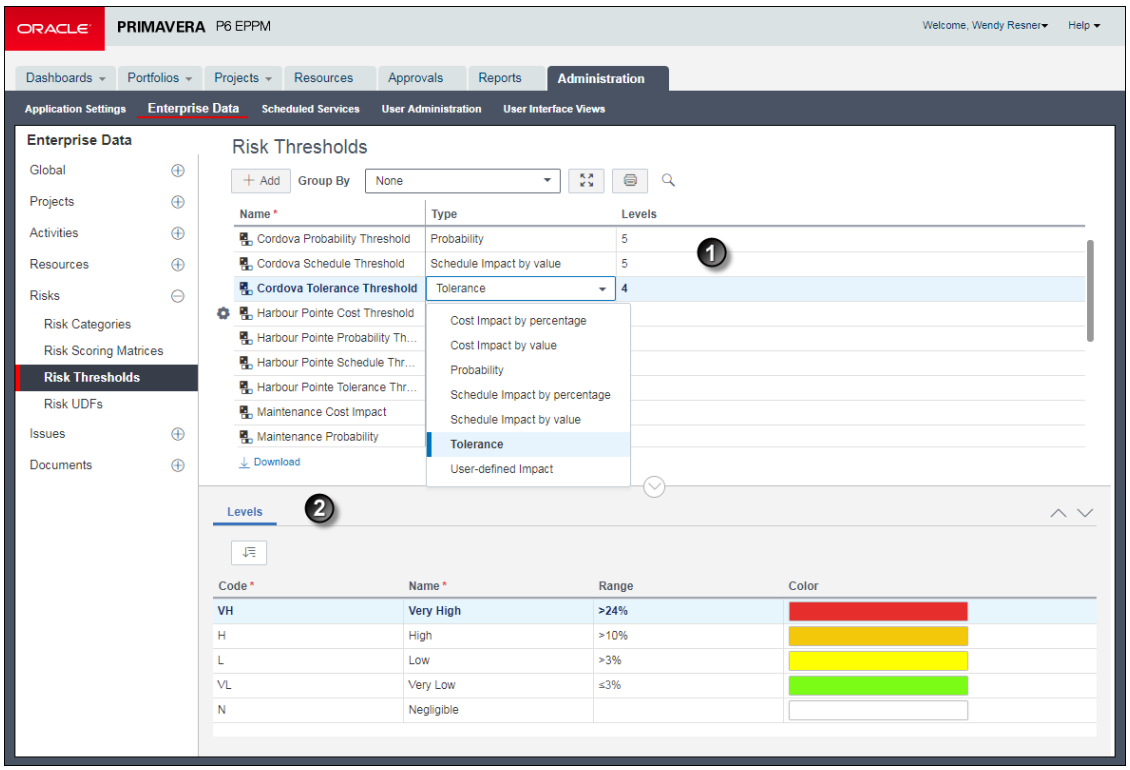
Working with Risk Thresholds

From the **Risk Thresholds** page, create risk thresholds for use in risk scoring matrices.

Risk thresholds necessary for a risk scoring matrix are:

- **Probability**: The likelihood of a risk occurring.
- **Tolerance**: The acceptability or manageability of a risk on a project.
- **Schedule Impact by percentage or value**: The amount of time the risk will increase or decrease the project schedule, defined as either a percentage of the project's planned duration (by percentage) or as a duration value (by value).
- **Cost Impact by percentage or value**: The cost impact if a risk occurs, defined as either a percentage of the project's planned cost (by percentage) or as a monetary value.

Additional user-defined impacts can be added to track impacts such as Political, Environmental, or Reputation.



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Table of Risk Threshold Elements

Item	Description
1	**Risk Threshold** work area: Define the risk threshold name, type (Probability, Tolerance, Schedule Impact by percentage or value, Cost Impact by percentage or value, User-Defined Impact), and number of thresholds levels in this work area. Each threshold can have 2 - 9 levels; however, the cost impact, schedule impact, and any user-defined impacts must have the same number of levels for a given risk scoring matrix. In the example above, the Cost Impact by value, Schedule Impact by value, Probability, and Tolerance thresholds are defined for the Harbour Pointe Assisted Living construction project. The Cost Impact and Schedule Impact thresholds are each defined with 5 levels and the Probability threshold is also defined with 5 levels. The risk scoring matrix using these thresholds will have a matrix size of 5 x 5. For each risk scoring matrix, only one threshold for Probability, Tolerance, Schedule Impact, and Cost Impact is allowed. You can add as many user-defined impacts as necessary. You create multiple thresholds of the same type, but with different values, when you create multiple risk scoring matrices.
2	**Levels** detail window: The details for each level are defined in this window. Define a name for each level and a code, which is a short name or abbreviation for the name. Also, define the range of acceptable values for that level; the range levels could be a percentage value, dollar amount, number of days, or a text string depending on the chosen threshold. You can define a color for each threshold level; however, you should define colors for the tolerance threshold. The colors for the threshold are used to give visual representation in the risk register. The colors for the tolerance threshold are used in the Probability and Impact Diagram (PID) to visually represent the threshold values. More importantly, the colors display in the Score and Score (text) fields on the risk register on the **Risks** page. This enables you to easily identify where in the risk scoring matrix this risk falls in terms of severity. In the example above, the Tolerance threshold is defined with 3 levels (High, Medium, and Low) and each range is assigned a color. You will see the impact of the color after you create a risk scoring matrix, assign the thresholds to the matrix, and assign a risk scoring method.

Creating Risk Thresholds

Create risk thresholds to use when creating a risk scoring matrix. When creating risk thresholds, you must define the probability threshold, cost impact threshold by percentage or value, schedule impact threshold by percentage or value, and tolerance threshold. You can also define as many user-defined impacts as necessary.

To create risk thresholds:

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1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand Risks and click **Risk Thresholds**.
3. On the **Risk Thresholds** page:
   a. Click + **Add**.
   b. In the **Name** field, double-click and type a threshold name.
   c. In the **Type** field, double-click and select a type of risk from the list.
   d. In the **Levels** field, double-click and select a level number from the list.
4. In the **Levels** detail window, default values are assigned for the Code, Name, and Range values. Use the default values provided, or double-click any field to customize it.

> **Note**
>
> You can define a color for each threshold level to visually represent the values when working the risk register on the Risks page in the Projects section. However, you should define colors for the tolerance threshold. The colors for the tolerance threshold are used to color the Score field on the risk register on the Risks page. This enables you to easily identify where in the risk scoring matrix this risk falls in terms of severity.

5. On the **Risk Thresholds** page, click **Save**.

> **Tip**
>
> The *Cost Impact by percentage* and *Schedule Impact by percentage* options allow you to assess risk without having to define absolute values. This enables you to use the same risk scoring matrix across multiple projects.

Modifying Risk Thresholds

If you are going to change the type or level of a threshold that is currently assigned to a scoring matrix, you must first remove the threshold from the risk scoring matrix and assign a new threshold.

To delete a threshold from a risk scoring matrix:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Scoring Matrices**.
3. On the **Risk Scoring Matrices** page:
   a. Locate the risk scoring matrix that includes the threshold you are modifying.
   b. Double-click in the appropriate threshold field.
4. In the **Select Threshold** dialog box, choose a different threshold and click **Select**.
5. On the **Risk Scoring Matrices** page, click **Save**.

To modify a risk threshold:

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1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Thresholds**.
3. On the **Risk Thresholds** page:
   a. Locate the threshold you are modifying.
   b. Double-click in the field you are modifying and update the value.

> **Note**
>
> If you are modifying the number of levels assigned to a threshold, all data for existing levels are overwritten and replaced with the default values for that level.

   c. Click **Save**.

About Risk Categories

Risk categories are a classification of risk types customized to your specific project or business that are used to categorize and organize project risks. Categorizing risks enables you to analyze the types of risks occurring and see trends within the project or across multiple projects. This visibility enables you to more effectively manage risks over the long term.

Creating Risk Categories

Create risk categories and subcategories to define a risk breakdown structure (RBS), which enables you to categorize and organize project risks.

To create a risk category:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Categories**.
3. On the **Risk Categories** page:
   a. Select an existing category and click **Add** and select **Add** to create a category at the same level, or select **Add Child** to create a category below the selected level.
   b. In the **Category** field, double-click and type a unique name.
   c. Move the risk category to the correct location in the list by clicking **Context** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
   d. Click **Save**.

About Issues

Issues are perceived problems within a schedule that require attention or corrective action. When you create them in the Activities section, you can associate them with a single project and assign them to a responsible manager in the OBS for follow-up based on priority. You can also associate issues with a single activity. You can choose to receive email notifications when new issues of a certain priority are added, when existing issues are modified, or when issues are assigned a specific issue code.

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You can also think of issues as impediments, action items, open items, punch lists, logs, or concerns. Over time, if you do not resolve or close open issues or issues placed on hold, they can become risks.

For example, you can create an issue code titled *Severity*, and subsequently create issue code values: *High*, *Medium*, and *Low*. You can assign each of these code values to issues across multiple projects, enabling you to categorize each issue according to how severe it is. Similarly, you can create codes to categorize issues by responsibility, subproject, or any other classification you require to organize issues. Assigning issue codes enables you to quickly search for and view issues according to specific criteria.

Creating Issue Codes

Create issue codes to organize project issues in a way that is meaningful to your organization.

To create an issue code:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Issues** and click **Issue Codes**.
3. On the **Issue Codes** page:
   a. Click **Context** and select **Add Code**.
   b. In the **Name** field, double-click and type a unique code name.
   c. In the **Secure** field, select the option to make the code read-only for users without the necessary security privileges to make changes.
   d. Click **Save**.

> **Tip**
>
> You can designate an issue code as secure only if you have the appropriate security privilege; otherwise, this option does not appear.

Creating Issue Code Values

Create issue code values to represent variations within the larger scope of the issue code.

To create an issue code value:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Issues** and click **Issue Codes**.
3. On the **Issue Codes** page:
   a. Select a code or code value.
   b. Click **Context** and select **Add Code Value**.
   c. In the **Name** field, double-click and type a unique code value name.
   d. In the **Description** field, double-click and type a brief narrative about the code value.
   e. Move the code value to the correct location in the list by clicking **Context** and selecting **Move Up** or **Move Down**.

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f. Click **Save**.

> **Tip**
>
> Issue code values at the same level are siblings. Subordinate issue code values are children.

About Document Categories and Statuses

Document category and status designations can help you track project work products and documents. For example, document category designations can identify documents that are project standards or project deliverables. Document status designations can identify which documents are in review or completed.

Creating Document Categories

Create document categories to organize documents. Each category serves as a folder for easy retrieval of the document.

To create document categories:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Documents** and click **Document Categories**.
3. On the **Document Categories** page:
   a. Click **Add**.
   b. In the **Name** field, enter a name.
   c. Click **Save**.

> **Tip**
>
> - To change a name of a category, double-click the selected name and enter a new name. If you change a document category's name, the change is applied to all document assignments.
> - To change the order in which a document category is displayed, select it, then click **Context** and select **Move Up** or **Move Down**.

Creating Document Statuses

Create document statuses to identify the current status of work products and documents within a project.

To create a document status:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Documents** and click **Document Statuses**.

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3. On the **Document Statuses** page:
   a. Click + **Add**.
   b. In the **Name** field, double-click and type a name.
   c. Click **Save**.

> **Tip**
>
> - To change a status type, double-click it, then type a new name. The change applies to all projects to which the document is assigned.
> - To change the order in which a document status is displayed, select it, then click **Context** and select **Move Up** or **Move Down**.

About Currencies

Currencies are the monetary units used to store costs for all projects in the database. Monetary units are stored in the database with a base currency that you select. The base currency is used to display costs in windows and dialog boxes. If you select a different currency than the base currency to view costs, the exchange rate for the base currency is always 1.0. The base currency value is multiplied by 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 for Euros is .75, a value of 10 dollars is displayed as 7.5 Euros in cost fields for windows and dialog boxes. Similarly, if you enter 7.5 Euros in a cost field, it is stored in the database as 10 dollars.

Admin Superusers and users with the 'Edit Currency' privilege can change the base currency and define additional view currency types. When you enter values in cost and price fields, they are always displayed in the user's view currency.

Adding a Currency

To add a currency:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Currencies**.
3. On the **Currencies** page:
   a. Click **Context** and select **Add**.
   b. Type an ID for the new currency.
   c. Specify the appropriate values for the currency.
   d. Click **Save**.

Defining a Base Currency

The base currency is U.S. dollars by default. The exchange rate for the base currency is always one.

To define a different currency as the base:

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1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Currencies**.
3. On the **Currencies** page:
   a. Select the row that has BASE RATE in the Exchange Rate field.
   b. Double-click in the **ID**, **Name**, and **Currency Symbol** fields and enter the base currency's information.

      For example, if you want the pound to be the new base currency, you can type in U.K. for the ID, British Pound for the name, and £ for the currency symbol.

   c. Click **Customize View** and display other fields, such as **Decimal Digits** and **Positive Format**, and edit as needed.
4. Click **Save.**

About Financial Periods

Financial periods are predefined time periods you can apply to financial or scheduling data throughout the application to measure and compare that data. Customized financial periods provide more accurate display and reporting of actual costs and units according to time increments recognized by your finance and accounting staff. Users can focus on a financial period and pinpoint how actual costs were incurred during that time.

A calendar year with 365 days, a fiscal quarter ending July 15, and a week from Sunday to Saturday are all examples of financial periods.

You must have the 'Add/Edit/Delete Financial Period Calendar' global privilege to create, modify, or remove data on the Financial Periods page. To store past period actuals for a project's defined financial periods, you must have the 'Store Period Performance' and 'Add/Edit Activities Except Relationships' project privileges. To edit past period actual data in P6 Professional after storing period performance, users must have the 'Edit Period Performance' project privilege. A setting in the Display Format section of the Global tab of the My Preferences page determines whether a user can add Financial Period columns to their view and the earliest and latest financial period columns they can add. If a user adds Financial Period columns to their view, they should make sure that the view is using the appropriate financial period calendar for those columns. To set the financial period calendar for a view, select **Customize View**, select the Gantt tab, then choose the appropriate financial period calendar on the Financial Period list.

Creating Financial Period Calendars

Create financial period calendars to measure and compare financial data when projects have different financial periods. You can create multiple financial period calendars using different periods and different period lengths. For example, some projects might use monthly financial periods while others require weekly financial periods.

To create a financial period calendar:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Financial Periods**.
3. On the **Financial Periods** page:
   a. Click **Add** .

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- Select **Blank financial period calendar** to create a new calendar with no periods assigned.
- Select **Copy from existing financial period calendar** to select an existing calendar with periods similar to those you want to use in the new calendar.

b. If you selected to copy an existing calendar, in the Select Financial Period Calendar dialog box:

- Select a calendar to use as the basis for the new calendar.
- Click **Show** » to view the financial periods which have already been created for the calendar.
- Click **Select**.

c. Type a name for the calendar and click **Save**.

Creating Financial Periods

Create financial periods to measure and compare financial data. You can create annual, monthly, or weekly periods.

To create a financial period:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Financial Periods**.
3. On the **Financial Periods** page:
   a. Select a calendar.
   b. On the **Financial Periods** tab, click + **Add**.
   c. To change the default name for the new financial period, click the **Name** field, and enter a name.
   d. To change the **Start Date** field, directly enter a new date, or select a date from the common calendar tool.
   e. To change the **Finish Date** field, directly enter a new date, or select a date from the common calendar tool.
4. Click **Save**.

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Tip

- To save time, consider generating financial periods in a batch rather than individually.
- Although the application will alert you in each case, be aware of the following constraints when creating or configuring financial periods:
- You cannot introduce gaps in a series of financial periods. Any new periods you create must start or end flush with any existing entries. For example, if October 7-13 and October 14-20 are existing financial periods, you can create a new one that either ends on October 6 or starts on October 21.
- You cannot overlap financial periods. In order to serve their purpose, financial periods must represent unique slices of time.
- You can create financial periods with a duration of fewer than seven days; however, if a financial period calendar contains financial periods with a duration of less than one week, that calendar is not available in timescales in P6. You can use P6 Professional if you need to view data by financial periods spanning increments of fewer than seven days.

Creating a Financial Period Batch

You can create annual or quarterly periods one at a time; however, to speed the time required to add monthly or weekly periods, consider using the Generate Financial Period Batch feature.

To create a financial period batch:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Financial Periods**.
3. On the **Financial Periods** page, select a calendar.
4. On the **Financial Period** tab, click the **Actions** menu and select **Generate Financial Periods**.
5. In the **Generate Financial Periods** dialog box:
   a. In the **Batch Start Date** field, click **Select Date** and select a date from the calendar or type a start date.
   b. In the **Batch Finish Date** field, click **Select Date** and select a date from the calendar or type a finish date.
   c. On the **Period Cycle** list, select a period.
   d. In the **Every** field, use the up and down arrows to specify a number.
   e. Click **Add**.
   f. Click **Close**.
6. On the **Financial Periods** page:
   - Click **Save**.

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Tip

- Although the application will alert you in each case, be aware of the following constraints when creating or configuring financial periods:
- You cannot introduce gaps in a series of financial periods. Any new periods you create must start or end flush with any existing entries. For example, if October 7-13 and October 14-20 are existing financial periods, you can create a new one that either ends on October 6 or starts on October 21.
- You cannot overlap financial periods. In order to serve their purpose, financial periods must represent unique slices of time.
- You can create financial periods with a duration of fewer than seven days; however, if a financial period calendar contains financial periods with a duration of less than one week, that calendar is not available in timescales in P6. You can use P6 Professional if you need to view data by financial periods spanning increments of fewer than seven days.

About Overhead Codes

Overhead codes provide P6 Team Member Web timesheets users with a way to categorize their time. When applied on their timesheets, the codes help users log hours that are not associated with project activities. For example, users can enter time for vacations, holidays, sick time, or general administrative work.

Creating Overhead Codes

Create overhead codes for P6 Team Member Web users to add overhead activities to their timesheets to log timesheet hours that are not associated with the project.

To create an overhead code:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Overhead Codes**.
3. On the **Overhead Codes** page:
   a. Click **Add**.
   b. In the **Name** field, double-click and type a unique code.
   c. In the **Description** field, double-click and type a unique name.
   d. Click **Save**.

Tip

When you specify that two approval levels are required to approve timesheets, timesheets that contain only overhead activities bypass project manager approval and are sent directly to the resource/cost manager for approval. For timesheets containing a mix of regular and overhead activities, project managers can view, but not approve, the overhead activities.

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About Timesheet Periods

The timesheet period is the amount of time a timesheet covers. The administrator defines the time covered by timesheet periods; for example, every two weeks, every four weeks, or every month. The administrator must create timesheet periods before the user can view and enter time on their timesheets.

Creating Timesheet Periods

Create timesheet periods to define the date range timesheets will cover. Each timesheet covers a single timesheet period. You can create timesheet periods singly or in batches. Timesheet periods may not overlap.

To create timesheet periods:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Timesheet Periods**.
3. On the **Timesheet Periods** page:
   - Click **Actions** and select Generate Timesheet Periods.
4. In the Generate Timesheet Periods dialog box:
   a. In the **Batch Start Date** field, click **Select Date** and select the date you want the first timesheet period of the batch to start.
   b. In the **Batch Finish Date** field, click **Select Date** and select a date you want the last timesheet period of the batch to include.
   c. In the **Period Cycle** list, click **Period Cycle** and select how often you want users to submit their timesheets.
   d. Click **Add**.
5. Click **Save**.

> **Tip**
>
> To create timesheet periods one at a time, click **Add**, then in the Start Date and Finish Date columns, enter the dates you want the timesheet period to start and finish.

About Resource and Role Rate Types

The rate type determines the price per unit used to calculate costs for the assignment. In today's global economy, different resources and roles command varying levels of pay. Moreover, those rates can change over time. The price per unit, or rate, applied to a resource or role assignment for an activity is determined by that assignment's specific **Rate Type** or **Rate Source** field values.

A rate type is a user-defined title for a specific price-per-unit of work. Up to five global user-defined rate types can be defined as part of your enterprise data settings. Examples of rate types include *Standard, Internal*, *External*, *Hourly*, *Weekly*, and *Special*. To illustrate how they

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are used, a resource might be assigned at an *Hourly* rate of $175 per hour but for other assignments the same resource might be assigned at a *Weekly* rate of $5,000 per week or $125 per hour.

Configuring Resource and Role Rate Types

Configure resource and role rate type titles to determine what is displayed whenever the rate types are displayed in a list or column.

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Rate Types**.
3. On the **Rate Types** page:
   a. Select a rate.
   b. Double-click in the User Defined Title field and type a rate type title.
   c. Click **Save**.

About Resource Codes

Resource codes provide another way to categorize project resources. Grouping by resource codes enables you to quickly see activities assigned to an area of responsibility and activities being performed by a specific group in your organization.

Creating Resource Codes

Create resource codes to group and arrange resources.

To create resource codes:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource Codes**.
3. On the **Resource Codes** page:
   a. Click **Context** and select **Add Code**.
   b. In the **Name** field, double-click and type a unique code name.
   c. In the **Secure** field, select the option to make the code read-only for users without the necessary security privileges to make changes.
   d. Move the code to the correct location in the list by clicking **Context** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
   e. In the **Maximum Length** field, double-click and click the up or down arrow to specify the maximum length for resource code value names.
   f. Click **Save**.

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> **Tip**
>
> You can designate a resource code as secure only if you have the appropriate security privilege; otherwise, this option does not display.

Creating Resource Code Values

Create resource code values to represent variations within the larger scope of the resource code.

To create resource code values:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource Codes**.
3. On the **Resource Codes** page:
   a. Select a code or code value.

      > **Note**
      >
      > : You might have to expand an EPS node or Project before you see the codes and code values.

   b. Click **Context** and select **Add Code Value** or **Add Child Code Value**.
   c. In the **Name** field, double-click and type a unique code value name.
   d. In the **Description** field, double-click and type a brief narrative about the code value.
   e. Move the code value to the correct location in the list by clicking **Context** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
   f. Click **Save**.

About Role Codes

Role codes provide another way to categorize assignments. Grouping roles by code enables you to see assignments to a particular skill and activities being performed by a specific group in your organization.

Creating Role Codes

Create role codes to group and arrange roles.

To create role codes:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Role Codes**.
3. On the **Role Codes** page:

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a. Click **Context** and select **Add Code**.
b. In the **Name** field, double-click and type a unique code name.
c. In the **Secure** field, select the option to make the code read-only for users without the necessary security privileges to make changes.
d. Move the code to the correct location in the list by clicking **Context** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
e. In the **Maximum Length** field, double-click and click the up or down arrow to specify the maximum length for role code value names.
f. Click **Save**.

Tip

You can designate a role code as secure only if you have the appropriate security privilege; otherwise, this option does not display.

Creating Role Code Values

Create role code values to represent variations within the larger scope of the role code.

To create role code values:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Role Codes**.
3. On the **Role Codes** page:
   a. Select a code or code value.

Note

: You might have to expand an EPS node or Project before you see the codes and code values.

   b. Click **Context** and select **Add Code Value** or **Add Child Code Value**.
   c. In the **Name** field, double-click and type a unique code value name.
   d. In the **Description** field, double-click and type a brief narrative about the code value.
   e. Move the code value to the correct location in the list by clicking **Context** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
   f. Click **Save**.

About Assignment Codes

Assignment codes provide another way to categorize resource and role assignments to activities.

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Creating Assignment Codes

Create assignment codes to group and arrange resource and role assignments.

To create assignment codes:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Assignment Codes**.
3. On the **Assignment Codes** page:
   a. Click **Context** and select **Add Code**.
   b. In the **Name** field, double-click and type a unique code name.
   c. In the **Secure** field, select the option to make the code read-only for users without the necessary security privileges to make changes.
   d. Move the code to the correct location in the list by clicking **Context** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
   e. In the **Maximum Length** field, double-click and click the up or down arrow to specify the maximum length for resource code value names.
   f. Click **Save**.

> **Tip**
>
> You can designate an assignment code as secure only if you have the appropriate security privilege; otherwise, this option does not display.

Creating Assignment Code Values

Create assignment code values to represent variations within the larger scope of the assignment code.

To create assignment code values:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Assignment Codes**.
3. On the **Assignment Codes** page:
   a. Select a code or code value.

> **Note**
>
> : You might have to expand an EPS node or Project before you see the codes and code values.

   b. Click **Context** and select **Add Code Value** or **Add Child Code Value**.
   c. In the **Name** field, double-click and type a unique code value name.

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d. In the **Description** field, double-click and type a brief narrative about the code value.

e. Move the code value to the correct location in the list by clicking **Context** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.

f. Click **Save**.

About Resource Curves

Resource curves allow the user to specify the allocation of resources and costs 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.

Defining Resource Curves

Define resource curves to specify how you want resource units or costs spread over the duration of an activity. There are twelve default resource curves defined in the application. You can add a new curve, which is based on the default linear curve, or copy and modify one of the default resource curves or an existing Global curve to create a custom global resource curve.

To define a custom resource curve:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource Curves**.
3. On the **Resource Curves** page, you can copy an existing curve to use as a base for defining a new curve or add a new curve. The new curve defaults to a linear curve.
   - To copy an existing curve:
     a. In the **Name** field, expand the **Default** group, or the **Global** group.
     b. Click **Context** and select **Duplicate**.
   - To add a new curve, click **Add**.
4. On the **Resource Curves** page, in the **Name** field under the **Global** group, double-click and type a name for the resource curve.
5. On the **Curves** detail window:
   a. 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 (at 5% intervals from 0 to 100).
   b. Click **Prorate** to make the total of the distribution values equal to 100% while maintaining the shape you specified.
6. On the **Resource Curves** page, click **Save**.

About Units of Measure

A unit of measure is a standardized way to define a unit of time or material. You can change units of measure in a project to alter how materials such as graphs and spreadsheets are depicted. You can also modify the list of unit of measure abbreviations that the application refers to for conversions.

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Creating Units of Measure

Create units of measure labels to assign to material resources.

To create units of measure:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Units of Measure**.
3. On the **Units of Measure** page:
   a. Click **Add**.
   b. In the **Unit Abbreviation** field, double-click and type an abbreviation.
   c. In the **Unit Name** field, double-click and type a name for the unit.
   d. Click **Save**.

About Stored Images

Store images to be used in the header or footer of printed pages. Users do not need to have access to a shared network location to use these stored images. A central repository of images makes it easier to ensure that all users have access to the correct images and logos.

You can store images in P6, P6 Professional, and Primavera Virtual Desktop and use the images to print from any of the applications connected to the database.

Creating Stored Images

Store images to use in the header and footer of printed output.

To create an overhead code:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Stored Images**.
3. On the **Stored Images** page:
   a. Click **Add** and select an image file.
   b. In the **Name** field, double-click and type a unique code.
   c. In the **Description** field, double-click and type a description.
   d. Click **Save**.

About User Access

User access helps you create user accounts, assign access, manage the organizational breakdown structure (OBS) and configure profiles:

Users: Enables you to modify security attributes and project and module access for all users of P6 EPPM modules.

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OBS: Enables you to configure the OBS hierarchy.

Global Security Profiles: Enables you to assign or omit global privileges to profiles.

Project Security Profiles: Enables you to assign or omit project privileges to profiles.

About Users

The term *user* is a shortened form of the full reference to a user access account. To illustrate this concept, you might have a P6 personal name of `msmith`. You are user `msmith` with all the permissions set by an administrator for your user account on the **User Administration** page.

The **Users** page allows you to add and remove users, assign global and project profiles to users, set resource access, and assign or remove access to projects and P6 EPPM modules. For example, you can assign a user an Admin Superuser security profile, giving them read/write privileges for application-wide information and features, or you can assign a user no global privileges. You can assign module access in order to restrict user access to only the modules you want them to use, and you can use the project access tab to assign responsible managers and give them project-level security profiles, such as Contributor.

> **Note**
>
> - To assign a user the Admin Superuser profile or to copy and paste a user with the Admin Superuser profile assigned, you must be logged in as a user who has Admin Superuser rights.
> - When you copy a user the user's settings are copied. The new user will have the same Resource Access, Global Security Profile, Project Access, Module Access, Global Preferences, User Interface View, Dashboards, Activities Toolbars, Activities Views (including multiple user views), EPS Toolbars, EPS Views (including multiple user views), Resource Assignment Toolbars, and Resource Assignment Views (including multiple user views) as the copied user. The user's Associated Resource, email address, Phone, and View Preferences are not copied. If the users view is grouped by global security profile or user interface view and you select a different grouping band before pasting a copied user, the new user will be assigned with the global security profile or user interface view corresponding to the grouping band you selected.

The Default Admin Superuser

For security reasons, Oracle strongly recommends that you replace the default Admin Superuser (admin) in P6 immediately after a manual database installation or an upgrade from P6 version 7.0 and earlier. Since P6 requires that at least one Admin Superuser exists at all times, follow the procedures below in the order specified.

1. Follow the steps in Creating User Accounts for P6 EPPM*Creating User Accounts for P6 EPPM* to create a new user.
2. Follow the steps in Assigning Global Security Profiles to assign "Admin Superuser" as the global profile for the new user.
3. Follow the steps in Assigning Module Access to assign at least one of the following module access rights: Portfolios, Projects, or Resource.
4. Create a new Admin Superuser then delete the original Admin Superuser, "Admin".

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> **Note**
>
> Only Admin Superusers can create, edit, and delete other Admin Superusers. You must have at least one Admin Superuser to create other Admin Superusers.

Creating User Accounts for P6 EPPM

Follow these steps to create new user accounts for applications in P6 EPPM including P6, P6 Professional, and P6 Team Member interfaces. These steps represent the minimum you must do to create a user account. You can also configure user access to grant or deny a user's access to data.

> **Note**
>
> When you copy a user the user's settings are copied. The new user will have the same Resource Access, Global Security Profile, Project Access, Module Access, Global Preferences, User Interface View, Dashboards, Activities Toolbars, Activities Views (including multiple user views), EPS Toolbars, EPS Views (including multiple user views), Resource Assignment Toolbars, and Resource Assignment Views (including multiple user views) as the copied user. The user's Associated Resource, email address, Phone, and View Preferences are not copied. If the users view is grouped by global security profile or user interface view and you select a different grouping band before pasting a copied user, the new user will be assigned with the global security profile or user interface view corresponding to the grouping band you selected.

To create a new user account:

1. Launch P6 as an administrator.
2. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
3. On the **User Administration** page, click **Users**.
4. On the **Users** page, click the **Add** button.
5. What appears next depends on your security configuration:

To add users in Native authentication mode see Adding Users in Native Authentication Mode for On-Premises.

To add users in LDAP or SSO authentication mode see Adding Users in LDAP or SSO Authentication Mode for On-Premises.

> **Note**
>
> If you want further information about creating new users with provisioning in Oracle Identity Manager, refer to the *Oracle Fusion Middleware User's Guide for Oracle Identity Manager*.

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Tip

For a video tutorial about creating User Accounts, please visit the following knowledge article:

- How To Configure User Access In P6 [Video] (KB605002)
- Give each user a unique name with up to 30 alpha-numeric characters.
- For example, a global organization has three users with the following Login Name field values to uniquely identify them: *tharris*, *tjharris*, and *tsharris*. The following Personal Name values are added to assist the entire organization in identifying the users:
  tharris Thomas Harris in Accounting (USA)

  tjharris Thomas J. Harris in Legal (ESP)

  tsharris Tina S. Harris in Design (CAN)
- Cloud only: To configure a default email address for users without an email address, submit a Service Request in My Oracle Support.
- Oracle recommends using strong passwords. Strong passwords in P6 EPPM contain between 8 and 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.
- For security reasons, Oracle strongly recommends that on-premises users replace the default Admin Superuser (admin) immediately after a manual database installation or an upgrade from P6 version 7.0 and earlier. See information on the default Admin Superuser in the *P6 EPPM Application Administration Guide* for guidelines on this process.

tharris Thomas Harris in Accounting (USA)

tjharris Thomas J. Harris in Legal (ESP)

tsharris Tina S. Harris in Design (CAN)

Adding Users in Native Authentication Mode for On-Premises

If P6 is configured for native authentication you add users with the **Add User** dialog box.

To add users in native authentication mode:

1. Fill in the **Login Name**, **Personal name**, **Password**, and **Confirm Password** fields.
2. Click **Add**.
3. If the ability to edit a personal resource calendar or access to P6 Team Member is required, you can select an **Associated Resource** in the **Users** table at this time, or you can create the link when you add resources.
4. In the **Users** table, add the **Email** and **Phone** columns (if they are not already present), and enter the appropriate data.
5. Click **Save**.
   - Your user name can be a maximum of 30 characters.

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- 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.
- The assigned **Global Security Profile** will determine the user's capabilities.
- When the **Password Policy** is enabled, the password must be between 8 and 20 characters and contain at least one number and one letter. The policy is enabled by default.
- When the **Password Policy** is disabled, the password must be between 1 and 20 characters. The application does not allow blank passwords.

Adding Users in LDAP or SSO Authentication Mode for On-Premises

If P6 is configured for LDAP or SSO authentication mode you add users with the Add Users From LDAP dialog box.

To add users in LDAP or SSO authentication mode:

> **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 may need to work with your Network Administrator to make sure that User names do not include commas.

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. Click the **Add** menu and select **Users fromLDAP**.
3. In the Add Users From LDAP dialog box:
   a. Enter an LDAP query or accept the query in the search field and click **Search**.

      > **Note**
      >
      > Depending on your P6 administrative configuration settings, you might be prompted to log into the LDAP server. For more information about P6 administrative configuration settings, refer to the *P6 EPPM System Administration Guide for On-Premises*.

   b. Select the users to add and click **Select Items**.
   c. Click **Add**.
4. On the Users page, click **Save**.

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Tip

- You can also add users from an LDIF file. When you add users from an LDIF file all users in the file are added to the Available Users list.
- You must have the Add/Edit/Delete Users and Provision Users from LDAP privileges to search the LDAP directory. You do not need the Provision Users from LDAP privilege to import users from an LDIF file.
- The new users will be assigned the default global profile unless you selected to copy the settings of another user in the Copy Preferences from (optional) field. If you select to copy the settings from another user, the project and global security pofiles, OBS assignments, project access, and module access will be copied from the other user. The LDAP repository will remain the source for the name, ID, phone number, and email even if you copy the preferences from another user. Copying preferences from another user does not copy the associated resource to the new user.
- If you select the Create Resource option, the resources are created and the Associated Resource column is populated when you save the changes in the User Administration page.

Updating Users in LDAP or SSO Authentication Mode for On-Premises

If P6 is configured for LDAP or SSO authentication mode you update users that have already been added to P6 from the LDAP repository. The Update Users From LDAP dialog box only shows users that have different data in any of the matched fields in P6 from the corresponding matched field in the LDAP repository. When you update users from LDAP, the data for the selected users in P6 is replaced with the data from the LDAP repository.

To update users in LDAP or SSO authentication mode:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. Click the **Actions** menu and select **Update Users From LDAP**.
4. In the **Update Users From LDAP** dialog box:
   a. Enter an LDAP query or accept the query in the search field and click **Search**.
   b. Choose to update **All Users** or **Selected Users**.
   c. If you chose to update Selected Users, select the users to update and click **Select Items**.
   d. Click **Update**.

Tip

The matched fields in P6 are Login Name, Personal Name, Email, and Phone. The fields in the LDAP repository that are matched is determined in P6 Administrator application. For more information about configuring the LDAP Field Map see *P6 EPPM System Administration Guide for On-Premises*.

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Configuring User Access

For security purposes, configure user access controls to grant or deny user's access to data.

To configure user access, see:

- Assigning Associated Resources
- Assigning Global Security Profiles
- Assigning Module Access
- Assigning OBS Elements to Users
- Assigning Resource Access

Tip

- If you frequently need to create users with similar preferences, consider creating a user account to act as a template then copying that user's preferences to new user accounts to streamline the process of creating users. See: Copying User Preferences
- Show or hide columns on the **Users** page to configure additional user access options.

Assigning Associated Resources

Assign an associated resource to the user profile to connect the user with a resource in the application. Each user can have only one resource assigned, and a resource cannot be assigned to more than one user at the same time. Not all users require an associated resource, but users must have a resource assigned to enable them to edit their personal resource calendars and use P6 Team Member Web or P6 mobile. Also, by associating a resource with a user, the user will be able to see all projects to which the resource is assigned using the Activities page in P6 if the user is assigned Contributor module access.

To assign an associated resource:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page:
   a. Select a user.
   b. In the **Associated Resource** field, double-click and click **Select**.
4. In the **Select Resource** dialog box, select a resource and click **Select**.

Note

In Native Authentication mode, the user's Personal Name will be updated to match the Resource Name. Otherwise, the Resource Name will be updated to match the user's Personal Name.

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5. On the **Users** page, click **Save**.

> **Tip**
>
> If the resource you need to assign to the user does not yet exist, you can create one quickly by clicking **Context** and then click **Create Resource**.

Assigning Global Security Profiles

Every user is assigned a global security profile by default. You can change a global security profile for every user to control user access to application-wide information.

To change the user's global security profile:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page:
   a. Select a user.
   b. In the **Global Security Profile** field, double-click and choose a profile from the list.

   > **Note**
   >
   > The assigned **Global Security Profile** will determine the location of the user in the **Users** tab hierarchy if they are grouped by the global profile.

   c. Click **Save**.

> **Tip**
>
> - You must have the appropriate privileges to assign security attributes.
> - An Admin Superuser is a global security profile that gives a user read/write privileges for application-wide information and features. The Admin Superuser always has access to all resources. If resource security is enabled, resource access settings are not applicable. To make global information read-only for a user, choose No Global Privileges. The No Global Privileges profile provides read-only access to all global data except costs and secure codes.

Assigning Module Access

Assign user module access to allow or deny the user access to different parts of the application.

To assign user module access:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.

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3. On the **Users** page:
   - Select a user.
4. In the **Module Access** detail window, select options to grant access to each module or feature set.
5. On the **Users** page, click **Save**.

Assigning OBS Elements to Users

Assign OBS elements to a user to control their access to the EPS and projects.

> **Note**
>
> Users assigned to an OBS that is assigned to the root EPS have access to all projects at all levels.

To assign OBS elements to a user:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page, select a user.
4. In the **Project Access** detail window:
   - Click **Assign OBS**.
5. In the **Select Responsible Manager** dialog box:
   a. Select a **Project Security Profile**.
   b. Select OBS elements from the list and click **Select**.
   c. Select additional Project Security Profiles and additional OBS elements as necessary.
   d. Click **Select** when finished.
6. On the **Users** page, click **Save**.

> **Tip**
>
> - You can also assign users to OBS elements using the Users Detail Window of the OBS Page.
> - Project access settings are not applicable to users with the special Admin Superuser global security profile. The Admin Superuser profile always has access to all projects.
> - To remove an OBS assignment, select an element in the **Project Access** detail window, select **Context** and click **Delete**.

Assigning Resource Access

You can control which resources a user can access.

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To control resource access:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page:
   a. Select a user.
   b. In the **Resource Access** field, double-click and click **Select**.
4. In the **Select Resource Access** dialog box, select one of the following and click **Select**:
   - **No Resources**: to deny the user access to resources. This is the default resource access setting for new users.
   - **All Resources**: to grant the user access to all resources.
   - **Select Resources**: to grant the user access to up to five resource nodes and their children.
5. On the **Users** page, click **Save**.

Tip

- Resource access settings are not applicable to Admin Superusers. Admin Superusers always have access to all resources.
- Resource access changes go into effect when you click **Save**, however P6 users must exit the application and log in again to see the changes.
- If a resource is deleted from the resource hierarchy, users that previously had been assigned only to the deleted resource will automatically be assigned to the **No Resources Access** option.

Assigning User Interface Views

Assign user interface views to users to give users a view that is optimized for their role. User interface views permit visibility to features essential for a user's role and determine the default start page, while hiding functionality that is not applicable. You can assign user interface views only if you have the necessary privileges.

To assign a user interface view:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page:
   a. Select a user.
   b. In the **User Interface View** field, double-click and click **Select**.
4. In the **Select User Interface View** dialog box, select a user interface view and click **Select**.
5. On the **Users** page, click **Save**.

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Copying User Preferences

You can copy the preferences of one user to multiple users at the same time. If you frequently need to create users with similar preferences, consider creating a user account to act as a template then copying that user's preferences to new user accounts to streamline the process of creating users.

The settings which are copied include global and project security profiles, module access, OBS access, resource access and User Interface View access. You must be logged in as an admin superuser to update users.

To copy user settings:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. Click the **Actions** menu and select **Copy User Settings**.
4. In the **Copy User Settings** dialog box:
   a. In the **Copy settings from** field, select a user whose settings you want to copy to other users.
   b. On the **Select settings types to copy** list, select one or more options.
   c. In the grid, select all the users you want to update.
   d. Select **Apply**.
5. On the **User Administration** page, select **Save**.

Tip

- You can search the user list by any visible column.
- If you use the Select All option, all users are selected even if the user list is filtered to a set of users matching search criteria you entered.
- The personal user interface view is not copied to the updated users.

Changing Passwords

Administrators can change a user's password and users can change their own passwords.

- Administrators: See Changing User Passwords.
- Users: See Changing Your Own Password.

Changing User Passwords

Administrators can change users' passwords.

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> **Note**
>
> You cannot change passwords if P6 EPPM is running in LDAP or SSO authentication mode.

To change a user password:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page:
   a. Select a user.
   b. Click **Context** and click **Change Password**.
4. In the **Change Password** dialog box:
   a. In the **New Password** field, enter a new password.
   b. In the **Confirm New Password** field, enter the new password again for verification and click **Change**.
5. On the **Users** page, click **Save**.

> **Tip**
>
> - When the **Password Policy** is enabled, the password must be between 8 and 20 characters and contain at least one number and one letter. The policy is enabled by default.
> - When the **Password Policy** is disabled, the password must be between 1 and 20 characters. The application does not allow blank passwords.

Counting Users

As an aid in determining whether you have reached licensing limitations, use the Count feature to view the number of users assigned access to each P6 EPPM module:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page, click **Actions** menu and select **User Count**.
4. In the **User Count** dialog box, view the user count by module.

> **Note**
>
> You can output the results of this process to Excel or print the view. You can also count the number of active and inactive users by grouping the Users page by Status.

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Deactivating User Accounts

Deactivate a user account when an employee has left the organization or the user no longer requires access to P6. Deactivate the account instead of deleting the user if the user uses P6 Team Member or when you need to retain the history of actual working hours on the projects the user is assigned to.

Deactivating a user removes their access to all modules of P6 EPPM including P6 Team Member. If a user does not have module access, they cannot log into that module. Therefore, deactivating a user prevents them from logging into any P6 EPPM or P6 Team Member application, while retaining important historical data associated with that user account.

When you deactivate a user, there is no automatic way to reactiviate the user account with the same module access the account had prior to being deactivated. However, you can give the user account access to any module of P6 EPPM again at any time by selecting the user and selecting the Access option for the module on the Module Access detail window.

> **Note**
>
> Deleting a user account and its associated resource will cause historical data to change. It is almost always preferable to deactivate the user instead of deleting the user.

To deactivate user accounts

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page:
   a. Select the user accounts to deactivate.
   b. Click **Context**.
   c. Select **Deactivate User**.
4. Click **Save**.

> **Tip**
>
> - You can also deactivate the user by de-provisioning the user in Primavera Administration (cloud only).
> - If the users are assigned an associated resource, the resource and the resource assignments remain in the database when you deactivate the user.

Deleting User Accounts

Delete a user account when an employee has left the organization or the user no longer requires access to P6.

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> **Note**
>
> You should exercise extreme caution when deleting users account. When you delete a user account, historical data for your projects might be affected. If a user has P6 Team Member module access or is associated with a resource and has actual working hours on a project, you should deactivate the user account instead of deleting it to avoid loss of data.

To delete a user:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page:
   a. Click on the user.
   b. Click **Context** and click **Delete**.
   c. Click **Save**.

> **Tip**
>
> If a resource is associated with a user, the resource remains in the database. Determine if the resource needs to be deleted from the Resources Administration page or if the resource should be marked as inactive. To indicate a resource is inactive, clear the Active column for the resource on the Resources Administration page.

About Team Member Work Distribution Filters

A Team Member filter, also known as a Team Member work distribution filter, extends the reporting capabilities of Team Member interface users. A work distribution filter is created to enable team members to update progress for selected labor resources, roles, and codes.

Multiple team members can be assigned the same filter if all are responsible for updating the same activities. For example, a team that works in shifts may have multiple supervisors. If each supervisor is responsible for updating the same group of activities, then they can all be assigned the same team member work distribution filter.

Use these filters when:

- Resource assignments or owners are not responsible for updating their own activities.
- Roles are assigned to an activity instead of a resource or owner.
- You want to update activities based on EPS or global activity codes.

Creating a Team Member Work Distribution Filter

Create Team Member work distribution filters to enable Team Member interface users to update progress for selected labor resources, roles, and global and EPS activity codes.

To create a Team Member work distribution filter:

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1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page:
   a. Select a user.
   b. In the **Team Member Filter** field, double-click and click **Select**.

> **Note**
>
> If the **Team Member Filter** option is not displayed, click **Customize View** and select **Team Member Filter**.

4. In the **Team Member Filters** dialog box:
   a. Click **Context** and click **Add**.

> **Note**
>
> This filter is automatically applied to the user you selected. If you do not want to apply this filter to the selected user, then clear the **Selected** option.

   b. In the **Name** field, enter a name that describes the filter you are creating.
   c. In the **Filter Details** area:
      i. Configure the filter criteria.
      ii. Click **Context** and click **Add** to configure additional filter criteria.
   d. Click **Save**.
5. On the **Users** page, click **Save**.

Assigning a Team Member Work Distribution Filter

Assign Team Member work distribution filters to enable Team Member interface users to update progress for selected labor resources, roles, and global and EPS activity codes.

To assign a Team Member work distribution filter:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page:
   a. Select a user.
   b. In the **Team Member Filter** field, double-click and click **Select**.

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> **Note**
>
> If the **Team Member Filter** option is not displayed, click **Customize View** and select **Team Member Filter**.

4. In the **Team Member Filter** dialog box:
   a. Select the **Selected** option for each filter you want to assign to the selected user.
   b. Click **Save**.
5. On the **Users** page, click **Save**.

> **Tip**
>
> - P6 will not list the resources assigned to a user with a Team Member filter.
> - Team Member interface users with a Team Member filter assigned must have OBS access for the projects and must have the privilege 'Add/Edit Activities Except Relationships' for the activities.

About the OBS

The organizational breakdown structure (OBS) is a hierarchical way to represent the managers responsible for the projects in your enterprise. You can associate the responsible managers with their areas of the enterprise project structure (EPS) with either an EPS node or a project. 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. An OBS supports large projects that involve several project managers with different areas of responsibility.

To access a project, a user must have access permissions for an OBS element within the project. You can then assign users to OBS elements. When you assign users to OBS elements, users get access privileges to projects and EPS nodes where they have OBS access. These access privileges are not passed down to child OBS elements. If some users need access to multiple OBS elements, you must assign those users to all of the OBS elements they need to access. The type of access granted to a user is determined by the project security profile assigned to the user.

Creating an OBS

Create an organizational breakdown structure (OBS) to hierarchically represent the managers responsible for your projects. You must have the appropriate privileges to create an OBS.

To create a new OBS:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **OBS**.
3. On the **OBS** page:
   a. Click **Add**.

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> **Note**
>
> The OBS is automatically added as a child of another OBS.

b. Move the OBS to the correct location in the list and hierarchical position by clicking **Context** and selecting **Move Up**, **Move Down**, **Move Left**, and **Move Right**.

c. In the **OBS Name** field, double-click and type a unique name.

d. Click the **Users** detail window.

4. In the **Users** detail window, remove or assign users to the OBS.

   - To remove a user from the OBS, select a user, click **Context** and click **Delete**.
   - To assign users to the OBS, click **Assign...**.

5. In the **Select Users** dialog box:

   a. Select a **Project Security Profile**.

   b. Select users and click **Select**.

   c. When you are finished assigning users, click **Close**.

6. On the **OBS** page, click **Save**.

> **Tip**
>
> - When you set up enterprise project structure (EPS) nodes, a root OBS is automatically assigned to the root EPS.
> - When you create a new project, the default responsible manager is automatically assigned so that an OBS element is available for each work breakdown structure (WBS) element added to the project.

Assigning Users to an OBS

Except for a project owner or a Contributor user, a user must have permission to access an organizational breakdown structure (OBS) to access a project assigned to that OBS. If you have appropriate privileges, you can assign users to OBS elements using their login names.

> **Note**
>
> Users assigned to an OBS that is assigned to the root EPS have access to all nodes beneath the root.

To assign users to an OBS:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **OBS**.
3. On the **OBS** page, select an OBS and click the **Users** detail window.
4. In the **Users** detail window, click **Assign...**.

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5. In the **Select Users** dialog box:
   a. Select a **Project Security Profile** with which you want to assign users.
   b. Select one or more users and click **Select**.
   c. Select additional Project Security Profiles and assign additional users as necessary.
   d. Click **Close** when finished.
6. On the **OBS** page, click **Save**.

> **Tip**
>
> You can also select multiple OBS elements in the OBS page then assign multiple users to them simultaneously by selecting **Assign User** in the Users detail window.

About Security Profiles

A security profile is a collection of security permissions. There are two types of security profiles: global security profiles and project security profiles. A global security profile determines the user's access to application-wide information. The global security profile provides read-only access to all global data except cost and resource data. Privileges can be added to global security profiles to allow users to add, edit, and delete global data, and view global cost data. A project security profile determines the user's level of access to each project within the enterprise project structure. When you assign a project security profile to a user, you also associate the project security profile with an organizational breakdown structure (OBS) element/responsible manager. When an OBS node is assigned to a user, the default project security profile is automatically assigned. The user's access privileges, as defined in the project security profile, will then apply only to those elements of the enterprise project structure (EPS) that are assigned to the OBS element/responsible manager you selected.

P6 Professional and P6 require that all users have a global security profile. As an administrator, you create global security profiles and assign individual access privileges associated with them. To control access to global information, you create global security profiles, and then assign them to individual users. If you want to give users access to all global information, create a global security profile with all privileges.

You can also choose to assign the Admin Superuser global security profile. Admin Superuser is an application-generated global security profile. You cannot edit the Admin Superuser profile. One user must have the Admin Superuser profile, and you can assign Admin Superuser profiles to as many people as you want, though you should limit the number of users you assign to it. An Admin Superuser can add, edit, and delete information by default, where all other users will have to be assigned the proper privileges to do so. You must be logged in as a user assigned the Admin Superuser profile to assign the Admin Superuser profile to other users.

To allow users to only see certain project information, you can create project security profiles. A project security profile defines a set of privileges for access to project information. You create project security profiles, then assign these profiles and specific OBS elements to users. The assigned OBS element determines the EPS and work breakdown structure (WBS) elements where the user can access project information. The assigned project security profile determines the type of access privileges the user has to that project information.

The application requires that all WBS elements have an assigned responsible OBS. If a user's project security profile assignment includes a WBS element's responsible OBS, then the user can access all activities, risks, and issues related to that WBS element. Similarly, project issues

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also have an assigned responsible OBS. If a user's project security profile assignment includes an issue's responsible OBS, then the user can access that issue. You can assign a project security profile called Project Superuser, if you want to give a user access to all information belonging to a project. You can assign Project Superuser profiles to as many people as you want. Project Superuser is an application-generated project security profile. You cannot edit the Project Superuser profile. A Project Superuser can add, edit, and delete information by default, where all other users will have to be assigned the proper privileges to do so. You must be logged in as a user assigned the Admin Superuser profile to assign the Project Superuser profile to other users.

Working with Security Profiles

Global Security Profiles:

A global security profile determines a user's access to application-wide information and settings, such as resources, global codes, and the OBS. P6 requires that you assign a global security profile to each user.

You can define an unlimited number of global security profiles in P6. In addition, P6 provides two predefined global security profiles: Admin Superuser and No Global Privileges.

- The **Admin Superuser** profile allows complete access to all global information and all projects. It also shows the full Administer menu, even when the currently assigned user interface view settings do not. For the pages and menus of the other sections, even for users with the Admin Superuser profile, the current user interface view settings still apply. The Admin Superuser profile is assigned to the application (administrative) user created during the P6 EPPM database installation.
  For security reasons, Oracle strongly recommends that on-premises users replace the default Admin Superuser (admin) immediately after a manual database installation or an upgrade from P6 version 7.0 and earlier. See information on the default Admin Superuser in the *P6 EPPM Application Administration Guide* for guidelines on this process. Also, limit the Admin Superuser assignment to only those individuals who require access to all data. At least one user must be assigned to the Admin Superuser profile. If only one user is assigned to this profile, P6 will not allow that user to be deleted.
- The **No Global Privileges** profile restricts access to global data. Assign this profile to anyone who is strictly a P6 Team Member interfaces user and does not require access to P6 Professional or P6. If a user with rights to P6 Professional or P6 is assigned this profile, the user can log in to these applications but will not have access to project data and will have read-only access to global data. If a user is assigned this profile and is also assigned to an OBS element, the user will have access to project data as defined for the OBS element, but access to other global data is restricted.

The Admin Superuser can designate that users have the ability to add/delete, edit, assign, or view secure codes. Secure codes enable privileged users to hide Project, Activity, Resource, Role, and Issue codes from users that do not have security privileges to view them. Also, users with privileges to Edit Security Profiles can restrict other users to edit, assign, and view privileges. For example, management could track project approval processes through secure codes that others cannot edit or, in some cases, view.

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> **Tip**
>
> When defining each global security profile, some privileges are structured hierarchically. In other words, if a user is granted add or delete privileges, that user automatically has edit, assign, and view privileges. If a user is granted edit privileges, that user is automatically granted assign and view privileges. If a user is granted assign privileges, that user is automatically assigned view privileges.

Project Security Profiles:

A project profile is a role-based profile that limits privileges to specific project data, such as baselines, the WBS, and expenses. P6 does not require that each user be assigned a project profile; however, users cannot access projects unless they are assigned a project profile or the global profile, Admin Superuser.

You can create an unlimited number of project profiles in P6. In addition, P6 provides a predefined project profile called Project Superuser. The Project Superuser profile allows complete access to elements within a project. For security reasons, limit the Project Superuser assignment to only those individuals who require access to all project data.

Project profiles are applied to users via OBS assignments. P6 requires that all EPS and WBS elements, and projects, are assigned a responsible OBS. The combination of the project profile/user assignment to an OBS assignment, and the OBS assignment to the EPS/WBS, determines which projects and data the user can access. The default profile is automatically assigned when an OBS is assigned to a user.

> **Tip**
>
> When defining each project profile, some privileges are structured hierarchically. In other words, if a user is granted add or delete privileges, that user automatically has edit, assign, and view privileges. If a user is granted edit privileges, that user is automatically granted assign and view privileges. If a user is granted assign privileges, that user is automatically assigned view privileges.

Creating Global Security Profiles

Create a global security profile to determine user access to application-wide information.

To create a global security profile:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Global Security Profiles**.
3. On the **Global Security Profiles** page:
   a. Click **Add**.
   b. In the **Profile Name** field, double-click and type a unique name.
   c. In the **Description** field, double-click and type a description.
   d. Click the **Privileges** detail window and select options to assign privileges to the profile.

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e. Click **Context** and click **Set As Default** if you want this profile to be the new default.

> **Note**
>
> Select the **Privilege** option in the detail window header to assign all privileges in the window. Clear the **Privilege** option to disable all privileges in the window. You can also select the **Privilege** option at the grouping level to select or clear all privileges in that group.

4. On the **Global Security Profiles** page, click **Save**.

> **Tip**
>
> Provide clear profile names and descriptions to help you manage profiles.
>
> - Create a default global profile with few or no privileges.
> - To save time, consider copying, pasting, and modifying an existing profile: select the closest matching profile and click **Context** and click **Duplicate**. All privilege options are also duplicated. The new profile will appear with a unique name based on the original. For example, if you duplicated *PM Set*, the duplicate is named *PM Set-1*.

Creating Project Security Profiles

Create a project security profile to determine a user's level of access to each project within the enterprise project structure. A user can only access projects they have been assigned.

To create a project security profile:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Project Security Profiles**.
3. On the **Project Security Profiles** page:
   a. Click **Add**.
   b. In the **Profile Name** field, double-click and type a unique name.
   c. In the **Description** field, double-click and type a description.
   d. Click **Context** and click **Set As Default** if you want this profile to be the new default.
   e. Click the **Privileges** detail window and select options to assign privileges to the profile.

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> **Note**
>
> Select the **Privilege** option in the detail window header to assign all privileges in the window. Clear the **Privilege** option to disable all privileges in the window. You can also select the **Privilege** option at the grouping level to select or clear all privileges in that group.

4. Click **Save**.

> **Tip**
>
> - Provide clear profile names and descriptions to help you manage profiles.
> - Create a default project profile with few or no privileges.
> - To save time, consider copying, pasting, and modifying an existing profile: select the closest matching profile and click **Context** and click **Duplicate**. All privilege options are also duplicated. The new profile will appear with a unique name based on the original. For example, if you duplicated *PM Set*, the duplicate is named *PM Set-1*.

About User Interface Views

A user interface view is a pre-configured set of options you assign to users so their view of Dashboards, Portfolios, Projects, Resources, and Administration is optimized for their role. User interface views permit visibility to features essential for a user's role while hiding functionality that is not applicable.

Users with the same or similar roles can be assigned parallel views. To further enhance a role-specific configuration, you can:

- Assign specific views to open by default when a user assigned to the User Interface View opens the EPS, Activities, or Assignments pages.
- Assign global dashboards and multi-user dashboards to a user interface view.

If you assign a multi-user dashboard to a user interface view, only users who have access to the dashboard as specified on the Access tab of the Create Dashboard page can view the dashboard. Users who have access to Manage Dashboards (in the Dashboards menu) enabled in their view can use the Manage Dashboards page to create dashboards and choose which dashboards are displayed on their dashboards home page. Users who have the right to edit user interface views can modify their views to suit their needs.

Working with User Interface Views

Administrators:

When creating a user interface view, you can choose to configure the view from scratch, or you can use an existing view as a template and adjust it as necessary. For each user interface view, you choose the default start page, which pages and menu items you want to display and the order in which they appear in each section. You can also choose which views will open when a user assigned to the user interface view opens the EPS, Activities, or Assignments pages.

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You can assign global and multi-user dashboards to a user interface view. Users can customize their own views, within bounds set by their administrators, and can use the Manage Dashboards page to create custom dashboards displayed on the Dashboards home page.

After creating user interface views that correspond to the roles in your organization, you can assign users to the views. When assigning users to each user interface view, you can designate that users can edit the options you define for a user interface view. You can also select a default view for all new users who are not yet assigned a view. Existing users who are not yet assigned a view can access all functionality.

Once you assign users to views, users can view their view settings on the View Preferences tab. Access that an administrator grants a user always takes precedence over settings specified in the user's assigned interface view. For example, if a user's assigned view provides access to items in the Resources section but the user does not have module access to the Resources section, the user will not be able to access this section.

> **Note**
>
> - The View Preferences tab is not available to users with Contributor module access.
> - See the *P6 EPPM Application Administration Guide* for additional information on user interface views.

Users:

Your P6 administrator can select the pages and menu items available to you, the default start page, the view which will open when you open the EPS, Activities, or Assignments pages, and the order in which the items appear in each section. For example, if you are a Resource Manager with module access rights to all sections of the application, but your role is limited to planning resource allocation and assigning resources to activities, your administrator can create a user interface view that:

- In the Projects section, provides access to the Team Usage and Activities pages, but hides all menu items and all other pages.
- In the Resources section, provides full access to tabs and menu items, and opens a view including the most important columns for your role when you open the Assignments page.
- In the Portfolios section, provides access to only the Capacity Planning page.
- In the Dashboards section, provides access to all menu items as well as some global dashboards and multi-user dashboards configured by your administrator.

You can set or change your own default start page and modify your user interface view by going to the User menu and choosing My Preferences, however the options that you see and your ability to modify your view can be limited via your module access and security profiles.

Creating User Interface Views

Create a user interface view to optimize user to module interaction. The user interface view permits visibility to features essential for a role while hiding functionality that is not applicable. You can choose to create a brand new user interface view or modify an existing view.

To create a user interface view:

1. On the **Navigation Menu**, expand **Administration** and click **User Interface Views**.

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2. On the **User Interface Views** page, click + **Add**.
3. Click the **Content** tab.
4. On the **Content** tab:
   a. Enter a unique name in the **Name** field.
   b. Select which section the new user interface view should show when it is first opened from the **Start Page** list.
   c. Configure the Menu Items and Dashboards for the view on the **Dashboards** tab.
   d. Configure the Menu Items and Pages for the view on the **Portfolios** tab.
   e. Configure the Menu Items and Pages for the view on the **Projects** tab.
   f. Optionally select views to open when the EPS, Activities, and Assignments pages are opened.
   g. Configure the Pages for the view on the **Resources** tab.
   h. Optionally select a view to open when the Assignments page is opened.
   i. Configure the Menu Items for the view on the **Administration** tab.

   > **Note**
   >
   > - If you select the option next to Menu Items or Pages, all items will be included in the view. Conversely, if you clear the option, none of those items will be displayed in the view.
   > - To configure the sequence of pages and dashboards, select a page or dashboard and click Move Up or Move Down. The first item listed in each section is designated as the left-most item for that section.

5. Click the **Activity Editing** tab.
6. On the **Activity Editing** tab:
   - Expand each section and select the option in the **Edit** field to allow the user to edit that type of data in the view.

   > **Note**
   >
   > If you select the option next to the name of the section, all items in that section will be editable. Global Activity Codes, EPS Activity Codes, Project Activity Codes, and User Defined do not have the select all option; you must select each code individually.

7. Click the **Users** tab.
8. On the **Users** tab:
   - Configure the list of users for the view.
9. Click **Save**.

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Tip

- To create a new view which shares some features with an existing view, select the view and click **Context** and select Duplicate, then configure the new view.
- Users can view their interface view settings on the My Preferences page View tab.
- Continue to configure views over time in line with changing roles, capabilities, features, and organizational needs.
- You can quickly add users to a user interface view by double-clicking their name in the Available Users column. Likewise, you can remove users from a view by double-clicking their name in the Selected Users window.
- You can also assign user interface views on the Users page.

Configuring User Interface Views

Configure user interface views over time in line with changing roles, capabilities, and organizational needs. The changes you make will affect all users assigned to the view.

To configure a user interface view:

1. On the **Navigation Menu**, expand **Administration** and click **User Interface Views**.
2. On the User Interface Views page, select a view in the **Name** list.
3. Click the **Content** tab.
4. On the **Content** tab:
   a. In the **Name** field modify the name if necessary.
   b. In the **Start Page** field, select which section the new user interface view should show when it is first opened.
   c. Click each tab and select options for the menu items and pages you want to include in the view.
5. Click the **Activity Editing** tab.
6. On the **Activity Editing** tab:
   - Expand each section and select the option in the Edit field to allow the user to edit that type of data in the view.
7. Click the **Users** tab.
8. On the **Users** tab:
   a. Select a user from the **Available Users** list to assign to the currently selected view.
   b. Click **Add Users to Selected Users** to add the user to the view.
   c. Select a user from the **Selected Users** window to remove the user from that view.
   d. Click **Remove Users from Selected Users** to remove the user from the view.
9. Click **Save**.

To designate a view as the default user interface view:

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1. On the **Navigation Menu**, expand **Administration** and click **User Interface Views**.
2. On the **User Interface Views** page, select a view in the **Name** list.
3. Click **Context** and select **Set as Default View**.

Tip

- You must have at least one page option selected in the Projects, Resources, and Portfolios sections on the Content tab.
- To assign multiple users to the view on the User Interface View page Users tab, press the Ctrl key as you click multiple users. You can also double-click each user name in the Available Users list. You can quickly remove users from a view by double-clicking their names in the Selected Users window.
- You can configure the sequence of pages and dashboards. Select a page or dashboard and click Move Up or Move Down. The first item listed in each section is designated as the left-most item for that section.

About User Sessions

Manage user sessions to view a list of active users, or to reset users that are locked out of P6, P6 Team Member Web, P6 for Android, P6 for iOS, or P6 Professional. Locked-out users are unable to initiate new sessions because they have violated login constraints set in P6 Administrator application. For example, users may become locked out if they have attempted to log in while a session is already running, or if they have repeatedly entered incorrect login information.

Note

If you reset a user's session while they are using P6, P6 Team Member Web, P6 for Android, P6 for iOS or P6 Professional, their session will be ended and they will need to log back in again. Users of P6 Professional might not be aware that their session has ended for up to five minutes. Data changes they make after their session is ended will be lost. Therefore, it is important to let users know you will be resetting their session before hand wherever possible.

The User Sessions page displays:

- Users who are currently logged in to the application, and the time of their last activity
- Users who have left the application, but did not log out
- Users whose failed login count exceeds the acceptable threshold set in the P6 Administrator application

Resetting User Sessions

Reset a locked-out user's session to grant the user rights to initiate a new session. Users may be locked out if they have attempted to log in while a session is already running, or if they have repeatedly entered incorrect login information.

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> **Note**
>
> - If you reset a user's session while they are using P6, P6 Team Member Web, P6 for Android, P6 for iOS or P6 Professional, their session will be ended and they will need to log back in again. Users of P6 Professional might not be aware that their session has ended for up to five minutes. Data changes they make after their session is ended will be lost. Therefore, it is important to let users know you will be resetting their session before hand wherever possible.
> - For on-premises deployments, system administrators can use the P6 Administrator application to specify the number of times a user can fail to log in before P6 locks them out. The default setting is 5.
> - For on-premises deployments, accounts that are locked out, but not reset, will become available after a length of time defined in the P6 Administrator application. The default setting is 1 hour.
> - For more information about P6 Administrator application, refer to *P6 EPPM System Administration Guide* (on-premises only).

To reset sessions for users:

1. Click the **User** menu and select **User Sessions**.
2. On the **Manage User Sessions** page:

> **Caution**
>
> **Caution** Oracle recommends that users only be reset if they are locked out. Once a user session has been reset, the user will be returned to the login screen.

   a. Select the users whose sessions you want to reset.
   b. Select **Actions** and then select **Reset User**.

> **Tip**
>
> - A user account that is locked out is highlighted in red and denoted by an asterisk.
> - You must be an Admin Superuser to access the User Sessions page.
> - The User Sessions page displays users who are currently logged in, users who left the application but did not log out, and users whose failed login count exceeds the acceptable threshold.

About Table Auditing

Table Auditing in P6 EPPM allows you to gather information about incremental changes to projects and project-related data. If you configure table auditing, whenever a change is made in any of the tables you choose to audit, a row is written to the PAUDIT table of the database, recording information about the field that was changed, the activity and project for which the

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change was made, which user made the change and from which application, as well as the previous and new values of the data.

Because every change to an audited table triggers a row to be written to PAUDIT, table auditing involves an increased amount of interaction between P6 and the database, which can affect performance.

You can configure auditing on one or many tables in the database. For each table you can audit the following types of changes:

- **Insert**: A new record is written to a table, for example, when a new item is created. Audit data for insert operations shows only a new value; the old value is null because the row represents a new row being written to the table.
- **Update**: A record is modified, for example, when a field's value is changed. Audit data for update operations show both an old and a new value, representing the values of the field before and after the change was made.
- **Delete**: A record is removed from a table, for example when a data item is deleted. Audit data for delete operations shows only an old value; the new value is null because the row represents a table row being removed.

Before you can see audit data, you must configure P6 EPPM to start collecting audit data and set up the Publish Audit Data job to run. See: Configuring Audit Settings

After audit data has been collected by P6 EPPM, you can view it either by running reports against the database to query the PAUDITX table, or by using the Audit panel on the EPS page of P6. See: Viewing Audit Data

To learn more about table auditing, see: *P6 EPPM Database Administration Guide for On-Premises*.

Configuring Audit Settings

Configure Auditing in P6 so that you can produce reports about incremental changes to projects and project related data. You can view audit data collected by this process on the Audit panel of the EPS page, or by running reports to retrieve audit data from the database. See: *P6 EPPM Reporting Guide*.

> **Note**
>
> Table auditing involves an increased amount of interaction between P6 and the database, which can affect performance.

To configure Auditing:

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Audit**.
3. On the **Audit** page:
   a. In the **Interval to store user login information (in days)** field, enter a number of days.
   b. In the **Interval to store audit information (in days)** field, enter a number of days.

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c. In the Select the tables and operations to audit list, select a table or operation to audit and click **Add**.

d. In the Audit Tables section:

- Select **Audit Insert** to audit insertions to the table.
- Select **Audit Update** to audit updates to data in the table.
- Select **Audit Delete** to audit deletions of data in the table.

> **Note**
>
> – Select **Audit Insert** to see when new rows have been added to that table. For example, auditing inserts on the PROJECT table will show you when someone has created a new project.
>
> – Select **Audit Update** to see when data in a table has been edited. For example, auditing updates on the PROJECT table will show you when someone has changed the name or other properties of a Project.
>
> – Select **Audit Delete** to see when data in a table has been deleted. For example, auditing deletes on the PROJECT table will show you when someone has deleted a project.

e. Select **Enable auditing for all tables**.

4. Click **Save**.

> **Tip**
>
> - Table auditing records data about changes to projects and project related data items to the PAUDIT table. To be able to view audit data, you must also configure and enable the Publish Audit Data service.
> - To stop auditing on a particular table, remove it from the list by selecting ✕ **Remove**, or by clearing all three audit options for that table.
> - If you need to suspend all auditing without changing the configuration of the actions and tables which will be audited, clear the **Enable auditing for all tables** option.

Viewing Audit Data

If you have configured table auditing in your database, changes to any tables you are auditing are recorded in real time. You can view the audit data by using the audit panel on the EPS page of P6.

To view audit data in P6:

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select the projects or grouping nodes for which you want to view audit data, then click ⚙ **Context** menu and select **View Audit Data**.
3. In the **Audit** panel you can:

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- Use the **Subject Area** menu, to select the tables for which you want to view data.
- Use the **Date** menu, **From** field and **To** field to limit the data shown to a specific time period.
- Click **Customize View** to configure the columns you want to view, filter your view further, or determine the sort order to use in the panel.
- Print the data.
- Drag the edge of the panel to make it wider or narrower as needed.

Zero Values Versus Null Values

Zero and null have different meanings in table auditing. A zero value means that the data stored in the field is '0', whereas a null value means that there is no data in the field at all.

For example, consider the following examples:

Example 1:

Attribute Name	Old Value	New Value
Remaining Duration	5	0

In this example, the data for the Remaining Duration field has changed from 5 to 0, suggesting that the activity was completed, or the remaining duration was changed by a user.

Example 2

Attribute Name	Old Value	New Value
Remaining Duration	5	

In this example, the data for the Remaining Duration field has changed from 5 to null, suggesting that the activity has been deleted, so that the row has been removed from the table.

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7

P6 Team Member Interfaces

How to Work with P6 Team Member Interface Users

Your company may choose to install any combination of P6 Team Member interfaces and P6 mobile apps, depending on your business needs.

Use the information in this section to:

- Learn the capabilities of each P6 Team Member interface.
- Ensure each team member is set up correctly in P6.
- Configure project settings to customize the information team members view and update in their P6 Team Member interfaces, P6 for Android, and P6 for iOS.
- Learn how to create and assign Team Member work distribution filters.
- Learn how to turn on status reviews for a project or specific activities and how to view and approve team member status updates.
- Learn how to use Email Statusing Service.
- Learn how to interact with your P6 Team Member Web, P6 for Android, and P6 for iOS users using the Discussion feature.

About P6 Team Member

P6 Team Member is designed for individual contributors, or team members, to record their statuses and report their time using timesheets. Team members can also use Email Statusing Service and P6 mobile to status their activities. P6 mobile allows access to P6 Team Member Web functionality. P6 Team Member Web, Email Statusing Service and the P6 mobile apps provide quick, convenient, and easy access to assigned activities using the platform or device that accommodates your line of work.

Your project manager uses P6 to create and update the project schedule and activity list. Depending on the project preferences the manager selected when creating the project in P6, the updates you make in P6 Team Member Web, Email Statusing Service or P6 mobile will either apply immediately or require approval before they are applied to the project.

Work assignments in P6 Team Member are based on work distribution filters, or a team member being named as a resource assignment or an activity owner. As a team member, the P6 Team Member interfaces and the P6 mobile apps enable you to:

- View only your assigned activities.
- Provide status on your activities. The project manager customizes the status fields in your view. These fields can include time spent, time left, % complete, remaining duration, start date, and finish date.

Timesheets enable project team members to use the web to communicate timesheets and activity statuses directly to their organization's database, regardless of their location. this

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ensure that project managers are always working with the most up-to-date project information, making it easier to plan resources or resolve conflicts.

P6 Team Member Web

You can use P6 Team Member Web to:

- View only your assigned activities.
- Provide status updates on your activities. The project manager customizes the status fields in your view. These fields may include time spent, time left, % complete, remaining duration, start date, and finish date.
- Provide status updates for other resources assigned to activities.
- Modify your view to display your activity list by project and by current status, including Active, Due, Overdue, Starred, or Completed. You can refine your activity list even further by filtering on the basis of specific parameters, entering a term by which to filter, or providing a sort order for your list.
- Mark an activity with a star to signify its importance to you. You can view all your starred activities in one list when you select the Starred activity list view in the app menu.
- View a list of all your steps for an activity. Add, edit, or delete steps to more accurately reflect your work, if you are given the privileges by your project manager. You can enter the % complete to show progress and mark a step as complete when you finish a step.
- View the codes and UDFs associated with an activity for additional information about the activity. Update codes and UDFs if your project manager requires you to update activity status using these fields.
- View the baseline dates for an activity.
- View predecessor and successor activity related to an activity and contact resources associated with related activities.
- Communicate with the project manager or other team members through email.
- Communicate with the project manager about an activity by viewing and posting messages in the Discussion dialog box. All messages are saved with the selected activity.
- View and edit notebook topics associated with an activity to see or provide more information about the activity.
- View documents associated with an activity and contact resources associated with project documents.
- Enter up-to-the-minute information about your assignments and to record the time you spent working on each one, by submitting timesheets. Timesheets helps you to focus on the work at hand with a simple cross-project to-do list of your upcoming assignments.

Email Statusing Service

You can use Email Statusing Service to:

- Request a list of your current activities through email using the email account associated with your P6 user account. You can request a filtered list of activities by project; time frame; current status, including Active, Due, Overdue, Completed, or Starting; or by all the activities that you starred.
- Reply to the email you receive with your activity list, record your progress, and send your updates.

Project managers can use Email Statusing Service to:

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- Send a Welcome email to new Email Statusing Service users, which includes the email address to the email Statusing Service, and instructions for requesting an activity list and updating the list through email.
- Send team members an email request for status updates. Project managers can customize the activity list sent to team members using the available filter options. Team members can provide status by replying to the email with their updates.

Getting Started with P6 Team Member Applications

Project managers must ensure their team members are set up properly in P6 and they must send their team members access information to the P6 Team Member interfaces, P6 for Android and P6 for iOS.

Setting P6 to Support Email Statusing Service Users

Projects may require that P6 users temporarily work in remote locations without access to the private network where the P6 server resides. Diverse project teams may also exist with some members updating their activities using P6, and others using Email.

> **Note**
>
> Timesheet users can request a list of their activities using Email Statusing Service; however, timesheet users can only update their activities using P6 Team Member Web.

To support updating assignment status by Email, you will need to:

1. Ensure the users you want to use Email Statusing Service have a valid account in P6.

   > **Note**
   >
   > Each user with a valid user account can be assigned to activities as a resource assignment if the account is associated with a labor resource, as an activity owner, or by being assigned a Team Member work distribution filter.

2. Assign users to at least one module access option.
3. Ensure the user's account specifies their unique Email address.
4. Assign users to one or more activity assignments for at least one active project. Email Statusing Service will show activities that have not yet started, active activities, and activities completed in the last 30 days.

   > **Note**
   >
   > OBS access to a project is not required for resource assignments or activity owners using P6 Team Member Web, Email Statusing Service, or P6 mobile to view and update their assigned activities. OBS access is required for each user with a Team Member work distribution filter assigned.

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5. Ensure your users download and install an Email client application or browser to access web mail.
6. Have your teams and managers plan their Email process. For example, consider details such as the timing of updates by Email versus updates made in P6 to avoid conflicts, network access hot spots, and what equipment or mobile devices you will be using.

Yahoo and Hotmail web clients are not supported. If the user's Email address is assigned to one of these accounts, have them access their account within an SMTP Email client.

Users may receive error messages when updating activities if their Email application is set to return Email messages in HTML format.

One of the following situations will occur:

- An Email will be returned with the message "Date or unit format specified was invalid or missing.".
- If there is an error in the Time Spent, Time Left, or Remaining Duration fields, an Email will be returned with a message that the updated value is incorrect because only part of the updated value was parsed by the Email Statusing Service.

The following methods can be used to avoid this issue:

- When entering activity updates, delete the original value in its entirety before entering an updated value.
- Set the Email application to reply to messages in text format.
- Click the **Update this activity** link to update activities individually.

Setting P6 to Support P6 mobile Users

For users to perform activities in P6 for iOS or P6 for Android, you will need to:

1. Ensure the users you want to use the P6 mobile apps have a valid account in P6.

> **Note**
>
> Each user with a valid user account can be assigned to activities as a resource assignment if the account is associated with a labor resource, as an activity owner, or by being assigned a Team Member work distribution filter.

2. Assign users to at least one module access option.
3. Assign users to one or more activity assignments for at least one active project. P6 mobile apps will show activities that have not yet started, active activities, and activities completed in the last 30 days.

> **Note**
>
> OBS access to a project is not required for resource assignments or activity owners using P6 Team Member Web, Email Statusing Service, or P6 mobile to view and update their assigned activities. OBS access is required for each user with a Team Member work distribution filter assigned.

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Have your P6 mobile app users download and install P6 for iOS from the Apple App Store or P6 for Android from the Google Play Store to their mobile device.

> **Note**
>
> The users will need to know the P6 server and their SSO username and password (if using SSO) or their P6 username and password (if using native authentication).

If your company is running an older version of P6 EPPM, users can install and use the latest version of P6 for iOS; however, they may not be able to use all the features of P6 for iOS.

If users receive one of the following messages, an SSL certificate may need to be obtained from a trusted certificate authority.

- iOS: "Server URL points to an invalid web application."
- Android: "Cannot connect to server."
- If users are in a time zone that observes daylight savings time, the hours displayed in their activities may be incorrect by one hour.
- If users do not have any activities assigned to them, they might receive the message "Some data failed to load. Refresh to try again." on the Home page of the app. This issue will only occur if your company has version 8.2 deployed on the P6 application server.

Setting P6 to Support P6 Team Member Web Users

For users to perform activities in P6 Team Member Web, you will need to:

1. Ensure the users you want to use P6 Team Member Web have a valid account in P6.

   > **Note**
   >
   > Each user with a valid user account can be assigned to activities as a resource assignment if the account is associated with a labor resource, as an activity owner, or by being assigned a Team Member work distribution filter.

2. Assign users the **Team Member** module access option.
3. Assign users to one or more activity assignments for at least one active project. P6 Team Member Web will show activities that have not yet started, active activities, and activities completed in the last 30 days.

   > **Note**
   >
   > OBS access to a project is not required for resource assignments or activity owners using P6 Team Member Web, Email Statusing Service, or P6 mobile to view and update their assigned activities. OBS access is required for each user with a Team Member work distribution filter assigned.

4. Send one of the following URLs to users so they can use the correct language. The default language setting is English. To change the language setting:

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a. Enter the URL for the application in your browser.

b. At the end of the URL, enter: **?locale=**<*locale code*>

   The locale codes are as follows:

   - Arabic = ar
   - Brazilian Portuguese = pt_BR
   - Dutch = nl
   - French = fr
   - German = de
   - Italian = it
   - Japanese = ja
   - Korean = ko
   - Russian = ru
   - Spanish = es
   - Simplified Chinese = zh_CN
   - Traditional Chinese = zh_TW

   For example, to change the language to German, the URL would be http://yourserver/p6tmweb/?locale=de.

c. Bookmark this URL for future access.

5. Send your P6 Team Member Web users the URL for the P6 Team Member Web server with the language code included.

> **Note**
>
> The users will need to know their SSO username and password (if using SSO) or their P6 username and password (if using native authentication).

Configuring P6 Team Member View Preferences

Configure the Team Member view preferences to enable users to view and update the fields that are important for statusing the project in P6 Team Member Web, P6 for Android, or P6 for iOS.

To configure view preferences:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project.
   b. Click **Context** and select **Set Project Preferences**.
   c. In the **Project Preferences** dialog box, click **Team Member** then click the **Status Updates** tab.
   d. On the **Status Updates** tab:

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- Choose whether you want team members to provide status at **Assignment Level**, **Activity Level**, or both.
- If you selected the Activity Level option choose whether you want team members to provide status **As Owner** or **As Primary Resource**. Select the **As Owner** option if your team members are assigned Team Member work distribution filters.
- Click + **Add** to add an **Assignment Field** or **Activity Field** and select the field you want team members to use to update their activities. Users assigned Team Member work distribution filters update Activity Fields.
- Choose whether you want team members to update **Additional Time Spent** or **Total Time Spent** when updating actual units.
- Select whether you want Team Members to be able to see **Planned units**, **Baseline dates**, and **Total float**.
- Choose whether you want team members to update status in P6 Team Member Web Timesheets view by changing **Percent Complete** or **Remaining Units**.
- Choose whether you want primary resources to be able to mark activities as complete.
- Choose whether you want primary resources to be able to update activity dates in timesheets.

e. On the **Activity Updates** Tab:

- Select the **Add and delete steps** option if you want to allow team members using P6 Team Member Web, P6 for Android, or P6 for iOS to add and delete their own steps.
- Select the **Update notebooks** option if you want to allow team members using P6 Team Member Web, P6 for Android, or P6 for iOS to be able to update notebook topics.
- Select the **Status other resource assignments on an activity** option if you want to allow team members using P6 Team Member Web who are assigned as the activity owner, primary resource or who have been assigned Team Member work distribution filters, to update other resource assignments on the activity.
- Select the **Warn team members when their update might put the activity out-of-sequence** option if you want team members using P6 Team Member Web, P6 for Android, or P6 for iOS to receive a warning if the change they are trying to make could affect schedule logic.
- Click + **Add Code or UDF** and select a global activity code, EPS activity code, or a UDF that should be visible to team members. The **Read-only** option next to each code and UDF is selected by default. If you want team members to update the code or UDF value clear this option.
- Click +**Add Step UDF** and select a step UDF that should be visible to team members. The **Read-only** option next to each code and UDF is selected by default. If you want team members to update the code or UDF value clear this option.

f. On the **Activity Assignments** Tab:

- Select the **Assign themselves to activities** option if you want to allow team members using P6 Team Member Web, P6 for Android, or P6 for iOS to add themselves to activities.
- Select the **Outside assigned OBS access** option if you want to allow team members using P6 Team Member Web, P6 for Android, or P6 for iOS to add

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themselves to activities even if the resource does not have access to the relevant OBS for the activity.

- Select the **Assign themselves to activities as owners** option if you want to allow team members using P6 Team Member Web to assign themselves as the owners of activities.
- Select the **Outside assigned OBS access** option if you want to allow team members using P6 Team Member Web to assign themselves as the activity owner even if the resource does not have access to the relevant OBS for the activity.
- Select the **Reassign activities to a different owner** option if you want to allow team members using P6 Team Member Web to assign other team members as activity owners.
- Select the **Assign themselves to activities with role assignments matching Team Member's role** option if you want to allow team members using P6 Team Member Web, P6 for Android, or P6 for iOS to be able to assign themselves to activities on the basis of their role. Then select which Units/Time and Overtime factor to use when a resource assigns themself to an existing activity assignment, and when a resource and role share an activity assignment.
- Optionally select whether the assignment proficiency should be considered when team members assign themselves to an activity on the basis of their role.

g. Click **Apply**.

Tip

- Time Spent is read only if the **Team members enter new actual units** option is selected.
- If reviews are enabled for status updates and you allow team members to add or delete steps, the status reviewer is prompted to approve the change of a step name; however, steps that are added or deleted by a team member are not submitted for review.
- The assignment and activity fields display in P6, Email Statusing Service, P6 for Android, and P6 for iOS in the following order, if selected:
- The activity codes and UDF fields will appear in the P6, Email Statusing Service, P6 for Android, and P6 for iOS interfaces in the same order as shown on this tab.
- Expected Finish
- Activity % Complete
- Remaining Duration
- Actual Units or Actual Labor Units
- Actual Nonlabor Units
- Remaining Units or Remaining Labor Units
- Remaining Nonlabor Units

About Team Member Work Distribution Filters

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A Team Member filter, also known as a Team Member work distribution filter, extends the reporting capabilities of Team Member interface users. A work distribution filter is created to enable team members to update progress for selected labor resources, roles, and codes.

Multiple team members can be assigned the same filter if all are responsible for updating the same activities. For example, a team that works in shifts may have multiple supervisors. If each supervisor is responsible for updating the same group of activities, then they can all be assigned the same team member work distribution filter.

Use these filters when:

- Resource assignments or owners are not responsible for updating their own activities.
- Roles are assigned to an activity instead of a resource or owner.
- You want to update activities based on EPS or global activity codes.

Creating a Team Member Work Distribution Filter

Create Team Member work distribution filters to enable Team Member interface users to update progress for selected labor resources, roles, and global and EPS activity codes.

To create a Team Member work distribution filter:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page:
   a. Select a user.
   b. In the **Team Member Filter** field, double-click and click **Select**.

> **Note**
>
> If the **Team Member Filter** option is not displayed, click **Customize View** and select **Team Member Filter**.

4. In the **Team Member Filters** dialog box:
   a. Click **Context** and click **Add**.

> **Note**
>
> This filter is automatically applied to the user you selected. If you do not want to apply this filter to the selected user, then clear the **Selected** option.

   b. In the **Name** field, enter a name that describes the filter you are creating.
   c. In the **Filter Details** area:
      i. Configure the filter criteria.
      ii. Click **Context** and click **Add** to configure additional filter criteria.
   d. Click **Save**.

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5. On the **Users** page, click **Save**.

Assigning a Team Member Work Distribution Filter

Assign Team Member work distribution filters to enable Team Member interface users to update progress for selected labor resources, roles, and global and EPS activity codes.

To assign a Team Member work distribution filter:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page:
   a. Select a user.
   b. In the **Team Member Filter** field, double-click and click **Select**.

> **Note**
>
> If the **Team Member Filter** option is not displayed, click **Customize View** and select **Team Member Filter**.

4. In the **Team Member Filter** dialog box:
   a. Select the **Selected** option for each filter you want to assign to the selected user.
   b. Click **Save**.
5. On the **Users** page, click **Save**.

> **Tip**
>
> - P6 will not list the resources assigned to a user with a Team Member filter.
> - Team Member interface users with a Team Member filter assigned must have OBS access for the projects and must have the privilege 'Add/Edit Activities Except Relationships' for the activities.

About Timesheets

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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Working with Timesheets

Resources required to submit their time using the optional timesheets provided by P6 Team Member Web will navigate to an online timesheet they can fill in and submit for approval by their manager.

Resources submitting a timesheet must meet the following requirements:

1. The resource must be assigned to activities in the project.
2. The resource must be assigned to a user account with Timesheet module access by their administrators.

Approval managers must meet the following requirements:

1. Approval managers must be assigned as the Approval Manager for the resource submitting the timesheet.
2. Approval managers must be granted Timesheet access by their administrators to utilize the full set of timesheet features; however, a manager strictly reviewing timesheets just needs access to the Timesheet Approval page from dashboards.

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:

- 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
- runs a timesheet report in the Reports section of P6

> **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.

Configuring Resources for Timesheets

To enable a project resource to use Timesheets functionality, you must assign a user login account to the resource and set the resource to use timesheets. Follow the steps below to complete these requirements.

Assigning Associated Resources

Assign an associated resource to the user profile to connect the user with a resource in the application. Each user can have only one resource assigned, and a resource cannot be assigned to more than one user at the same time. Not all users require an associated resource, but users must have a resource assigned to enable them to edit their personal resource calendars and use P6 Team Member Web or P6 mobile. Also, by associating a

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resource with a user, the user will be able to see all projects to which the resource is assigned using the Activities page in P6 if the user is assigned Contributor module access.

To assign an associated resource:

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page:
   a. Select a user.
   b. In the **Associated Resource** field, double-click and click **Select**.
4. In the **Select Resource** dialog box, select a resource and click **Select**.

> **Note**
>
> In Native Authentication mode, the user's Personal Name will be updated to match the Resource Name. Otherwise, the Resource Name will be updated to match the user's Personal Name.

5. On the **Users** page, click **Save**.

> **Tip**
>
> If the resource you need to assign to the user does not yet exist, you can create one quickly by clicking **Context** and then click **Create Resource**.

Configuring Resource Settings for Timesheet Reporting

Configure timesheet reporting settings if some users will report progress using the Timesheets tab in P6 Team Member Web and you are implementing non-automatic approval.

To configure resource settings for timesheet reporting:

> **Note**
>
> You must perform these steps in order when configuring these settings for the first time for each new resource.

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. In the **Users** pane, select the user and click the **Module Access** detail window.
4. In the **Module Access** detail window, select **Timesheet**.
5. On the **Navigation Menu**, expand **Resources** and click **Administration**.
6. On the **Resources** page, click **Resources**.

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7. On the **Resources** tab, select the resource and click the **Settings** detail window.
8. In the **Settings** detail window:
   a. Click ••• **Select** in the **User Login** field.
   b. In the **Select User** dialog box, select the resources name from the list and click **OK**.
9. In the **Settings** detail window:
   - In the **Timesheet Approval Manager** field, click ••• **Select**.
10. In the **Select User** dialog box, choose a manager to assign to the resource and click **OK**.
11. Click **Save**.

> **Note**
>
> Users designated as timesheet approval managers are not automatically granted access to P6 Team Member Web, even if they are assigned the required module access. To enable timesheet approval managers to access timesheets in P6 Team Member Web, you must configure them as timesheet resources, as you would any other resource that requires access to timesheets in P6 Team Member Web. Configuring timesheet approval managers as timesheet resources enables approval managers to log into P6 Team Member Web to edit the timesheets of their reporting resources.

Approving or Rejecting Timesheets

As a timesheet approval manager or delegate, you can approve or reject timesheets for resources for which you are responsible. Depending on your P6 EPPM Application settings, an email may be sent to other managers when you reject a timesheet.

To approve or reject timesheets:

1. On the **Navigation Menu**, expand **Approvals** and click **Timesheets**.
2. On the **Timesheets** page:
   a. Select Resource Manager from the **Approving as** list.
   b. Select **Action Required** to view timesheets awaiting your input or **All Timesheets**to view all timesheets.
   c. Configure the options in the **Filter** dock to filter the list of timesheets if required.
   d. Select the timesheets you want to approve or reject. To select multiple timesheets, use Ctrl+click or Shift+click.
   e. To approve the selected timesheets, click **Approve** or, to reject the selected timesheets, click **Reject**.

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Tip

- A setting in P6 Administrator application enables daily emails to be sent to all users listing all their timesheets which have been approved or rejected in the past 24 hours. An administrator can configure P6 to prevent timesheets from being rejected if they were submitted before the current week, before the current month, or at all.
- You can see whether there have been more units approved against an assignment than were planned by adding the Approved Units, Planned Units, and Variance Units columns to the details dock.
- The Timesheets page of the Application Settings pane specifies how timesheets are submitted and approved, including whether Resource Managers or Project Managers, or both, must review and approve timesheets. Manager approval is not required if these settings specify that timesheets are automatically approved upon submission; however, you can still review and even reject those timesheets if needed.
- The PM Approved and RM Approved status types are only valid when two approval levels are required. In this case, the PM Approved status appears in the Action Required filter for the resource manager when two approval levels are required, the PM has approved, and resource manager approval is pending; likewise, the RM Approved status appears in the Action Required filter for the project manager when two approval levels are required, the RM has approved, and project manager approval is pending.
- If you are a Resource Manager, you can review timesheets for resources to whom you have been assigned as timesheet approval manager. If you are a timesheet approval delegate for a Resource Manager, you can review timesheets for resources to whom the original manager has been assigned as timesheet approval manager.

Sending Email about Timesheets to Resources

As a timesheet approval manager, you can send an Email notification to a resource at any time. For example, you might want to remind a resource or group of resources about timesheets that need to be submitted. The resources and users you notify must already have a valid Email address stored in P6.

To send Email about timesheets:

1. On the **Navigation Menu**, expand **Approvals** and click **Timesheets**.
2. On the **Timeshests** page:
   a. Select Project Manager or Resource Manager from the **Approving as** list. Or, if you are a delegate, select the value from the list that best represents your current role.
   b. Click **Action Required** to view timesheets awaiting your input or **All Timesheets**to view all timesheets.
   c. Select a timesheet about which you want to send an email.
   d. Click **Context** and select **Email**.
3. In the **Send Email** dialog box:

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a. P6 pre-fills the recipient list and subject of the Email. Edit the recipients and subject as necessary.

b. Enter the message body in the large field below the subject line.

c. Click **Send**.

> **Note**
>
> Use the Bcc field to send Email to multiple recipients. This hides the list of recipients when delivered, safeguarding the privacy of each recipient.

Assigning a Project Manager Delegate for Timesheets

If you are a project manager, you can assign a temporary delegate to process timesheets awaiting your approval while you are not able to process them yourself. For example, you might be on business travel or vacation, or the workload requires you to assign timesheet approval responsibility to others.

To assign a project manager delegate:

1. On the **Navigation Menu**, expand **Approvals** and click **Timesheets**.
2. On the **Timesheets** page:
   a. Select **Project Manager** from the **Approving as** list.
   b. Click **Actions** and select **Assign Project Manager Delegate**.
3. In the **Assign Project Manager Delegate** dialog box:
   a. If more than one project is listed, select a project.
   b. Double click the **delegate** field, click **Select**, and select a user from the **Select a User** dialog box. Click **OK**.
   c. To activate the delegate's approval rights, select the check box for the project row where you need to designate a delegate.
   d. Click **Apply**.
   e. Repeat for each project that you want to assign to a delegate.
   f. Click **OK**.

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Tip

- You can assign any user as your delegate; however, the activities that appear in the table are dependent on the delegate's OBS access.
- If you are a project manager, the Assign Project Manager Delegate dialog displays a list of all projects for which you are responsible for processing timesheets. You can assign the same delegate to each project, or you can select a different delegate per project.
- The maximum number of projects displayed in the Assign Project Manager Delegate dialog is controlled by the Maximum number of rows displayed in trees and pick lists value on the My Preferences page Global tab.
- To disable a delegate's approval rights, clear the check box or clear the top-level option to clear all delegate options. If you want to remove a user as a potential delegate in the Assign Project Manager Delegate dialog box, select the user's name and press the Delete key or select another user to replace the previously listed user.
- Even when you activate a delegate's approval rights, you continue to have approval rights as a resource manager or project manager.
- When you add or remove a delegate's approval rights, the delegate will receive an email notification if they have a valid email address defined with their user account. When adding a delegate, the format of the message is:

  ```
  <username> has assigned you to review timesheets for the following projects:
  <project 1>, <project 2>, etc. Please contact <username> if you need
  assistance.
  ```

  <username> has assigned you to review timesheets for the following projects: <project 1>, <project 2>, etc. Please contact <username> if you need assistance.

When removing a delegate, the format of the message is:

```
<username> has removed your time approval delegate rights for the following projects:
<project 1>, <project 2>, etc. Thank you for your assistance.
```

Assigning a Resource Manager Delegate for Timesheets

If you are a resource manager, you can assign a temporary delegate to process timesheets awaiting your approval while you are not able to process them yourself. For example, you might be on business travel or vacation, or the workload requires you to assign timesheet approval responsibility to others.

To assign a resource manager delegate:

1. On the **Navigation Menu**, expand **Approvals** and click **Timesheets**.
2. On the **Timesheets** page:
   a. Select **Resource Manager** from the **Approving as** list.
   b. Click **Actions** and select **Assign Resource Manager Delegate**.
3. In the **Assign Resource Manager Delegate** dialog box:

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a. Click ••• **Select** and select a user from the **Select a User** dialog box.

b. To activate the delegate's approval rights, select **Make this delegate active**.

c. Click **Apply**.

Tip

- You can assign any user as your delegate; however, the activities that appear in the table are dependent on the delegate's OBS access.
- To disable a delegate's approval rights, clear the check box next to the delegate's name. If you want to remove a user as a potential delegate in the Assign Resource Manager Delegate dialog box, you can select the user's name and press the Delete key or select another user to replace the previously listed user.
- Even when you activate a delegate's approval rights, you continue to have approval rights as a resource manager or project manager.
- When you add or remove a delegate's approval rights, the delegate will receive an email notification if they have a valid email address defined with their user account.
- When adding a delegate, the format of the message is: `<username> has assigned you to review timesheets for the following people: <resource 1>, <resource 2>, etc.`
- When removing a delegate, the format of the message is: `<username> has removed your time approval delegate rights for the following people: <resource 1>, <resource 2>, etc. Thank you for your assistance.`

```
<username> has assigned you to review timesheets for the following people:
<resource 1>, <resource 2>, etc. <username> has removed your time approval
delegate rights for the following people: <resource 1>, <resource 2>, etc.
Thank you for your assistance.
```

About P6 Team Member Status Updates

Project managers might need a way to view team member status updates before the updates are committed to the schedule. The team member status updates feature enables you to view, update, approve and reject activity progress captured by users of the P6 Team Member interfaces.

When setting up team member status reviews in Project Preferences, you enable reviews for the project, choose the required reviewers, choose the review type, and choose whether to require reviews for all activity updates in the project. Status updates can be turned on and off for individual activities on the Activities page. In addition to setting reviewers for all activities, you can set reviewers for all activities within a specific WBS on the Activities page.

- Users assigned as a status reviewer for a WBS node can view, edit, approve, and reject the status updates for all activities in that WBS node only, but not any of its child, sibling, or parent WBS nodes.
- Users assigned as a status reviewer for a project can, by default, view, edit, approve, and reject status updates for activities in the top level of the project and also for any activities in WBS nodes of the project that do not have status reviewers assigned.

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> **Note**
>
> When you assign a status reviewer at project level, P6 prompts you to choose whether to assign that status reviewer to all WBS nodes in the project. If you choose No, the user cannot view, edit, approve or reject status updates for activities in WBS nodes to which they are not explicitly assigned as a status reviewer, unless there are no other status reviewers assigned to that WBS node.

- Users assigned the Project Superuser project security profile against a project can view, edit, approve, and reject status updates for all activities in that project, regardless of whether they are explicitly assigned as a status reviewer to specific WBS nodes in the project.
- Users assigned the Admin Superuser global security profile can view, edit, approve, and reject status updates for activities in any WBS node of any project.

If you do not assign any status reviewers for a project, only users assigned the Project Superuser project security profile against that project or users assigned the Admin Superuser global security profile can view, edit, approve, and reject the status updates for activities in that project.

When a team member assigns an activity or saves a change in a P6 Team Member interface, the change appears in the Status Updates page.

The history of all activity updates made in P6 Team Member interfaces is captured in the Update History detail window on the Activities page.

Configuring P6 Team Member Status Update Reviews

Configure the team member status updates feature to enable a project manager to manually edit and approve status updates made by P6 Team Member interface users before the updates are applied to the project.

> **Note**
>
> The status update reviews feature is turned off by default.

To configure status updates:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project.
   b. Click **Context** and select **Set Project Preferences**.
   c. In the **Project Preferences** dialog box, click **Team Member.**
   d. On the **Team Member** page, click **Status Reviews**.
   e. On the **Status Reviews** tab:
      - Select **Enable review for team member status updates**.

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- Select **Review required by default for new activities** if all new activities require approval. When prompted to apply the setting to all existing activities in the project, choose **Yes** or **No**.
- In the **Review Type** list, select whether anyone can or everyone must review status updates.

> **Note**
>
> You cannot change the review type if there are pending status reviews for the project.

- In the **Reviewers** list, click **Select**.

f. In the **Select Status Reviewers** dialog box:

- Select people to review activity status updates.
- Click **Select**.
- When prompted to set this user as the status reviewer for all WBS nodes in the project, choose **Yes** or **No**.

g. Click **Apply.**

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Tip

- You can also assign status reviewers to projects by adding the Status Reviewer column to your EPS page view.
- Assigning status reviewers at project level with Fill Down on the EPS page automatically assigns the same status reviewers to all WBS nodes in each of the selected projects, overwriting existing status reviewer assignments to those WBS nodes.
- Status reviewers can be set at the WBS level and apply to each activity included in the WBS, but not to its child, sibling, or parent WBS nodes.
- A setting in P6 Administrator application enables daily emails to be sent to status update reviewers listing all the updates pending their review. There is also a setting to allow all users to receive a daily email listing all their status updates which have been approved or rejected in the past 24 hours.
- The assigned status reviewers, or a user with Admin or Project superuser privileges can view, edit, and approve the status updates for the project. However, only users identified as status reviewers receive notifications that pending status updates exist.
- You can manually change the reviewers for each WBS on the **Activities** page. Click the **General** detail window for the WBS and double-click the **Status Reviewers** field. If the **Status Reviewers** column is not displayed, click **Customize View** to add it to your view.
- To require approval on an activity, on the **Activities** page, select **Review Required** for the activity. If the **Reviewer Required** column is not displayed, click **Customize View** and add the **Review Required** column.
- If an activity does not require review, it is automatically approved. View the **Update History** detail window on the **Activities** page to view all updates made the to the activity.
- Team members can continue to update their activities even if a review is pending.

Working with P6 Team Member Status Updates

If you are assigned the appropriate privileges, you can view, update, approve and reject status updates made by team members using P6 Team Member interfaces.

View only pending status updates to see the new updates requiring your attention. The number in the bubble shows how many updates are currently pending for the selected projects.

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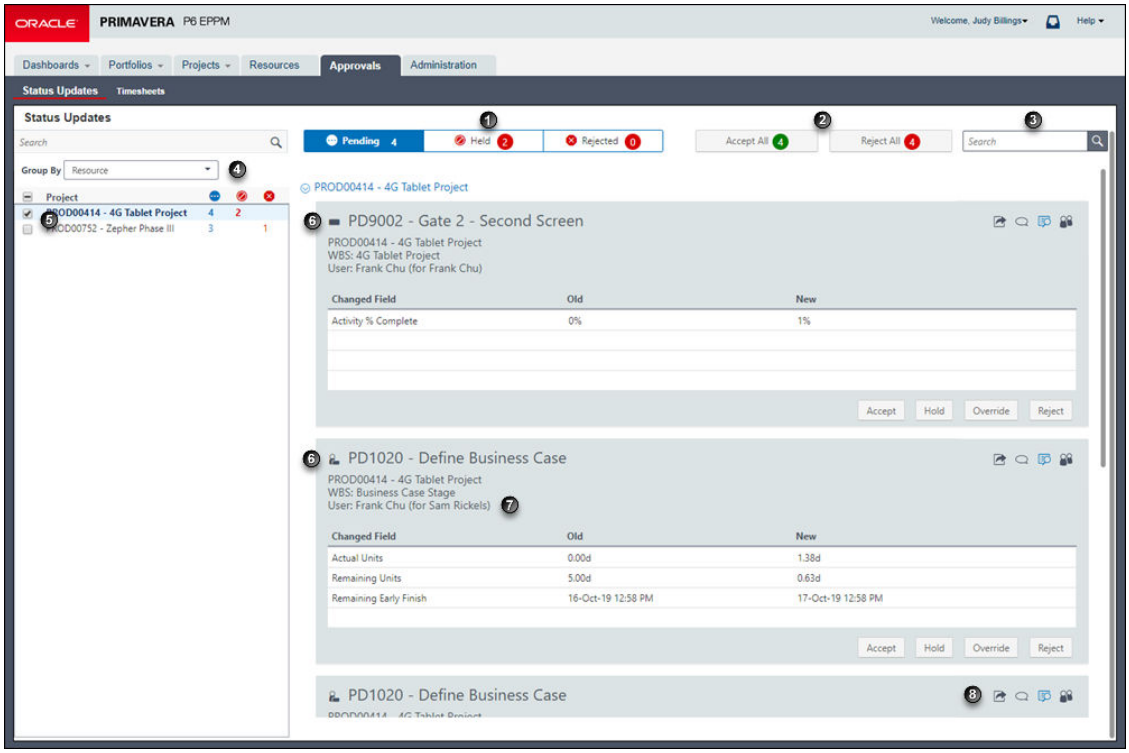


Table of Screen Elements

Item	Description
1	**Pending**: View only pending status updates to see the new updates requiring your attention. The number in the bubble shows how many updates are currently pending for the selected projects. **Held**: View only held updates to focus on updates which were not approved when they were initially made. The number in the bubble shows how many updates are currently held for the selected projects. **Rejected**: View only rejected updates to see which updates were not approved and have not yet been modified and resubmitted by team members
2	**Accept All**: When you have reviewed all the updates in the view and are satisfied that the updated data is correct, select **Accept All** to apply the updated information to the activities. When you select **Accept All**, only the status updates in the view are approved. The number in the bubble shows how many updates will be accepted. **Reject All**: When you have reviewed all the updates in the view and the remaining updates are all updates which must be resubmitted, select Reject All to reject the status updates and provide feedback to the team members about what needs to be changed. When you select **Reject All**, only the status updates in the view are rejected. The number in the bubble shows how many updates will be rejected.

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Item	Description
3	**Search**: Use search as another way to filter the status updates visible on the page. You can search using any field name in the view. For example, to view all status updates for a single resource, search on the name of the resource. When you select **Accept all updates**, only the status updates in the view are approved.
4	**Group By**: You can choose to group the page by None, Resource, or Review. You must be an Admin Superuser or Project Superuser to view this option.
5	**Project Filter**: To reduce the number of status updates displayed on the page, choose to view only some projects. The status update cards are grouped by project.
6	**Assignment** or **Owner** or **Team Member work distribution filter**: These icons indicate whether the activity is assigned to a resource assignment, an activity owner, or a user with a Team Member work distribution filter assigned.
7	**User (for Resource)**: If the project level setting to allow users to status other resources is selected, you can see the resource which was updated by the user who submitted the status update.
8	**Accept**: If you see that all the information in the status update is correct, accept the update to allow the data to be integrated into the activity or resource assignment. **Hold**: If you need more information before you approve the status update, place the update on hold. After you click **Hold**, the status update will move to the **Held** category. Team members can continue to make updates to their activities even when the update is in the held state. If a team member makes another update while the initial status update is in the held state, the data is updated and a message displays indicating a change was made. **Override**: If you see incorrect information in the status update and know what the correct data is, override the update to correct the incorrect information. **Reject**: If you see incorrect information in the status update, reject the update to have the team member review the data and resubmit the update. Team members can continue to make updates to their activities even after an update is rejected. If a team member makes another update while the initial status update is in the rejected state, the data is updated and a message displays indicating a change was made.

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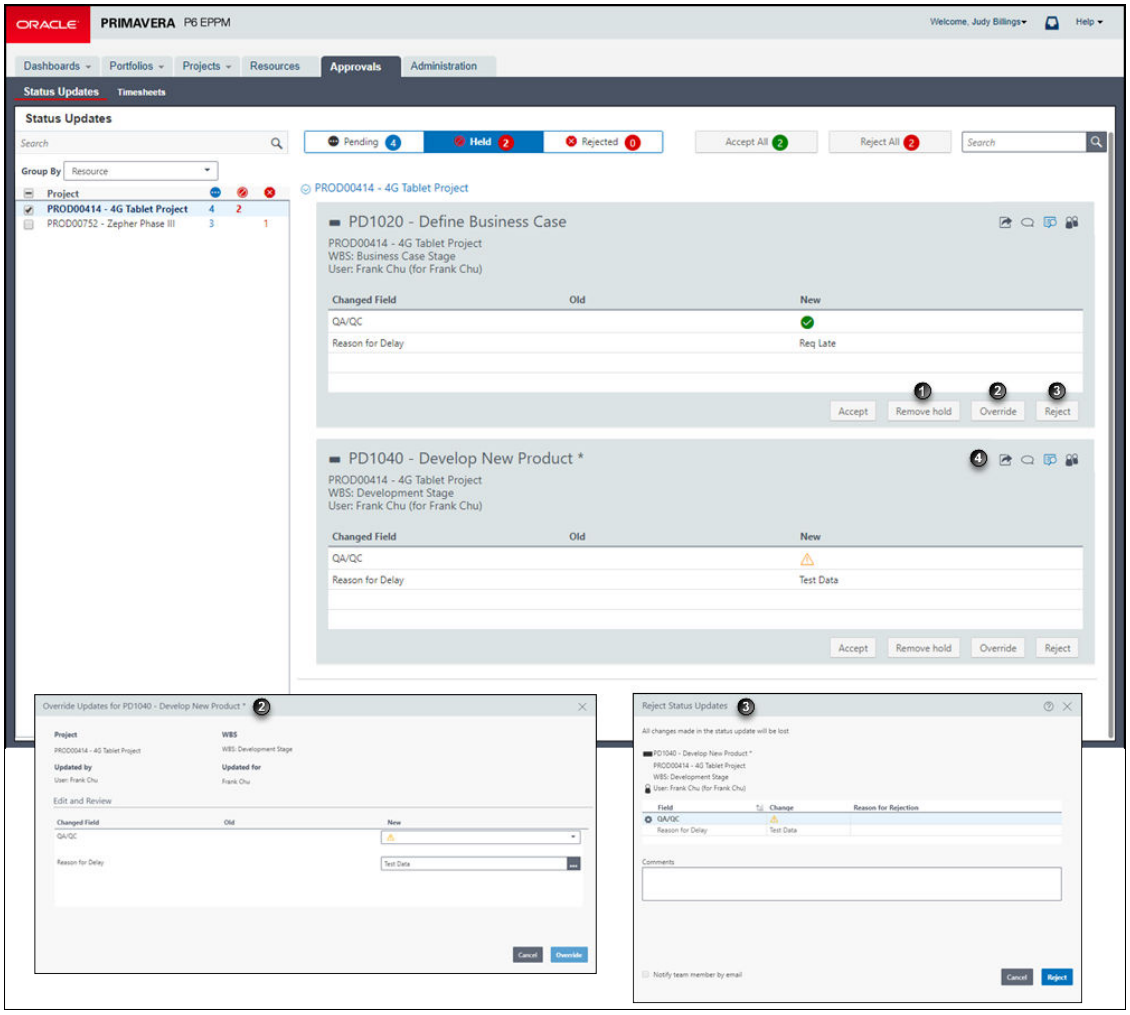


Table of Screen Elements

Item	Description
1	**Remove Hold**: When you are ready to approve a status update in a held state, select **Remove Hold** to return the card to the **Pending** list. The status update will be approved when you select **Accept All** in the **Pending** list. Alternatively you can select **Accept** on the card in the **Held** list to accept the status update.
2	**Override**: If you need to make a correction to a status update, click **Override**. The updated values will be saved to the activity once you click **Accept**.
3	**Reject**: If you see incorrect information in the status update, reject the update to have the team member review the data and resubmit the update. Enter your reason for rejection for each of the fields which is incorrect and an overall comment for the team member. Select the option to **Notify team member by email** that their update was rejected.

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Item	Description
4	**Send Email**: To email the team member about an assignment, select Send Email to open a dialog box with a preformatted message. You can edit the email before you send it. **Discussion**: Launches a dialog box where you can communicate with the team member assigned to the activity. A number by the discussion icon indicates the number of unread messages. **More...**: Launches a dialog box which provides information about the submitted date, held date, activity codes, and UDFs assigned to the activity. **Reviewers**: launches a dialog which provides information about the reviewers for this task and the type of review. **Documents**: launches a dialog which enables you to view any attachments to the status update that have been uploaded from P6 for Android and P6 for iOS. If a content repository has been configured, you can view all documents uploaded to the content repository for the project on the **Project** tab of the Documents window. The **Work Product Documents** tab shows documents that have been linked to the project and provide a file path.

Assigning a Status Reviewer to a WBS

Assign status reviewers to a WBS to enable them to view team member activity updates, make changes to the updates, and approve or reject the updates for the selected activities in the selected WBS only. If a user is a required status reviewer for multiple WBS nodes in a project, you must assign the user as status reviewer to each WBS node individually. If a user is a required status reviewer for all activities in a project, assign the user as a status reviewer at the Project level and select yes when you are prompted to choose whether to assign the user as a status reviewer to all WBS nodes in the project.

You do not need to assign a required status reviewer to a WBS if the user is assigned the Project Superuser project security profile for that project or the Admin Superuser global security profile.

To assign status reviewers to a WBS:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select a WBS.
   b. In the **General** detail window, double-click the **Status Reviewer** field.

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> **Note**
>
> If the **Status Reviewer** field is not displayed, click **Customize View** and select **Status Reviewer** in the Available Columns list then click **Add column to Selected Columns** (Ctrl + Shift + Right Arrow).

3. In the **Select Status Reviewers** dialog box, select the reviewers and click **OK**.
4. If the WBS contains child WBSs, you are prompted with a choice to assign the status reviewers to all child WBSs in the project. Choose **Yes** or **No**.
5. Click **Save**.

> **Tip**
>
> Team member status reviews must be enabled in Project Preferences to edit the Status Reviewers field.

Selecting an Activity for Review

Select an activity for review to enable the project manager or assigned status reviewers to approve the activity when updated by a team member before the status updates are applied to the project.

To select an activity for review:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select an activity.
   b. Select the **Review Required** option.

   > **Note**
   >
   > If the Review Required option is not displayed, click **Customize View** and select the Columns tab, then select Review Required from the General category.

   c. Save your changes.

> **Tip**
>
> - Team member status reviews must be enabled in Project Preferences.
> - If the Review Required option is not selected, status updates made by team members are approved automatically. View updates for each activity assigned to a team member in the Update History detail window.

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Reviewing Team Member Status Updates

Review updates your team members made to activities. While reviewing updates, you can modify the data, approve or reject the status updates, or place a hold on a status update to reconcile at a later time. You can view status updates for all projects that you are assigned as a reviewer, or choose to view status updates only for some projects.

> **Note**
>
> Only the fields updated by a team member using one of the P6 Team Member interfaces are displayed in the **Status Updates** page.

To view status updates:

1. On the **Navigation Menu**, expand **Approvals** and click **Status Updates**.
2. On the **Status Updates** page:
   a. Select whether to group the view by **Resource**, **Review ,**or **None**.

      You must be assigned the Admin Superuser or Project Superuser global security profile to group by review status.

   b. To see the assigned reviewers for a status update and the type of the review, select **Reviewers**.

> **Tip**
>
> - A status update might have more than one reviewer and might require that any reviewer approves the update or that all assigned reviewers approve ir.
> - Team members can continue to make updates to activities that have not been approved yet or are on hold. The status updates will reflect the latest team member updates.
> - Pending updates for a project checked out in P6 Professional or opened exclusively are not displayed until the project is checked in or the exclusive lock is released.
> - When team members update Actual Units, the updated value for Remaining Units is displayed when the field is updated by the team member or calculated automatically. The Remaining Units field is displayed even when the field is not selected for editing in the Project Preferences dialog box.
> - Steps that are added or deleted by team members do not go through the approval process.

Viewing Team Member Status Updates History

You can see the history of team member status updates in the detail window for each updated activity. From the Update History detail window, you can view the history for all activities, assignments, steps, activity codes, and UDFs.

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To view the history for status updates:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select an activity.
   b. Click the **Update History** detail window.
3. In the **Update History** detail window:
   a. In the **Show updates for** list, choose **Activity**, **Activity Codes**, **Assignments**, **Notebooks**, **Steps**, or **UDFs**.
   b. Optionally, to show only recent updates, choose to view all approved updates in the last week, month, or last 3 months on the **Filter** list.

> **Note**
>
> Pending and held updates will display regardless of the filter applied.

> **Tip**
>
> - Only the data fields updated by a team member are displayed in the detail window.
> - Fields that were overridden by a project manager show the original value entered by the team member in parentheses next to the new value. However, when a project manager overrides the Actual Finish date and clears the Actual Finish field, the Actual Finish field will remain blank. If the entire row is blank, then you know the Actual Finish field was cleared.

About Email Statusing Service

As a team member with assignments in P6, you can request a list of your assigned activities directly from the P6 server using Email Statusing Service. Only activities from active projects in which you (the requesting user) are assigned as a resource, activity owner, or if you are assigned a Team Member work distribution filter will be returned.

As a project manager with team members assigned to activities on the projects, you can send your team members an email request for status updates using Email Statusing Service. The email request includes a list of activities for the projects you specify. Team members can provide updates by replying to the email and updating their status in the body of the email.

Sending a Welcome Email to Email Statusing Service Users

If Email Statusing Service is configured at your organization, send your team members who will be updating their activities through email a Welcome email. This email includes the email address to the Email Statusing Service, and instructions for requesting an activity list and updating the list through email.

To send team members a Welcome email:

1. Log into the email account uniquely associated with your P6 user account.

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2. Create a new email to send to the Email Statusing Service address provided to you by your P6 administrator.
3. In the email subject line, enter **Welcome**.
4. In the body of the email, identify a list of team members to send a Welcome email to by entering their email addresses, separated by a comma, semi colon, space, or by entering one address per line. If the body of the message is blank, the service will send an email to every team member assigned to the projects for which you have access rights.

> **Note**
>
> When listing multiple email addresses, use only one type of separator. Do not mix separators in the list. For example, if you choose to use a comma to separate email addresses, use a comma to separate every email address in the list.

5. Send the email.

Sending Team Members Their Assigned Activities using Email Statusing Service

If Email Statusing Service is configured at your organization, you can send your team members an email request for status updates using Email Statusing Service. The email request includes a list of activities for the projects you specify. Team members can provide updates by replying to the email and updating their status in the body of the email.

To send team members an email with their activity list:

1. Log into the email account uniquely associated with your P6 user account.
2. Create a new email to send to the Email Statusing Service address provided to you by your P6 administrator.
3. In the email subject line, enter **Notify** and the *Email Statusing Service Activity Filter Options*Email Statusing Service Activity Filter Options for the activity list you want to send to team members, using the following format:

   ```
   Notify <Activity Status> <Time Frame, optional> <Project, optional>
   ```

4. In the body of the email, identify the list of team members to send activities to by entering their email addresses, separated by a comma, semi colon, space, or by entering one address per line. If the body of the message is blank, the service will send an email to every team member assigned to the projects identified for which you have access rights.

> **Note**
>
> When listing multiple email addresses, use only one type of separator. Do not mix separators in the list. For example, if you choose to use a comma to separate email addresses, use a comma to separate every email address in the list.

5. Send the email message.

   After you send the message, each team member will receive an email with their activity list and you will receive a confirmation message with a list of all team members who were sent an email.

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> **Tip**
>
> For help sending notification emails, send an email to the Email Statusing Service address provided by your P6 administrator with the words **Notify Help** in the subject line.

Updating the Progress of Activities Using Email Statusing Service

If Email Statusing Service is configured at your organization, you can request a list of your assigned activities using email. Then, you can reply with your status updates.

To update your status using email:

1. Log into the email account uniquely associated with your P6 user account.
2. Create a new email to send to the Email Statusing Service address provided to you by your P6 administrator.
3. Request a list of activities from P6 by specifying the *Email Statusing Service Activity Filter Options*Email Statusing Service Activity Filter Options in the subject line using the format:

   ```
   <Activity Status> <Time Frame, optional> <Project, optional>
   ```

   Send the email.
4. When you get the list of your assignments as a message in your inbox, open it.
5. (Optional) To update the status of only a single activity:
   a. Click on the **Update this activity** link.
   b. In the resulting form, enter your updates.
   c. Click **Send**.

   > **Note**
   >
   > To save time, try to update the status of all your activities at the same time. If your email application does not support inline email editing in your reply message, use the **Update this activity** step for each activity.
6. To update the status of one or more activities at the same time, click **Reply**.
7. In the reply message:
   a. Enter your status updates using the approved formatting.

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> **Note**
>
> - To avoid potential errors, delete the original value in its entirety before entering an updated value.
> - If the same activity is listed twice in your activity list, you are assigned as a resource to this activity and you are also either assigned as the activity owner or you are assigned a Team Member work distribution filter that is capturing the same activity. Update only one of the two activities per email update. If you need to update both activities, request another activities list and then update the second activity.

b. Click **Send**.

A confirmation message will be sent to you after your updates have been processed.

> **Note**
>
> If you need assistance with the options, syntax, or required formatting of these messages, send an email message with only the word "Help" or a question mark in the subject line to receive more detailed instructions.

Email Statusing Service Activity Filter Options

As a team member or project manager, you must follow the syntax and formatting for the filter options below when sending a request to Email Statusing Service.

Filter Options

There are three types of request filters: *Status*, *Time Frame*, and *Project*. A status request is a minimum requirement; a time frame and project request are optional extensions to the status request.

For team members, a valid request for an activity list would appear in the email subject line as:

```
<Status> <Time Frame, optional> <Project, optional>
```

> **Note**
>
> If you need assistance with the options, syntax, or required formatting of these messages, send an email message with only the word "Help" or a question mark in the subject line to receive more detailed instructions. In addition, if your status request message is ever invalid, you will be notified by email.

For project managers, a valid request to send a notification email to team members would appear in the subject line as:

```
Notify <Status> <Time Frame, optional> <Project, optional>
```

Status Options

Active

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Activities that are in progress or have not started.

Due

Activities scheduled to finish today.

Overdue

Activities that were scheduled to finish prior to today.

Completed

Activities where the finished date is today's date.

Starting

Activities that are scheduled to start today.

Starred

Activities team members marked as important. This filter can only be combined with a Project ID or Project Name filter. The starring feature is not available to users assigned Team Member work distribution filters.

Time Frame Options

Requests by status can optionally be filtered based on a specified number of days, weeks, or months, or by specifying today, tomorrow, or yesterday.

Active in next <number> <units of time>

Activities that are in progress or scheduled to start in the next number of days, weeks, or months.

Example: Active in next 3 weeks

Active Today

Activities that are in progress or are scheduled to start on or before today's date.

Active Tomorrow

Activities that are in progress or are scheduled to start on or before tomorrow's date.

Due in next <number> <units of time>

Activities that should be completed in the next number of days, weeks, or months.

Example: Due in next 5 days

Due Today

Activities scheduled to finish today.

Due Tomorrow

Activities that are scheduled to finish tomorrow.

Completed in last <number> <units of time>

Activities that were completed in the last number of days, weeks, or months.

Example: Completed in last 3 days

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> **Note**
>
> - There is a 180 day limit to viewing completed activities . Any completed activity with a Finished Date more than 180 days in the past will not be returned.
> - If the completed activity was updated with a Finished Date within the past 180 days and the last approved Finished Date is more than 180 days in the past, the activity will not be sent to you regardless of the updated Finished Date. (This only applies if Team Member status updates require approval.)

Completed Today

Activities where the finished date is today's date.

Completed Yesterday

Activities where the finished date is yesterday's date.

Starting in next <number> <units of time>

Activities that are scheduled to start in the next number of days, weeks, month.

Example: Starting in next 1 month

Starting Today

Activities that are scheduled to start today.

Starting Tomorrow

Activities that are scheduled to start tomorrow.

Project Options

Requests by status can optionally be filtered based on an active project name or project ID.

on Project <Project ID or Name>

Restricts the results of the requested status and optional time frame filter to the activities that belong to the specified active project. If no project is specified, all active projects for which you have access rights will be included.

Examples:

- Overdue on project MFG00925
- Due in next 5 days on project Plant Expansion and Modernization

Fields Available for Activity Status Updates

The fields available in the email are assigned by the project manager in P6. Also, in P6, team members are assigned as either a resource assignment, an activity owner, or a user with a Team Member work distribution filter. Project managers should let team members know what fields are assigned to them and whether they are a resource assignment, an activity owner, or a user with a Team Member work distribution filter because some of the status fields depend on their role.

The updates you can make to the fields that are returned depend on the activity status (Not Started, In Progress, or Completed). Use the following table to determine which fields can be updated for a Not Started, In Progress, or Completed activity.

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Table of Activity Status Fields Available by Email

Resource Assignment

Field	Status: Not Started	Status: In Progress	Status: Completed	Sample Value
Start/Started Date	Yes	Yes	Yes	15-APR-2012
Finish/Finished Date	Yes	Yes	Yes	18-APR-2012
Time Spent	Yes	Yes	Yes	1d 2h
Time Left	Yes	Yes	No	2d 6h
Remaining Duration	Yes	Yes	No	5d
Finished (Y/N)	Yes	Yes	No	N
Starred (Y/N)	Yes	Yes	No	N

Activity Owner or User Assigned a Team Member Work Distribution Filter

Field	Status: Not Started	Status: In Progress	Status: Completed	Sample Value
Start/Started Date	Yes	Yes	Yes	15-APR-2012
Finish/Finished Date	No	No	Yes	18-APR-2012
Activity % Complete (see notes)	Yes	Yes	No	25%
Expected Finish	Yes	Yes	No	30-APR-2012
Time Spent (Labor/ Nonlabor)	Yes	Yes	Yes	1d 2h
Time Left (Labor/ Nonlabor)	Yes	Yes	No	2d 6h
Remaining Duration	Yes	Yes	No	4d
Finished (Y/N)	Yes	Yes	No	N
Starred (Y/N) (see notes)	Yes	Yes	No	N

Note

- The calculation of the **Activity % Complete** field depends on the settings your project manager configured in P6. The field is either calculated using units or duration, calculated using the percentage complete from steps, or a value you enter based on your own perception of the work you completed on this activity.
- When you enter **100%** to indicate your work is complete, you must also enter **Y** for **Finished (Y/N)** to mark this activity complete.
- The starring feature is not available to users assigned Team Member work distribution filters.

About Discussions

The Discussion detail window on the Activities page provides a way for project managers using P6 to communicate with team members who are using P6, P6 Team Member Web, P6 for Android, or P6 for iOS.

A discussion is an exchange of information, such as a question, answer, or general information that is specific to an activity. The messages to and from team members are saved with the

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activities and are available to anyone who has access to the project. If more than one team member is assigned to the same activity, all messages are captured in the same dialog box for that activity.

Having a Discussion with Team Members

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 a team member:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click the activity that relates to the message you want to post to a team member.
   b. Click the **Discussion** detail window.
3. In the **Discussion** detail window:
   a. Click **Add**
   b. In the **Notes** window, enter a message.
   c. Click **Apply**.

Tip

- To determine which activities have unread comments, review the Unread Comments column in your Activities view. If the Unread Comments column is not displayed, click **Customize View** and select the Columns tab, then select Unread Comments from the General category.
- To delete discussion items, click **Context** and select Delete.

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8

Reference Topics

P6 Team Member Interface Field Names

P6 field names are simplified for users in P6 Team Member interfaces. When communicating with your team members, be sure to use the correct terms when discussing dates and work units.

> **Note**
>
> Users with a Team Member work distribution filter assigned see the same fields as an Activity Owner.

P6 Team Member Interfaces Field Names

P6	P6 Team Member Interfaces	Available to...
Remaining Start	Start By	All
Actual Start	Started	All
Remaining Finish	Finish By	All
Actual Finish	Finished	All
Remaining Duration	Remaining Duration	All
Activity % Complete	% Complete	Activity owner and user assigned Team Member work distribution filter
Actual Units	Time Spent	Resource assignment
Actual Labor Units	Time Spent (Labor)	Activity owner and user assigned Team Member work distribution filter
Actual Nonlabor Units	Time Spent (Nonlabor)	Activity owner and user assigned Team Member work distribution filter
Remaining Units	Time Left	Resource assignment
Remaining Labor Units	Time Left (Labor)	Activity owner and user assigned Team Member work distribution filter
Remaining Nonlabor Units	Time Left (Nonlabor)	Activity owner and user assigned Team Member work distribution filter
Expected Finish	Expected Finish	Activity owner and user assigned Team Member work distribution filter

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Action Required for Document Reviews Toolbar

Overview

The following icons and screen elements appear in this toolbar; however, their availability is subject to change based on your current selections, view settings, security permissions, window type, and other factors.

Screen Elements

 **Details**

Enables you to view details about the document, including who initiated the review, the due date for the review, as well as the status and type of review.

 **View**

Opens the document.

 **Approve**

Enables you to approve a document in review, make comments, and upload attachments.

 **Reject**

Enables you to reject a document in review, make comments, and upload attachments.

Activity Count Columns of the Activity Table

Activity Count field

The number of activities in the group.

Activity Resource Assignment Count field

The number of assigned resources.

Actual Completed Activities field

The number of activities that have an actual finish date.

Actual In-Progress Activities field

The number of activities that have an actual start date, but no actual finish date.

Actual Not-Started Activities field

The number of activities that have no actual start date.

BL Project Completed Activities field

The number of activities that should currently be completed, according to the project baseline.

BL Project In-Progress Activities field

The number of in-progress activities in the project baseline.

BL Project Not Started Activities field

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The number of activities not started in the project baseline.

BL1 Completed Activities field

The number of activities that should be completed according to the primary baseline.

BL1 In-Progress Activities field

The number of activities that should be in progress according to the primary baseline.

BL1 Not Started Activities field

The number of activities that should be not started according to the primary baseline.

Activity Steps Columns of the Activity Table

Step Count field

The number of steps assigned to the activity, WBS, or project.

Steps Completed field

The number of steps marked complete.

Steps In Progress field

The number of steps on which work has started but is not yet complete.

Steps Not Started field

The number of steps that are not yet started.

Applying Actuals Based on the Auto Compute Actuals Method

The following processing occurs behind the scenes when you run the *Apply Actuals* command.

- For all activities where the **Planned Start Date** field is less than the new data date, set the **Actual Start** field equal to the **Planned Start** field.
- Set **Remaining Duration** equal to the **Early Finish** field minus the new data date.
- Set the **Actual Duration** equal to the **Planned Duration** minus the **Remaining Duration**.
- Set **Actual Units** equal to the **Unit Percent** multiplied by the **At Complete Units**.
- For all activities where the **Planned Finish Date** field is less than the new data date, set the **Actual Finish** field equal to the **Planned Finish** field.
- All **Remaining** values are set to **At Complete** values minus **Actuals**.
- For all role assignments without a resource, processing will update progress on the role assignment.
- If **Units and Cost** are linked, then **Remaining** and **Actual Cost** will always be set to Units multiplied by Price per unit.
- If there are multiple price per units, then the assignment's **Actual Cost** will be calculated using time-varying resource rates.

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> **Note**
>
> *Apply Actuals* will take resource lags and resource curves into consideration, just as the *Auto Compute Actuals* feature does. If there is a curve applied to a resource, the application will apply the actuals to the resource based on the distribution of the curve.

Example: A project's data date is June 1 and a user runs *Apply Actuals* with a new data date of June 20. An activity is planned for June 18 and is estimated to last 10 days until June 27. The activity's resource assignment has +5 days of lag (meaning it cannot start until June 23). When the user applies actuals on June 20, the activity's status is updated; however, because the assignment carries a resource lag beyond the new data date, it is not updated.

Applying Actuals Based on the Timesheets Method

Before you *Apply Actuals*, ensure the timesheets have been completed and approved. In addition to updating actual units in timesheets, users can also update remaining units, or actual and percent complete values.

The following processing occurs behind the scenes when you *Apply Actuals*.

- For all approved timesheets where the timesheet period end date falls before the new data date, set all applicable actual unit fields for activities and related labor or nonlabor assignments based on approved actual hours from timesheets.
- Recalculate **Remaining Units**, **Actual Duration**, and **Percent Complete** fields.
- Very complex business rules dictate how each activity and/or assignment is calculated based on each activity's duration type setting. These calculations also take into consideration updates a user might make to the actual units, actual and remaining units, or actual and percent complete values on their timesheets.

> **Note**
>
> If there are timesheet actuals for a resource and the resource is changed to use *Auto Compute Actuals*, the actuals will be recalculated based on the auto compute actual method. Original timesheet actuals will remain in the database.

Available Columns of the Activities Page

Overview

The following is a comprehensive list of all the columns/fields available to add to the table on the Activities page.

Fields with names starting with BL Project or BL1 are fields related to the project baseline and primary baseline respectively. To see these fields open a project with the associated baseline assigned or assign a project and primary baseline to an open project.

Screen Elements

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Activity Count category

Activity Count field

The number of activities in the group.

Activity Resource Assignment Count field

The number of assigned resources.

Actual Completed Activities field

The number of activities that have an actual finish date.

Actual In-Progress Activities field

The number of activities that have an actual start date, but no actual finish date.

Actual Not-Started Activities field

The number of activities that have no actual start date.

BL Project Completed Activities field

The number of activities that should currently be completed, according to the project baseline.

BL Project In-Progress Activities field

The number of in-progress activities in the project baseline.

BL Project Not Started Activities field

The number of activities not started in the project baseline.

BL1 Completed Activities field

The number of activities that should be completed according to the primary baseline.

BL1 In-Progress Activities field

The number of activities that should be in progress according to the primary baseline.

BL1 Not Started Activities field

The number of activities that should be not started according to the primary baseline.

Activity Steps category

Step Count field

The number of steps assigned to the activity, WBS, or project.

Steps Completed field

The number of steps marked complete.

Steps In Progress field

The number of steps on which work has started but is not yet complete.

Steps Not Started field

The number of steps that are not yet started.

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Baseline category

BL Project Match field

Indicates whether the activity is present in the baseline assigned as the project baseline.

BL1 Match field

Indicates whether the activity is present in the baseline the user currently has assigned as their primary baseline.

BL2 Match field

Indicates whether the activity is present in the baseline the user currently has assigned as their secondary baseline.

BL3 Match field

Indicates whether the activity is present in the baseline the user currently has assigned as their tertiary baseline.

Budget category

Current Budget field

The current budget for the project or WBS. This data is available for WBS and Project rows only.

Calculated as **Original Budget** plus the sum of the approved budget changes from the budget log.

Distributed Current Budget field

The sum of all budgets that were assigned to control accounts during baseline planning. These budgets are allocated for work and planning packages. This data is available for WBS and Project rows only.

Calculated as the sum of the **Current Budget** values from one level lower. This value does not aggregate.

Original Budget field

The estimate of the total amount you require for the selected project or WPS, including all contributed funds. This data is available for WBS and Project rows only.

Unallocated Budget field

The difference between the total current and distributed current budget. This data is available for WBS and Project rows only.

Calculated as **Total Current Budget** minus **Distributed Current Budget**.

Costs category

Actual Expense Cost field

The actual cost for all project expenses associated with the activity.

Actual Labor Cost field

The actual costs for all labor resources assigned to the activity.

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If no resources are assigned, calculated as the **Actual Labor Units** multiplied by **Project Default Price** divided by **Time**.

Actual Material Cost field

The actual cost for all material resources assigned to the activity.

Actual Nonlabor Cost field

The actual costs for all nonlabor resources assigned to the activity.

If no resources are assigned, calculated as the **Activity Actual Nonlabor Units** multiplied by **Project Default Price** divided by **Time**.

Actual This Period Labor Cost field

The labor costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Labor Cost** minus the sum of the stored **Actual This Period Labor Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Labor Cost** is the same as **Actual Labor Cost**.

Actual This Period Material Cost field

The material costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Material Cost** minus the sum of the stored **Actual This Period Material Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Material Cost** is the same as **Actual Material Cost**.

Actual This Period Nonlabor Cost field

The nonlabor costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Nonlabor Cost** minus the sum of the stored **Actual This Period Nonlabor Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Nonlabor Cost** is the same as **Actual Nonlabor Cost**.

Actual Total Cost field

The actual total cost incurred for the activity as of the project data date.

Calculated as **Actual Labor Cost** plus **Actual Nonlabor Cost** plus **Actual Material Cost** plus **Actual Expense Cost.**

At Completion Expense Cost field

The sum of the actual and remaining costs for all expenses associated with the activity.

Calculated as **Actual Expense Cost** plus **Remaining Expense** cost.

At Completion Labor Cost field

The sum of the actual and remaining costs for all labor resources assigned to the activity.

If the activity is not started, this equals the planned labor costs. If the activity is completed, this equals the actual labor costs.

Calculated as **Actual Labor Cost** plus **Remaining Labor Cost**.

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At Completion Material Cost field

The material cost at completion. It is the sum of the actual and remaining costs for all material resources assigned to the activity.

It is the same as the planned material costs if the activity is not started, and the actual material costs once the activity is completed.

Calculated as **Actual Material Cost** plus **Remaining Material Cost**.

At Completion Nonlabor Cost field

The nonlabor cost at completion. The sum of the actual and remaining costs for all nonlabor resources assigned to the activity.

It is the same as the planned nonlabor costs if the activity is not started, and the actual nonlabor costs once the activity is completed.

Calculated as **Actual Nonlabor Cost** plus **Remaining Nonlabor Cost**.

At Completion Total Cost field

The estimated cost at completion for the activity.

Calculated as the **Actual Total Cost** plus the **ETC** (estimate-to-complete) cost. The method for computing ETC depends on the Earned Value technique selected for the activity's WBS.

BL Project Actual Expense Cost field

The actual cost for all project expenses associated with the activity in the project baseline.

BL Project Actual Labor Cost field

The actual cost for all labor resources associated with the activity in the project baseline.

BL Project Actual Material Cost field

The actual cost for all material resources associated with the activity in the project baseline.

BL Project Actual Nonlabor Cost field

The actual cost for all nonlabor resources associated with the activity in the project baseline.

BL Project Actual Total Cost field

The actual cost for all project expenses, labor, non-labor, and material resources associated with the activity in the project baseline.

BL Project Expense Cost field

The planned cost for all project expenses associated with the activity in the project baseline.

BL Project Labor Cost field

The cost for all labor resources assigned to the activity in the project baseline.

BL Project Material Cost field

The planned cost for all material resources assigned to the activity in the project baseline.

BL Project Nonlabor Cost field

The cost for all nonlabor resources assigned to the activity in the project baseline.

BL Project Total Cost field

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The total cost for the activity in the project baseline.

Calculated as **BL Project Labor Cost** plus **BL Project Nonlabor Cost** plus **BL Project Material Cost** plus **BL Project Expense Cost**.

BL1 Actual Expense Cost field

The actual cost for all project expenses associated with the activity in the primary baseline.

BL1 Actual Labor Cost field

The actual cost for all labor resources associated with the activity in the primary baseline.

BL1 Actual Material Cost field

The actual cost for all material resources associated with the activity in the primary baseline.

BL1 Actual Nonlabor Cost field

The actual cost for all nonlabor resources associated with the activity in the primary baseline.

BL1 Actual Total Cost field

The actual cost for all project expenses, labor, non-labor, and material resources associated with the activity in the primary baseline.

BL1 Expense Cost field

The planned cost for all project expenses associated with the activity in the primary baseline.

BL1 Labor Cost field

The cost for all labor resources assigned to the activity in the primary baseline.

BL1 Material Cost field

The planned cost for all material resources assigned to the activity in the primary baseline.

BL1 Nonlabor Cost field

The cost for all nonlabor resources assigned to the activity in the primary baseline.

BL1 Total Cost field

The total cost for the activity in the primary baseline.

Planned Expense Cost field

The planned total cost of all project expenses associated with the activity.

Planned Labor Cost field

The planned costs for all labor resources assigned to the activity.

If no resources are assigned, calculated as **Activity Planned Labor Units** multiplied by **Project Default Price/Unit** divided by **Time**.

Planned Material Cost field

The planned cost for all material resources assigned to the activity.

Planned Nonlabor Cost field

The planned costs for all nonlabor resources assigned to the activity.

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If no resources are assigned, calculated as **Activity Planned Nonlabor Units** multiplied by **Project Default Price** divided by **Time**.

Planned Total Cost field

The planned total cost for the activity, including labor resources, nonlabor resources, material resources, and project expenses.

Calculated as **Planned Labor Cost** plus **Planned Nonlabor Cost** plus **Planned Material Cost** plus **Planned Expense Cost**.

Remaining Expense Cost field

The remaining costs for all project expenses associated with the activity.

Remaining Labor Cost field

The remaining costs for all labor resources assigned to the activity.

If no resources are assigned, calculated as the **Activity Remaining Labor Units** multiplied by **Project Default Price** divided by **Time**.

Remaining Material Cost field

The sum of all material resource remaining costs.

Remaining Nonlabor Cost field

The remaining costs for all nonlabor resources assigned to the activity.

If no resources are assigned, calculated as **Activity Remaining Nonlabor Units** multiplied by **Project Default Price** divided by **Time**.

Remaining Total Cost field

The remaining total cost for the activity, including labor resources, nonlabor resources, material resources, and project expenses.

Calculated as **Remaining Labor Costs** plus **Remaining Nonlabor Costs** plus **Remaining Material Costs** plus **Remaining Expense Costs**.

Variance BL Project - Expense Cost field

The difference between the baseline project expense cost and the at completion expense cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL Project Expense Cost** minus **At Completion Expense Cost**.

Variance BL Project - Labor Cost field

The difference between the baseline planned labor cost and at completion labor cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Planned Labor Cost** minus **At Completion Labor Cost**.

Variance BL Project - Material Cost field

The difference between baseline material cost and at completion material cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL Project Material Cost** minus **At Completion Material Cost**.

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Variance BL Project - Nonlabor Cost field

The difference between the baseline planned nonlabor cost and at completion nonlabor cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Planned Nonlabor Cost** minus **At Completion Nonlabor Cost**.

Variance BL Project - Total Cost field

The difference between the baseline planned total cost and the at completion total cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Planned Total Cost** minus **At Completion Total Cost**.

Variance BL1 - Expense Cost field

The difference between the primary baseline expense cost and the at completion expense cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Primary Baseline Expense Cost** minus **At Completion Expense Cost**.

Variance BL1 - Labor Cost field

The difference between primary baseline labor cost and the at completion labor cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Labor Cost** minus **At Completion Labor Cost**.

Variance BL1 - Material Cost field

The difference between the baseline planned material cost and the at completion material cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Material Cost** minus **At Completion Material Cost**.

Variance BL1 - Nonlabor Cost field

The difference between the primary baseline nonlabor cost and the at completion nonlabor cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Nonlabor Cost** minus **At Completion Nonlabor Cost**.

Variance BL1 - Total Cost field

The difference between the primary baseline total cost and the at completion total cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Total Cost** minus **At Completion Total Cost**.

Dates category

Actual Finish field

The date on which the activity was completed.

Actual Start field

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The date work on the activity began.

If resources (labor, nonlabor, or material) or roles are assigned to the activity, the actual start date is the earliest among all the resource or role assignments.

Anticipated Finish field

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.

If there are no children elements, the anticipated finish is the finish date listed for the item in the table.

The Anticipated Finish date is used as the Finish date if there are no activities assigned to the project or WBS.

Anticipated Start field

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.

If there are no children elements, the anticipated start is the start date listed for the item in the table.

The Anticipated Start date is used as the Start date if there are no activities assigned to the project or WBS.

BL Project Actual Finish field

The actual finish date of the activity in the project baseline.

BL Project Actual Start field

The actual start date of the activity in the project baseline.

BL Project Early Finish field

The early finish date of the activity in the project baseline.

BL Project Early Start field

The early start date of the activity in the project baseline.

BL Project Finish field

The current latest finish date of all activities in the project baseline.

BL Project Late Finish field

The late finish date of the activity in the project baseline.

BL Project Late Start field

The late start date of the activity in the project baseline.

BL Project Start field

The current earliest start date of all activities in the project baseline.

BL1 Actual Finish field

The actual finish date of the activity in the primary baseline.

BL1 Actual Start field

The actual start date of the activity in the primary baseline.

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BL1 Early Finish field

The early finish date of the activity in the primary baseline.

BL1 Early Start field

The early start date of the activity in the primary baseline.

BL1 Finish field

The current finish date of the activity in the primary baseline. Set to the activity planned finish date while the activity is not started, the remaining finish date while the activity is in progress, and the actual finish date once the activity is completed.

BL1 Late Finish field

The late finish date of the activity in the primary baseline.

BL1 Late Start field

The late start date of the activity in the primary baseline.

BL1 Start field

The current start date of the activity in the primary baseline.

This is set to the planned start date.

BL2 Finish field

The current finish date of the activity in the secondary baseline. Set to the activity planned finish date while the activity is not started, the remaining finish date while the activity is in progress, and the actual finish date once the activity is completed.

BL2 Start field

The current start date of the activity in the secondary baseline.

This is set to the planned start date.

BL3 Finish field

The current finish date of the activity in the tertiary baseline. Set to the activity planned finish date while the activity is not started, the remaining finish date while the activity is in progress, and the actual finish date once the activity is completed.

BL3 Start field

The current start date of the activity in the tertiary baseline.

This is set to the planned start date.

Early Finish field

The earliest possible date the activity can finish. Early finish dates can change as the project progresses and changes are made to the project management plan.

This date is calculated based on network logic, schedule constraints, and resource availability. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.

Early Start field

The earliest possible date the remaining work for the activity can begin.

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This date is calculated based on network logic, schedule constraints, and resource availability. Early start dates can change as the project progresses and as changes are made to the project management plan. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.

Expected Finish field

The date on which the primary resource, the person who assigns the expected finish date, anticipates work on the activity will finish.

Only the primary resource can edit this field if the activity has started.

External Early Start field

The early start date for imported activities with external relationships to projects that do not exist in the database.

This field is the relationship early finish date when the lost relationship type is Finish to Start or Start to Start. When the relationship type is Start to Finish or Finish to Finish, this field is calculated as **Relationship Early Finish Date** minus **Remaining Duration** of the successor.

External Late Finish field

The late finish date for imported activities with external relationships to projects that do not exist in the database.

This field is the relationship early finish date when the lost relationship type is Finish to Start or Finish to Finish. When the relationship type is Start to Start or Start to Finish, this field is calculated as **Relationship Late Start** plus **Remaining Duration** of the predecessor.

Finish field

The current finish date for the activity. For not started activities, this is the planned finish date. For in-progress activities, this is the remaining early finish date. For completed activities, this is the actual finish date.

Forecast Finish Date field

The planned finish date of a project or WBS based on a what-if scenario designed to simulate project performance and outcomes and to plan resource allocation.

Forecast Start Date field

The planned start date of a project or WBS based on a what-if scenario designed to simulate project performance and outcomes and to plan resource allocation.

Late Finish field

The latest possible date the activity can finish without delaying the project finish date.

This date is calculated based on activity relationships, schedule constraints, and resource availability. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.

Late Start field

The latest possible date the remaining work for the activity can begin without delaying the project finish date.

This date is calculated based on activity relationships, schedule constraints, and resource availability. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.

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Planned Finish field

The date the activity is scheduled to finish if the activity has not started.

This date is calculated by the project scheduler but can be updated manually by the project manager. This date is not changed by the project scheduler after the activity has started.

Planned Start field

The date the activity is scheduled to start.

This date the activity is scheduled to begin is calculated by the project scheduler but can be updated manually by the project manager. This date is not changed by the project scheduler after the activity has started.

Post Response Pessimistic Finish field

The Post Response Pessimistic Finish date calculated by Oracle Primavera Cloud during quantitative risk analysis.

Post Response Pessimistic Start field

The Post Response Pessimistic Start date calculated by Oracle Primavera Cloud during quantitative risk analysis.

Pre Response Pessimistic Finish field

The Pre Response Pessimistic Finish date calculated by Oracle Primavera Cloud during quantitative risk analysis.

Pre Response Pessimistic Start field

The Pre Response Pessimistic Start date calculated by Oracle Primavera Cloud during quantitative risk analysis.

Primary Constraint Date field

The constraint date for the activity, if the activity has a constraint. The activity's constraint type determines whether this is a start date or finish date.

Activity constraints are used by the project scheduler.

Remaining Early Finish field

The date the remaining work for the activity is scheduled to finish.

If this activity is not started, this date is the planned finish. This date can be updated manually by the user, but it is overwritten when you schedule the project.

Remaining Early Start field

The date the remaining work for the activity is scheduled to begin.

This date can be updated manually by the user. Before the activity is started, this date is the same as the planned start.

Remaining Late Finish field

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, this field is blank.

Remaining Late Start field

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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 relationship, schedule constraints, and resource availability.

Resume Date field

The date when a suspended task or activity is resumed.

The resume date must be later than the suspend date and earlier than the actual finish date.

The suspend/resume period behaves like non-work time on the activity calendar.

Secondary Constraint Date field

The date for the activity's secondary constraint, if the activity has a secondary constraint.

The activity's constraint type determines whether this is a start date or finish date. This field is only available if a primary constraint has been selected.

Start field

The current start date of the activity. For started activities, this is the actual start date. For not started activities, this is the planned start date until the project is scheduled. When scheduled, the start date field is set to the remaining early start date.

Suspend Date field

The date work has temporarily stopped on a given activity.

For example, an event might force an activity to be interrupted or resource constraints might put an activity on hold.

The suspend date must be later than the actual start date, which the activity must have. Activity progress can resume when the Resume Date is set. The suspend/resume period behaves like non-work time on the activity calendar or resource calendar for task and resource dependent activities.

Durations category

Actual Duration field

The total working time from the activity **Actual Start** date to the **Actual Finish** date for completed activities, or the total working time from the **Actual Start** date to the data date for in-progress activities.

The actual working time is computed using the activity's calendar.

At Completion Duration field

The total working time from the activity's current start date to the current finish date.

The current start date is the planned start date until the activity is started, and then it is the actual start date. The current finish date is the activity planned finish date while the activity is not started, the remaining finish date while the activity is in progress, and the actual finish date once the activity is completed. The total working time is calculated using the activity's calendar.

BL Project Actual Duration field

The actual duration of the activity in the project baseline. The duration is the total working time from the activity actual start date to the actual finish date.

The total working time is calculated using the activity's calendar.

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BL Project Duration field

The duration of the activity in the project baseline. The duration is the total working time from the activity current start date to the current finish date.

Calculated as **Actual Duration** plus **Remaining Duration**.

The total working time is calculated using the activity's calendar.

BL Project Free Float field

The free float of the activity in the project baseline.

BL Project Remaining Duration field

The remaining duration of the activity in the project baseline.

BL Project Total Float field

The total float of the activity in the project baseline.

BL1 Actual Duration field

The actual duration of the activity in the primary baseline. The duration is the total working time from the activity actual start date to the actual finish date.

The total working time is calculated using the activity's calendar.

BL1 Duration field

The duration of the activity in the primary baseline. The duration is the total working time from the activity current start date to the current finish date.

Calculated as **Actual Duration** plus **Remaining Duration**.

The total working time is calculated using the activity's calendar.

BL1 Free Float field

The free float of the activity in the primary baseline.

BL1 Remaining Duration field

The remaining duration of the activity in the primary baseline.

BL1 Total Float field

The total float of the activity in the primary baseline.

Free Float field

The amount of time the activity can be delayed before delaying the start date of any successor activity.

Maximum Duration field

The longest duration for the activity. Required for three point estimation if quantitative risk analysis will be performed in Oracle Primavera Cloud.

Minimum Duration field

The shortest duration for the activity. Required for three point estimation if quantitative risk analysis will be performed in Oracle Primavera Cloud.

Most Likely Duration field

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The most likely duration for the activity. Required for three point estimation if quantitative risk analysis will be performed in Oracle Primavera Cloud.

Planned Duration field

The expected amount of time required to complete an activity.

The planned working time is calculated using the activity's calendar. The duration is measured from the activity's planned start date to its planned finish date.

Remaining Duration field

The total working time from the activity remaining start date to the remaining finish date.

The remaining working time is calculated using the activity's calendar. Before the activity is started, the remaining duration is the same as the planned duration. After the activity is completed the remaining duration is zero.

Remaining Float field

The amount of time remaining by which the activity can be delayed before delaying the project finish date.

Calculated as **Late Finish** minus **Remaining Finish**. If the remaining finish is the same as the early finish (in general, when the activity is not started), then the remaining float is the same as the total float.

Total Float field

The amount of time the activity can be delayed before risking a delay to the project finish date.

A float of zero hours indicates that the activity cannot be delayed at all and a negative float indicates that the project is already behind schedule. In a complex schedule, negative total float on some activities might not cause a delay to the project finish date.

Calculated as **Late Start** minus **Early Start** or as **Late Finish** minus **Early Finish**.

Variance BL Project - Duration field

The duration between the activity's baseline duration and the at completion duration. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Planned Duration** minus **At Completion Duration**.

Variance BL Project - Finish Date field

The duration between the current project finish date in the baseline project finish date. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Finish** minus **BL Project Finish**.

Variance BL Project - Start Date field

The duration between the current project start date and the baseline start date. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Start** minus **BL Project Start**.

Variance BL1 - Duration field

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The duration between the activity's primary baseline duration and the at completion duration. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Duration** minus **At Completion Duration**.

Variance BL1 - Finish Date field

The duration between the current project finish date and the primary baseline finish date. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Finish** minus **BL1 Finish**.

Variance BL1 - Start Date field

The duration between the current project start date and the primary baseline start date. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Start** minus **BL1 Start**.

Earned Value category

Accounting Variance field

The difference between the planned value of work scheduled and the actual cost of work performed.

A negative value indicates that actual costs have exceeded the scheduled costs.

Calculated as **Planned Value** minus **Actual Cost**.

Accounting Variance - Labor Units field

The difference between the planned value of work scheduled and the actual work performed.

A negative value indicates that actual costs have exceeded the scheduled costs.

Calculated as **Planned Value Labor Units** minus **Actual Units**.

Budget At Completion field

The planned total cost through activity completion.

Calculated as **Planned Labor Cost** plus **Planned Nonlabor Cost** plus **Planned Expense Cost** and **Planned Material Cost**.

Budget At Completion - Labor Units field

The planned total cost for labor units through activity completion.

Cost Performance Index field

A measure of the value of work accomplished as a percentage of the actual costs of an activity or WBS.

Cost Performance Index (CPI) indicates whether you have spent money over the budget to date.

On the My Preferences page, you can set performance thresholds for CPI calculated values to determine whether you need to take corrective action.

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Calculated as **Earned Value Cost** divided by **Actual Cost**. A value less than 1 indicates that the actual cost has exceeded the planned value.

Cost Performance Index - Labor Units field

A measure of work efficiency on a WBS or activity.

Calculated as **Earned Value Labor Units** divided by **Actual Labor Units**. A value less than 1 indicates that the actual units have exceeded the planned units.

Cost Variance field

A measure of cost performance on an activity or WBS.

A negative value indicates that the actual cost has exceeded the planned value.

Calculated as **Earned Value** minus **Actual Cost**.

Cost Variance - Labor Units field

The difference between the earned value labor units and the actual value labor units.

A negative value indicates that actual costs have exceeded the value of work performed.

Calculated as **Earned Value Labor Units** minus **Actual Labor Units**.

Cost Variance Index field

The ratio of the cost variance and the earned value of work performed on the WBS or activity.

Calculated as **Cost Variance** divided by **Earned Value**.

Cost Variance Index - Labor Units field

The ratio of the cost variance labor units and the earned value labor units for the activity or WBS.

Calculated as **Cost Variance Labor Units** divided by **Earned Value Labor Units**.

Earned Value Cost field

The portion of the baseline total cost of the activity that is actually completed as of the project data date.

Budget at completion is calculated from the baseline.

Calculated as **Budget At Completion** multiplied by **Performance Percent Complete**. The method for computing performance percent complete depends on the Earned Value technique selected for the activity's WBS.

Earned Value Labor Units field

The portion of baseline labor units that are complete as of the project data date.

Activity Level:

Calculated as **BL Project Labor Units** or **BL1 Labor Units**, depending on project settings, multiplied by **Performance % Complete**.

WBS Level:

Calculated as **BL Project Labor Units** multiplied by **Performance % Complete**.

Estimate At Completion - Labor Units field

The estimated labor units at completion of the activity.

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Calculated as **Actual Labor Units** plus **Estimate to Complete Labor Units**. The Estimate to Complete Labor Units calculation is based off of the earned value setting for the WBS.

Estimate At Completion Cost field

The expected total cost of a schedule activity, a work breakdown structure component, or the project when the defined scope of work will be completed.

Calculated as **Actual Cost** plus **Estimate to Complete Cost**. The method for calculating estimate to complete depends on the earned value technique selected for the activity's WBS.

Estimate To Complete field

The estimated cost to complete the activity or WBS.

Calculated as either the **Remaining Total Cost** for the activity, or as **Performance Factor** multiplied by (**Budget At Completion** minus **Earned Value**), depending on the earned-value technique selected for the activity's WBS. Budget at completion is calculated from the project baseline.

Estimate To Complete Labor Units field

The estimated quantity to complete the activity or WBS.

Calculated as either the **Remaining Total Units** for the activity or as **Performance Factor** multiplied by (**BL Labor Units** minus **Earned Value**) depending on the earned-value technique selected for the activity's WBS.

Estimated Time To Complete field

The projected duration required to complete the remaining scope of work, work based on labor efficiency to date, assuming current performance trends continue. This estimate helps you to assess labor efficiency, forecast resource availability, and identify potential over-run of work due to declining productivity.

Calculated as **Original Duration** divided by **Schedule Performance Index (SPI)**.

Estimated Time To Complete Units field

The projected labor effort needed to complete the remaining scope of work, based on labor efficiency to date. This estimate helps you to assess labor efficiency, forecast resource availability, and identify potential over-run of work due to declining productivity.

Calculated as **Planned Labor Units** divided by **Schedule Performance Index - Labor Units**.

Independent ETC Labor Units field

The user-entered estimate to complete total labor for the WBS or project.

Independent ETC Total Cost field

The user-entered estimate to complete total cost for the WBS or project.

Planned Value Cost field

The portion of the baseline total cost of the activity that is scheduled to be completed as of the project data date.

Also known as the work scheduled to be performed for the activity. The schedule percent complete specifies how much of the activity's project baseline duration has been completed so far. Budget at completion is calculated from the baseline.

Calculated as **Budget At Completion** multiplied by **Schedule Percent Complete**.

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Planned Value Labor Units field

The product of the budget at completion and the schedule percent complete.

The schedule percent complete specifies how much of the activity's baseline duration has been completed so far. Budget at completion is calculated from the baseline.

Calculated as **Budget At Completion** multiplied by **Schedule Percent Complete**.

Schedule Performance Index field

A measure of the work accomplished as a percentage of the work scheduled.

Schedule Performance Index indicates whether you are meeting earned and planned values within your schedule. A value less than 1 indicates that less work was performed than was scheduled.

Calculated as **Earned Value** divided by **Planned Value**.

Schedule Performance Index - Labor Units field

The ratio of the earned value of labor units to the planned value of labor units.

Calculated as **Earned Value Labor Units** divided by **Planned Value Labor Units**.

Schedule Variance field

The measure of schedule performance on a project.

A negative value indicates that less work was actually performed than was scheduled.

Calculated as **Earned Value** minus **Planned Value**.

Schedule Variance - Labor Units field

The difference between the earned value of work performed and the work scheduled to be performed.

Calculated as **Earned Value Labor Units** minus **Planned Value Labor Units**.

Schedule Variance Index field

The ratio of the schedule variance and the work scheduled to be performed.

Calculated as **Schedule Variance** divided by **Planned Value**.

Schedule Variance Index - Labor Units field

The ratio of schedule variance labor units and the planned value labor units.

Calculated as **Schedule Variance Labor Units** divided by **Planned Value Labor Units**.

To Complete Performance Index field

The ratio of the remaining work to the remaining funds.

Calculated as (**Budget at Completion** minus **Earned Value**) divided by (**Estimate at Completion** minus **Actual Units** or **Cost**).

Variance At Completion field

The difference between the baseline total cost and the current estimate of total cost. A negative value indicates an estimated cost overrun.

Budget At Completion is calculated from the current baseline.

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Calculated as **Budget At Completion** minus **Estimate At Completion**.

Variance At Completion - Labor Units field

The difference between the baseline planned total labor units and the estimate at completion labor units.

Calculated as **Project Baseline Planned Total Labor Units** minus **Estimate At Completion Labor Units**.

General category

Activity ID field

The unique identifier of the activity.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Activity Leveling Priority list

Determines the priority of the activity when performing resource leveling.

Activity Owner field

The user responsible for the activity.

Activity Name field

The name of the activity.

The activity name does not have to be unique.

Activity Status list

Determines the status of the activity.

Valid values are **Not Started**, **In Progress**, and **Completed**.

Activity Type list

Determines how duration and schedule dates are calculated for an activity.

Task Dependent: Activities are scheduled using the activity's calendar rather than the calendars of the assigned resources. Choose task dependent when you want to control the duration of the activity yourself (that is, no resources are assigned), or when one or more resources assigned to the same activity can work according to the same calendar. For example, you might have an activity to cure concrete; you know how long the task takes and the addition of resources won't complete the task any earlier. You would designate this activity as task dependent.

Resource Dependent: Activities are scheduled using the calendars of the assigned resources. This type is used when several resources are assigned to the activity, but they might work separately. Choose resource dependent when you want to schedule each resource according to his/her own time schedule, or resource calendar, not the activity calendar. The assigned resource availability determines the start and finish dates of the activity. Typically, you use this type when multiple resources assigned to the same activity can work independently, or when availability can affect the activity's duration. For example, an activity that requires an Inspector might be delayed if that resource is assigned to multiple projects or is on vacation.

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Level of Effort: Activities have a duration that is determined by its dependent activities and are typically administration type. Choose level of effort to indicate that the activity's duration depends on its predecessor and/or successor activities. A level of effort activity is usually one that is ongoing, such as clerical work, Change Management, or project management tasks. For example, site cleanup could be considered a level of effort activity; it occurs repeatedly and is dependent on the completion of a phase.

Start or Finish Milestone: Milestone activities are zero-duration and are used to mark significant project events. Choose start milestone or finish milestone to indicate that the activity marks the beginning or end of a major stage in the project. A primary resource or an activity owner, and expenses can be assigned to a milestone. In an office building addition project, examples of milestones might include Project Definition Complete, Structure Complete, or End Bidding Process.

WBS Summary: Activities that are used to aggregate date, duration, and percent complete values for a group of activities that share a common WBS code level. Choose WBS Summary to indicate that the activity is a summary-level WBS activity. A WBS Summary activity represents a group of activities that share a common WBS level. The summary-level WBS activity enables roll-ups of dates for the activity group. The duration of a WBS Summary activity extends from the start of the earliest activity in a group to the finish of the latest activity. WBS codes control which activities are part of a WBS Summary activity; P6 incorporates any activities that share a component of the WBS Summary activity's WBS code into the WBS Summary activity. For example, all activities whose WBS codes begin with A (A.1, A.1.1, A.1.2, etc.) can be part of one WBS Summary activity whose WBS code is A. At a lower level, all activities whose WBS codes start with A.1 (A.1.1, A.1.2, etc.) can be part of a WBS Summary activity whose WBS code is A.1.

Added By field

The name of the user who added the activity to the project.

Added Date field

The date the activity was inserted into the project, showN in your timezone..

Auto Compute Actuals option

Determines whether the activity actual and remaining units, and start and finish dates for the resource are calculated automatically using the planned dates, planned units, and the activity's schedule percent complete.

If this option is selected, the actual/remaining units and actual dates are automatically updated when project actuals are applied. This assumes that all work by the resource proceeds according to plan.

This option is not available if the **Uses Timesheets** option is selected.

BL Project Activity Status field

The status of the activity in the project baseline.

BL1 Activity Status field

The status of the activity in the primary baseline.

Calendar field

The calendar assigned to the activity.

CBS field

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The Primavera Unifier Cost Breakdown Sheet to which you want to link an activity, assignment or expense.

Cost Account IDs field

The identifying codes of the cost accounts assigned to the activity.

Cost Account Names field

The name(s) of the cost accounts assigned to the activity.

Critical option

Determines whether the activity is critical.

An activity is critical when its total float is below the critical duration specified for the project. Delaying critical activities will delay the finish date of the project.

Duration Type list

Determines how remaining duration, units, and units/time are calculated when you update an activity that has resources assigned. The activity's duration type should correspond to the dominant factor, that is, the least flexible factor in the project: schedule, costs/work effort, or resource availability.

Fixed Units/Time: The resource units per time are constant when the activity duration or units are changed. Use this duration type when an activity has fixed resources with fixed productivity output per time period.

Fixed Duration & Units/Time: The activity duration is constant as the units or resource units per time are changed. Use this duration type when the activity must be completed within a fixed time period regardless of the resources assigned.

Fixed Units: The activity units are constant when the duration or resource units per time are changed. Use this duration type when the total amount of work is fixed, and increasing the resources can decrease the activity duration.

Fixed Duration & Units: The duration and units remain constant as the units/time are changed. Use this duration type when the activity must be completed within a fixed time period and the total amount of work is fixed.

Financial Period Calendar field

The name of the financial period calendar assigned to the project.

Last Modified By field

The name of the user who last modified the activity.

Last Modified Date field

The date the activity was last updated.

Location field

The geographical location.

Longest Path option

Determines critical activities based on the sequence of driving activities that determine the project end date.

Post Response Criticality Index field

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Shows the percentage of time the activity in Oracle Primavera Cloud was on the critical path during quantitative post-response risk analysis.

Pre Response Criticality Index field

Shows the percentage of time the activity in Oracle Primavera Cloud was on the critical path during quantitative pre-response risk analysis.

Primary Constraint list

The primary constraint type for the selected activity.

Primary Resource field

The person primarily responsible for performing or overseeing work related to a specific activity.

The first resource you assign to an activity is automatically identified as the activity's primary resource.

Project ID field

The unique identifying code for the project associated with the activity.

Project Name field

The name of the project associated with the activity.

Review Required option

Determines whether activity updates made in P6 Team Member interfaces require review.

Secondary Constraint field

The secondary constraint type for the selected activity.

This field is only available if a primary constraint has been selected.

Task Status - Completion field

Shows the completion status of the activity and the associated tasks.

Task Status - Dates field

Shows whether any of the tasks assigned to the activity has dates outside of the activity dates.

Task Status - Indicator field

Shows an alert if any tasks dates are outside the activity dates, all task assigned to an incomplete activity are completed, or any tasks assigned to a completed activity are incomplete.

Unread Comments field

The number of comments posted to the activity since you last reviewed the comments in the Discussion detail window.

Work Package ID field

The ID of the work package in Oracle Primavera Cloud.

Work Package Name field

The name of the work package in Oracle Primavera Cloud.

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Lists category

Expenses field

The expenses assigned to the activity.

Notebook Topics field

The name of the notebook topics assigned to the activity.

Predecessor Details field

The activities required to start or finish *before* the activity starts or finishes, including the relationship types and lags applicable to the relationships. The column shows a comma separated list of the IDs of the predecessor activities, their relationship types (as "SS", "SF", "FS" or "FF") and the duration of any lag applied to the relationships. If lag duration is zero, it is not shown.

Predecessors field

The activities required to start or finish *before* the activity starts or finishes, depending on the relationship type.

Resource IDs field

The identifiers of the resources assigned to the activity.

Resource Names field

The names of the resources assigned to the activity.

Role IDs field

The identifiers of the roles assigned to the activity.

Roles field

The name of the roles assigned to the activity resources.

Steps field

The names of the steps assigned to the activity.

Sucessor Details field

The activities required to start or finish a*fter* the activity has started or finished, including the relationship types and lags applicable to the relationships. The column shows a comma separated list of the IDs of the successor activities, their relationship types (as "SS", "SF", "FS" or "FF") and the duration of any lag applied to the relationships. If lag duration is zero, it is not shown.

Successors field

The activities required to start or finish *after* the activity has started or finished, depending on the relationship type.

Multiple Float Paths category

Float Path field

The integer representing the critical path this activity is on.

Value 1 is the most critical path, and value 2 is the second most critical path.

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Float Path Order field

The integer representing the order in which this object was found on one of the critical paths.

Percent Complete category

Activity % Complete field

The percent of the activity that has been completed.

The calculation is based on the formula for the selected Percent Complete Type. The Percent Complete Type can be *Units*, *Duration*, *Physical, or Scope*.

If the selected activity's percent complete type is *Duration*, the percent complete is calculated as (**Planned Duration** minus **Remaining Duration**) divided by **Planned Duration**.

If the activity's percent complete type is *Units*, the percent complete is calculated as (**Actual Labor Units** plus **Actual Nonlabor Units**) divided by (**Actual Labor Units** plus **Actual Nonlabor Units** plus **Remaining Labor Units** plus **Remaining Nonlabor Units**).

If the activity's percent complete type is *Physical*, either the user records the percent complete manually or the field is set to calculate using steps. To calculate using steps, the **Calculate Activity % Complete from activity steps** option must be set in Project Preferences.

If the activity's percent complete type is *Scope*, the percent complete originates from Oracle Primavera Cloud and cannot be modified in P6.

BL Project Activity % Complete field

The activity percent complete of the activity in the project baseline.

BL Project Cost % Complete field

The cost percent complete of the activity in the project baseline.

BL Project Duration % Complete field

The duration percent complete of the activity in the project baseline.

BL Project Percent Complete Type field

The percent complete type of the activity in the project baseline.

BL Project Units % Complete field

The units percent complete of the activity in the project baseline.

BL1 Activity % Complete field

The activity percent complete of the activity in the primary baseline.

BL1 Cost % Complete field

The cost percent complete of the activity in the primary baseline.

BL1 Duration % Complete field

The duration percent complete of the activity in the primary baseline.

BL1 Percent Complete Type field

The percent complete type of the activity in the primary baseline.

BL1 Units % Complete field

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The units percent complete of the activity in the primary baseline.

Cost % Complete field

The percent complete of costs for all labor resources, nonlabor resources, and expenses for the activity.

Calculated as **Actual Total Cost** divided by **At Completion Total Cost** multiplied by 100.

Cost % of Planned field

The percent complete of planned costs for all labor resources, nonlabor resources, and expenses for the activity.

Calculated as **Actual Total Cost** divided by **BL Planned Total Cost** multiplied by 100. The value can exceed 100. The baseline total cost is the activity's at completion cost from the current baseline.

Duration % Complete field

The duration percent complete for the activity or WBS.

Calculated as **Planned Duration** minus **Remaining Duration** divided by **Planned Duration** multiplied by 100. The value is always between 0 and 100. P6 always calculates **Duration % Complete** from the **Planned Duration** and **Remaining Duration**, even if you enter **Duration % Complete** manually. For example, if an activity has an **Planned Duration** of 25.57h and you enter 90% for **Duration % Complete** P6 will calculate the **Remaining Duration** as 2.55h and will correct the **Duration % Complete** to 90.03%.

Duration % of Planned field

The actual duration percent of planned duration for the activity.

The baseline duration is the activity's at completion duration from the project baseline.

Calculated as **Actual Duration** divided by **BL Duration** multiplied by 100. The value can exceed 100.

Expense Cost % Complete field

The percent complete of cost for all expenses associated with the activity or WBS.

Calculated as **Actual Expense Cost** divided by **At Completion Expense Cost** multiplied by 100. Always in the range 0 to 100.

Labor Cost % Complete field

The percent complete of costs for all labor resources assigned to the activity or WBS.

Calculated as **Actual Labor Cost** divided by **At Completion Labor Cost** multiplied by 100. Always in the range 0 to 100.

Labor Units % Complete field

The percent complete of units for all labor resources for the activity or WBS.

Calculated as **Actual Labor Units** divided by **At Completion Labor Units** multiplied by 100. Always in the range 0 to 100.

Material Cost % Complete field

The percent complete of costs for all material resources assigned to the activity or WBS.

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Calculated as **Actual Material Cost** divided by **At Complete Material Cost** multiplied by 100. Always in the range 0 to 100.

Nonlabor Cost % Complete field

The percent complete of costs for all nonlabor resources assigned to the activity or WBS.

Calculated as **Actual Nonlabor Cost** divided by **At Completion Nonlabor Cost** multiplied by 100. Always in the range 0 to 100.

Nonlabor Units % Complete field

The percent complete of units for all nonlabor resources for the activity, WBS, or project.

Calculated as **Actual Nonlabor Units** divided by **At Completion Nonlabor Units** multiplied by 100. Always in the range 0 to 100.

Percent Complete Type list

Determines the way in which the application calculates the percent complete for the activity.

This default activity percent complete type will be applied to all new activities added to a project. If you change this setting for an existing project that has activities, the percent complete type of those existing activities will not be changed.

Performance % Complete field

The percentage of the activity planned work that is currently complete.

Performance % Complete is used to calculate earned value. It can be based on the activity percent complete, on the 0/100 rule, on the 50/50 rule, depending on the technique for computing earned-value percent complete for the activity's WBS.

Performance % Complete - Labor Units field

The percentage of the activity or project planned work that is currently complete as measured by labor units.

Calculated as **Earned Value Labor Units** divided by **Budget at Complete Labor Units** multiplied by 100. Always in the range 0 to 100.

Physical % Complete field

The activity percent complete, which is either user-entered or calculated from activity steps.

To calculate **Physical % Complete** from activity steps, the **Calculate Activity % Complete from activity steps** option must be enabled for the project.

Schedule % Complete field

The activity schedule percent complete, which specifies how much of the activity's project baseline duration is complete so far.

Calculated based on where the current data date falls relative to the activity's project baseline start and finish dates.

If the data date is earlier than the baseline start, the schedule percent complete is 0. If the data date is later than the baseline finish, the schedule percent complete is 100. The schedule percent complete indicates how much of the activity duration should currently be complete, relative to the selected project baseline.

Scope % Complete field

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The percent complete for the activity if the percent complete type is set to scope. Scope is calculated in Oracle Primavera Cloud when P6 is integrated with Oracle Primavera Cloud for scope management.

Units % Complete field

The percent complete of units for all labor and nonlabor resources assigned to the activity.

The percent complete is always in the range 0 to 100.

Calculated as **Actual Units** divided by **At Completion Units** multiplied by 100.

Timesheet Feedback category

Feedback from Resource field

The notes received from the resource as recorded in P6 Professional.

New Feedback option

Determines whether there is feedback from resources about this activity as recorded in P6 Professional that you haven't yet viewed. If the option is not selected, then there is no new feedback or you have already viewed the feedback.

Review Finish Date field

The finish date for the activity as proposed by the primary resource.

If the project manager approves the activity finish date, the review finish date is copied to the actual finish.

Review Status list

The activity review status.

Primary resources can set the status to **For Review** when they believe the activity is completed, but a primary resource is not allowed to mark activities as completed.

Units category

Actual Labor Units field

The number of units expended for all labor resources assigned to the activity.

Actual Nonlabor Units field

The number of nonlabor units that have been expended on the activity.

Actual This Period Labor Units field

The number of labor units used during this financial period.

If period performance is stored, the calculation is **Actual Labor Units** minus the sum of the stored **Actual This Period Labor Units** fields for all previous periods.

If the period performance is not stored, **Actual This Period Labor Units** is the same as **Actual Labor Units**.

Actual This Period Nonlabor Units field

The nonlabor units used during this financial period.

If period performance is stored, the calculation is **Actual Nonlabor Units** minus the sum of the stored **Actual This Period Nonlabor Units** fields for all previous periods.

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If the period performance is not stored, **Actual This Period Nonlabor Units** is the same as **Actual Nonlabor Units**.

At Completion Labor Units field

The sum of the actual plus remaining units for all labor resources assigned to the activity.

It is the same as the planned labor units if the activity is not started, and the actual labor units once the activity is completed.

Calculated as **Actual Labor Units** plus **Remaining Labor Units**.

At Completion Nonlabor Units field

The non labor units at completion. The sum of the actual plus remaining units for all nonlabor resources assigned to the activity.

It is the same as the planned nonlabor units if the activity is not started, and the actual nonlabor units once the activity is completed.

Calculated as **Actual Nonlabor Units** plus **Remaining Nonlabor Units**.

BL Project Actual Labor Units field

The actual units for all labor resources assigned to the activity in the project baseline.

BL Project Actual Nonlabor Units field

The actual units for all actual nonlabor resources assigned to the activity in the project baseline.

BL Project Labor Units field

The units for all labor resources assigned to the activity in the project baseline.

BL Project Nonlabor Units field

The units for all nonlabor resources assigned to the activity in the project baseline.

BL1 Actual Labor Units field

The actual units for all labor resources assigned to the activity in the primary baseline.

BL1 Actual Nonlabor Units field

The actual units for all nonlabor resources assigned to the activity in the primary baseline.

BL1 Labor Units field

The units for all labor resources assigned to the activity in the primary baseline.

Calculated as **Baseline Actual Labor Units** plus **Baseline Remaining Labor Units**.

BL1 Nonlabor Units field

The units for all nonlabor resources assigned to the activity in the primary baseline.

Planned Labor Units field

The planned number of units for all labor resources assigned to the activity.

Planned Nonlabor Units field

The planned units for all nonlabor resources assigned to the activities in the project.

Remaining Labor Units field

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The remaining units for all labor resources assigned to the activity.

The Remaining Labor Units reflect the work remaining to be done for the activity. Before the activity is started, the remaining units are the same as the planned units. After the activity is completed, the remaining units are zero.

Remaining Nonlabor Units field

The remaining units for all nonlabor resources assigned to the activities.

The remaining units reflect the work remaining to be done for the activity. Before the activity is started, the remaining units are the same as the planned units. After the activity is completed, there are zero remaining units.

Variance BL Project - Labor Units field

The difference between baseline labor units and at completion labor units. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL Project Labor Units** minus **At Completion Labor Units**.

Variance BL Project - Nonlabor Units field

The difference between the baseline nonlabor units and the at completion nonlabor units. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL Project Nonlabor Units** minus **At Completion Nonlabor Units**.

Variance BL1 - Labor Units field

The difference between primary baseline labor units and the at completion labor units. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Labor Units** minus **At Completion Labor Units**.

Variance BL1 - Nonlabor Units field

The difference between the primary baseline nonlabor units and the at completion nonlabor units. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Nonlabor Units** minus **At Completion Nonlabor Units**.

WBS General category

Contains Summary Data option

Determines whether the project has been summarized. If the checkbox is marked, the project has been summarized.

Integrated Application option

Determines whether the WBS was created in an application which has been integrated with P6. You cannot edit this WBS in P6.

Integrated WBS option

Determines whether this WBS is shared with Primavera Gateway when sharing a partial WBS structure.

Parent field

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The ID and name of the WBS that is the parent of the selected WBS.

In this context, the selected WBS has inherited the attributes of its parent and is formed one level beneath its parent in the hierarchy.

Project Status field

The current state of the project or WBS element.

Proposed Budget field

The proposed budget for the WBS.

Calculated as **Original Budget** plus the sum of the Approved and Pending budget changes from the budget log.

Responsible Manager field

The organizational breakdown structure (OBS) responsible for completion of the WBS tasks.

Status Reviewers field

The people designated to review and approve team member status updates for activities in the selected WBS.

WBS field

The name of the WBS element.

WBS Category field

The category of the selected WBS.

Use this category to organize, filter, and report WBS information in all projects. The category applies to this WBS in all projects to which the WBS item is assigned.

WBS Code field

The unique identifier of the WBS.

WBS Path field

A series of WBS codes that represent the position of the WBS within the project hierarchy.

For example, if you have a parent WBS named WBS1, a child named WBS2, and WBS2 has a child called WBS3, the WBS Path for WBS3 is WBS1.WBS2.WBS3.

Global Activity Codes category

This category contains global activity codes listed in alphabetical order.

EPS Activity Codes category

This category contains EPS activity codes listed in alphabetical order.

Project Activity Codes category

This category contains project activity codes listed in alphabetical order.

Project Codes category

This category contains project codes listed in alphabetical order.

Activity User Defined category

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This category contains activity user defined columns listed in alphabetical order.

WBS User Defined category

This category contains WBS user defined columns listed in alphabetical order.

Available Columns of the Assignments Detail Window of the Activities Page

Overview

The following is a comprehensive list of all the columns/fields available to add to the **Assignments** detail window of the **Activities** page.

Screen Elements

Costs category

Actual Cost field

The actual non-overtime plus overtime cost for the resource assignment on the activity.

Calculated as **Actual Regular Cost** plus **Actual Overtime Cost**.

At Completion Cost field

The sum of the actual costs plus remaining costs for the resource assignment on the activity.

Calculated as **Actual Costs** plus **Remaining Costs**.

Planned Cost field

The planned cost of work required for the assignment to be completed.

Calculated as **Planned Units** multiplied by **Price per Time**.

Remaining Cost field

The remaining cost for the resource assignment on the activity.

Calculated as **Remaining Units** multiplied by **Cost/Time**.

Dates category

Actual Finish field

The date on which the assignment was completed.

If the activity does not already have an **Actual Finish** date, the last assignment to set an **Actual Finish** date triggers the activity to have an **Actual Finish** date equal to the latest assignment's **Actual Finish** date when the assignment is saved.

Actual Start field

If the activity has started, the date work began on the activity.

If the activity does not have already have an **Actual Start** date, the first assignment to set an **Actual Start** date triggers the activity to have an **Actual Start** date equal to the activity's **Planned Start** date when the assignment is saved.

Finish field

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The finish date for the assignment. For not started activities, this is the **Planned Finish** date. For in progress activities, this is the **Remaining Finish** date. For completed activities, this is the **Actual Finish** date.

Planned Finish field

The date the assignment is scheduled to be finished.

This date is calculated by the project scheduler but can be updated manually by the project manager. This date is not changed by the project scheduler after the activity has started. This is the finish date that P6 Team Member Web timesheet users follow and that schedule variance is measured against.

Planned Start field

The date work on the assignment is scheduled to begin.

This date is calculated by the project scheduler but can be updated manually by the project manager. This date is not changed by the project scheduler after the activity has been started. This is the start date that P6 Team Member Web timesheet users follow and schedule variance is measured against.

Remaining Early Finish field

The date the assignment is scheduled to be finished.

This date can be updated manually by the user. Before the activity is started, this date is the same as the **Planned Finish** date.

Remaining Early Start field

The date the assignment is scheduled to begin.

This date can be updated manually by the user. Before the activity is started, this date is the same as the **Planned Start** date.

Remaining Late Finish field

The latest possible date the assignment must be finished to not delay 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, this field is blank.

Remaining Late Start field

The latest possible date the assignment must begin to not delay the project finish date.

This date is calculated by the project scheduler based on activity relationships, schedule constraints, and resource availability.

Start field

The start date for the assignment on the activity. For a not started assignment, this is the activity's **Planned Start** date. For a started assignment, this is the **Actual Start** date.

Durations category

Actual Duration field

The total working time from the activity **Actual Start** date to the **Actual Finish** date for completed activities, or the total working time from the **Actual Start** date to the data date for in-progress activities.

The actual working time is computed using the activity's calendar.

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Planned Duration field

The resource's total working time on the activity from the **Planned Start** date to the **Planned Finish** date.

Remaining Duration field

The remaining working time for the resource assignment on the activity, from the resource's remaining start date to the remaining finish date.

The remaining working time is calculated using the calendar determined by the activity type. Resource dependent activities use the resource's calendar; other activity types use the activity's calendar. Before the activity is started, the **Remaining Duration** is the same as the **Planned Duration**. After the activity is completed, the remaining duration is zero.

General category

Calculate Costs from Units option

Determines whether to override the cost calculation setting specified for the assigned resource or role. To have cost for this assignment calculated (cost equals **Units** multiplied by **Price/ Unit**), select this option. To manually record resource or role costs for this activity, clear this option. If you elect not to calculate costs from units, the resource or role costs for the assignment will not be updated when units or rates change.

If you select this option, the costs for the assignment will be recalculated based on current units and rates.

Cost Account field

The cost account associated with the resource assignment.

Curve field

The resource's units and costs distributed over the duration of an activity.

A curve can only be assigned to activities that have a duration type of **Fixed Duration and Units** or **Fixed Duration and Units/Time**.

A manual curve type indicates that the assignment's future period resource distribution was manually entered in the **Resource Usage Spreadsheet** of P6 Professional. If you select a different curve type, the manually-entered distribution is deleted, and the units and costs for the assignment are redistributed according to the curve you select. Be sure this is the appropriate course of action before replacing a manual curve with another curve.

Drive Activity Dates option

Determines whether new resource/role assignments drive activity dates by default.

Planned Units/Time field

The planned units per time at which the resource is to perform work on the activity.

For example, a person assigned full time would perform 8 hours of work per day. A department of five people might perform at 5 days per day.

Price/Unit field

The non-overtime price per unit of time for the resource or role.

When the option to **Calculate Costs from Units** is selected, this price is used to compute costs for the activity assignment, using the formula: **Cost** equals **Units** multiplied by **Price** divided by **Unit**.

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For resources and roles that have specified rates, Price/Unit corresponds to the Rate Source and Rate Type applied to the activity and is not editable. If an assigned resource or role does not have specified rates, the project default price/unit is used and cannot be edited on this tab. To manually enter a Price/Unit for the activity assignment, you must select Override as the Rate Source.

If the project default price/unit is applied to the activity, a caret symbol (^) appears beside the value. 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.

Primary Resource option

Determines whether the corresponding resource is the activity's primary resource.

Typically, the primary resource is the person responsible for the overall work on the activity and for updating activity status.

Proficiency list

The skill level of the resource: Master, Expert, Skilled, Proficient, or Inexperienced.

Rate Source field

The value that indicates which price/unit will be used to calculate costs for the assignment, such as *Resource*, *Role*, and *Override*.

When a resource, and only a resource, is assigned to an activity assignment, the rate source will automatically equal *Resource*. When a role, and only a role, is assigned to an activity assignment, the rate source will automatically equal *Role*. When both a resource and role are assigned to the activity assignment, the rate source can be either *Resource* or *Role* determined by your rate source preference. In any case, the *Override* value allows you to specify a different value for Price/Unit.

The default rate source preference can be changed on the **My Preferences** page under **Resource Assignments**.

Rate Type list

The price/unit used to calculate costs for the resource or role assignment.

Resources and Roles can have up to five rate types, with each rate type reflecting a different price/unit. When you add a new assignment, the rate type defaults to the setting specified for the project. When you edit and save a rate type, the **Price/Unit** is updated to reflect your change. If the **Calculate Costs from Units** option is selected, costs are recalculated.

Remaining Units/Time field

The units per time required for the resource assignment to complete the activity.

Resource ID Name field

The unique identifier and name of the resource.

Resource Name field

The name of the resource assigned to the activity.

Resource Type field

The type of resource/role assignment.

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Valid values are:

Labor: Indicates that the selected resource performs labor, which is measured in units of time.

Nonlabor: Indicates that the selected resource does not perform labor, but its work is measured in units of time.

Material: Indicates that the selected resource does not perform labor, and its work is measured in units you specify.

Role ID Name field

The identifying code and name of the role.

Role Name field

The name of the role assigned to the activity.

Search Criteria field

Indicates whether the assignment has any associated search criteria with a **Yes** or **No** link.

When search criteria have been specified, this field shows a **Yes** link that provides access to the stored resource request search criteria used to search for a qualified resource.

When you assign a resource using the *Request Resources* feature with your custom resource search criteria, the search criteria you specify is saved. A **Yes** link appears in the **Search Criteria** column beside the assignment, indicating search criteria is specified. This saved search criteria can be useful later if you ever need to modify the resource assignment and want to reuse the same criteria.

A **No** link appears when the assignment was made directly without any search criteria; however, you can click the **No** link to specify search criteria for the resource or role assignment.

Units category

Actual Units field

The sum of the actual non-overtime and the overtime units worked by the resource on the activity.

Calculated as **Actual Regular Units** plus **Actual Overtime Units**.

Values for **Actual Regular Units** and **Actual Overtime Units** are obtained from either timesheets when project actuals are applied, or directly from the updated fields in the interface.

At Completion Units field

The sum of the actual units and remaining units for the resource assignment on the activity.

Calculated as **Actual Units** plus **Remaining Units**.

Planned Units field

The planned units of work for the resource assignment on the activity.

Remaining Units field

The remaining units of work to be performed by the resource on the activity.

Calculated as **Planned Units** minus **Actual Units**.

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User Defined category

User Defined fields

The fields defined by your P6 administrator that are not standard in the application but are necessary to capture additional data.

Available Columns of the Assignments Page

Overview

The following is a comprehensive list of all the columns/fields available to add to the table on the Assignments page.

Screen Elements

Costs category

Actual Cost field

The actual non-overtime plus overtime cost for the resource assignment on the activity.

Calculated as **Actual Regular Cost** plus **Actual Overtime Cost**.

Actual Overtime Cost field

The actual overtime cost for the resource assignment on the activity.

Calculated as **Actual Overtime Units** multiplied by **Cost per Time** multiplied by **Overtime Factor**.

Actual Regular Cost field

The actual non-overtime cost for the resource assignment on the activity.

Calculated as **Actual Regular Units** multiplied by **Cost per Time**.

Actual This Period Cost field

The labor, nonlabor, and material costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Cost** minus the sum of the stored **Actual This Period Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Cost** is the same as **Actual Cost**.

At Completion Cost field

The sum of the actual costs plus remaining costs for the resource assignment on the activity.

Calculated as **Actual Costs** plus **Remaining Costs**.

Planned Cost field

The planned cost of work required for the assignment to be completed.

Calculated as **Planned Units** multiplied by **Price per Time**.

Remaining Cost field

The remaining cost for the resource assignment on the activity.

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Calculated as **Remaining Units** multiplied by **Cost/Time**.

Staffed Remaining Cost field

The remaining cost for resource assignments that have a filled role.

Unstaffed Remaining Cost field

The remaining cost for resource assignments that do not have a filled role.

Dates category

Activity Finish field

The finish date of the activity to which the assignment belongs. This is the planned finish if the activity has not started, the remaining finish if the activity is in progress, or the actual finish if the activity has completed.

Activity Start field

The start date of the activity to which the assignment belongs. This is the planned start date if the activity has not started, or the actual start date if the activity is in progress or completed.

Actual Finish field

The date on which the assignment was completed.

If the activity does not already have an **Actual Finish** date, the last assignment to set an **Actual Finish** date triggers the activity to have an **Actual Finish** date equal to the latest assignment's **Actual Finish** date when the assignment is saved.

Actual Start field

If the activity has started, the date work began on the activity.

If the activity does not have already have an **Actual Start** date, the first assignment to set an **Actual Start** date triggers the activity to have an **Actual Start** date equal to the activity's **Planned Start** date when the assignment is saved.

Finish field

The finish date for the assignment. For not started activities, this is the **Planned Finish** date. For in progress activities, this is the **Remaining Finish** date. For completed activities, this is the **Actual Finish** date.

Planned Finish field

The date the assignment is scheduled to be finished.

This date is calculated by the project scheduler but can be updated manually by the project manager. This date is not changed by the project scheduler after the activity has started. This is the finish date that P6 Team Member Web timesheet users follow and that schedule variance is measured against.

Planned Start field

The date work on the assignment is scheduled to begin.

This date is calculated by the project scheduler but can be updated manually by the project manager. This date is not changed by the project scheduler after the activity has been started. This is the start date that P6 Team Member Web timesheet users follow and schedule variance is measured against.

Remaining Early Finish field

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The date the assignment is scheduled to be finished.

This date can be updated manually by the user. Before the activity is started, this date is the same as the **Planned Finish** date.

Remaining Early Start field

The date the assignment is scheduled to begin.

This date can be updated manually by the user. Before the activity is started, this date is the same as the **Planned Start** date.

Remaining Late Finish field

The latest possible date the assignment must be finished to not delay 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, this field is blank.

Remaining Late Start field

The latest possible date the assignment must begin to not delay the project finish date.

This date is calculated by the project scheduler based on activity relationships, schedule constraints, and resource availability.

Start field

The start date for the assignment on the activity. For a not started assignment, this is the activity's **Planned Start** date. For a started assignment, this is the **Actual Start** date.

Durations category

Actual Duration field

The total working time from the assignment actual start date to the actual finish date for completed assignments, or the total working time from the actual start date to the data date for in-progress assignments.

At Completion Duration field

The total working time from the assignment's current start date to the current finish date.

The current start date is the planned start date until the assignment is started, and then it is the actual start date. The current finish date is the planned finish date while the assignment is not started, the remaining finish date while the assignment is in progress, and the actual finish date once the assignment is completed. The total working time is calculated using the activity's calendar.

Planned Duration field

The resource's total working time on the activity from the **Planned Start** date to the **Planned Finish** date.

Planned Lag field

The planned time lag between the activity's planned start date and the resource's planned start date on the activity.

If the resource is planned to start work when the activity is planned to start, the planned lag is zero.

Remaining Duration field

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The remaining working time for the resource assignment on the activity, from the resource's remaining start date to the remaining finish date.

The remaining working time is calculated using the calendar determined by the activity type. Resource dependent activities use the resource's calendar; other activity types use the activity's calendar. Before the activity is started, the **Remaining Duration** is the same as the **Planned Duration**. After the activity is completed, the remaining duration is zero.

Remaining Lag field

The time lag between the activity's remaining start date and the resource's remaining start date on the activity.

If the resource's remaining work starts on the activity's remaining start date, the lag is zero. Before the activity is started, the remaining lag is the same as the planned lag.

General category

Activity ID field

The unique identifying code for the activity assigned to the resource or role.

Activity Name field

The name of the activity assigned to the resource or role.

Activity Status field

The current condition of the activity.

Valid values are **Not Started**, **In Progress**, and **Completed**.

Activity Type field

Determines how duration and schedule dates are calculated for an activity.

Task Dependent: Activities are scheduled using the activity's calendar rather than the calendars of the assigned resources. Choose task dependent when you want to control the duration of the activity yourself (that is, no resources are assigned), or when one or more resources assigned to the same activity can work according to the same calendar. For example, you might have an activity to cure concrete; you know how long the task takes and the addition of resources won't complete the task any earlier. You would designate this activity as task dependent.

Resource Dependent: Activities are scheduled using the calendars of the assigned resources. This type is used when several resources are assigned to the activity, but they might work separately. Choose resource dependent when you want to schedule each resource according to his/her own time schedule, or resource calendar, not the activity calendar. The assigned resource availability determines the start and finish dates of the activity. Typically, you use this type when multiple resources assigned to the same activity can work independently, or when availability can affect the activity's duration. For example, an activity that requires an Inspector might be delayed if that resource is assigned to multiple projects or is on vacation.

Level of Effort: Activities have a duration that is determined by its dependent activities and are typically administration type. Choose level of effort to indicate that the activity's duration depends on its predecessor and/or successor activities. A level of effort activity is usually one that is ongoing, such as clerical work, Change Management, or project management tasks. For example, site cleanup could be considered a level of effort activity; it occurs repeatedly and is dependent on the completion of a phase.

Start or Finish Milestone: Milestone activities are zero-duration and are used to mark significant project events. Choose start milestone or finish milestone to indicate that the activity

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marks the beginning or end of a major stage in the project. A primary resource or an activity owner, and expenses can be assigned to a milestone. In an office building addition project, examples of milestones might include Project Definition Complete, Structure Complete, or End Bidding Process.

WBS Summary: Activities that are used to aggregate date, duration, and percent complete values for a group of activities that share a common WBS code level. Choose WBS Summary to indicate that the activity is a summary-level WBS activity. A WBS Summary activity represents a group of activities that share a common WBS level. The summary-level WBS activity enables roll-ups of dates for the activity group. The duration of a WBS Summary activity extends from the start of the earliest activity in a group to the finish of the latest activity. WBS codes control which activities are part of a WBS Summary activity; P6 incorporates any activities that share a component of the WBS Summary activity's WBS code into the WBS Summary activity. For example, all activities whose WBS codes begin with A (A.1, A.1.1, A.1.2, etc.) can be part of one WBS Summary activity whose WBS code is A. At a lower level, all activities whose WBS codes start with A.1 (A.1.1, A.1.2, etc.) can be part of a WBS Summary activity whose WBS code is A.1.

Assigned By field

The user who assigned the resource to the assignment.

Assigned Date field

The date the task was assigned to you, your group, or your role.

Calculate Costs from Units option

Determines whether by default any new assignments for this resource will have its costs recalculated whenever any quantity changes occur.

Calendar field

The name of the calendar selected for the resource.

CBS field

The Primavera Unifier Cost Breakdown Sheet to which you want to link an activity, assignment or expense.

Cost Account field

The cost account associated with the resource assignment.

Curve field

The resource's units and costs distributed over the duration of an activity.

A curve can only be assigned to activities that have a duration type of **Fixed Duration and Units** or **Fixed Duration and Units/Time**.

A manual curve type indicates that the assignment's future period resource distribution was manually entered in the **Resource Usage Spreadsheet** of P6 Professional. If you select a different curve type, the manually-entered distribution is deleted, and the units and costs for the assignment are redistributed according to the curve you select. Be sure this is the appropriate course of action before replacing a manual curve with another curve.

Drive Activity Dates option

Determines whether new resource/role assignments drive activity dates by default.

Duration Type list

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Determines how remaining duration, units, and units/time are calculated when you update an activity that has resources assigned. The activity's duration type should correspond to the dominant factor, that is, the least flexible factor in the project: schedule, costs/work effort, or resource availability.

Fixed Units/Time: The resource units per time are constant when the activity duration or units are changed. Use this duration type when an activity has fixed resources with fixed productivity output per time period.

Fixed Duration & Units/Time: The activity duration is constant as the units or resource units per time are changed. Use this duration type when the activity must be completed within a fixed time period regardless of the resources assigned.

Fixed Units: The activity units are constant when the duration or resource units per time are changed. Use this duration type when the total amount of work is fixed, and increasing the resources can decrease the activity duration.

Fixed Duration & Units: The duration and units remain constant as the units/time are changed. Use this duration type when the activity must be completed within a fixed time period and the total amount of work is fixed.

Financial Period Calendar field

The name of the financial period calendar assigned to the project.

Overtime Factor field

The overtime factor used to compute the overtime price for the resource assignment on this activity.

When the resource is assigned to the activity, the resource's overtime factor is copied to the assignment. The assignment overtime factor is refreshed from the resource value when resource prices are synchronized for the project.

Calculated as the rate in use multiplied by **Overtime Factor**.

Planned Units/Time field

The planned units per time at which the resource is to perform work on the activity.

For example, a person assigned full time would perform 8 hours of work per day. A department of five people might perform at 5 days per day.

Price/Unit field

The non-overtime price per time for the resource or role's work on this activity.

This price is used to compute costs for any activities to which the resource or role is assigned. When the resource or role is assigned to the activity, the relevant price is copied to the assignment based on the effective date of the price and the activity start date. The price is refreshed whenever resource and role prices are synchronized for the project.

Primary Resource field

The person primarily responsible for performing or overseeing work related to a specific assignment.

Proficiency field

The skill level of the resource. If you do not have appropriate privilege, you cannot access this field.

Project ID field

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The unique identifying code for the project associated with the activity.

Project Name field

The name of the project associated with the activity.

Rate Source field

The value that indicates which price/unit will be used to calculate costs for the assignment, such as *Resource*, *Role*, and *Override*.

When a resource, and only a resource, is assigned to an activity assignment, the rate source will automatically equal *Resource*. When a role, and only a role, is assigned to an activity assignment, the rate source will automatically equal *Role*. When both a resource and role are assigned to the activity assignment, the rate source can be either *Resource* or *Role* determined by your rate source preference. In any case, the *Override* value allows you to specify a different value for Price/Unit.

The default rate source preference can be changed on the **My Preferences** page under **Resource Assignments**.

Rate Type list

Determines which of the five user-defined resource and role rate types will be used to calculate the cost for the assignment.

Remaining Units/Time field

The units per time required for the resource assignment to complete the activity.

Resource Type list

The resource type. Valid values are:

Labor: Indicates that the selected resource performs labor, measured in units of time.

Nonlabor: Indicates that the selected resource does not perform labor, measured in units of time. Equipment is a nonlabor resource.

Material: Indicates that the resource has a unit of measure other than time. You can select a unit of measure for the material resource.

Search Criteria field

Indicates whether the assignment has any associated search criteria with a **Yes** or **No** link.

When search criteria have been specified, this field shows a **Yes** link that provides access to the stored resource request search criteria used to search for a qualified resource.

When you assign a resource using the *Request Resources* feature with your custom resource search criteria, the search criteria you specify is saved. A **Yes** link appears in the **Search Criteria** column beside the assignment, indicating search criteria is specified. This saved search criteria can be useful later if you ever need to modify the resource assignment and want to reuse the same criteria.

A **No** link appears when the assignment was made directly without any search criteria; however, you can click the **No** link to specify search criteria for the resource or role assignment.

WBS ID field

The unique identifier of the WBS for the activity.

WBS Name field

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The name of the WBS element.

WBS Path field

A series of WBS codes that represent the position of the WBS within the project hierarchy.

For example, if you have a parent WBS named WBS1, a child named WBS2, and WBS2 has a child called WBS3, the WBS Path for WBS3 is WBS1.WBS2.WBS3.

Percent Complete category

Pending % Complete field

The estimate of the percentage of the resource's units of work completed on this activity.

The pending percent complete is entered by each resource using timesheets. This value is used to compute the resource's remaining units for the activity when project actuals are applied. The project manager specifies whether resources update their percent complete or remaining units for each project.

Units % Complete field

The percent complete of units for the resource assignment on the activity.

The percent complete is always in the range 0 to 100.

Calculated as **Actual Units** divided by **At Completion Units** multiplied by 100.

Resource category

Active option

Determines whether the resource is currently active. A selected option indicates the resource is active.

Non-active resources might have left the organization, but are not deleted from the system since they might have actual hours.

Auto Compute Actuals option

Determines whether the activity actual and remaining units, and start and finish dates for the resource are calculated automatically using the planned dates, planned units, and the activity's schedule percent complete.

If this option is selected, the actual/remaining units and actual dates are automatically updated when project actuals are applied. This assumes that all work by the resource proceeds according to plan.

This option is not available if the **Uses Timesheets** option is selected.

Default Units/Time field

The default units/time for resource assignments in projects, which is shown as either a percentage or units/duration depending on your settings in **My Preferences**.

If you change the default setting, existing resource assignments are not affected. The default setting only applies to new resource assignments.

email Address field

The email address for the resource.

Employee ID field

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The resource identifier within the organization, typically the employee number or social security number.

Max Resource Units/Time field

The maximum work units per time this resource can perform on all their assigned activities

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.

Max Role Units/Time field

The maximum work units per time this role can perform on assigned activities.

Office Phone field

The office phone number for the resource.

Other Phone field

The alternate phone numbers for the resource.

Overtime Allowed option

Determines whether the resource is allowed to log overtime hours.

Resource ID field

The unique identifier for the resource.

Resource ID Name field

The unique identifier and name of the resource.

Resource Name field

The name of the resource assigned to the activity.

Role ID field

The unique identifier of the associated role.

Role ID Name field

The identifying code and name of the role.

Role Name field

The name of the role assigned to the activity.

Unit of Measure field

The unit of measure used for the material resource.

Units category

Actual Overtime Units field

The actual overtime units worked by the resource on the activity.

This value is calculated from timesheets when project actuals are applied or can be entered directly by the project manager.

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Actual Regular Units field

The actual non-overtime units worked by the resource on the activity.

This value is calculated from timesheets when project actuals are applied or can be entered directly by the project manager.

Actual This Period Units field

The labor, nonlabor, and material units used during this financial period.

If period performance is stored, the calculation is **Actual Units** minus the sum of the stored **Actual This Period Units** fields for all previous periods.

If the period performance is not stored, **Actual This Period Units** is the same as **Actual Units**.

Actual Units field

The sum of the actual non-overtime and the overtime units worked by the resource on the activity.

Calculated as **Actual Regular Units** plus **Actual Overtime Units**.

Values for **Actual Regular Units** and **Actual Overtime Units** are obtained from either timesheets when project actuals are applied, or directly from the updated fields in the interface.

At Completion Units field

The sum of the actual units and remaining units for the resource assignment on the activity.

Calculated as **Actual Units** plus **Remaining Units**.

Pend Remaining Units field

The estimate of the resource's remaining units on this activity.

The Pend Remaining Units value is entered by each resource using timesheets. This value is copied to the resource's remaining units for the activity when project actuals are applied. The project manager specifies whether resources update their percent complete or remaining units for each project.

Planned Units field

The planned units of work for the resource assignment on the activity.

Remaining Units field

The remaining units of work to be performed by the resource on the activity.

Calculated as **Planned Units** minus **Actual Units**.

Staffed Remaining Units field

The remaining units for resource assignments that have filled a role.

Unstaffed Remaining Units field

The remaining units for resource assignments that have not filled a role.

User-Defined Code and Field categories

Activity User Defined category

This category contains activity user defined columns listed in alphabetical order.

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Assignment Codes category

This category contains assignment codes listed in alphabetical order.

Assignment User Defined category

This category contains user defined columns listed in alphabetical order.

Global Activity Codes category

This category contains global activity codes listed in alphabetical order.

Project Codes category

This category contains project codes listed in alphabetical order.

Project User Defined category

This category contains Project user defined columns listed in alphabetical order.

Resource Codes category

This category contains resource codes listed in alphabetical order.

Resource User Defined category

This category contains user defined columns for resources listed in alphabetical order.

Role Codes category

This category contains role codes listed in alphabetical order.

WBS User Defined category

This category contains WBS user defined columns listed in alphabetical order.

Available Columns of the EPS Page

Overview

The following is a comprehensive list of all the columns/fields available to add to the table on the EPS page.

Screen Elements

Baseline category

Baseline Data Date field

The last date of recorded progress for the project baseline. Status is up-to-date as of the data date.

Project Baseline field

The project baseline for the selected project. Published and Summarized data always uses the Project Baseline for Earned Value calculations.

Budget category

Annual Discount Rate field

The interest rate associated with the cost of an investment from your commercial bank or another funding source.

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Valid values are 0 to 100. This rate is used to calculate **Total Spending Plan (Present Value)** and **Total Benefit Plan (Present Value)**.

For example, an annual growth rate of an investment such as 4.75% can be used as an annual discount rate. This rate is used when a future value is assumed and you are trying to find the required net present value.

Current Budget field

The current budget for the project or EPS.

Calculated as **Original Budget** plus the sum of the approved budget changes from the budget log.

Current Variance field

The difference between the current budget and the total spending plan. This value does not aggregate.

Calculated as **Current Budget** minus **Total Spending Plan**.

Distributed Current Budget field

The sum of all budgets that were assigned to control accounts during baseline planning. These budgets are allocated for work and planning packages.

Calculated as the sum of the **Current Budget** values from one level lower. This value does not aggregate.

Independent ETC Labor Units field

The user-entered estimate to complete total labor.

Independent ETC Total Cost field

The user-entered estimate to complete total cost.

Net Present Value field

The difference between the present value (PV) of the future cash flows from an investment and its investment cost.

Present value of the expected cash flows is computed by discounting them at the required rate of return or discount rate. Positive net present value (NPV) is an indicator of projects that should be pursued.

Calculated as **Total Benefit Plan (Present Value)** minus **Total Spending Plan (Present Value)**.

Original Budget field

The estimate of the total amount you require for the selected project or EPS, including all contributed funds.

Payback Period field

An estimate of the length of time that will transpire before net profits recover the initial and periodic costs of an investment to carry out the selected project.

It is calculated using projections depending on the timescale you select and the number of work days in a standard work week in the project calendar since the first time period in which a spending amount was entered for this project or the Project Start Date, whichever occurred earliest. Payback Period is calculated as the length of time that transpires before the

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cumulative value of income minus costs, usually negative when a project is just beginning, first exceeds zero.

Because it is based on cumulative values, it can be computed using the difference between present values (adjusted using the discount rate) or non-adjusted values for (Total Spending Plan) + Total Benefit Plan; the results will be the same. It is the point in time where the Spending Plan (PV) curve crosses the Benefit (PV) curve.

Proposed Budget field

The proposed budget for the project or EPS.

Calculated as **Original Budget** plus the sum of the approved and pending budgets from the budget log.

Return on Investment field

A calculation of the expected return or benefit over and above the investment costs of a project or portfolio expressed as a percentage.

Calculated as the **Net Present Value** divided by the **Total Spending Plan (Present Value)**.

For example, a project is expected to cost 1.0 million dollars with a total benefit of 1.2 million dollars. Its Net Present Value is $200,000. The Return on Investment is 20%.

Total Funding field

The total amount contributed to the project from funding sources.

Unallocated Budget field

The difference between the total current and distributed current budget.

Calculated as **Total Current Budget** minus **Distributed Current Budget**.

Cost category

Actual Expense Cost field

The actual cost for all project expenses associated with the project within the EPS.

Actual Labor Cost field

The actual cost for all labor resources assigned to the projects within the EPS.

Actual Material Cost field

The actual units for all material resources assigned to the project within the EPS.

Actual Nonlabor Cost field

The actual cost for all nonlabor resources assigned to the project within the EPS.

Actual This Period Labor Cost field

The labor costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Labor Cost** minus the sum of the stored **Actual This Period Labor Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Labor Cost** is the same as **Actual Labor Cost**.

Actual This Period Material Cost field

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The material costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Material Cost** minus the sum of the stored **Actual This Period Material Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Material Cost** is the same as **Actual Material Cost**.

Actual This Period Nonlabor Cost field

The nonlabor costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Nonlabor Cost** minus the sum of the stored **Actual This Period Nonlabor Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Nonlabor Cost** is the same as **Actual Nonlabor Cost**.

Actual Total Cost field

The actual total cost incurred on the project as of the project data date.

Calculated as **Actual Labor Costs** plus **Actual Nonlabor Costs** plus **Actual Material Costs** plus **Actual Expense Costs**.

At Completion Expense Cost field

The sum of the actual plus remaining cost for all project expenses associated with the cost account.

Calculated as **Actual Expense Cost** plus **Remaining Expense Cost**.

At Completion Labor Cost field

The sum of the actual plus remaining costs for all labor resources assigned to the activities in the project.

If the activities are not started, this equals the planned labor costs. Once the activities are complete, this equals the actual labor costs.

Calculated as **Actual Labor Cost** plus **Remaining Labor Cost**.

At Completion Material Cost field

The material cost at completion. It is the sum of the actual plus remaining costs for all material resources assigned to all activities in the project.

It is the same as the planned material costs if the activities are not started, and the actual material costs once the activities are completed.

Calculated as **Actual Material Cost** plus **Remaining Material Cost**.

At Completion Nonlabor Cost field

The nonlabor cost at completion. It is the sum of the actual plus remaining costs for all nonlabor resources assigned to the activities in the project.

It is the same as the planned nonlabor costs if the activities are not started, and the actual nonlabor costs once the activities are completed.

Calculated as **Actual Nonlabor Cost** plus **Remaining Nonlabor Cost**.

At Completion Total Cost field

The estimated cost at completion for the activities in the project.

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Calculated as the **Actual Total Cost** plus the **ETC** (estimate-to-complete) cost. The method for computing ETC depends on the Earned Value technique selected for the activity's WBS.

BL Project Expense Cost field

The planned cost for all expenses associated with the project in the project baseline.

BL Project Labor Cost field

The cost for all labor resources assigned to the project in the project baseline.

BL Project Material Cost field

The planned cost for all material resources assigned to the project in the project baseline.

BL Project Nonlabor Cost field

The cost for all nonlabor resources assigned to the project in the project baseline.

BL Project Total Cost field

The total cost for the project in the project baseline.

Calculated as **BL Project Labor Cost** plus **BL Project Nonlabor Cost** plus **BL Project Material Cost** plus **BL Project Expense Cost**.

Planned Expense Cost field

The planned total cost of all expenses associated with the project or EPS.

Planned Labor Cost field

The planned costs for all labor resources assigned to activities in the project.

Planned Material Cost field

The planned cost for all expenses associated with the project or EPS.

Planned Non Labor Cost field

The planned costs for all non labor expenses associated with the project or EPS.

Planned Total Cost field

The planned cost for all expenses associated with the project or EPS.

Remaining Expense Cost field

The remaining costs for all project expenses associated with the activities in the EPS.

Remaining Labor Cost field

The remaining costs for all labor resources assigned to the activities in the EPS.

The remaining cost reflects the cost remaining for the EPS.

Remaining Material Cost field

The remaining material costs for all project expenses associated with the activities in the EPS.

Remaining Nonlabor Cost field

The remaining nonlabor costs for all project expenses associated with the activities in the EPS.

Remaining Total Cost field

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The remaining total cost for the project, including labor resources, nonlabor resources, and project expenses.

Calculated as **Remaining Labor Costs** plus **Remaining Nonlabor Costs** plus **Remaining Expense Costs**.

Variance - Expense Cost field

The difference between project baseline expense cost and the at completion expense cost.

Calculated as **Project Baseline Expense Cost** minus **At Completion Expense Cost**.

Variance - Labor Cost field

The difference between the project baseline labor cost and the at completion labor cost.

Calculated as **BL Labor Cost** minus **At Completion Labor Cost**.

Variance - Material Cost field

The difference between the project baseline planned material cost and the at completion material cost.

Calculated as **Project Baseline Planned Material Cost** minus **At Completion Material Cost**.

Variance - Nonlabor Cost field

The difference between the project baseline nonlabor cost and at completion nonlabor cost.

Calculated as **BL Nonlabor Cost** minus **At Completion Nonlabor Cost**.

Variance - Total Cost field

The difference between the project baseline total cost and at completion total cost.

Calculated as **BL Total Cost** minus **At Completion Total Cost**.

Dates category

Actual Finish field

The date on which the project is complete.

This field is empty until all activities in the project have an actual finish date.

Actual Start field

If the work has started, the date work on the project began. For an EPS, the actual start is the earliest actual start among all projects within it.

Anticipated Finish field

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.

If there are no children elements, the anticipated finish is the finish date listed for the item in the table.

The Anticipated Finish date is used as the Finish date if there are no activities assigned to the project or WBS.

Anticipated Start field

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.

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If there are no children elements, the anticipated start is the start date listed for the item in the table.

The Anticipated Start date is used as the Start date if there are no activities assigned to the project or WBS.

BL Finish field

The current latest finish date of all activities in the project baseline.

BL Start field

The current earliest start date of all activities in the project baseline.

Data Date field

The progress point, or "as-of date", for activities in the project. Project status is up-to-date as of the data date. You can set the data date when you schedule the project or apply actuals, or you can set it manually. Set it manually if resources manually update activity progress and you do not plan to reschedule the project or apply actuals.

Finish field

The current finish date of the project. For not started and in-progress projects, this is the latest early finish date from all activities in the project. For completed projects, this is the latest actual finish date derived from all activities. For projects with no activities, the Finish Date is equal to the Anticipated Finish date if one is defined. For projects with no activities and no Anticipated Finish date, the Finish Date field is blank.

Forecast Finish Date field

The end date used for synchronizing resource dates on the Planning page.

Forecast Start Date field

The start date used for synchronizing resource dates on the Planning page.

Last Apply Actuals Date field

The last date actuals were applied to this project.

Last Leveled Date field

The most recent date when the project was leveled.

Last Scheduled Date field

The most recent date when the project was scheduled.

Must Finish By field

The optional date constraint you can specify for the project end date.

Planned Finish Date field

The latest planned finish date of all projects or templates within the EPS.

Planned Start Date field

The date the project is scheduled to start.

Post-Response Pessimistic Finish Date field

The Post-Response Pessimistic Finish Date calculated in Oracle Primavera Cloud during quantitative risk analysis.

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Post-Response Pessimistic Start Date field

The Post-Response Pessimistic Start Date calculated in Oracle Primavera Cloud during quantitative risk analysis.

Pre-Response Pessimistic Finish Date field

The Pre-Response Pessimistic Finish Date calculated in Oracle Primavera Cloud during quantitative risk analysis.

Pre-Response Pessimistic Start Date field

The Pre-Response Pessimistic Start Date calculated in Oracle Primavera Cloud during quantitative risk analysis.

Project Forecast Start field

The planned start date of the project based on a what-if scenario designed to simulate project performance and outcomes.

Project Planned Start field

The expected start date for the project.

Scheduled Finish field

The calculated latest early finish date, which is based on the schedule most recently generated for the project.

Start field

The current start date of the project. For a not started project, this is the project's planned start date. For a project that has started or is complete, this is the project's actual start date. For projects with no activities, the start date is equal to the anticipated start date if one is defined; if no anticipated start is defined, then the start date is equal to the project's planned start date.

Durations category

Actual Duration field

The current total working time for the project, template, or EPS. For completed items, this field displays the total working time from the actual start date to the actual finish date. For items that are in-progress, this field displays the total working time from the actual start date to the data date.

At Completion Duration field

The total working time from the project current start date to the current finish date.

The current start date is the planned start date until the project is started, and then it is the actual start date. The current finish date is the planned finish date while the project is not started, the remaining finish date while the project is in progress, and the actual finish date once the project is completed.

BL Duration field

The planned duration for the activity in the primary baseline. Planned duration is the total working time from the activity current start date to the current finish date.

Calculated as **Actual Duration** plus **Remaining Duration**.

The total working time is calculated using the activity's calendar.

Planned Duration field

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The total working time from the project planned start date to the planned finish date.

Remaining Duration field

The total working time from the project remaining start date to the remaining finish date.

Total Float field

The amount of time the activity can be delayed before risking a delay to the project finish date.

A float of zero hours indicates that the activity cannot be delayed at all and a negative float indicates that the project is already behind schedule. In a complex schedule, negative total float on some activities might not cause a delay to the project finish date.

Calculated as **Late Start** minus **Early Start** or as **Late Finish** minus **Early Finish**.

Variance - Duration field

The duration between the activity's baseline duration and the at complete duration.

Calculated as **Baseline Duration** minus **At Completion Duration**.

Variance - Finish Date field

The duration between the finish date in the current project and the baseline finish date.

Calculated as **Finish Date** minus **Baseline Finish Date**.

Variance - Start Date field

The duration between the start date in the current project and the baseline start date.

Calculated as **Start Date** minus **Baseline Start Date**.

Earned Value category

> **Note**
>
> Some values on this page are calculated from published or summarized data. The publisher and summarizer services always use the project baseline for earned value calculations, regardless of the *Baseline to be used for earned value calculations* setting in each project's preferences. Therefore earned value data viewed on this page might differ from the same data viewed in areas of the software using live data. For further information see: Summarized, Published, and Live Data Usage in P6*Summarized, Published, and Live Data Usage in P6*

Accounting Variance field

The difference between the planned value of work scheduled and the actual cost of work performed.

A negative value indicates that actual costs have exceeded the scheduled costs.

Calculated as **Planned Value** minus **Actual Cost**.

Accounting Variance - Labor Units field

The difference between the planned value of work scheduled and the actual work performed.

A negative value indicates that actual costs have exceeded the scheduled costs.

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Calculated as **Planned Value Labor Units** minus **Actual Units**.

Actual Cost field

The actual total cost incurred on the project as of the project data date.

Calculated as **Actual Labor Costs** plus **Actual Nonlabor Costs** plus **Actual Material Costs** plus **Actual Expense Costs**.

Budget At Completion field

The planned total cost through project completion.

Calculated as **Planned Labor Cost** plus **Planned Nonlabor Cost** plus **Planned Expense Cost** plus **Planned Material Cost**.

Budget At Completion - Labor Units field

The planned total cost for labor units through project completion.

Cost Performance Index (CPI) field

A measure of the value of work accomplished as a percentage of the actual costs of a project.

Cost Performance Index (CPI) indicates whether you have spent money over the budget to date.

On the My Preferences page, you can set performance thresholds for CPI calculated values to determine whether you need to take corrective action.

Calculated as **Earned Value Cost** divided by **Actual Cost**. A value less than 1 indicates that the actual cost has exceeded the planned value.

Cost Performance Index - Labor Units field

A measure of work efficiency on a project.

Calculated as **Earned Value Labor Units** divided by **Actual Labor Units**. A value less than 1 indicates that the actual units have exceeded the planned units.

Cost Variance field

A measure of cost performance on a project.

A negative value indicates that the actual cost has exceeded the planned value.

Calculated as **Earned Value** minus **Actual Cost**.

Cost Variance - Labor Units field

The difference between the earned value labor units and the actual value labor units.

A negative value indicates that actual costs have exceeded the value of work performed.

Calculated as **Earned Value Labor Units** minus **Actual Labor Units**.

Cost Variance Index field

The ratio of the cost variance and the earned value of work performed on the project.

Calculated as **Cost Variance** divided by **Earned Value**.

Cost Variance Index - Labor Units field

The ratio of the cost variance labor units and the earned value labor units for the project.

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Calculated as **Cost Variance Labor Units** divided by **Earned Value Labor Units**.

Earned Value Cost field

The portion of the baseline total cost of the project that is actually completed as of the project data date. Also known as Budgeted Cost of Work Performed (BCWP), Budgeted Quantity of Work Performed (BQWP), or simply Earned Value (EV).

Budget at completion is calculated from the baseline.

Calculated as **Budget At Completion** multiplied by **Performance Percent Complete**. The method for computing performance percent complete depends on the Earned Value technique selected for the activity's WBS.

Earned Value Labor Units field

The portion of baseline labor units that are complete as of the project data date.

Calculated as **BL Project Labor Units** multiplied by **Performance % Complete**.

Estimate At Completion - Labor Units field

The estimated labor units at completion.

Calculated as **Actual Labor Units** plus **Estimate to Complete Labor Units**. Estimate to complete labor units is calculated based on of the Earned Value setting on the EPS.

Estimate At Completion Cost field

The expected total cost of a schedule activity, a work breakdown structure component, or the project when the defined scope of work will be completed.

Calculated as **Actual Cost** plus **Estimate to Complete Cost**. The method for calculating estimate to complete depends on the earned value technique selected for the activity's WBS.

Estimate To Complete field

The estimated cost to complete the project.

Calculated as **Remaining Total Cost** for the activity or the **Performance Factor** multiplied by (**Budget At Completion** minus **Earned Value**), depending on the Earned Value technique selected for the activity's WBS (calculated from the baseline).

Estimate To Complete Labor Units field

The estimated quantity to complete the project.

Calculated as either the **Remaining Total Units** for the activity, or as **Performance Factor** multiplied by (**Baseline Planned Labor Units** minus **Planned Quantity of Work Performed**), depending on the Earned Value Technique selected for the activity's WBS.

Estimated Time To Complete field

The projected duration required to complete the remaining scope of work, work based on labor efficiency to date, assuming current performance trends continue. This estimate helps you to assess labor efficiency, forecast resource availability, and identify potential over-run of work due to declining productivity.

Calculated as **Original Duration** divided by **Schedule Performance Index (SPI)**.

Estimated Time To Complete Units field

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The projected labor effort needed to complete the remaining scope of work, based on labor efficiency to date. This estimate helps you to assess labor efficiency, forecast resource availability, and identify potential over-run of work due to declining productivity.

Calculated as **Planned Labor Units** divided by **Schedule Performance Index - Labor Units**.

Planned Value Cost field

The portion of the baseline total cost of the project that is scheduled to be completed as of the project data date. This is also known as Budgeted Cost of Work Scheduled (BCWS).

Calculated as **Schedule % Complete** multiplied by **Budget at Completion**.

Planned Value Labor Units field

The portion of baseline labor units that are scheduled to be complete as of the project data date.

The schedule percent complete specifies how much of the activity's baseline duration has been completed so far. The baseline labor units are taken from the current baseline.

Calculated as **Baseline Labor Units** multiplied by **Schedule Percent Complete**.

Schedule Performance Index field

A measure of the work accomplished as a percentage of the work scheduled.

Schedule Performance Index indicates whether you are meeting earned and planned values within your schedule. A value less than 1 indicates that less work was performed than was scheduled.

Calculated as **Earned Value** divided by **Planned Value**.

Schedule Performance Index - Labor Units field

The ratio of the earned value of labor units to the planned value of labor units.

Calculated as **Earned Value Labor Units** divided by **Planned Value Labor Units**.

Schedule Variance field

The measure of schedule performance on a project.

A negative value indicates that less work was actually performed than was scheduled.

Calculated as **Earned Value** minus **Planned Value**.

Schedule Variance - Labor Units field

The difference between the earned value of work performed and the work scheduled to be performed.

Calculated as **Earned Value Labor Units** minus **Planned Value Labor Units**.

Schedule Variance Index field

The ratio of schedule variance labor units and the planned value labor units.

Calculated as **Schedule Variance Labor Units** divided by **Planned Value Labor Units**.

Schedule Variance Index - Labor Units field

The ratio of schedule variance labor units and the planned value labor units.

Calculated as **Schedule Variance Labor Units** divided by **Planned Value Labor Units**.

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To Complete Performance Index field

The ratio of the remaining work to the remaining funds.

Calculated as (**Budget at Completion** minus **Earned Value**) divided by (**Estimate at Completion** minus **Actual Units** or **Cost**).

Variance At Completion field

The difference between the baseline total cost and the current estimate of total cost. A negative value indicates an estimated cost overrun.

Budget At Completion is calculated from the current baseline.

Calculated as **Budget At Completion** minus **Estimate At Completion**.

Variance At Completion - Labor Units field

The difference between the baseline planned total labor units and the estimate at completion labor units.

Calculated as **Project Baseline Planned Total Labor Units** minus **Estimate At Completion Labor Units**.

General category

Added By field

The name of the user who added the project to the EPS.

Checked Out By field

The name of the user who checked out the project.

If the project is not checked out, this field is blank.

Date Added field

The date and time the project was added to the EPS.

Date Checked Out field

The date and time the user checked out the project. If the project is not checked out, this field is blank.

EPS ID field

An identifier that is unique to the EPS node.

EPS Name field

The name of the EPS.

Financial Period Calendar field

The name of the financial period calendar assigned to the project.

History Interval - Project or WBS list

Choose to store historical spread data by month, week, quarter, year, or financial period for project and WBS data.

History Level list

Determines the type of historical project data stored for use in Primavera Analytics.

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None: Data is not stored for this project.

Project: Project-level data is stored.

WBS: Project-level and WBS data is stored.

Activity (Daily): Project-level, WBS, activity and resource assignment data is stored. Activity and resource assignment data is stored at a daily interval, regardless of the option selected in the History Interval field.

Activity (Weekly): Project-level, WBS, activity and resource assignment data is stored. Activity and resource assignment data is stored at a weekly interval, regardless of the option selected in the History Interval field.

Activity (Monthly): Project-level, WBS, activity and resource assignment data is stored. Activity and resource assignment data is stored at a monthly interval, regardless of the option selected in the History Interval field.

Integrated Project field

The type of system integration, if any, in place at your organization. Data within this project will be shared with the integrated solution.

The default value is <none>.

Portfolios field

The portfolios associated with the project.

Project ID field

The unique identifying code for the project.

Project Leveling Priority field

The priority of each project during leveling.

You can enter a value from 1 to 100, with 1 being the highest priority.

Project Name field

The name of the project.

Project Owner field

The resource designated as responsible for the project.

The project owner designation provides a user with viewing access for the project.

Project Risk Exposure field

The sum of the Pre-Response Risk Exposure values for all risks in the project that are in a *Proposed*, *Open*, or *Active* state, and are identified as a threat to the project.

Project Risk Score field

The sum of the Pre-Response Scores for all risks in the project that are in a *Proposed*, *Open*, or *Active* state, and are identified as a threat to the project.

Project Score field

The project score, based on all project code types assigned to this project.

Project Status list

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The current state of the project or WBS element. For activities, this field reflects the current state of its parent WBS or project. The status type determines how project, WBS, activity, and resource assignment data are handled by applications within P6 EPPM.

The status you assign to a project automatically applies to all its WBS elements and their activities. By default, when you create and save a new WBS, it automatically inherits the **Project Status** value of its parent WBS or project; however, subject to certain logical constraints, you can change the individual status of a WBS. For example, within an *Active* project you can designate WBS elements that are *Active*, *Inactive*, and *Planned*. The following status values can appear in this field:

Active: This is the default setting for new projects. Use this status to reflect actual authorized WBS or project work at your organization. When you designate a project as *Active*, P6 Team Member Web timesheet users can view all activities included in its active WBS elements. Depending on their timesheet privileges, users may also be able to assign themselves to and perform work on activities that are included in an active WBS element.

Inactive: Use this status to designate a WBS or project that is on hold, terminated, or no longer active. Select the **Resources can view activities from an inactive project** option on the **Team Member** page of the **Project Preferences** dialog box to allow P6 Team Member Web timesheet users to view, but not edit, activities that are included in an inactive WBS element or project.

Planned: Use this status to designate a project or WBS that is in its planning phase. If a WBS element's status is *Planned*, P6 Team Member Web timesheet users cannot view any of its activities. This prevents P6 Team Member Web timesheet users from assigning themselves to and performing work on unauthorized activities not yet officially designated *Active*.

What If: This status can only be designated at the project level. Use this status to designate a project is only being considered or is undergoing analysis before establishing a more defined project schedule. When a project's status is *What If*, P6 Team Member Web timesheet users cannot view any of its activities. This prevents P6 Team Member Web timesheet users from assigning themselves to and performing work on unauthorized activities not yet officially designated *Active*.

Reflection projects created in P6 Professional appear in P6 as What If projects.

Template: This status appears in this field only for template projects or for a WBS element that belongs to a template project. This status is set by P6; you cannot directly set this value.

Project Website URL field

The address of the project's website.

Responsible Manager field

The organization breakdown structure (OBS) assigned to the project or EPS.

Risk Scoring Matrix field

The name of the risk scoring matrix assigned to the project.

Strategic Priority field

The project's priority in the strategic plan.

This priority value ranges from 1 to 10,000 with a default of 500. Use of the priority value, such as whether to place higher priority at the lower end of the scale, toward the endpoint 1, or at the higher end, toward 10,000, is at the discretion of the user. This field is not used for calculating data.

Type field

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The type of element, whether project or EPS.

Website Root Directory field

The root directory for storing project Website files before they are published to the Web server.

Number of Activities category

Actual Completed Activities field

The number of activities that have an actual finish date.

Actual In-Progress Activities field

The number of activities that have an actual start date, but no actual finish date.

Actual Not-Started Activities field

The number of activities that have no actual start date.

BL Completed Activities field

The number of completed activities in the project baseline.

BL In-Progress Activities field

The number of in-progress activities in the project baseline.

BL Not-Started Activities field

The number of activities not started in the project baseline.

Total Activities field

The number of activities in the project.

Percent Complete category

Cost % Complete field

The percent complete of costs for all labor resources, nonlabor resources, and expenses for the project.

Calculated as **Actual Total Cost** divided by **At Completion Total Cost** multiplied by 100.

Cost % of Planned field

The percent complete of planned costs for all labor resources, nonlabor resources, and expenses for the project.

Calculated as **Actual Total Cost** divided by **Baseline Total Cost** multiplied by 100. The value can exceed 100. The baseline total cost is the activity's at completion cost from the current baseline.

Duration % Complete field

The duration percent complete for the project.

Calculated as **Planned Duration** minus **Remaining Duration** divided by **Planned Duration** multiplied by 100. The value is always between 0 and 100.

Duration % of Planned field

The summary actual duration percent of planned duration of all activities for the project.

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The baseline duration is the activity's at complete duration from the current baseline.

Calculated as **Actual Duration** divided by **Baseline Duration** multiplied by 100. The value can exceed 100.

Expense Cost % Complete field

The percent complete of cost for all expenses associated with project.

Calculated as **Actual Expense Cost** divided by **At Complete Expense Cost** multiplied by 100, and it is always in the range of 0 to 100.

Labor Cost % Complete field

The percent complete of cost for all labor resources assigned to a project or EPS.

Calculated as **Actual Labor Cost** divided by **At Completion Labor Cost** multiplied by 100. Always in the range 0 to 100.

Labor Units % Complete field

The percent complete of units for all labor resources for the project or EPS.

Calculated as **Actual Labor Units** divided by **At Completion Labor Units** multiplied by 100. Always in the range 0 to 100.

Material Cost % Complete field

The percent complete of cost for all material resources assigned to the project or EPS.

Calculated as **Actual Material Cost** divided by **At Complete Material Cost** multiplied by 100. Always in the range 0 to 100.

Nonlabor Cost % Complete field

The percent complete of cost for all nonlabor resources assigned to the project and EPS.

Calculated as **Actual Nonlabor Cost** divided by **At Completion Nonlabor Cost** multiplied by 100. It is always in the range of 0 to 100.

Nonlabor Units % Complete field

The percent complete of units for all nonlabor resources for the project or EPS.

Calculated as **Actual Nonlabor Cost** divided by **At Completion Nonlabor Cost** multiplied by 100. Always in the range 0 to 100.

Performance % Complete field

The percentage of the project planned work that is currently complete.

Performance % Complete is used to calculated earned value and may be based on the Activity % Complete, the 0/100 rule, the 50/50 rule, etc., depending on the technique selected for computing earned value percent complete the WBS elements in the project.

Calculated as **Earned Value Cost** divided by **Budget At Completion** multiplied by 100. Always in the range 0 to 100.

Schedule % Complete field

The measure of how much of the project baseline is complete so far.

Calculated as the Planned Value Cost *100 / Budget At Completion Cost.

At the EPS level, Planned Value Cost and Budget At Completion Cost are rolled-up values.

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Units % Complete field

The percent complete of units for the resource assignments in the EPS.

The percent complete is always in the range 0 to 100.

Calculated as **Actual Units** divided by **At Complete Units** multiplied by 100.

Preferences category

Activity % Complete from Steps option

Determines if Activity % Complete is calculated from activity steps or from manual input.

This option is cleared by default. If the option is selected, you must also set Percent Complete Type to Physical on the Activities page to view the calculation in the Activity % Complete field. This option also sets the Physical % Complete field calculation to calculate from activity steps instead of manual input.

For example, if 3 of 4 steps are marked complete, and the steps are weighted equally, the Activity % Complete and the Physical % Complete is 75%.

Activity ID Prefix field

The series of initial letters, numeric digits, or special characters you want P6 to use to auto-number all the activities in a given project. By default, this field can contain 1 to 20 characters.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Activity ID Suffix field

The numeric digits you want P6 to use to auto-number all the activities in a given project. The value must be a number between 1 and 999,999.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Activity Type list

Determines how duration and schedule dates are calculated for an activity.

Task Dependent: Activities are scheduled using the activity's calendar rather than the calendars of the assigned resources. Choose task dependent when you want to control the duration of the activity yourself (that is, no resources are assigned), or when one or more resources assigned to the same activity can work according to the same calendar. For example, you might have an activity to cure concrete; you know how long the task takes and the addition of resources won't complete the task any earlier. You would designate this activity as task dependent.

Resource Dependent: Activities are scheduled using the calendars of the assigned resources. This type is used when several resources are assigned to the activity, but they might work separately. Choose resource dependent when you want to schedule each resource according to his/her own time schedule, or resource calendar, not the activity calendar. The assigned

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resource availability determines the start and finish dates of the activity. Typically, you use this type when multiple resources assigned to the same activity can work independently, or when availability can affect the activity's duration. For example, an activity that requires an Inspector might be delayed if that resource is assigned to multiple projects or is on vacation.

Level of Effort: Activities have a duration that is determined by its dependent activities and are typically administration type. Choose level of effort to indicate that the activity's duration depends on its predecessor and/or successor activities. A level of effort activity is usually one that is ongoing, such as clerical work, Change Management, or project management tasks. For example, site cleanup could be considered a level of effort activity; it occurs repeatedly and is dependent on the completion of a phase.

Start or Finish Milestone: Milestone activities are zero-duration and are used to mark significant project events. Choose start milestone or finish milestone to indicate that the activity marks the beginning or end of a major stage in the project. A primary resource or an activity owner, and expenses can be assigned to a milestone. In an office building addition project, examples of milestones might include Project Definition Complete, Structure Complete, or End Bidding Process.

WBS Summary: Activities that are used to aggregate date, duration, and percent complete values for a group of activities that share a common WBS code level. Choose WBS Summary to indicate that the activity is a summary-level WBS activity. A WBS Summary activity represents a group of activities that share a common WBS level. The summary-level WBS activity enables roll-ups of dates for the activity group. The duration of a WBS Summary activity extends from the start of the earliest activity in a group to the finish of the latest activity. WBS codes control which activities are part of a WBS Summary activity; P6 incorporates any activities that share a component of the WBS Summary activity's WBS code into the WBS Summary activity. For example, all activities whose WBS codes begin with A (A.1, A.1.1, A.1.2, etc.) can be part of one WBS Summary activity whose WBS code is A. At a lower level, all activities whose WBS codes start with A.1 (A.1.1, A.1.2, etc.) can be part of a WBS Summary activity whose WBS code is A.1.

Allow Duplicate Resource Assignments option

Determines whether resources can work on the same activity multiple times.

Allow Negative Actual Units option

Determines if the Apply Actuals feature can record negative actual units against activities in the project via timesheets.

Baseline Option list

The baseline the project uses.

This field is disabled if the project is checked out.

Calendar field

The calendar assigned to the project.

Cost Account field

The cost account associated with the project.

Drive Activity Dates by Default option

Determines whether assignments will drive activity dates.

Duration Type field

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Determines how remaining duration, units, and units/time are calculated when you update an activity that has resources assigned. The activity's duration type should correspond to the dominant factor, that is, the least flexible factor in the project: schedule, costs/work effort, or resource availability.

Fixed Units/Time: The resource units per time are constant when the activity duration or units are changed. Use this duration type when an activity has fixed resources with fixed productivity output per time period.

Fixed Duration & Units/Time: The activity duration is constant as the units or resource units per time are changed. Use this duration type when the activity must be completed within a fixed time period regardless of the resources assigned.

Fixed Units: The activity units are constant when the duration or resource units per time are changed. Use this duration type when the total amount of work is fixed, and increasing the resources can decrease the activity duration.

Fixed Duration & Units: The duration and units remain constant as the units/time is changed. Use this duration type when the activity must be completed within a fixed time period and the total amount of work is fixed.

Fiscal year list

Determines on which month the fiscal year begins.

Increment field

The number you want P6 to add to the previous Activity ID in order to auto-number all the new activities in a given project. This field value must be between 1 and 99,999.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Link Actual and Period Actual Units and Costs option

Determines whether to recalculate actual or actual this period units and costs when one of these values is updated. This option must be marked if you plan to store period performance or edit past period actuals for a project.

Link Percent Complete with Actuals option

Determines whether the actual units and cost values are recalculated when duration percent complete is updated.

Link Planned and At Completion option

Determines whether to recalculate all of the planned unit and cost values using the remaining costs and units for activities that have not started. When this option is selected, Planned, Remaining, and At Completion values are set to equal for not started activities.

Percent Complete Type list

Determines the way in which the application calculates the percent complete for the activity.

This default activity percent complete type will be applied to all new activities added to a project. If you change this setting for an existing project that has activities, the percent complete type of those existing activities will not be changed.

Price/Unit field

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The default price/unit used to calculate the cost for activities that have labor/non-labor units but no assigned resources and for activities that have assigned resources or roles that do not have a specified price/unit.

Primary Can Complete Activity option

Determines whether primary resources can mark activities as completed.

Primary Resources Can Update Activity Dates option

Determines whether primary resources can see the Update Dates button in the Timesheets page of P6 Team Member Web.

Rate Type list

The price/unit used to calculate costs for the project.

There can be up to five rate types, with each rate type reflecting a different price/unit.

Resources Can Assign Themselves option

Determines whether resources can assign themselves to activities.

Resources Can Assign Themselves Outside OBS option

Determines whether resources can assign themselves to activities even if the resource does not have access to the relevant OBS for the activity.

Resources Status Activities Using list

Determines how P6 Team Member Web timesheet users enter their status for assignments.

Review Type list

Determines who can review status updates. Available options are **Anyone can review** and **Everyone must review**.

Status Reviewers field

The people designated to review and approve team member status updates for activities in the selected WBS.

WBS Code Separator field

The character(s), such as a period, used to separate code fields. You may use one or two characters.

The separator is also the WBS code separator for new projects by default.

When Activity Progress Removed list

Determines how units and duration are handled if activity progress is removed.

Reset planned duration and units to remaining: Determines whether the application will recalculate planned unit spreads to match the remaining units.

Reset remaining duration and units to planned: Determines whether the application will recalculate remaining unit spreads to match the planned units.

When Updating Units or Costs field

Determines whether the application will add actual to remaining or subtract actual from at completion if activity progress is removed.

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Publication category

Enable Publication option

Determines whether the project is able to be published.

Last Published On field

The most recent publication date for the project data. This field displays no value for projects that have never been published.

Publication Priority field

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.

Summary category

Contains Summary Data option

Determines whether the project has been summarized. If the checkbox is marked, the project has been summarized.

Enable Summarization option

Determines whether a project will be summarized. If you select this option, the fields on the **Summarization** page are enabled. If this option is cleared, the project will not be summarized.

Last Summarized Date field

The date the project was last summarized. This is useful for assessing whether summary data for the project is current.

This field is blank for projects that have not been summarized or whose summary data has been deleted.

Summarize Resources/Roles by WBS option

Determines whether resource and role summaries should be created at WBS level for the project. If this option is selected, then P6 will create summary data for resources and roles to the level determined by **Summarize to WBS level**.

Summarize to WBS Level list

Determines the depth of the WBS hierarchy for which summary data will be calculated and stored in the database. Level 1 is the project level, therefore if you select to summarize to WBS level 3, summary data will be calculated at the project level and for all first- and second-level WBS elements of the project. If you want to be able to drill down to lower levels of the WBS hierarchy when viewing or reporting on summarized data, change this setting to a higher number.

Units category

Actual Labor Units field

The labor units expended on the project within the EPS.

Actual Nonlabor Units field

The number of nonlabor units that have been expended on the project within the EPS.

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Actual This Period Labor Units field

The number of labor units used during this financial period.

If period performance is stored, the calculation is **Actual Labor Units** minus the sum of the stored **Actual This Period Labor Units** fields for all previous periods.

If the period performance is not stored, **Actual This Period Labor Units** is the same as **Actual Labor Units**.

Actual This Period Nonlabor Units field

The nonlabor units used during this financial period.

If period performance is stored, the calculation is **Actual Nonlabor Units** minus the sum of the stored **Actual This Period Nonlabor Units** fields for all previous periods.

If the period performance is not stored, **Actual This Period Nonlabor Units** is the same as **Actual Nonlabor Units**.

At Completion Labor Units field

The sum of the actual plus remaining units for all labor resources assigned to the project.

It is the same as the planned labor units if the activities in the project are not started, and the actual labor units once the activities are completed.

Calculated as **Actual Labor Units** plus **Remaining Labor Units**.

At Completion Nonlabor Units field

The nonlabor units at completion. It is the sum of the actual plus remaining units for all nonlabor resources assigned to the activities in the project.

It is the same as the planned nonlabor units if the activities are not started, and the actual nonlabor units once the activities are completed.

Calculated as **Actual Nonlabor Units** plus **Remaining Nonlabor Units**.

BL Project Labor Units field

The planned units for all labor resources assigned to the activity in the project baseline.

Calculated as **Baseline Actual Labor Units** plus **Baseline Remaining Labor Units**.

BL Project Nonlabor Units field

The units for all nonlabor resources assigned to the project in the project baseline.

Planned Labor Units field

The planned number of units for all labor resources assigned to activities in the project.

Planned Non Labor Units field

The planned units for all non labor resources assigned to the activities in the project.

Remaining Labor Units field

The remaining units for all labor resources assigned to the activities in the project.

The Remaining Labor Units reflect the work remaining to be done for the EPS. Before the project is started, the remaining units are the same as the planned units. After the project is completed, the remaining units are zero.

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Remaining Nonlabor Units field

The remaining units for all nonlabor resources assigned to the activities.

The remaining units reflect the work remaining to be done for the EPS.

Variance - Labor Units field

The difference between baseline labor units and at completion labor units.

Calculated as **Baseline Labor Units** minus **At Completion Labor Units**.

Variance - Nonlabor Units field

The difference the between baseline nonlabor units and the at completion nonlabor units.

Calculated as **Baseline Nonlabor Units** minus **At Completion Nonlabor Units**.

Project Codes category

This category contains project codes listed in alphabetical order.

Project User Defined category

This category contains project user defined columns listed in alphabetical order.

If a Project UDF cannot be calculated, for example because the data used in the formula is unavailable, the column the EPS page displays **Locked**.

Baseline Columns of the Activities Table

BL Project Match field

Indicates whether the activity is present in the baseline assigned as the project baseline.

BL1 Match field

Indicates whether the activity is present in the baseline the user currently has assigned as their primary baseline.

BL2 Match field

Indicates whether the activity is present in the baseline the user currently has assigned as their secondary baseline.

BL3 Match field

Indicates whether the activity is present in the baseline the user currently has assigned as their tertiary baseline.

Baseline Columns of the EPS Table

Baseline Data Date field

The last date of recorded progress for the project baseline. Status is up-to-date as of the data date.

Project Baseline field

The project baseline for the selected project. Published and Summarized data always uses the Project Baseline for Earned Value calculations.

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Bubble Chart Settings Area

The Bubble Chart settings area displays configurable options for viewing portfolio data in a bubble chart. Use the following fields to modify your bubble chart view.

Bubble Chart Settings:

X Axis list

Select a field value to determine information displayed through the X Axis.

Y Axis list

Select a field value to determine the information displayed through the Y Axis.

Group By list

Select a field value to determine your preferred option to group your data.

Bubble Size list

Determines the size of bubbles that display in a Bubble chart.

Color Theme list

Determines colors displayed on the chart. Select a predefined or user-defined color theme.

Horizontal Gridlines option

Determines whether to show or hide horizontal gridlines.

Vertical Gridlines option

Determines whether to show or hide vertical gridlines.

Show All Values on Axis option

Determines whether all values are displayed in the histogram. Select this option to include all values on the X-axis and not just values with data.

Budget Columns of the Activities Table

Current Budget field

The current budget for the project or WBS. This data is available for WBS and Project rows only.

Calculated as **Original Budget** plus the sum of the approved budget changes from the budget log.

Distributed Current Budget field

The sum of all budgets that were assigned to control accounts during baseline planning. These budgets are allocated for work and planning packages. This data is available for WBS and Project rows only.

Calculated as the sum of the **Current Budget** values from one level lower. This value does not aggregate.

Original Budget field

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The estimate of the total amount you require for the selected project or WPS, including all contributed funds. This data is available for WBS and Project rows only.

Unallocated Budget field

The difference between the total current and distributed current budget. This data is available for WBS and Project rows only.

Calculated as **Total Current Budget** minus **Distributed Current Budget**.

Budget Columns of the EPS Table

Annual Discount Rate field

The interest rate associated with the cost of an investment from your commercial bank or another funding source.

Valid values are 0 to 100. This rate is used to calculate **Total Spending Plan (Present Value)** and **Total Benefit Plan (Present Value)**.

For example, an annual growth rate of an investment such as 4.75% can be used as an annual discount rate. This rate is used when a future value is assumed and you are trying to find the required net present value.

Current Budget field

The current budget for the project or EPS.

Calculated as **Original Budget** plus the sum of the approved budget changes from the budget log.

Current Variance field

The difference between the current budget and the total spending plan. This value does not aggregate.

Calculated as **Current Budget** minus **Total Spending Plan**.

Distributed Current Budget field

The sum of all budgets that were assigned to control accounts during baseline planning. These budgets are allocated for work and planning packages.

Calculated as the sum of the **Current Budget** values from one level lower. This value does not aggregate.

Independent ETC Labor Units field

The user-entered estimate to complete total labor.

Independent ETC Total Cost field

The user-entered estimate to complete total cost.

Net Present Value field

The difference between the present value (PV) of the future cash flows from an investment and its investment cost.

Present value of the expected cash flows is computed by discounting them at the required rate of return or discount rate. Positive net present value (NPV) is an indicator of projects that should be pursued.

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Calculated as **Total Benefit Plan (Present Value)** minus **Total Spending Plan (Present Value)**.

Original Budget field

The estimate of the total amount you require for the selected project or EPS, including all contributed funds.

Payback Period field

An estimate of the length of time that will transpire before net profits recover the initial and periodic costs of an investment to carry out the selected project.

It is calculated using projections depending on the timescale you select and the number of work days in a standard work week in the project calendar since the first time period in which a spending amount was entered for this project or the Project Start Date, whichever occurred earliest. Payback Period is calculated as the length of time that transpires before the cumulative value of income minus costs, usually negative when a project is just beginning, first exceeds zero.

Because it is based on cumulative values, it can be computed using the difference between present values (adjusted using the discount rate) or non-adjusted values for (Total Spending Plan) + Total Benefit Plan; the results will be the same. It is the point in time where the Spending Plan (PV) curve crosses the Benefit (PV) curve.

Proposed Budget field

The proposed budget for the project or EPS.

Calculated as **Original Budget** plus the sum of the approved and pending budgets from the budget log.

Return on Investment field

A calculation of the expected return or benefit over and above the investment costs of a project or portfolio expressed as a percentage.

Calculated as the **Net Present Value** divided by the **Total Spending Plan (Present Value)**.

For example, a project is expected to cost 1.0 million dollars with a total benefit of 1.2 million dollars. Its Net Present Value is $200,000. The Return on Investment is 20%.

Total Funding field

The total amount contributed to the project from funding sources.

Unallocated Budget field

The difference between the total current and distributed current budget.

Calculated as **Total Current Budget** minus **Distributed Current Budget**.

Cost Columns of the EPS Table

Actual Expense Cost field

The actual cost for all project expenses associated with the project within the EPS.

Actual Labor Cost field

The actual cost for all labor resources assigned to the projects within the EPS.

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Actual Material Cost field

The actual units for all material resources assigned to the project within the EPS.

Actual Nonlabor Cost field

The actual cost for all nonlabor resources assigned to the project within the EPS.

Actual This Period Labor Cost field

The labor costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Labor Cost** minus the sum of the stored **Actual This Period Labor Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Labor Cost** is the same as **Actual Labor Cost**.

Actual This Period Material Cost field

The material costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Material Cost** minus the sum of the stored **Actual This Period Material Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Material Cost** is the same as **Actual Material Cost**.

Actual This Period Nonlabor Cost field

The nonlabor costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Nonlabor Cost** minus the sum of the stored **Actual This Period Nonlabor Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Nonlabor Cost** is the same as **Actual Nonlabor Cost**.

Actual Total Cost field

The actual total cost incurred on the project as of the project data date.

Calculated as **Actual Labor Costs** plus **Actual Nonlabor Costs** plus **Actual Material Costs** plus **Actual Expense Costs**.

At Completion Expense Cost field

The sum of the actual plus remaining cost for all project expenses associated with the cost account.

Calculated as **Actual Expense Cost** plus **Remaining Expense Cost**.

At Completion Labor Cost field

The sum of the actual plus remaining costs for all labor resources assigned to the activities in the project.

If the activities are not started, this equals the planned labor costs. Once the activities are complete, this equals the actual labor costs.

Calculated as **Actual Labor Cost** plus **Remaining Labor Cost**.

At Completion Material Cost field

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The material cost at completion. It is the sum of the actual plus remaining costs for all material resources assigned to all activities in the project.

It is the same as the planned material costs if the activities are not started, and the actual material costs once the activities are completed.

Calculated as **Actual Material Cost** plus **Remaining Material Cost**.

At Completion Nonlabor Cost field

The nonlabor cost at completion. It is the sum of the actual plus remaining costs for all nonlabor resources assigned to the activities in the project.

It is the same as the planned nonlabor costs if the activities are not started, and the actual nonlabor costs once the activities are completed.

Calculated as **Actual Nonlabor Cost** plus **Remaining Nonlabor Cost**.

At Completion Total Cost field

The estimated cost at completion for the activities in the project.

Calculated as the **Actual Total Cost** plus the **ETC** (estimate-to-complete) cost. The method for computing ETC depends on the Earned Value technique selected for the activity's WBS.

BL Project Expense Cost field

The planned cost for all expenses associated with the project in the project baseline.

BL Project Labor Cost field

The cost for all labor resources assigned to the project in the project baseline.

BL Project Material Cost field

The planned cost for all material resources assigned to the project in the project baseline.

BL Project Nonlabor Cost field

The cost for all nonlabor resources assigned to the project in the project baseline.

BL Project Total Cost field

The total cost for the project in the project baseline.

Calculated as **BL Project Labor Cost** plus **BL Project Nonlabor Cost** plus **BL Project Material Cost** plus **BL Project Expense Cost**.

Planned Expense Cost field

The planned total cost of all expenses associated with the project or EPS.

Planned Labor Cost field

The planned costs for all labor resources assigned to activities in the project.

Planned Material Cost field

The planned cost for all expenses associated with the project or EPS.

Planned Non Labor Cost field

The planned costs for all non labor expenses associated with the project or EPS.

Planned Total Cost field

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The planned cost for all expenses associated with the project or EPS.

Remaining Expense Cost field

The remaining costs for all project expenses associated with the activities in the EPS.

Remaining Labor Cost field

The remaining costs for all labor resources assigned to the activities in the EPS.

The remaining cost reflects the cost remaining for the EPS.

Remaining Material Cost field

The remaining material costs for all project expenses associated with the activities in the EPS.

Remaining Nonlabor Cost field

The remaining nonlabor costs for all project expenses associated with the activities in the EPS.

Remaining Total Cost field

The remaining total cost for the project, including labor resources, nonlabor resources, and project expenses.

Calculated as **Remaining Labor Costs** plus **Remaining Nonlabor Costs** plus **Remaining Expense Costs**.

Variance - Expense Cost field

The difference between project baseline expense cost and the at completion expense cost.

Calculated as **Project Baseline Expense Cost** minus **At Completion Expense Cost**.

Variance - Labor Cost field

The difference between the project baseline labor cost and the at completion labor cost.

Calculated as **BL Labor Cost** minus **At Completion Labor Cost**.

Variance - Material Cost field

The difference between the project baseline planned material cost and the at completion material cost.

Calculated as **Project Baseline Planned Material Cost** minus **At Completion Material Cost**.

Variance - Nonlabor Cost field

The difference between the project baseline nonlabor cost and at completion nonlabor cost.

Calculated as **BL Nonlabor Cost** minus **At Completion Nonlabor Cost**.

Variance - Total Cost field

The difference between the project baseline total cost and at completion total cost.

Calculated as **BL Total Cost** minus **At Completion Total Cost**.

Costs Columns of the Activity Table

Actual Expense Cost field

The actual cost for all project expenses associated with the activity.

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Actual Labor Cost field

The actual costs for all labor resources assigned to the activity.

If no resources are assigned, calculated as the **Actual Labor Units** multiplied by **Project Default Price** divided by **Time**.

Actual Material Cost field

The actual cost for all material resources assigned to the activity.

Actual Nonlabor Cost field

The actual costs for all nonlabor resources assigned to the activity.

If no resources are assigned, calculated as the **Activity Actual Nonlabor Units** multiplied by **Project Default Price** divided by **Time**.

Actual This Period Labor Cost field

The labor costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Labor Cost** minus the sum of the stored **Actual This Period Labor Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Labor Cost** is the same as **Actual Labor Cost**.

Actual This Period Material Cost field

The material costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Material Cost** minus the sum of the stored **Actual This Period Material Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Material Cost** is the same as **Actual Material Cost**.

Actual This Period Nonlabor Cost field

The nonlabor costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Nonlabor Cost** minus the sum of the stored **Actual This Period Nonlabor Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Nonlabor Cost** is the same as **Actual Nonlabor Cost**.

Actual Total Cost field

The actual total cost incurred for the activity as of the project data date.

Calculated as **Actual Labor Cost** plus **Actual Nonlabor Cost** plus **Actual Material Cost** plus **Actual Expense Cost.**

At Completion Expense Cost field

The sum of the actual and remaining costs for all expenses associated with the activity.

Calculated as **Actual Expense Cost** plus **Remaining Expense** cost.

At Completion Labor Cost field

The sum of the actual and remaining costs for all labor resources assigned to the activity.

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If the activity is not started, this equals the planned labor costs. If the activity is completed, this equals the actual labor costs.

Calculated as **Actual Labor Cost** plus **Remaining Labor Cost**.

At Completion Material Cost field

The material cost at completion. It is the sum of the actual and remaining costs for all material resources assigned to the activity.

It is the same as the planned material costs if the activity is not started, and the actual material costs once the activity is completed.

Calculated as **Actual Material Cost** plus **Remaining Material Cost**.

At Completion Nonlabor Cost field

The nonlabor cost at completion. The sum of the actual and remaining costs for all nonlabor resources assigned to the activity.

It is the same as the planned nonlabor costs if the activity is not started, and the actual nonlabor costs once the activity is completed.

Calculated as **Actual Nonlabor Cost** plus **Remaining Nonlabor Cost**.

At Completion Total Cost field

The estimated cost at completion for the activity.

Calculated as the **Actual Total Cost** plus the **ETC** (estimate-to-complete) cost. The method for computing ETC depends on the Earned Value technique selected for the activity's WBS.

BL Project Actual Expense Cost field

The actual cost for all project expenses associated with the activity in the project baseline.

BL Project Actual Labor Cost field

The actual cost for all labor resources associated with the activity in the project baseline.

BL Project Actual Material Cost field

The actual cost for all material resources associated with the activity in the project baseline.

BL Project Actual Nonlabor Cost field

The actual cost for all nonlabor resources associated with the activity in the project baseline.

BL Project Actual Total Cost field

The actual cost for all project expenses, labor, non-labor, and material resources associated with the activity in the project baseline.

BL Project Expense Cost field

The planned cost for all project expenses associated with the activity in the project baseline.

BL Project Labor Cost field

The cost for all labor resources assigned to the activity in the project baseline.

BL Project Material Cost field

The planned cost for all material resources assigned to the activity in the project baseline.

BL Project Nonlabor Cost field

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The cost for all nonlabor resources assigned to the activity in the project baseline.

BL Project Total Cost field

The total cost for the activity in the project baseline.

Calculated as **BL Project Labor Cost** plus **BL Project Nonlabor Cost** plus **BL Project Material Cost** plus **BL Project Expense Cost**.

BL1 Actual Expense Cost field

The actual cost for all project expenses associated with the activity in the primary baseline.

BL1 Actual Labor Cost field

The actual cost for all labor resources associated with the activity in the primary baseline.

BL1 Actual Material Cost field

The actual cost for all material resources associated with the activity in the primary baseline.

BL1 Actual Nonlabor Cost field

The actual cost for all nonlabor resources associated with the activity in the primary baseline.

BL1 Actual Total Cost field

The actual cost for all project expenses, labor, non-labor, and material resources associated with the activity in the primary baseline.

BL1 Expense Cost field

The planned cost for all project expenses associated with the activity in the primary baseline.

BL1 Labor Cost field

The cost for all labor resources assigned to the activity in the primary baseline.

BL1 Material Cost field

The planned cost for all material resources assigned to the activity in the primary baseline.

BL1 Nonlabor Cost field

The cost for all nonlabor resources assigned to the activity in the primary baseline.

BL1 Total Cost field

The total cost for the activity in the primary baseline.

Planned Expense Cost field

The planned total cost of all project expenses associated with the activity.

Planned Labor Cost field

The planned costs for all labor resources assigned to the activity.

If no resources are assigned, calculated as **Activity Planned Labor Units** multiplied by **Project Default Price/Unit** divided by **Time**.

Planned Material Cost field

The planned cost for all material resources assigned to the activity.

Planned Nonlabor Cost field

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The planned costs for all nonlabor resources assigned to the activity.

If no resources are assigned, calculated as **Activity Planned Nonlabor Units** multiplied by **Project Default Price** divided by **Time**.

Planned Total Cost field

The planned total cost for the activity, including labor resources, nonlabor resources, material resources, and project expenses.

Calculated as **Planned Labor Cost** plus **Planned Nonlabor Cost** plus **Planned Material Cost** plus **Planned Expense Cost**.

Remaining Expense Cost field

The remaining costs for all project expenses associated with the activity.

Remaining Labor Cost field

The remaining costs for all labor resources assigned to the activity.

If no resources are assigned, calculated as the **Activity Remaining Labor Units** multiplied by **Project Default Price** divided by **Time**.

Remaining Material Cost field

The sum of all material resource remaining costs.

Remaining Nonlabor Cost field

The remaining costs for all nonlabor resources assigned to the activity.

If no resources are assigned, calculated as **Activity Remaining Nonlabor Units** multiplied by **Project Default Price** divided by **Time**.

Remaining Total Cost field

The remaining total cost for the activity, including labor resources, nonlabor resources, material resources, and project expenses.

Calculated as **Remaining Labor Costs** plus **Remaining Nonlabor Costs** plus **Remaining Material Costs** plus **Remaining Expense Costs**.

Variance BL Project - Expense Cost field

The difference between the baseline project expense cost and the at completion expense cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL Project Expense Cost** minus **At Completion Expense Cost**.

Variance BL Project - Labor Cost field

The difference between the baseline planned labor cost and at completion labor cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Planned Labor Cost** minus **At Completion Labor Cost**.

Variance BL Project - Material Cost field

The difference between baseline material cost and at completion material cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

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Calculated as **BL Project Material Cost** minus **At Completion Material Cost**.

Variance BL Project - Nonlabor Cost field

The difference between the baseline planned nonlabor cost and at completion nonlabor cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Planned Nonlabor Cost** minus **At Completion Nonlabor Cost**.

Variance BL Project - Total Cost field

The difference between the baseline planned total cost and the at completion total cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Planned Total Cost** minus **At Completion Total Cost**.

Variance BL1 - Expense Cost field

The difference between the primary baseline expense cost and the at completion expense cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Primary Baseline Expense Cost** minus **At Completion Expense Cost**.

Variance BL1 - Labor Cost field

The difference between primary baseline labor cost and the at completion labor cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Labor Cost** minus **At Completion Labor Cost**.

Variance BL1 - Material Cost field

The difference between the baseline planned material cost and the at completion material cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Material Cost** minus **At Completion Material Cost**.

Variance BL1 - Nonlabor Cost field

The difference between the primary baseline nonlabor cost and the at completion nonlabor cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Nonlabor Cost** minus **At Completion Nonlabor Cost**.

Variance BL1 - Total Cost field

The difference between the primary baseline total cost and the at completion total cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Total Cost** minus **At Completion Total Cost**.

Costs Columns of the Assignments Table

Actual Cost field

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The actual non-overtime plus overtime cost for the resource assignment on the activity.

Calculated as **Actual Regular Cost** plus **Actual Overtime Cost**.

Actual Overtime Cost field

The actual overtime cost for the resource assignment on the activity.

Calculated as **Actual Overtime Units** multiplied by **Cost per Time** multiplied by **Overtime Factor**.

Actual Regular Cost field

The actual non-overtime cost for the resource assignment on the activity.

Calculated as **Actual Regular Units** multiplied by **Cost per Time**.

Actual This Period Cost field

The labor, nonlabor, and material costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Cost** minus the sum of the stored **Actual This Period Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Cost** is the same as **Actual Cost**.

At Completion Cost field

The sum of the actual costs plus remaining costs for the resource assignment on the activity.

Calculated as **Actual Costs** plus **Remaining Costs**.

Planned Cost field

The planned cost of work required for the assignment to be completed.

Calculated as **Planned Units** multiplied by **Price per Time**.

Remaining Cost field

The remaining cost for the resource assignment on the activity.

Calculated as **Remaining Units** multiplied by **Cost/Time**.

Staffed Remaining Cost field

The remaining cost for resource assignments that have a filled role.

Unstaffed Remaining Cost field

The remaining cost for resource assignments that do not have a filled role.

Dates Columns of the Activity Table

Actual Finish field

The date on which the activity was completed.

Actual Start field

The date work on the activity began.

If resources (labor, nonlabor, or material) or roles are assigned to the activity, the actual start date is the earliest among all the resource or role assignments.

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Anticipated Finish field

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.

If there are no children elements, the anticipated finish is the finish date listed for the item in the table.

The Anticipated Finish date is used as the Finish date if there are no activities assigned to the project or WBS.

Anticipated Start field

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.

If there are no children elements, the anticipated start is the start date listed for the item in the table.

The Anticipated Start date is used as the Start date if there are no activities assigned to the project or WBS.

BL Project Actual Finish field

The actual finish date of the activity in the project baseline.

BL Project Actual Start field

The actual start date of the activity in the project baseline.

BL Project Early Finish field

The early finish date of the activity in the project baseline.

BL Project Early Start field

The early start date of the activity in the project baseline.

BL Project Finish field

The current latest finish date of all activities in the project baseline.

BL Project Late Finish field

The late finish date of the activity in the project baseline.

BL Project Late Start field

The late start date of the activity in the project baseline.

BL Project Start field

The current earliest start date of all activities in the project baseline.

BL1 Actual Finish field

The actual finish date of the activity in the primary baseline.

BL1 Actual Start field

The actual start date of the activity in the primary baseline.

BL1 Early Finish field

The early finish date of the activity in the primary baseline.

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BL1 Early Start field

The early start date of the activity in the primary baseline.

BL1 Finish field

The current finish date of the activity in the primary baseline. Set to the activity planned finish date while the activity is not started, the remaining finish date while the activity is in progress, and the actual finish date once the activity is completed.

BL1 Late Finish field

The late finish date of the activity in the primary baseline.

BL1 Late Start field

The late start date of the activity in the primary baseline.

BL1 Start field

The current start date of the activity in the primary baseline.

This is set to the planned start date.

BL2 Finish field

The current finish date of the activity in the secondary baseline. Set to the activity planned finish date while the activity is not started, the remaining finish date while the activity is in progress, and the actual finish date once the activity is completed.

BL2 Start field

The current start date of the activity in the secondary baseline.

This is set to the planned start date.

BL3 Finish field

The current finish date of the activity in the tertiary baseline. Set to the activity planned finish date while the activity is not started, the remaining finish date while the activity is in progress, and the actual finish date once the activity is completed.

BL3 Start field

The current start date of the activity in the tertiary baseline.

This is set to the planned start date.

Early Finish field

The earliest possible date the activity can finish. Early finish dates can change as the project progresses and changes are made to the project management plan.

This date is calculated based on network logic, schedule constraints, and resource availability. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.

Early Start field

The earliest possible date the remaining work for the activity can begin.

This date is calculated based on network logic, schedule constraints, and resource availability. Early start dates can change as the project progresses and as changes are made to the project management plan. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.

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Expected Finish field

The date on which the primary resource, the person who assigns the expected finish date, anticipates work on the activity will finish.

Only the primary resource can edit this field if the activity has started.

External Early Start field

The early start date for imported activities with external relationships to projects that do not exist in the database.

This field is the relationship early finish date when the lost relationship type is Finish to Start or Start to Start. When the relationship type is Start to Finish or Finish to Finish, this field is calculated as **Relationship Early Finish Date** minus **Remaining Duration** of the successor.

External Late Finish field

The late finish date for imported activities with external relationships to projects that do not exist in the database.

This field is the relationship early finish date when the lost relationship type is Finish to Start or Finish to Finish. When the relationship type is Start to Start or Start to Finish, this field is calculated as **Relationship Late Start** plus **Remaining Duration** of the predecessor.

Finish field

The current finish date for the activity. For not started activities, this is the planned finish date. For in-progress activities, this is the remaining early finish date. For completed activities, this is the actual finish date.

Forecast Finish Date field

The planned finish date of a project or WBS based on a what-if scenario designed to simulate project performance and outcomes and to plan resource allocation.

Forecast Start Date field

The planned start date of a project or WBS based on a what-if scenario designed to simulate project performance and outcomes and to plan resource allocation.

Late Finish field

The latest possible date the activity can finish without delaying the project finish date.

This date is calculated based on activity relationships, schedule constraints, and resource availability. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.

Late Start field

The latest possible date the remaining work for the activity can begin without delaying the project finish date.

This date is calculated based on activity relationships, schedule constraints, and resource availability. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.

Planned Finish field

The date the activity is scheduled to finish if the activity has not started.

This date is calculated by the project scheduler but can be updated manually by the project manager. This date is not changed by the project scheduler after the activity has started.

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Planned Start field

The date the activity is scheduled to start.

This date the activity is scheduled to begin is calculated by the project scheduler but can be updated manually by the project manager. This date is not changed by the project scheduler after the activity has started.

Post Response Pessimistic Finish field

The Post Response Pessimistic Finish date calculated by Oracle Primavera Cloud during quantitative risk analysis.

Post Response Pessimistic Start field

The Post Response Pessimistic Start date calculated by Oracle Primavera Cloud during quantitative risk analysis.

Pre Response Pessimistic Finish field

The Pre Response Pessimistic Finish date calculated by Oracle Primavera Cloud during quantitative risk analysis.

Pre Response Pessimistic Start field

The Pre Response Pessimistic Start date calculated by Oracle Primavera Cloud during quantitative risk analysis.

Primary Constraint Date field

The constraint date for the activity, if the activity has a constraint. The activity's constraint type determines whether this is a start date or finish date.

Activity constraints are used by the project scheduler.

Remaining Early Finish field

The date the remaining work for the activity is scheduled to finish.

If this activity is not started, this date is the planned finish. This date can be updated manually by the user, but it is overwritten when you schedule the project.

Remaining Early Start field

The date the remaining work for the activity is scheduled to begin.

This date can be updated manually by the user. Before the activity is started, this date is the same as the planned start.

Remaining Late Finish field

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, this field is blank.

Remaining Late Start field

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 relationship, schedule constraints, and resource availability.

Resume Date field

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The date when a suspended task or activity is resumed.

The resume date must be later than the suspend date and earlier than the actual finish date.

The suspend/resume period behaves like non-work time on the activity calendar.

Secondary Constraint Date field

The date for the activity's secondary constraint, if the activity has a secondary constraint.

The activity's constraint type determines whether this is a start date or finish date. This field is only available if a primary constraint has been selected.

Start field

The current start date of the activity. For started activities, this is the actual start date. For not started activities, this is the planned start date until the project is scheduled. When scheduled, the start date field is set to the remaining early start date.

Suspend Date field

The date work has temporarily stopped on a given activity.

For example, an event might force an activity to be interrupted or resource constraints might put an activity on hold.

The suspend date must be later than the actual start date, which the activity must have. Activity progress can resume when the Resume Date is set. The suspend/resume period behaves like non-work time on the activity calendar or resource calendar for task and resource dependent activities.

Dates Columns of the Assignments Table

Activity Finish field

The finish date of the activity to which the assignment belongs. This is the planned finish if the activity has not started, the remaining finish if the activity is in progress, or the actual finish if the activity has completed.

Activity Start field

The start date of the activity to which the assignment belongs. This is the planned start date if the activity has not started, or the actual start date if the activity is in progress or completed.

Actual Finish field

The date on which the assignment was completed.

If the activity does not already have an **Actual Finish** date, the last assignment to set an **Actual Finish** date triggers the activity to have an **Actual Finish** date equal to the latest assignment's **Actual Finish** date when the assignment is saved.

Actual Start field

If the activity has started, the date work began on the activity.

If the activity does not have already have an **Actual Start** date, the first assignment to set an **Actual Start** date triggers the activity to have an **Actual Start** date equal to the activity's **Planned Start** date when the assignment is saved.

Finish field

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The finish date for the assignment. For not started activities, this is the **Planned Finish** date. For in progress activities, this is the **Remaining Finish** date. For completed activities, this is the **Actual Finish** date.

Planned Finish field

The date the assignment is scheduled to be finished.

This date is calculated by the project scheduler but can be updated manually by the project manager. This date is not changed by the project scheduler after the activity has started. This is the finish date that P6 Team Member Web timesheet users follow and that schedule variance is measured against.

Planned Start field

The date work on the assignment is scheduled to begin.

This date is calculated by the project scheduler but can be updated manually by the project manager. This date is not changed by the project scheduler after the activity has been started. This is the start date that P6 Team Member Web timesheet users follow and schedule variance is measured against.

Remaining Early Finish field

The date the assignment is scheduled to be finished.

This date can be updated manually by the user. Before the activity is started, this date is the same as the **Planned Finish** date.

Remaining Early Start field

The date the assignment is scheduled to begin.

This date can be updated manually by the user. Before the activity is started, this date is the same as the **Planned Start** date.

Remaining Late Finish field

The latest possible date the assignment must be finished to not delay 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, this field is blank.

Remaining Late Start field

The latest possible date the assignment must begin to not delay the project finish date.

This date is calculated by the project scheduler based on activity relationships, schedule constraints, and resource availability.

Start field

The start date for the assignment on the activity. For a not started assignment, this is the activity's **Planned Start** date. For a started assignment, this is the **Actual Start** date.

Dates Columns of the EPS Table

Actual Finish field

The date on which the project is complete.

This field is empty until all activities in the project have an actual finish date.

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Actual Start field

If the work has started, the date work on the project began. For an EPS, the actual start is the earliest actual start among all projects within it.

Anticipated Finish field

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.

If there are no children elements, the anticipated finish is the finish date listed for the item in the table.

The Anticipated Finish date is used as the Finish date if there are no activities assigned to the project or WBS.

Anticipated Start field

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.

If there are no children elements, the anticipated start is the start date listed for the item in the table.

The Anticipated Start date is used as the Start date if there are no activities assigned to the project or WBS.

BL Finish field

The current latest finish date of all activities in the project baseline.

BL Start field

The current earliest start date of all activities in the project baseline.

Data Date field

The progress point, or "as-of date", for activities in the project. Project status is up-to-date as of the data date. You can set the data date when you schedule the project or apply actuals, or you can set it manually. Set it manually if resources manually update activity progress and you do not plan to reschedule the project or apply actuals.

Finish field

The current finish date of the project. For not started and in-progress projects, this is the latest early finish date from all activities in the project. For completed projects, this is the latest actual finish date derived from all activities. For projects with no activities, the Finish Date is equal to the Anticipated Finish date if one is defined. For projects with no activities and no Anticipated Finish date, the Finish Date field is blank.

Forecast Finish Date field

The end date used for synchronizing resource dates on the Planning page.

Forecast Start Date field

The start date used for synchronizing resource dates on the Planning page.

Last Apply Actuals Date field

The last date actuals were applied to this project.

Last Leveled Date field

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The most recent date when the project was leveled.

Last Scheduled Date field

The most recent date when the project was scheduled.

Must Finish By field

The optional date constraint you can specify for the project end date.

Planned Finish Date field

The latest planned finish date of all projects or templates within the EPS.

Planned Start Date field

The date the project is scheduled to start.

Post-Response Pessimistic Finish Date field

The Post-Response Pessimistic Finish Date calculated in Oracle Primavera Cloud during quantitative risk analysis.

Post-Response Pessimistic Start Date field

The Post-Response Pessimistic Start Date calculated in Oracle Primavera Cloud during quantitative risk analysis.

Pre-Response Pessimistic Finish Date field

The Pre-Response Pessimistic Finish Date calculated in Oracle Primavera Cloud during quantitative risk analysis.

Pre-Response Pessimistic Start Date field

The Pre-Response Pessimistic Start Date calculated in Oracle Primavera Cloud during quantitative risk analysis.

Project Forecast Start field

The planned start date of the project based on a what-if scenario designed to simulate project performance and outcomes.

Project Planned Start field

The expected start date for the project.

Scheduled Finish field

The calculated latest early finish date, which is based on the schedule most recently generated for the project.

Start field

The current start date of the project. For a not started project, this is the project's planned start date. For a project that has started or is complete, this is the project's actual start date. For projects with no activities, the start date is equal to the anticipated start date if one is defined; if no anticipated start is defined, then the start date is equal to the project's planned start date.

Default Settings for Views

When a new view is created, the default settings depend on the type of the view.

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Projects Page, Activities View

Columns	
Fixed columns	ID, Name
Selected columns	Start, Finish, Remaining Duration, Activity % Complete, Primary Resource
Filtering	
Filters applied	None
Grouping	
Group By	WBS Sort Order: Hierarchy Grouping Interval: All
Show field title	Not selected
Show field rollups	Not selected
Hide if empty	Not selected
Sorting	
Sorting applied	None
Bars	
Summary Bar	Label: Activity Count Bar Type: Current Height: Medium Show Progress: Selected Show Critical: Selected Show Expanded Summary Bars: Selected
Current Bar	Label: Activity Name Bar Type: Current Height: Medium Show Progress: Selected Show Critical: Selected
Gantt	
Data date line	Not selected
Relationship Lines	Not selected
Sight Lines	Selected
Non-work time shading	Selected
Timescale	Month/Week
Activity Network	
One field per line	Selected
Field One	Start
Field Two	Finish
Field Three	None
Field Four	None

Projects Page, EPS View

Columns	
Fixed columns	ID, Name
Selected columns	Start, Data Date, Project Owner, Responsible Manager, Location
Filtering	
Filters applied	None
Grouping	
Group By	EPS Sort Order: Hierarchy Grouping Interval: All
Show field title	Not selected
Show field rollups	Not selected
Hide if empty	Not selected
Sorting	

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Sorting applied	None
Bars	
Summary Bar	Label: Project Name Bar Type: Current Height: Medium Show Progress: Selected Show Expanded Summary Bars: Not selected
Current Bar	Label: Project Name Bar Type: Current Height: Medium Show Progress: Selected
Gantt	
Sight Lines	Selected
Non-work time shading	Selected
Timescale	Year/Quarter

Projects Page, Assignments View and Resources Page, Assignments View

Columns	
Fixed columns	Activity ID, Activity Name
Selected columns	Planned Units, Actual Units , Remaining Units
Filtering	
Filters applied	None
Grouping	
Group By	Resource Sort Order: Hierarchy Grouping Interval: All
Show field title	Selected
Show field rollups	Not selected
Hide if empty	Selected
Sorting	
Sorting applied	None
Bars	
Summary Bar	Label: Resource Name Bar Type: Current Height: Medium Show Progress: Selected Show Expanded Summary Bars: Not selected
Current Bar	Label: Resource Name Bar Type: Current Height: Medium Show Progress: Selected
Gantt	
Sight Lines	Selected
Non-work time shading	Selected
Timescale	Month/Week
Spreadsheet	
Selected Columns	Remaining Early Units
Start Date	Earliest Project Date
Finish Date	Latest Project Date
Calculate average for units and costs	Selected Divide values by: 1
Timescale	Month/Week

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Document Search Criteria

When creating document search criteria, you can use a combination of keywords, operators, and wildcard characters to define your query. Try to be as specific as possible when coming up with search criteria.

Use the following guidelines and examples to create effective document search criteria.

Keywords

Keywords are terms and phrases, including a combination of letters, numbers, and special characters on which you can base your search.

Example: To search for documents that contain the keyword "budget", type *budget*.

You can also use quotation marks when defining keywords. Quotation marks enable you to create phrases; the application will search for the entire phrase.

Example: To search for documents that contain the entire phrase "annual budget", type "annual budget" (with the quotation marks).

Operators

Operators enable you to establish associations, or relationships, between keywords and phrases. Logical operators, such as Boolean operators (AND, OR, required operator +, and prohibit operator -), place conditions on the search criteria and identify which keywords you want to include or exclude from your search.

> **Note**
>
> Type Boolean operators in capital letters.

The *AND* operator returns all documents that contain both keywords specified on each side of the operator.

The required operator (+) returns all documents that contain the keyword listed after the operator.

Example: To search for documents containing both the keywords, "budget", and "analysis", enter *budget AND analysis* in the search bar. Or, you could enter *+budget+analysis*.

The *OR* operator returns all documents that contain either or both of the keywords specified on each side of the operator.

Example: To search for documents containing the keyword "budget", "analysis", or both, enter *budget OR analysis*.

The prohibited operator (-) excludes the keyword listed after the operator from appearing in the search results.

Example: To search for documents that contain the keyword "budget", but not the phrase "fiscal year", enter *budget-"fiscal year"*.

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Wildcard Characters

Wildcard characters are special characters you can use to represent unknown characters in your search. You can use one of the following two wildcard characters in your search:

- the question mark (?) represents a single alphanumeric character
- the asterisk (*) represents a string of characters and is entered by default in the search string

Example: To search for the keywords "test" or "text" enter *te?t*. To search for the keywords "test," "tests," or "tester," type *test*.

> **Note**
>
> You cannot use a wildcard character as the first character in your search criteria.

Document Security (Reference)

Only the user who added the project document can modify its security policy.

Three document security policies are available:

- **Personal** - A personal document can be viewed, modified, or deleted only by the user who added it to the project.
  - Although it is associated with a project, a personal policy document does not appear in the list of project documents for any team member except the document owner.
- **Shared** - A shared document can be viewed, modified, or deleted by any project team member.
- **Read-Only** - A read-only document can be viewed by any project team member, but team members cannot modify or delete it.

Durations Columns of the Activity Table

Actual Duration field

The total working time from the activity **Actual Start** date to the **Actual Finish** date for completed activities, or the total working time from the **Actual Start** date to the data date for in-progress activities.

The actual working time is computed using the activity's calendar.

At Completion Duration field

The total working time from the activity's current start date to the current finish date.

The current start date is the planned start date until the activity is started, and then it is the actual start date. The current finish date is the activity planned finish date while the activity is not started, the remaining finish date while the activity is in progress, and the actual finish date once the activity is completed. The total working time is calculated using the activity's calendar.

BL Project Actual Duration field

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The actual duration of the activity in the project baseline. The duration is the total working time from the activity actual start date to the actual finish date.

The total working time is calculated using the activity's calendar.

BL Project Duration field

The duration of the activity in the project baseline. The duration is the total working time from the activity current start date to the current finish date.

Calculated as **Actual Duration** plus **Remaining Duration**.

The total working time is calculated using the activity's calendar.

BL Project Free Float field

The free float of the activity in the project baseline.

BL Project Remaining Duration field

The remaining duration of the activity in the project baseline.

BL Project Total Float field

The total float of the activity in the project baseline.

BL1 Actual Duration field

The actual duration of the activity in the primary baseline. The duration is the total working time from the activity actual start date to the actual finish date.

The total working time is calculated using the activity's calendar.

BL1 Duration field

The duration of the activity in the primary baseline. The duration is the total working time from the activity current start date to the current finish date.

Calculated as **Actual Duration** plus **Remaining Duration**.

The total working time is calculated using the activity's calendar.

BL1 Free Float field

The free float of the activity in the primary baseline.

BL1 Remaining Duration field

The remaining duration of the activity in the primary baseline.

BL1 Total Float field

The total float of the activity in the primary baseline.

Free Float field

The amount of time the activity can be delayed before delaying the start date of any successor activity.

Maximum Duration field

The longest duration for the activity. Required for three point estimation if quantitative risk analysis will be performed in Oracle Primavera Cloud.

Minimum Duration field

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The shortest duration for the activity. Required for three point estimation if quantitative risk analysis will be performed in Oracle Primavera Cloud.

Most Likely Duration field

The most likely duration for the activity. Required for three point estimation if quantitative risk analysis will be performed in Oracle Primavera Cloud.

Planned Duration field

The expected amount of time required to complete an activity.

The planned working time is calculated using the activity's calendar. The duration is measured from the activity's planned start date to its planned finish date.

Remaining Duration field

The total working time from the activity remaining start date to the remaining finish date.

The remaining working time is calculated using the activity's calendar. Before the activity is started, the remaining duration is the same as the planned duration. After the activity is completed the remaining duration is zero.

Remaining Float field

The amount of time remaining by which the activity can be delayed before delaying the project finish date.

Calculated as **Late Finish** minus **Remaining Finish**. If the remaining finish is the same as the early finish (in general, when the activity is not started), then the remaining float is the same as the total float.

Total Float field

The amount of time the activity can be delayed before risking a delay to the project finish date.

A float of zero hours indicates that the activity cannot be delayed at all and a negative float indicates that the project is already behind schedule. In a complex schedule, negative total float on some activities might not cause a delay to the project finish date.

Calculated as **Late Start** minus **Early Start** or as **Late Finish** minus **Early Finish**.

Variance BL Project - Duration field

The duration between the activity's baseline duration and the at completion duration. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Planned Duration** minus **At Completion Duration**.

Variance BL Project - Finish Date field

The duration between the current project finish date in the baseline project finish date. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Finish** minus **BL Project Finish**.

Variance BL Project - Start Date field

The duration between the current project start date and the baseline start date. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

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Calculated as **Start** minus **BL Project Start**.

Variance BL1 - Duration field

The duration between the activity's primary baseline duration and the at completion duration. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Duration** minus **At Completion Duration**.

Variance BL1 - Finish Date field

The duration between the current project finish date and the primary baseline finish date. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Finish** minus **BL1 Finish**.

Variance BL1 - Start Date field

The duration between the current project start date and the primary baseline start date. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Start** minus **BL1 Start**.

Durations Columns of the Assignments Table

Actual Duration field

The total working time from the assignment actual start date to the actual finish date for completed assignments, or the total working time from the actual start date to the data date for in-progress assignments.

At Completion Duration field

The total working time from the assignment's current start date to the current finish date.

The current start date is the planned start date until the assignment is started, and then it is the actual start date. The current finish date is the planned finish date while the assignment is not started, the remaining finish date while the assignment is in progress, and the actual finish date once the assignment is completed. The total working time is calculated using the activity's calendar.

Planned Duration field

The resource's total working time on the activity from the **Planned Start** date to the **Planned Finish** date.

Planned Lag field

The planned time lag between the activity's planned start date and the resource's planned start date on the activity.

If the resource is planned to start work when the activity is planned to start, the planned lag is zero.

Remaining Duration field

The remaining working time for the resource assignment on the activity, from the resource's remaining start date to the remaining finish date.

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The remaining working time is calculated using the calendar determined by the activity type. Resource dependent activities use the resource's calendar; other activity types use the activity's calendar. Before the activity is started, the **Remaining Duration** is the same as the **Planned Duration**. After the activity is completed, the remaining duration is zero.

Remaining Lag field

The time lag between the activity's remaining start date and the resource's remaining start date on the activity.

If the resource's remaining work starts on the activity's remaining start date, the lag is zero. Before the activity is started, the remaining lag is the same as the planned lag.

Durations Columns of the EPS Table

Actual Duration field

The current total working time for the project, template, or EPS. For completed items, this field displays the total working time from the actual start date to the actual finish date. For items that are in-progress, this field displays the total working time from the actual start date to the data date.

At Completion Duration field

The total working time from the project current start date to the current finish date.

The current start date is the planned start date until the project is started, and then it is the actual start date. The current finish date is the planned finish date while the project is not started, the remaining finish date while the project is in progress, and the actual finish date once the project is completed.

BL Duration field

The planned duration for the activity in the primary baseline. Planned duration is the total working time from the activity current start date to the current finish date.

Calculated as **Actual Duration** plus **Remaining Duration**.

The total working time is calculated using the activity's calendar.

Planned Duration field

The total working time from the project planned start date to the planned finish date.

Remaining Duration field

The total working time from the project remaining start date to the remaining finish date.

Total Float field

The amount of time the activity can be delayed before risking a delay to the project finish date.

A float of zero hours indicates that the activity cannot be delayed at all and a negative float indicates that the project is already behind schedule. In a complex schedule, negative total float on some activities might not cause a delay to the project finish date.

Calculated as **Late Start** minus **Early Start** or as **Late Finish** minus **Early Finish**.

Variance - Duration field

The duration between the activity's baseline duration and the at complete duration.

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Calculated as **Baseline Duration** minus **At Completion Duration**.

Variance - Finish Date field

The duration between the finish date in the current project and the baseline finish date.

Calculated as **Finish Date** minus **Baseline Finish Date**.

Variance - Start Date field

The duration between the start date in the current project and the baseline start date.

Calculated as **Start Date** minus **Baseline Start Date**.

Earned Value Columns of the Activity Table

Accounting Variance field

The difference between the planned value of work scheduled and the actual cost of work performed.

A negative value indicates that actual costs have exceeded the scheduled costs.

Calculated as **Planned Value** minus **Actual Cost**.

Accounting Variance - Labor Units field

The difference between the planned value of work scheduled and the actual work performed.

A negative value indicates that actual costs have exceeded the scheduled costs.

Calculated as **Planned Value Labor Units** minus **Actual Units**.

Budget At Completion field

The planned total cost through activity completion.

Calculated as **Planned Labor Cost** plus **Planned Nonlabor Cost** plus **Planned Expense Cost** and **Planned Material Cost**.

Budget At Completion - Labor Units field

The planned total cost for labor units through activity completion.

Cost Performance Index field

A measure of the value of work accomplished as a percentage of the actual costs of an activity or WBS.

Cost Performance Index (CPI) indicates whether you have spent money over the budget to date.

On the My Preferences page, you can set performance thresholds for CPI calculated values to determine whether you need to take corrective action.

Calculated as **Earned Value Cost** divided by **Actual Cost**. A value less than 1 indicates that the actual cost has exceeded the planned value.

Cost Performance Index - Labor Units field

A measure of work efficiency on a WBS or activity.

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Calculated as **Earned Value Labor Units** divided by **Actual Labor Units**. A value less than 1 indicates that the actual units have exceeded the planned units.

Cost Variance field

A measure of cost performance on an activity or WBS.

A negative value indicates that the actual cost has exceeded the planned value.

Calculated as **Earned Value** minus **Actual Cost**.

Cost Variance - Labor Units field

The difference between the earned value labor units and the actual value labor units.

A negative value indicates that actual costs have exceeded the value of work performed.

Calculated as **Earned Value Labor Units** minus **Actual Labor Units**.

Cost Variance Index field

The ratio of the cost variance and the earned value of work performed on the WBS or activity.

Calculated as **Cost Variance** divided by **Earned Value**.

Cost Variance Index - Labor Units field

The ratio of the cost variance labor units and the earned value labor units for the activity or WBS.

Calculated as **Cost Variance Labor Units** divided by **Earned Value Labor Units**.

Earned Value Cost field

The portion of the baseline total cost of the activity that is actually completed as of the project data date.

Budget at completion is calculated from the baseline.

Calculated as **Budget At Completion** multiplied by **Performance Percent Complete**. The method for computing performance percent complete depends on the Earned Value technique selected for the activity's WBS.

Earned Value Labor Units field

The portion of baseline labor units that are complete as of the project data date.

Activity Level:

Calculated as **BL Project Labor Units** or **BL1 Labor Units**, depending on project settings, multiplied by **Performance % Complete**.

WBS Level:

Calculated as **BL Project Labor Units** multiplied by **Performance % Complete**.

Estimate At Completion - Labor Units field

The estimated labor units at completion of the activity.

Calculated as **Actual Labor Units** plus **Estimate to Complete Labor Units**. The Estimate to Complete Labor Units calculation is based off of the earned value setting for the WBS.

Estimate At Completion Cost field

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The expected total cost of a schedule activity, a work breakdown structure component, or the project when the defined scope of work will be completed.

Calculated as **Actual Cost** plus **Estimate to Complete Cost**. The method for calculating estimate to complete depends on the earned value technique selected for the activity's WBS.

Estimate To Complete field

The estimated cost to complete the activity or WBS.

Calculated as either the **Remaining Total Cost** for the activity, or as **Performance Factor** multiplied by (**Budget At Completion** minus **Earned Value**), depending on the earned-value technique selected for the activity's WBS. Budget at completion is calculated from the project baseline.

Estimate To Complete Labor Units field

The estimated quantity to complete the activity or WBS.

Calculated as either the **Remaining Total Units** for the activity or as **Performance Factor** multiplied by (**BL Labor Units** minus **Earned Value**) depending on the earned-value technique selected for the activity's WBS.

Estimated Time To Complete field

The projected duration required to complete the remaining scope of work, work based on labor efficiency to date, assuming current performance trends continue. This estimate helps you to assess labor efficiency, forecast resource availability, and identify potential over-run of work due to declining productivity.

Calculated as **Original Duration** divided by **Schedule Performance Index (SPI)**.

Estimated Time To Complete Units field

The projected labor effort needed to complete the remaining scope of work, based on labor efficiency to date. This estimate helps you to assess labor efficiency, forecast resource availability, and identify potential over-run of work due to declining productivity.

Calculated as **Planned Labor Units** divided by **Schedule Performance Index - Labor Units**.

Independent ETC Labor Units field

The user-entered estimate to complete total labor for the WBS or project.

Independent ETC Total Cost field

The user-entered estimate to complete total cost for the WBS or project.

Planned Value Cost field

The portion of the baseline total cost of the activity that is scheduled to be completed as of the project data date.

Also known as the work scheduled to be performed for the activity. The schedule percent complete specifies how much of the activity's project baseline duration has been completed so far. Budget at completion is calculated from the baseline.

Calculated as **Budget At Completion** multiplied by **Schedule Percent Complete**.

Planned Value Labor Units field

The product of the budget at completion and the schedule percent complete.

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The schedule percent complete specifies how much of the activity's baseline duration has been completed so far. Budget at completion is calculated from the baseline.

Calculated as **Budget At Completion** multiplied by **Schedule Percent Complete**.

Schedule Performance Index field

A measure of the work accomplished as a percentage of the work scheduled.

Schedule Performance Index indicates whether you are meeting earned and planned values within your schedule. A value less than 1 indicates that less work was performed than was scheduled.

Calculated as **Earned Value** divided by **Planned Value**.

Schedule Performance Index - Labor Units field

The ratio of the earned value of labor units to the planned value of labor units.

Calculated as **Earned Value Labor Units** divided by **Planned Value Labor Units**.

Schedule Variance field

The measure of schedule performance on a project.

A negative value indicates that less work was actually performed than was scheduled.

Calculated as **Earned Value** minus **Planned Value**.

Schedule Variance - Labor Units field

The difference between the earned value of work performed and the work scheduled to be performed.

Calculated as **Earned Value Labor Units** minus **Planned Value Labor Units**.

Schedule Variance Index field

The ratio of the schedule variance and the work scheduled to be performed.

Calculated as **Schedule Variance** divided by **Planned Value**.

Schedule Variance Index - Labor Units field

The ratio of schedule variance labor units and the planned value labor units.

Calculated as **Schedule Variance Labor Units** divided by **Planned Value Labor Units**.

To Complete Performance Index field

The ratio of the remaining work to the remaining funds.

Calculated as (**Budget at Completion** minus **Earned Value**) divided by (**Estimate at Completion** minus **Actual Units** or **Cost**).

Variance At Completion field

The difference between the baseline total cost and the current estimate of total cost. A negative value indicates an estimated cost overrun.

Budget At Completion is calculated from the current baseline.

Calculated as **Budget At Completion** minus **Estimate At Completion**.

Variance At Completion - Labor Units field

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The difference between the baseline planned total labor units and the estimate at completion labor units.

Calculated as **Project Baseline Planned Total Labor Units** minus **Estimate At Completion Labor Units**.

Earned Value Columns of the EPS Table

> **Note**
>
> Some values on this page are calculated from published or summarized data. The publisher and summarizer services always use the project baseline for earned value calculations, regardless of the *Baseline to be used for earned value calculations* setting in each project's preferences. Therefore earned value data viewed on this page might differ from the same data viewed in areas of the software using live data. For further information see: Summarized, Published, and Live Data Usage in P6*Summarized, Published, and Live Data Usage in P6*

Accounting Variance field

The difference between the planned value of work scheduled and the actual cost of work performed.

A negative value indicates that actual costs have exceeded the scheduled costs.

Calculated as **Planned Value** minus **Actual Cost**.

Accounting Variance - Labor Units field

The difference between the planned value of work scheduled and the actual work performed.

A negative value indicates that actual costs have exceeded the scheduled costs.

Calculated as **Planned Value Labor Units** minus **Actual Units**.

Actual Cost field

The actual total cost incurred on the project as of the project data date.

Calculated as **Actual Labor Costs** plus **Actual Nonlabor Costs** plus **Actual Material Costs** plus **Actual Expense Costs**.

Budget At Completion field

The planned total cost through project completion.

Calculated as **Planned Labor Cost** plus **Planned Nonlabor Cost** plus **Planned Expense Cost** plus **Planned Material Cost**.

Budget At Completion - Labor Units field

The planned total cost for labor units through project completion.

Cost Performance Index (CPI) field

A measure of the value of work accomplished as a percentage of the actual costs of a project.

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Cost Performance Index (CPI) indicates whether you have spent money over the budget to date.

On the My Preferences page, you can set performance thresholds for CPI calculated values to determine whether you need to take corrective action.

Calculated as **Earned Value Cost** divided by **Actual Cost**. A value less than 1 indicates that the actual cost has exceeded the planned value.

Cost Performance Index - Labor Units field

A measure of work efficiency on a project.

Calculated as **Earned Value Labor Units** divided by **Actual Labor Units**. A value less than 1 indicates that the actual units have exceeded the planned units.

Cost Variance field

A measure of cost performance on a project.

A negative value indicates that the actual cost has exceeded the planned value.

Calculated as **Earned Value** minus **Actual Cost**.

Cost Variance - Labor Units field

The difference between the earned value labor units and the actual value labor units.

A negative value indicates that actual costs have exceeded the value of work performed.

Calculated as **Earned Value Labor Units** minus **Actual Labor Units**.

Cost Variance Index field

The ratio of the cost variance and the earned value of work performed on the project.

Calculated as **Cost Variance** divided by **Earned Value**.

Cost Variance Index - Labor Units field

The ratio of the cost variance labor units and the earned value labor units for the project.

Calculated as **Cost Variance Labor Units** divided by **Earned Value Labor Units**.

Earned Value Cost field

The portion of the baseline total cost of the project that is actually completed as of the project data date. Also known as Budgeted Cost of Work Performed (BCWP), Budgeted Quantity of Work Performed (BQWP), or simply Earned Value (EV).

Budget at completion is calculated from the baseline.

Calculated as **Budget At Completion** multiplied by **Performance Percent Complete**. The method for computing performance percent complete depends on the Earned Value technique selected for the activity's WBS.

Earned Value Labor Units field

The portion of baseline labor units that are complete as of the project data date.

Calculated as **BL Project Labor Units** multiplied by **Performance % Complete**.

Estimate At Completion - Labor Units field

The estimated labor units at completion.

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Calculated as **Actual Labor Units** plus **Estimate to Complete Labor Units**. Estimate to complete labor units is calculated based on of the Earned Value setting on the EPS.

Estimate At Completion Cost field

The expected total cost of a schedule activity, a work breakdown structure component, or the project when the defined scope of work will be completed.

Calculated as **Actual Cost** plus **Estimate to Complete Cost**. The method for calculating estimate to complete depends on the earned value technique selected for the activity's WBS.

Estimate To Complete field

The estimated cost to complete the project.

Calculated as **Remaining Total Cost** for the activity or the **Performance Factor** multiplied by (**Budget At Completion** minus **Earned Value**), depending on the Earned Value technique selected for the activity's WBS (calculated from the baseline).

Estimate To Complete Labor Units field

The estimated quantity to complete the project.

Calculated as either the **Remaining Total Units** for the activity, or as **Performance Factor** multiplied by (**Baseline Planned Labor Units** minus **Planned Quantity of Work Performed**), depending on the Earned Value Technique selected for the activity's WBS.

Estimated Time To Complete field

The projected duration required to complete the remaining scope of work, work based on labor efficiency to date, assuming current performance trends continue. This estimate helps you to assess labor efficiency, forecast resource availability, and identify potential over-run of work due to declining productivity.

Calculated as **Original Duration** divided by **Schedule Performance Index (SPI)**.

Estimated Time To Complete Units field

The projected labor effort needed to complete the remaining scope of work, based on labor efficiency to date. This estimate helps you to assess labor efficiency, forecast resource availability, and identify potential over-run of work due to declining productivity.

Calculated as **Planned Labor Units** divided by **Schedule Performance Index - Labor Units**.

Planned Value Cost field

The portion of the baseline total cost of the project that is scheduled to be completed as of the project data date. This is also known as Budgeted Cost of Work Scheduled (BCWS).

Calculated as **Schedule % Complete** multiplied by **Budget at Completion**.

Planned Value Labor Units field

The portion of baseline labor units that are scheduled to be complete as of the project data date.

The schedule percent complete specifies how much of the activity's baseline duration has been completed so far. The baseline labor units are taken from the current baseline.

Calculated as **Baseline Labor Units** multiplied by **Schedule Percent Complete**.

Schedule Performance Index field

A measure of the work accomplished as a percentage of the work scheduled.

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Schedule Performance Index indicates whether you are meeting earned and planned values within your schedule. A value less than 1 indicates that less work was performed than was scheduled.

Calculated as **Earned Value** divided by **Planned Value**.

Schedule Performance Index - Labor Units field

The ratio of the earned value of labor units to the planned value of labor units.

Calculated as **Earned Value Labor Units** divided by **Planned Value Labor Units**.

Schedule Variance field

The measure of schedule performance on a project.

A negative value indicates that less work was actually performed than was scheduled.

Calculated as **Earned Value** minus **Planned Value**.

Schedule Variance - Labor Units field

The difference between the earned value of work performed and the work scheduled to be performed.

Calculated as **Earned Value Labor Units** minus **Planned Value Labor Units**.

Schedule Variance Index field

The ratio of schedule variance labor units and the planned value labor units.

Calculated as **Schedule Variance Labor Units** divided by **Planned Value Labor Units**.

Schedule Variance Index - Labor Units field

The ratio of schedule variance labor units and the planned value labor units.

Calculated as **Schedule Variance Labor Units** divided by **Planned Value Labor Units**.

To Complete Performance Index field

The ratio of the remaining work to the remaining funds.

Calculated as (**Budget at Completion** minus **Earned Value**) divided by (**Estimate at Completion** minus **Actual Units** or **Cost**).

Variance At Completion field

The difference between the baseline total cost and the current estimate of total cost. A negative value indicates an estimated cost overrun.

Budget At Completion is calculated from the current baseline.

Calculated as **Budget At Completion** minus **Estimate At Completion**.

Variance At Completion - Labor Units field

The difference between the baseline planned total labor units and the estimate at completion labor units.

Calculated as **Project Baseline Planned Total Labor Units** minus **Estimate At Completion Labor Units**.

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Future Period Planning: Deleting, Copying, Pasting, and Replacing Data

Copying and pasting a project, WBS, or activity

When you copy and paste a project, WBS or activity which has had future period data entered against it, the future period values are copied to the new project, WBS or activity if you choose to copy Resource and Role Assignments in the Copy Activity Options dialog box.

Deleting future period values

When you delete a future period value, P6 considers the value to be a zero.

Deleting a project, WBS, activity, or assignment

When you delete a project, WBS, activity, or assignment, the associated future period values are also deleted. This cannot be undone.

Deleting a resource or role with manual future period values

When you delete a resource or role, you can choose to preserve the associated assignment data, including future period data, by merging the data with another resource.

Assigning a new resource to an activity that already has a resource assignment with manually entered future period values

When you add an assignment to an activity that already has an existing assignment, P6 respects your My Preferences settings for assignment staffing.

When you add a resource assignment to an activity that already has an existing resource assignment with manual future period values, P6 considers your selection for the **When assigning a resource to an existing activity assignment** preference in the Resources section of the Global tab of My Preferences. If you select **Always use the new resource's Units/Time and Overtime factor** the future period values of the existing resource assignment may be respread across future periods if the new resource you assign has a different Uints/Time. If you select **Always use current assignment's Units/Time and Overtime factor** the units you that have been entered into future periods for the existing resource assignment are not changed for the existing assignment.

When you add a resource assignment to an activity that already has an existing role assignment (or vice versa), P6 considers your selection for the **When a resource and role share an activity assignment** preference in the Resources section of the Global tab of My Preferences. If you select **Always use resource's Price/Unit** the future period values for the existing role assignment may be respread across future periods based on the values of the new resource. If you select **Always use role's Price/Unit** the future period values for the existing resource assignment may be respread across future periods based on the new role's values.

Removing or replacing a resource assignment with manually entered future period values

When you replace the resource or role assigned to an activity future period values entered for that assignment are preserved with the new assignment.

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When you remove a resource or role assignment that has future period values, the future period values are deleted. If other assignments with future period values exist on the same activity, those assignments' future period values may change based on the activity type and your user preference settings for assignment staffing in the Resources section of the Global tab of My Preferences.

Future Period Planning: Entering and Editing Data

Entering differing values for Planned Units and Remaining Early Units for the same time period.

For assignments on activities that have not started, if the **Link planned and at completion for not started activities** option is selected on the Calculations tab of the project preferences, the total values of the Planned Units and Remaining Early Units for the assignment will always be equal. If this setting is not marked, you can enter different values for the same future period in the 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 Planned Units and Remaining Early Units fields.

Entering data by financial period.

You can enter data by financial period for the range of financial period dates defined in the Financial Periods calendar assigned to the project. For example, if you have defined weekly financial periods from January 1st, 2015 to December 31st, 2016, you can enter data in weekly financial periods beginning on or after January 1st, 2015, and ending on or before December 31st, 2016. You should set the **Timescale** to Financial Period in the Usage Options dialog box to enter data by financial periods.

Overallocating resources and roles when entering future period values.

If the resource or role on the assignment has valid worktime for a time period, you can enter more units for the time period than the resource or role's Units/Time would allow, thus overallocating the resource or role.

Representing planned work for time periods where no work is planned.

You can leave a time period blank (or enter zero) to represent a period when no work is planned. P6 treats a blank value the same as a zero value.

Entering future period values for an assignment that already has an assigned resource curve.

You can enter future period data when a resource assignment already has a resource curve assigned. In this case, P6 will change the resource curve to Manual. To simplify the process of 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 plan, then make any necessary modifications to the future period values.

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> **Note**
>
> When you apply a resource curve to an assignment and then modify future period values for that assignment, the resource curve is removed from the assignment when the assignment is designated as a Manual curve. If you then reapply a resource curve, the data you entered into future periods will be lost and future period data will be spread according to the resource curve you select.

Entering zero units.

If you enter zero into the first future periods of an assignment, P6 will interpret the zero units as lag and reduce the duration of the assignment. If zero is entered into the first Planned Units future periods, P6 will decrease the Planned Units and Planned Duration of the assignment. If zero is entered into the first Remaining Early Units future period, P6 will decrease the Remaining Early Units and Remaining Duration of the assignment.

For assignments to not started activities, if the **Link planned and at completion for not started activities** project option is not selected and you enter zero into the first future periods for an assignment, lag is added to both the Planned Start and Remaining Start dates. This occurs regardless of the field in which you enter the leading zero (Planned Units or Remaining Units) because the Planned Start and Remaining Start dates must be the same for activities that are not started.

If you enter a zero value in between non-zero values for an assignment, P6 considers the zero value to be part of the planned resource distribution.

When you enter zero in the last future periods for an assignment,P6 does not store the zero value as part of the manual curve. These zero values will not add to the duration of the assignment.

Entering negative values.

Negative values are valid when planning future periods if the total Planned Units or Remainign Early Units value for the assignment is negative.

Future Period Planning and Suspend and Resume dates.

You can enter or edit values in future periods between Suspend and Resume dates if the suspended 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 future periods which are scheduled to be suspended. Units which have been entered against a resource assignment between the suspend and resume dates of an activity are moved to the resume date when the project is scheduled.

Changing the view timescale after entering future period data.

If you change the view timescale to a smaller unit after entering future period data (for example, changing the timescale from showing months to showing weeks) future period values will be spread linearly across the smaller timescale periods. If you change the view timescale to a larger unit, future period data is aggregated into the larger timescale periods.

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Future Period Planning: Importing and Exporting Data

Importing and exporting edited future period values using Primavera XML files.

When you export a project to a Primavera XML file, edited future period values are exported to the file.

When you import a Primavera XML file to a project, all edited future period values that exist in the project remain intact.

Importing and exporting edited future period values using Microsoft Project XML format.

You can import and export edited future period values to Microsoft Project XML 2007 and Microsoft Project XML 2010 format.

When you export a project to Microsoft Project XML format:

- Edited future period values are imported to Microsoft Project as a contoured curve.
- For assignments to activities with suspend and resume dates, Microsoft Project honors the suspend and resume dates and spreads the planned unit values accordingly in the Baseline Work field. However, because P6's actual units and remaining early units are combined into Microsoft Project's Actual Work field, Microsoft Project only honors actual and remaining values up to the suspend date, if the resume date is after the data date or up to the data date if both the suspend and resume dates are before the data date.
- WBS Summary activities with edited future period values on assignments are exported to Microsoft Project. However, the edited 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.

Suspend and resume dates in Microsoft Project are not honored when imported to P6. When you import an Microsoft Project file that has an activity with suspend and resume dates, the suspend time is imported as a zero value on the assignment for the periods between the suspend and resume dates.

Future Period Planning: Miscellaneous Information

Leveling Resources when assignments have edited future period values.

When a project with edited future period values is leveled, assignments with edited future period values are leveled in the same ways as assignments without edited future period values.

Future Period Planning: Settings

Timescale setting of the Usage Options dialog box.

When you select a smaller timescale interval from the timescale you used to enter future period values, the values you entered in the future periods are spread linearly over the smaller future periods based on the assigned calendar.

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When you select a larger timescale interval, the values you originally entered in the smaller timescale intervals are aggregated into the larger intervals.

If you subsequently change the timescale back to the setting you used when you entered values in future periods, the values appear as you originally entered them.

> **Note**
>
> The timescale value does not affect the number of units you can assign to a future period. For example, if your timescale is set to Day, P6 will not prevent you from entering more than 24 hours.

Future period planning only supports a single line in the timescale.

- If you select **Year/Month**, the timescale will show monthly intervals.
- If you select **Year/Quarter**, the timescale will show quarterly intervals.
- If you select **Quarter/Month**, the timescale will show monthly intervals, labeled with the quarter number, month and year.
- If you select **Month/Week**, the timescale will show weekly intervals.
- If you select **Week/Day**, the timescale will show daily intervals.
- If you select **Financial Period**, the timescale will show financial periods.

Linking planned and at completion.

If the project option **Link planned and at completion for not started activities** is selected and you enter a value in the planned units field for a not started activity, P6 populates the remaining early units field with the same value; the reverse is also true. If this option is not selected, you can enter different values for the same future period in the planned units and remaining early units fields; in this case, the total values for each field are calculated independently for the assignment.

Activity settings.

Duration types: You can enter period values on 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.

Activity types: You can enter period values on assignments to any type of activity except milestone activities.

Future Period Planning: Troubleshooting

Symptom: Future periods are uneditable.

When a future period is not eligible for editing, the spreadsheet cell is gray.

Spreadsheet cells are uneditable when any of the following is 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.

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- 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, P6 determines if there is valid worktime based on the activity calendar. For resource assignments to resource dependent activities, P6 determines if there is valid worktime based on the resource calendar.
- For activities that have not started yet, the date of the timescale interval is prior to the Planned Start date (for the Planned Units field) or the Remaining Early Start date (for the Remaining Early Units field) of the activity.
- The activity associated with the assignment has an Actual Finish date (Remaining Early Units only).
- For activities that are in progress, the date of the timescale interval is prior to the Data Date (Remaining Early Units only).
- The activity associated with the assignment is a milestone activity.
- When the timescale is set to Financial Period, no financial period is defined for the time period or the first time period is not within the range of defined financial period dates.
- The **Calculate average for units and costs** option is selected and **Divide values by** does not have a value of 1 in the Usage Options dialog box.
- You have not been assigned the Edit Future Periods project privilege.

Symptom: Inability to enter differing values for Planned Units and Remaining Units.

For assignments on activities that have not started, if the **Link planned and at completion for not started activities** option is selected on the Calculations tab of the Project Preferences, the total values of the Planned Units and Remaining Early Units for the assignment will always be equal. If this setting is not marked, you can enter different values for the same future period in the 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 Planned Units and Remaining Early Units fields.

Symptom: Future period values have changed since they were entered.

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 time period. For example, remaining unit data for an assignment might change when you apply actuals, or if you change the timescale in your view.

Changes to some project, activity or assignment data can cause future period values to be respread and, in some cases, recalculated. When you enter data in future periods, the values are stored in the database. When you modify activity or assignment information which causes the values to respread across future periods, the values stored in the database do not change; only the spread of those values across future periods changes. When you modify activity or assignment data which causes the values to be recalculated, the values you originally entered are recalculated according to the distribution and stored in the database; the original values are lost. If you change the financial period calendar assigned to a project, activity or assignment data might be recalculated.

Changing values in the following fields at the assignment level might respread future period values:

- Remaining Early Start or Finish (Fixed Duration & Units activities only).
- Planned Duration (Fixed Duration & Units activities only).
- Actual, Planned, or Remaining Units.

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- Budgeted or Planned Units/Time.
- Planned or Remaining Lag.
- Curve (if you assign a resource curve to an assignment on which you have edited future period values.).

Changing values in the following fields at the activity level might respread future period values:

- Actual, Planned, or Remaining Units
- Start Date
- Planned or Remaining Lag
- Suspend and Resume Date
- Activity Type (future period values can be respread if the activity Finish Date changes as a result of the the activity type being changed from Task Dependent to Resource Dependent, or from Resource Dependent to Task Dependent).
- Activity Calendar (if you edit the existing calendar or change the assigned calendar)
- Duration % (Fixed Duration & Units activities only)

Performing the following actions might respread future period values:

- Changing the Project Planned Start or Finish (Fixed Duration & Units activities only), if you then reschedule the project.
- Adding a new assignment (depending on the options you have selected for When adding or removing multiple resource assignments on activities: and When assigning a resource to an existing activity assignment: on the Global tab of the My Preferences page in the Resources section).
- Updating activity progress (see Future Period Planning: Updating Projects).

Changing values in the following fields affecting Assignments might recalculate future period values:

- Planned or Remaining Finish (Fixed Duration & Units/Time activities only)
- Planned or Remaining Duration (Fixed Duration & Units/Time activities only)

Changing values in the following fields affecting Activities might recalculate future period values:

- Planned or Remaining Finish (Fixed Duration & Units/Time activities only)
- Planned or Remaining Duration (Fixed Duration & Units/Time activities only)
- Activity Status
- Duration Type
- Duration % (Fixed Duration & Units/Time activities only)

Future Period Planning: Updating Projects

Editing future periods on activities which are in progress or complete.

You can edit future period values for planned units on 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.

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For remaining early units, you can only edit values for future periods on an assignment that fall after the data date. You cannot edit remaining early units values for period before the data date when an activity is in progress, even if you entered the values before work began on the activity. Once an activity has an actual finish date, you can not edit remaining unit values.

> **Note**
>
> When work on an activity is not proceeding according to plan, you can reestimate the remaining work on the assignment and update the remaining units on the assignment without changing the original plan. This allows you to compare the original baseline plan with the work that actually occurred. If the project schedule has deviated significantly from the original plan and several activities need to be re-estimated, you can update the planned units for those assignments and make another baseline for the project, or update the existing baseline.

Using Apply Actuals for assignments with manual future period values.

P6 will consider the data you entered in future periods when applying actuals if **Auto Compute Actuals** is selected on the activity or for the resource assigned to the activity.

Updating progress for assignments with edited future period values.

Actuals are applied to edited values for future periods on assignments depending on the way you update activity progress.

If you update activity progress by modifying the remaining units or remaining early finish on the assignment, the actual units for the activity are updated using the budgeted unit distribution you specified when you apply actuals, if the project option **Recalculate actual units and cost when Duration % Complete changes** is selected.

If you update activity progress by modifying the actual units on the activity or assignment, edited future period budgeted and remaining unit values are not updated when you apply actuals.

Removing progress from an activity with edited future period values.

When you remove progress from an activity that has edited future period values on an associated assignment, P6 adheres to the setting for removing progress from activities in the preferences for the project.

If **Reset planned duration and units to remaining** is selected the edited future period planned unit values for the assignment are respread to match the remaining unit values.

If **Reset remaining duration and units to planned** is selected the edited future period remaining unit values for the assignment are respread to match the planned unit values.

Earned value.

P6 will consider the data you entered in future periods when calculating earned value.

General Columns of the Activity Table

Activity ID field

The unique identifier of the activity.

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In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Activity Leveling Priority list

Determines the priority of the activity when performing resource leveling.

Activity Owner field

The user responsible for the activity.

Activity Name field

The name of the activity.

The activity name does not have to be unique.

Activity Status list

Determines the status of the activity.

Valid values are **Not Started**, **In Progress**, and **Completed**.

Activity Type list

Determines how duration and schedule dates are calculated for an activity.

Task Dependent: Activities are scheduled using the activity's calendar rather than the calendars of the assigned resources. Choose task dependent when you want to control the duration of the activity yourself (that is, no resources are assigned), or when one or more resources assigned to the same activity can work according to the same calendar. For example, you might have an activity to cure concrete; you know how long the task takes and the addition of resources won't complete the task any earlier. You would designate this activity as task dependent.

Resource Dependent: Activities are scheduled using the calendars of the assigned resources. This type is used when several resources are assigned to the activity, but they might work separately. Choose resource dependent when you want to schedule each resource according to his/her own time schedule, or resource calendar, not the activity calendar. The assigned resource availability determines the start and finish dates of the activity. Typically, you use this type when multiple resources assigned to the same activity can work independently, or when availability can affect the activity's duration. For example, an activity that requires an Inspector might be delayed if that resource is assigned to multiple projects or is on vacation.

Level of Effort: Activities have a duration that is determined by its dependent activities and are typically administration type. Choose level of effort to indicate that the activity's duration depends on its predecessor and/or successor activities. A level of effort activity is usually one that is ongoing, such as clerical work, Change Management, or project management tasks. For example, site cleanup could be considered a level of effort activity; it occurs repeatedly and is dependent on the completion of a phase.

Start or Finish Milestone: Milestone activities are zero-duration and are used to mark significant project events. Choose start milestone or finish milestone to indicate that the activity marks the beginning or end of a major stage in the project. A primary resource or an activity owner, and expenses can be assigned to a milestone. In an office building addition project, examples of milestones might include Project Definition Complete, Structure Complete, or End Bidding Process.

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WBS Summary: Activities that are used to aggregate date, duration, and percent complete values for a group of activities that share a common WBS code level. Choose WBS Summary to indicate that the activity is a summary-level WBS activity. A WBS Summary activity represents a group of activities that share a common WBS level. The summary-level WBS activity enables roll-ups of dates for the activity group. The duration of a WBS Summary activity extends from the start of the earliest activity in a group to the finish of the latest activity. WBS codes control which activities are part of a WBS Summary activity; P6 incorporates any activities that share a component of the WBS Summary activity's WBS code into the WBS Summary activity. For example, all activities whose WBS codes begin with A (A.1, A.1.1, A.1.2, etc.) can be part of one WBS Summary activity whose WBS code is A. At a lower level, all activities whose WBS codes start with A.1 (A.1.1, A.1.2, etc.) can be part of a WBS Summary activity whose WBS code is A.1.

Added By field

The name of the user who added the activity to the project.

Added Date field

The date the activity was inserted into the project, showN in your timezone..

Auto Compute Actuals option

Determines whether the activity actual and remaining units, and start and finish dates for the resource are calculated automatically using the planned dates, planned units, and the activity's schedule percent complete.

If this option is selected, the actual/remaining units and actual dates are automatically updated when project actuals are applied. This assumes that all work by the resource proceeds according to plan.

This option is not available if the **Uses Timesheets** option is selected.

BL Project Activity Status field

The status of the activity in the project baseline.

BL1 Activity Status field

The status of the activity in the primary baseline.

Calendar field

The calendar assigned to the activity.

CBS field

The Primavera Unifier Cost Breakdown Sheet to which you want to link an activity, assignment or expense.

Cost Account IDs field

The identifying codes of the cost accounts assigned to the activity.

Cost Account Names field

The name(s) of the cost accounts assigned to the activity.

Critical option

Determines whether the activity is critical.

An activity is critical when its total float is below the critical duration specified for the project. Delaying critical activities will delay the finish date of the project.

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Duration Type list

Determines how remaining duration, units, and units/time are calculated when you update an activity that has resources assigned. The activity's duration type should correspond to the dominant factor, that is, the least flexible factor in the project: schedule, costs/work effort, or resource availability.

Fixed Units/Time: The resource units per time are constant when the activity duration or units are changed. Use this duration type when an activity has fixed resources with fixed productivity output per time period.

Fixed Duration & Units/Time: The activity duration is constant as the units or resource units per time are changed. Use this duration type when the activity must be completed within a fixed time period regardless of the resources assigned.

Fixed Units: The activity units are constant when the duration or resource units per time are changed. Use this duration type when the total amount of work is fixed, and increasing the resources can decrease the activity duration.

Fixed Duration & Units: The duration and units remain constant as the units/time are changed. Use this duration type when the activity must be completed within a fixed time period and the total amount of work is fixed.

Financial Period Calendar field

The name of the financial period calendar assigned to the project.

Last Modified By field

The name of the user who last modified the activity.

Last Modified Date field

The date the activity was last updated.

Location field

The geographical location.

Longest Path option

Determines critical activities based on the sequence of driving activities that determine the project end date.

Post Response Criticality Index field

Shows the percentage of time the activity in Oracle Primavera Cloud was on the critical path during quantitative post-response risk analysis.

Pre Response Criticality Index field

Shows the percentage of time the activity in Oracle Primavera Cloud was on the critical path during quantitative pre-response risk analysis.

Primary Constraint list

The primary constraint type for the selected activity.

Primary Resource field

The person primarily responsible for performing or overseeing work related to a specific activity.

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The first resource you assign to an activity is automatically identified as the activity's primary resource.

Project ID field

The unique identifying code for the project associated with the activity.

Project Name field

The name of the project associated with the activity.

Review Required option

Determines whether activity updates made in P6 Team Member interfaces require review.

Secondary Constraint field

The secondary constraint type for the selected activity.

This field is only available if a primary constraint has been selected.

Task Status - Completion field

Shows the completion status of the activity and the associated tasks.

Task Status - Dates field

Shows whether any of the tasks assigned to the activity has dates outside of the activity dates.

Task Status - Indicator field

Shows an alert if any tasks dates are outside the activity dates, all task assigned to an incomplete activity are completed, or any tasks assigned to a completed activity are incomplete.

Unread Comments field

The number of comments posted to the activity since you last reviewed the comments in the Discussion detail window.

Work Package ID field

The ID of the work package in Oracle Primavera Cloud.

Work Package Name field

The name of the work package in Oracle Primavera Cloud.

General Columns of the Assignments Table

Activity ID field

The unique identifying code for the activity assigned to the resource or role.

Activity Name field

The name of the activity assigned to the resource or role.

Activity Status field

The current condition of the activity.

Valid values are **Not Started**, **In Progress**, and **Completed**.

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Activity Type field

Determines how duration and schedule dates are calculated for an activity.

Task Dependent: Activities are scheduled using the activity's calendar rather than the calendars of the assigned resources. Choose task dependent when you want to control the duration of the activity yourself (that is, no resources are assigned), or when one or more resources assigned to the same activity can work according to the same calendar. For example, you might have an activity to cure concrete; you know how long the task takes and the addition of resources won't complete the task any earlier. You would designate this activity as task dependent.

Resource Dependent: Activities are scheduled using the calendars of the assigned resources. This type is used when several resources are assigned to the activity, but they might work separately. Choose resource dependent when you want to schedule each resource according to his/her own time schedule, or resource calendar, not the activity calendar. The assigned resource availability determines the start and finish dates of the activity. Typically, you use this type when multiple resources assigned to the same activity can work independently, or when availability can affect the activity's duration. For example, an activity that requires an Inspector might be delayed if that resource is assigned to multiple projects or is on vacation.

Level of Effort: Activities have a duration that is determined by its dependent activities and are typically administration type. Choose level of effort to indicate that the activity's duration depends on its predecessor and/or successor activities. A level of effort activity is usually one that is ongoing, such as clerical work, Change Management, or project management tasks. For example, site cleanup could be considered a level of effort activity; it occurs repeatedly and is dependent on the completion of a phase.

Start or Finish Milestone: Milestone activities are zero-duration and are used to mark significant project events. Choose start milestone or finish milestone to indicate that the activity marks the beginning or end of a major stage in the project. A primary resource or an activity owner, and expenses can be assigned to a milestone. In an office building addition project, examples of milestones might include Project Definition Complete, Structure Complete, or End Bidding Process.

WBS Summary: Activities that are used to aggregate date, duration, and percent complete values for a group of activities that share a common WBS code level. Choose WBS Summary to indicate that the activity is a summary-level WBS activity. A WBS Summary activity represents a group of activities that share a common WBS level. The summary-level WBS activity enables roll-ups of dates for the activity group. The duration of a WBS Summary activity extends from the start of the earliest activity in a group to the finish of the latest activity. WBS codes control which activities are part of a WBS Summary activity; P6 incorporates any activities that share a component of the WBS Summary activity's WBS code into the WBS Summary activity. For example, all activities whose WBS codes begin with A (A.1, A.1.1, A.1.2, etc.) can be part of one WBS Summary activity whose WBS code is A. At a lower level, all activities whose WBS codes start with A.1 (A.1.1, A.1.2, etc.) can be part of a WBS Summary activity whose WBS code is A.1.

Assigned By field

The user who assigned the resource to the assignment.

Assigned Date field

The date the task was assigned to you, your group, or your role.

Calculate Costs from Units option

Determines whether by default any new assignments for this resource will have its costs recalculated whenever any quantity changes occur.

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Calendar field

The name of the calendar selected for the resource.

CBS field

The Primavera Unifier Cost Breakdown Sheet to which you want to link an activity, assignment or expense.

Cost Account field

The cost account associated with the resource assignment.

Curve field

The resource's units and costs distributed over the duration of an activity.

A curve can only be assigned to activities that have a duration type of **Fixed Duration and Units** or **Fixed Duration and Units/Time**.

A manual curve type indicates that the assignment's future period resource distribution was manually entered in the **Resource Usage Spreadsheet** of P6 Professional. If you select a different curve type, the manually-entered distribution is deleted, and the units and costs for the assignment are redistributed according to the curve you select. Be sure this is the appropriate course of action before replacing a manual curve with another curve.

Drive Activity Dates option

Determines whether new resource/role assignments drive activity dates by default.

Duration Type list

Determines how remaining duration, units, and units/time are calculated when you update an activity that has resources assigned. The activity's duration type should correspond to the dominant factor, that is, the least flexible factor in the project: schedule, costs/work effort, or resource availability.

Fixed Units/Time: The resource units per time are constant when the activity duration or units are changed. Use this duration type when an activity has fixed resources with fixed productivity output per time period.

Fixed Duration & Units/Time: The activity duration is constant as the units or resource units per time are changed. Use this duration type when the activity must be completed within a fixed time period regardless of the resources assigned.

Fixed Units: The activity units are constant when the duration or resource units per time are changed. Use this duration type when the total amount of work is fixed, and increasing the resources can decrease the activity duration.

Fixed Duration & Units: The duration and units remain constant as the units/time are changed. Use this duration type when the activity must be completed within a fixed time period and the total amount of work is fixed.

Financial Period Calendar field

The name of the financial period calendar assigned to the project.

Overtime Factor field

The overtime factor used to compute the overtime price for the resource assignment on this activity.

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When the resource is assigned to the activity, the resource's overtime factor is copied to the assignment. The assignment overtime factor is refreshed from the resource value when resource prices are synchronized for the project.

Calculated as the rate in use multiplied by **Overtime Factor**.

Planned Units/Time field

The planned units per time at which the resource is to perform work on the activity.

For example, a person assigned full time would perform 8 hours of work per day. A department of five people might perform at 5 days per day.

Price/Unit field

The non-overtime price per time for the resource or role's work on this activity.

This price is used to compute costs for any activities to which the resource or role is assigned. When the resource or role is assigned to the activity, the relevant price is copied to the assignment based on the effective date of the price and the activity start date. The price is refreshed whenever resource and role prices are synchronized for the project.

Primary Resource field

The person primarily responsible for performing or overseeing work related to a specific assignment.

Proficiency field

The skill level of the resource. If you do not have appropriate privilege, you cannot access this field.

Project ID field

The unique identifying code for the project associated with the activity.

Project Name field

The name of the project associated with the activity.

Rate Source field

The value that indicates which price/unit will be used to calculate costs for the assignment, such as *Resource*, *Role*, and *Override*.

When a resource, and only a resource, is assigned to an activity assignment, the rate source will automatically equal *Resource*. When a role, and only a role, is assigned to an activity assignment, the rate source will automatically equal *Role*. When both a resource and role are assigned to the activity assignment, the rate source can be either *Resource* or *Role* determined by your rate source preference. In any case, the *Override* value allows you to specify a different value for Price/Unit.

The default rate source preference can be changed on the **My Preferences** page under **Resource Assignments**.

Rate Type list

Determines which of the five user-defined resource and role rate types will be used to calculate the cost for the assignment.

Remaining Units/Time field

The units per time required for the resource assignment to complete the activity.

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Resource Type list

The resource type. Valid values are:

Labor: Indicates that the selected resource performs labor, measured in units of time.

Nonlabor: Indicates that the selected resource does not perform labor, measured in units of time. Equipment is a nonlabor resource.

Material: Indicates that the resource has a unit of measure other than time. You can select a unit of measure for the material resource.

Search Criteria field

Indicates whether the assignment has any associated search criteria with a **Yes** or **No** link.

When search criteria have been specified, this field shows a **Yes** link that provides access to the stored resource request search criteria used to search for a qualified resource.

When you assign a resource using the *Request Resources* feature with your custom resource search criteria, the search criteria you specify is saved. A **Yes** link appears in the **Search Criteria** column beside the assignment, indicating search criteria is specified. This saved search criteria can be useful later if you ever need to modify the resource assignment and want to reuse the same criteria.

A **No** link appears when the assignment was made directly without any search criteria; however, you can click the **No** link to specify search criteria for the resource or role assignment.

WBS ID field

The unique identifier of the WBS for the activity.

WBS Name field

The name of the WBS element.

WBS Path field

A series of WBS codes that represent the position of the WBS within the project hierarchy.

For example, if you have a parent WBS named WBS1, a child named WBS2, and WBS2 has a child called WBS3, the WBS Path for WBS3 is WBS1.WBS2.WBS3.

General Columns of the EPS Table

Added By field

The name of the user who added the project to the EPS.

Checked Out By field

The name of the user who checked out the project.

If the project is not checked out, this field is blank.

Date Added field

The date and time the project was added to the EPS.

Date Checked Out field

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The date and time the user checked out the project. If the project is not checked out, this field is blank.

EPS ID field

An identifier that is unique to the EPS node.

EPS Name field

The name of the EPS.

Financial Period Calendar field

The name of the financial period calendar assigned to the project.

History Interval - Project or WBS list

Choose to store historical spread data by month, week, quarter, year, or financial period for project and WBS data.

History Level list

Determines the type of historical project data stored for use in Primavera Analytics.

None: Data is not stored for this project.

Project: Project-level data is stored.

WBS: Project-level and WBS data is stored.

Activity (Daily): Project-level, WBS, activity and resource assignment data is stored. Activity and resource assignment data is stored at a daily interval, regardless of the option selected in the History Interval field.

Activity (Weekly): Project-level, WBS, activity and resource assignment data is stored. Activity and resource assignment data is stored at a weekly interval, regardless of the option selected in the History Interval field.

Activity (Monthly): Project-level, WBS, activity and resource assignment data is stored. Activity and resource assignment data is stored at a monthly interval, regardless of the option selected in the History Interval field.

Integrated Project field

The type of system integration, if any, in place at your organization. Data within this project will be shared with the integrated solution.

The default value is <none>.

Portfolios field

The portfolios associated with the project.

Project ID field

The unique identifying code for the project.

Project Leveling Priority field

The priority of each project during leveling.

You can enter a value from 1 to 100, with 1 being the highest priority.

Project Name field

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The name of the project.

Project Owner field

The resource designated as responsible for the project.

The project owner designation provides a user with viewing access for the project.

Project Risk Exposure field

The sum of the Pre-Response Risk Exposure values for all risks in the project that are in a *Proposed*, *Open*, or *Active* state, and are identified as a threat to the project.

Project Risk Score field

The sum of the Pre-Response Scores for all risks in the project that are in a *Proposed*, *Open*, or *Active* state, and are identified as a threat to the project.

Project Score field

The project score, based on all project code types assigned to this project.

Project Status list

The current state of the project or WBS element. For activities, this field reflects the current state of its parent WBS or project. The status type determines how project, WBS, activity, and resource assignment data are handled by applications within P6 EPPM.

The status you assign to a project automatically applies to all its WBS elements and their activities. By default, when you create and save a new WBS, it automatically inherits the **Project Status** value of its parent WBS or project; however, subject to certain logical constraints, you can change the individual status of a WBS. For example, within an *Active* project you can designate WBS elements that are *Active*, *Inactive*, and *Planned*. The following status values can appear in this field:

Active: This is the default setting for new projects. Use this status to reflect actual authorized WBS or project work at your organization. When you designate a project as *Active*, P6 Team Member Web timesheet users can view all activities included in its active WBS elements. Depending on their timesheet privileges, users may also be able to assign themselves to and perform work on activities that are included in an active WBS element.

Inactive: Use this status to designate a WBS or project that is on hold, terminated, or no longer active. Select the **Resources can view activities from an inactive project** option on the **Team Member** page of the **Project Preferences** dialog box to allow P6 Team Member Web timesheet users to view, but not edit, activities that are included in an inactive WBS element or project.

Planned: Use this status to designate a project or WBS that is in its planning phase. If a WBS element's status is *Planned*, P6 Team Member Web timesheet users cannot view any of its activities. This prevents P6 Team Member Web timesheet users from assigning themselves to and performing work on unauthorized activities not yet officially designated *Active*.

What If: This status can only be designated at the project level. Use this status to designate a project is only being considered or is undergoing analysis before establishing a more defined project schedule. When a project's status is *What If*, P6 Team Member Web timesheet users cannot view any of its activities. This prevents P6 Team Member Web timesheet users from assigning themselves to and performing work on unauthorized activities not yet officially designated *Active*.

Reflection projects created in P6 Professional appear in P6 as What If projects.

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Template: This status appears in this field only for template projects or for a WBS element that belongs to a template project. This status is set by P6; you cannot directly set this value.

Project Website URL field

The address of the project's website.

Responsible Manager field

The organization breakdown structure (OBS) assigned to the project or EPS.

Risk Scoring Matrix field

The name of the risk scoring matrix assigned to the project.

Strategic Priority field

The project's priority in the strategic plan.

This priority value ranges from 1 to 10,000 with a default of 500. Use of the priority value, such as whether to place higher priority at the lower end of the scale, toward the endpoint 1, or at the higher end, toward 10,000, is at the discretion of the user. This field is not used for calculating data.

Type field

The type of element, whether project or EPS.

Website Root Directory field

The root directory for storing project Website files before they are published to the Web server.

Histogram Chart Settings Area

The Histogram Chart settings area displays configurable options for viewing portfolio data in a histogram, side-by-side histogram, or stacked histogram chart view. Use the following fields to modify your histogram chart view.

Screen Elements

X Axis list

Select a field value to determine information displayed through the X Axis.

Y Axis list

Select a field value to determine the information displayed through the Y Axis.

Color Theme list

Determines colors displayed on the chart. Select a predefined or user-defined color theme.

Horizontal Gridlines option

Determines whether to show or hide horizontal gridlines.

Vertical Gridlines option

Determines whether to show or hide vertical gridlines.

Show 3-D option

Determines whether to show a 3-Dimensional view of chart.

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Show All Values on Axis option

Determines whether all values are displayed in the histogram. Select this option to include all values on the X-axis and not just values with data.

Group By list

Select a field value to determine your preferred option to group your data.This option is only available for the Side-by-Side Histogram view.

Stack By list

Determines the value by which the data will be stacked. This option is only available for the Stacked Histogram view.

Level Resources Dialog Box (Reference)

If you select **Activity Leveling** priority, ascending levels higher priority activities first, and descending levels lower priority activities first.

If you select **Project Leveling** priority, ascending levels higher priority projects first, and descending levels lower priority projects first.

If you select **Planned Start** priority, ascending levels activities with earlier planned start dates first, and descending levels activities with later planned start dates first.

If you select **Planned Finish** priority, ascending levels activities with earlier planned finish dates first, and descending levels lower activities with later planned finish dates first.

If you select **Planned Duration** priority, ascending levels activities with shorter original or planned durations first, and descending levels activities with longer original or planned durations first.

If you select **Remaining Duration** priority, ascending levels activities with shorter remaining durations first, and descending levels activities with longer remaining duration first.

If you select **Total Float** priority, ascending levels activities with less total float or more critical activities first, and descending levels activities with more total float or less critical activities first.

If you select **Early Start** priority, ascending levels activities with earlier, early start dates first, and descending levels activities with later, early start dates first.

If you select **Early Finish** priority, ascending levels activities with earlier, early finish dates first, and descending levels activities with later, early finish dates first.

If you select **Late Start** priority, ascending levels activities with earlier, late start dates first, and descending levels activities with later, late start dates first.

If you select **Late Finish** priority, ascending levels activities with earlier, late finish dates first, and descending levels activities with later, late finish dates first.

Lists Columns of the Activity Table

Expenses field

The expenses assigned to the activity.

Notebook Topics field

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The name of the notebook topics assigned to the activity.

Predecessor Details field

The activities required to start or finish *before* the activity starts or finishes, including the relationship types and lags applicable to the relationships. The column shows a comma separated list of the IDs of the predecessor activities, their relationship types (as "SS", "SF", "FS" or "FF") and the duration of any lag applied to the relationships. If lag duration is zero, it is not shown.

Predecessors field

The activities required to start or finish *before* the activity starts or finishes, depending on the relationship type.

Resource IDs field

The identifiers of the resources assigned to the activity.

Resource Names field

The names of the resources assigned to the activity.

Role IDs field

The identifiers of the roles assigned to the activity.

Roles field

The name of the roles assigned to the activity resources.

Steps field

The names of the steps assigned to the activity.

Sucessor Details field

The activities required to start or finish a*fter* the activity has started or finished, including the relationship types and lags applicable to the relationships. The column shows a comma separated list of the IDs of the successor activities, their relationship types (as "SS", "SF", "FS" or "FF") and the duration of any lag applied to the relationships. If lag duration is zero, it is not shown.

Successors field

The activities required to start or finish *after* the activity has started or finished, depending on the relationship type.

Multiple Float Paths of the Activities Table

Float Path field

The integer representing the critical path this activity is on.

Value 1 is the most critical path, and value 2 is the second most critical path.

Float Path Order field

The integer representing the order in which this object was found on one of the critical paths.

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My Documents Portlet Toolbar

Overview

The following icons and screen elements appear in this toolbar; however, their availability is subject to change based on your current selections, view settings, security permissions, window type, and other factors.

Screen Elements

 **Add Document**

Enables you to select a document from your computer or a device attached to your computer to add to the selected project.

▼ **Add Options** menu

 **Add Document**: Enables you to select a document to add.

Add from content repository: Enables you to search, browse by folder, and select a document from the repository.

Copy from existing template: Enables you to search and select a template to copy as the basis for your new document.

Create new template: Enables you to browse and select a document template to store for future use.

 **Add Folder**: Enables you to add a document folder to the repository and set its security policy.

 **Edit Details**

Enables you to view and configure the details of the selected document.

 **View Document**

Enables you to view the selected document.

▼ **View Options**

Select from one of the following options in which to view the selected document:

-  **View**: Displays the selected document in a separate window.
-  **Download**: Allows you to download the document to your computer. You must select a path for where the downloaded document will be saved.

 **Delete**

Permanently deletes the selected items.

 **Check out**

Enables you to put a lock on a content repository document while you work on it remotely. The document cannot be modified by other users until you check it in.

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Check Out Options

- **Check out**: Enables you to specify where you want the document to be checked out to. Use to browse for a location. Use the Open Document option to determine whether to open the document or just check it out.
- **Check in**: Enables you to select a document to be checked in. Use to browse for a document. Use the comments field to enter a comment to be associated with the document. The Format and Version Type fields are read-only. Click the Check In icon to keep your changes and check in the document or click cancel to close the dialog box without checking in the document.
- **Undo Check Out**: Displays the Title, Version, and Path of the checked out document you want to revert back to its previous state. After confirming, if you decide to continue to undo the check out, any changes made to the selected document while it was checked out will be lost. Click **Undo Check Out** to continue or click **Cancel** to close the dialog and keep the document checked out.

Add to recent documents

Adds the selected document to the recent documents list.

Start Review

Enables you to specify the reviewers, type of review, and due date for a review.

Email

Enables you to send selected information about the current item to one or more recipients through email.

Customize Columns

Enables you to select the fields you want to display as columns in the current table.

Cut

Cuts the selected item.

Paste

Completes a Cut or Copy operation by inserting an item and its associated attributes into a supported location.

Search

Enables you to perform a search based on the value you enter in the search bar.

My Reviews Toolbar

Overview

The following icons and screen elements appear in this toolbar; however, their availability is subject to change based on your current selections, view settings, security permissions, window type, and other factors.

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Screen Elements

**Edit Details**

Enables you to view and configure the details of the selected document.

 **Terminate**

Stops the selected document review and removes it from view.

 **Filters**

Enables you to reduce the number of values displayed in a list or table by filtering out unwanted values. Select from one of the following options:

- In Review
- Approved
- Rejected
- All

Number of Activities Columns of the EPS Table

Actual Completed Activities field

The number of activities that have an actual finish date.

Actual In-Progress Activities field

The number of activities that have an actual start date, but no actual finish date.

Actual Not-Started Activities field

The number of activities that have no actual start date.

BL Completed Activities field

The number of completed activities in the project baseline.

BL In-Progress Activities field

The number of in-progress activities in the project baseline.

BL Not-Started Activities field

The number of activities not started in the project baseline.

Total Activities field

The number of activities in the project.

Pages Supporting Filters

The following areas of P6 support filtering:

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Page	Description
Activities page	Apply filters based on project and activity parameters to target specific activities.
EPS page	Apply filters based on EPS and project parameters to target specific projects.
Resource Assignments page	Apply filters based on resource and role parameters to target specific assignments.
Dashboards page	Apply filters based on portfolios, projects, or codes to target specific project and portfolio data displayed in portlets on the dashboard.
Timesheet Approval page	Apply filters based on timesheet status to target specific timesheets. Also apply filters to the activities for a selected timesheet.
Portfolio Analysis page	Apply filters based on EPS, portfolio, and project code to target specific portfolio data.
Issues page and Issues portlets	Apply filters based on issue parameters to target specific issues.
Risks page	Apply filters based on risk parameters to target specific risks.
Create Portfolio and Manage Portfolios pages	Apply filters based on project data, codes, and UDFs to target specific projects that make up a portfolio.

Percent Complete Columns of the Activity Table

Activity % Complete field

The percent of the activity that has been completed.

The calculation is based on the formula for the selected Percent Complete Type. The Percent Complete Type can be *Units*, *Duration*, *Physical, or Scope*.

If the selected activity's percent complete type is *Duration*, the percent complete is calculated as (**Planned Duration** minus **Remaining Duration**) divided by **Planned Duration**.

If the activity's percent complete type is *Units*, the percent complete is calculated as (**Actual Labor Units** plus **Actual Nonlabor Units**) divided by (**Actual Labor Units** plus **Actual Nonlabor Units** plus **Remaining Labor Units** plus **Remaining Nonlabor Units**).

If the activity's percent complete type is *Physical*, either the user records the percent complete manually or the field is set to calculate using steps. To calculate using steps, the **Calculate Activity % Complete from activity steps** option must be set in Project Preferences.

If the activity's percent complete type is *Scope*, the percent complete originates from Oracle Primavera Cloud and cannot be modified in P6.

BL Project Activity % Complete field

The activity percent complete of the activity in the project baseline.

BL Project Cost % Complete field

The cost percent complete of the activity in the project baseline.

BL Project Duration % Complete field

The duration percent complete of the activity in the project baseline.

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BL Project Percent Complete Type field

The percent complete type of the activity in the project baseline.

BL Project Units % Complete field

The units percent complete of the activity in the project baseline.

BL1 Activity % Complete field

The activity percent complete of the activity in the primary baseline.

BL1 Cost % Complete field

The cost percent complete of the activity in the primary baseline.

BL1 Duration % Complete field

The duration percent complete of the activity in the primary baseline.

BL1 Percent Complete Type field

The percent complete type of the activity in the primary baseline.

BL1 Units % Complete field

The units percent complete of the activity in the primary baseline.

Cost % Complete field

The percent complete of costs for all labor resources, nonlabor resources, and expenses for the activity.

Calculated as **Actual Total Cost** divided by **At Completion Total Cost** multiplied by 100.

Cost % of Planned field

The percent complete of planned costs for all labor resources, nonlabor resources, and expenses for the activity.

Calculated as **Actual Total Cost** divided by **BL Planned Total Cost** multiplied by 100. The value can exceed 100. The baseline total cost is the activity's at completion cost from the current baseline.

Duration % Complete field

The duration percent complete for the activity or WBS.

Calculated as **Planned Duration** minus **Remaining Duration** divided by **Planned Duration** multiplied by 100. The value is always between 0 and 100. P6 always calculates **Duration % Complete** from the **Planned Duration** and **Remaining Duration**, even if you enter **Duration % Complete** manually. For example, if an activity has an **Planned Duration** of 25.57h and you enter 90% for **Duration % Complete** P6 will calculate the **Remaining Duration** as 2.55h and will correct the **Duration % Complete** to 90.03%.

Duration % of Planned field

The actual duration percent of planned duration for the activity.

The baseline duration is the activity's at completion duration from the project baseline.

Calculated as **Actual Duration** divided by **BL Duration** multiplied by 100. The value can exceed 100.

Expense Cost % Complete field

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The percent complete of cost for all expenses associated with the activity or WBS.

Calculated as **Actual Expense Cost** divided by **At Completion Expense Cost** multiplied by 100. Always in the range 0 to 100.

Labor Cost % Complete field

The percent complete of costs for all labor resources assigned to the activity or WBS.

Calculated as **Actual Labor Cost** divided by **At Completion Labor Cost** multiplied by 100. Always in the range 0 to 100.

Labor Units % Complete field

The percent complete of units for all labor resources for the activity or WBS.

Calculated as **Actual Labor Units** divided by **At Completion Labor Units** multiplied by 100. Always in the range 0 to 100.

Material Cost % Complete field

The percent complete of costs for all material resources assigned to the activity or WBS.

Calculated as **Actual Material Cost** divided by **At Complete Material Cost** multiplied by 100. Always in the range 0 to 100.

Nonlabor Cost % Complete field

The percent complete of costs for all nonlabor resources assigned to the activity or WBS.

Calculated as **Actual Nonlabor Cost** divided by **At Completion Nonlabor Cost** multiplied by 100. Always in the range 0 to 100.

Nonlabor Units % Complete field

The percent complete of units for all nonlabor resources for the activity, WBS, or project.

Calculated as **Actual Nonlabor Units** divided by **At Completion Nonlabor Units** multiplied by 100. Always in the range 0 to 100.

Percent Complete Type list

Determines the way in which the application calculates the percent complete for the activity.

This default activity percent complete type will be applied to all new activities added to a project. If you change this setting for an existing project that has activities, the percent complete type of those existing activities will not be changed.

Performance % Complete field

The percentage of the activity planned work that is currently complete.

Performance % Complete is used to calculate earned value. It can be based on the activity percent complete, on the 0/100 rule, on the 50/50 rule, depending on the technique for computing earned-value percent complete for the activity's WBS.

Performance % Complete - Labor Units field

The percentage of the activity or project planned work that is currently complete as measured by labor units.

Calculated as **Earned Value Labor Units** divided by **Budget at Complete Labor Units** multiplied by 100. Always in the range 0 to 100.

Physical % Complete field

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The activity percent complete, which is either user-entered or calculated from activity steps.

To calculate **Physical % Complete** from activity steps, the **Calculate Activity % Complete from activity steps** option must be enabled for the project.

Schedule % Complete field

The activity schedule percent complete, which specifies how much of the activity's project baseline duration is complete so far.

Calculated based on where the current data date falls relative to the activity's project baseline start and finish dates.

If the data date is earlier than the baseline start, the schedule percent complete is 0. If the data date is later than the baseline finish, the schedule percent complete is 100. The schedule percent complete indicates how much of the activity duration should currently be complete, relative to the selected project baseline.

Scope % Complete field

The percent complete for the activity if the percent complete type is set to scope. Scope is calculated in Oracle Primavera Cloud when P6 is integrated with Oracle Primavera Cloud for scope management.

Units % Complete field

The percent complete of units for all labor and nonlabor resources assigned to the activity.

The percent complete is always in the range 0 to 100.

Calculated as **Actual Units** divided by **At Completion Units** multiplied by 100.

Percent Complete Columns of the Assignments Table

Pending % Complete field

The estimate of the percentage of the resource's units of work completed on this activity.

The pending percent complete is entered by each resource using timesheets. This value is used to compute the resource's remaining units for the activity when project actuals are applied. The project manager specifies whether resources update their percent complete or remaining units for each project.

Units % Complete field

The percent complete of units for the resource assignment on the activity.

The percent complete is always in the range 0 to 100.

Calculated as **Actual Units** divided by **At Completion Units** multiplied by 100.

Percent Complete Columns of the EPS Table

Cost % Complete field

The percent complete of costs for all labor resources, nonlabor resources, and expenses for the project.

Calculated as **Actual Total Cost** divided by **At Completion Total Cost** multiplied by 100.

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Cost % of Planned field

The percent complete of planned costs for all labor resources, nonlabor resources, and expenses for the project.

Calculated as **Actual Total Cost** divided by **Baseline Total Cost** multiplied by 100. The value can exceed 100. The baseline total cost is the activity's at completion cost from the current baseline.

Duration % Complete field

The duration percent complete for the project.

Calculated as **Planned Duration** minus **Remaining Duration** divided by **Planned Duration** multiplied by 100. The value is always between 0 and 100.

Duration % of Planned field

The summary actual duration percent of planned duration of all activities for the project.

The baseline duration is the activity's at complete duration from the current baseline.

Calculated as **Actual Duration** divided by **Baseline Duration** multiplied by 100. The value can exceed 100.

Expense Cost % Complete field

The percent complete of cost for all expenses associated with project.

Calculated as **Actual Expense Cost** divided by **At Complete Expense Cost** multiplied by 100, and it is always in the range of 0 to 100.

Labor Cost % Complete field

The percent complete of cost for all labor resources assigned to a project or EPS.

Calculated as **Actual Labor Cost** divided by **At Completion Labor Cost** multiplied by 100. Always in the range 0 to 100.

Labor Units % Complete field

The percent complete of units for all labor resources for the project or EPS.

Calculated as **Actual Labor Units** divided by **At Completion Labor Units** multiplied by 100. Always in the range 0 to 100.

Material Cost % Complete field

The percent complete of cost for all material resources assigned to the project or EPS.

Calculated as **Actual Material Cost** divided by **At Complete Material Cost** multiplied by 100. Always in the range 0 to 100.

Nonlabor Cost % Complete field

The percent complete of cost for all nonlabor resources assigned to the project and EPS.

Calculated as **Actual Nonlabor Cost** divided by **At Completion Nonlabor Cost** multiplied by 100. It is always in the range of 0 to 100.

Nonlabor Units % Complete field

The percent complete of units for all nonlabor resources for the project or EPS.

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Calculated as **Actual Nonlabor Cost** divided by **At Completion Nonlabor Cost** multiplied by 100. Always in the range 0 to 100.

Performance % Complete field

The percentage of the project planned work that is currently complete.

Performance % Complete is used to calculated earned value and may be based on the Activity % Complete, the 0/100 rule, the 50/50 rule, etc., depending on the technique selected for computing earned value percent complete the WBS elements in the project.

Calculated as **Earned Value Cost** divided by **Budget At Completion** multiplied by 100. Always in the range 0 to 100.

Schedule % Complete field

The measure of how much of the project baseline is complete so far.

Calculated as the Planned Value Cost *100 / Budget At Completion Cost.

At the EPS level, Planned Value Cost and Budget At Completion Cost are rolled-up values.

Units % Complete field

The percent complete of units for the resource assignments in the EPS.

The percent complete is always in the range 0 to 100.

Calculated as **Actual Units** divided by **At Complete Units** multiplied by 100.

Performance Status Calculations

This topic provides additional information about the formulas used to calculate the performance status metrics shown on the Portfolio Performance Status page. The Portfolio Performance Status page displays summarized schedule and cost or labor unit data based on one of three performance metrics you select:

- Schedule
- Earned Value (SV and CV)
- Index (SPI, CPI, and TCPI)

For each metric, to date and forecast data are provided at the group, project, and WBS levels. The values you specify in the Performance Threshold area of the My Preferences page Global tab determine which visual indicators apply to each metric.

Schedule

When you select **Schedule**, the page displays the following calculated data:

Schedule to Date

(Baseline Duration multiplied by Performance % Complete) minus (Baseline Duration multiplied by Schedule % Complete)

Performance % Complete = Earned Value divided by BAC

Schedule % Complete = Planned Value divided by BAC

Labor Units to Date

Earned Value Labor Units minus Actual Labor Units

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threshold percentage calculation = Labor Units to date divided by Earned Value Labor Units

Cost to Date

Earned Value — Actual Cost

threshold percentage calculation = Cost to date/Earned Value

Schedule at Completion

Remaining Finish Date - Baseline Finish Date

Labor Units at Completion

BAC Labor Units - EAC Labor Units

threshold percentage calculation = Labor Units at Completion/BAC Labor Units

Cost at Completion

BAC- EAC

threshold percentage calculation = Cost at Completion/BAC

Earned Value

When you select **Earned Value**, the page displays the following calculated data:

Schedule to Date (SV)

Earned Value Labor Units - Planned Value Labor Units

threshold percentage calculation = Schedule to Date/Planned Value Labor Units

Labor Units to Date (CV)

Earned Value Labor Units - Actual Labor Units

threshold percentage calculation = Labor Units to Date/Earned Value Labor Units

Cost to Date (CV)

Earned Value - Actual Cost

threshold percentage calculation = Cost to Date/Earned Value

Schedule at Completion

BAC*SVI

SVI = SV/Planned Value Labor Units

threshold percentage calculation = Schedule at Completion/BAC

Labor Units at Completion

BAC Labor Units*CVI

threshold percentage calculation = Labor Units at Completion/BAC Labor Units

Cost at Completion

BAC*CVI

threshold percentage calculation = Cost at Completion/BAC

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Index

When you select **Index**, the page displays the following calculated data:

SPI

SPI = bcwp / bcws

CPI

CPI = bcwp / ACWP

ACWP = act_equip_cost + act_expense_cost + act_work_cost

TCPI

TCPI = (BAC – bcwp) / (EAC – ACWP)

BAC = base_equip_cost + base_expense_cost + base_work_cost

EAC = (act_equip_cost + act_expense_cost + act_work_cost) + (remain_equip_cost + remain_expense_cost + remain_work_cost)

ACWP = act_equip_cost + act_expense_cost + act_work_cost

Personal Information Tab of the My Preferences Page

Overview

Use this tab to see the personal information stored about you in P6 EPPM. You cannot edit this information.

Screen Elements

Forget User Acceptance button

Resets your consent status to Not Responded.

Reset User Preferences button

Resets all your preferences to the defaults.

Login Name field

Your login name.

Personal Name field

The personal name for your user account. This name might be a nickname, full name, reference to a role or department, or include any information recognized by your organization to identify you as the user of this account.

Phone field

Your telephone number.

Email field

The Email address for your user account.

Associated Resource field

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The resource associated with your user account. Depending on the modules used by your organization, this is the resource used to pair your user account with timesheets, personal calendars, and assignments (for email or phone updates).

Getting Here

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Personal Information** tab.

Pie Chart Settings Area

The Pie Chart settings area displays configurable options for viewing portfolio data in a pie chart view. Use the following fields to modify your pie chart view.

Screen Elements

Data list

Select a field of data to display in the Pie Chart view. Select an option from the following categories:

Budget: The fields that display budget information.

Cost: The fields that display cost information.

Durations: The fields that display duration information.

Earned Value: The fields that display earned value information.

General: The fields that display general information.

Number of Activities: The fields that display information on activity numbers.

Percent Complete: The fields that display information on percent complete.

Units: The fields that display information on units.

User Defined: The additional fields created to capture important information that is not available from the standard fields.

Group By list

Select a field value to determine your preferred option to group your data.

Color Theme list

Determines colors displayed on the chart. Select a predefined or user-defined color theme.

Pie Data Label option

Determines whether to show the Pie Data Label.

Group by label option

Determines whether to show the Group by label.

Show percentage option

Determines whether to show percentage on the chart.

Show 3-D option

Determines whether to show a 3-Dimensional view of chart.

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Portfolio Analysis Settings Area

The Portfolio Analysis settings area displays configurable options for viewing portfolio data.

Basic Settings

The following fields are common in all views.

Filter by field

The portfolio, project code, or project that the application uses to filter the dashboard. The portlets only display information that meets the selected filtering criteria.

You can change the **Filter by** option for a private (user-defined) dashboard, and for any multi-user or global dashboard you create.

View list

Determines how data is displayed in the work area.

Select the type of view from the following categories:

Bubble Chart: A Bubble chart lets you analyze three aspects of project data. The x-axis represents one data field, the y-axis represents a second field, and the size of the bubble represents a third field. A bubble chart is useful when you want to analyze three independent project variables at one time.

Histogram: A histogram lets you analyze project data in a vertical bar chart format. You can select a project data field to display on the x-axis and another field to display on the y-axis of the chart; typically, the x-axis represents categorical data, and the y-axis represents individual data values.

Pie Chart: A Pie chart is a circular chart divided into slices, where each slice represents a particular group; the size of the size of the slice represents the value of the selected data field, specific to the group. A pie chart is useful for analyzing relative parts of a whole.

Scorecard: A scorecard lets you analyze data in a spreadsheet-type format. You can use a scorecard to assist with more sophisticated analysis of a set of projects.

Side-by-Side Histogram: A side-by-side histogram is a more sophisticated version of the histogram. In this type of chart, categorized data can be grouped, side-by-side, to assist with comparisons. A side-by-side chart is useful when analyzing relative parts of a whole.

Stacked Histogram: A stacked histogram is a more sophisticated version of the histogram. In this type of chart, categorized data can be grouped, or stacked, to assist with comparisons. A stacked histogram is useful when analyzing relative parts of a whole.

More Settings

Additional settings vary according to your chosen view:

- Bubble Chart Settings Area.
- Pie Chart Settings Area.
- Histogram Chart Settings Area.
- Scorecard Settings Area.

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Portfolio Analysis Toolbar

The Portfolio Analysis toolbar includes the following:

Screen Elements

**Save**

Saves any new or modified entries to the database.

 **Save As**

Enables you to save the current item as a new instance with a new name.

 **Cancel**

Cancels any pending changes and reverts back to the last saved state.

 **Create Portfolio View**

Enables you to create a new portfolio view based on either an existing view or new attributes you define.

**Maximize**

Maximizes the current chart in the work area, temporarily hiding the vertical or horizontal compare view.

**Print Preview**

Enables you to view a preview of the printed output. You can then decide to print or make additional changes.

Scorecard View

When you choose a scorecard view, the Portfolio Analysis toolbar displays the following additional options:

 **Add Project**

Enables you to add a new project to the scorecard.

 **DeleteProject**

Deletes the selected project from the view permanently.

 **Create Portfolio from Selected Projects**

Redirects you to the **Create Portfolio** page.

**Waterline**

Opens the **Waterline** tab of the **Customize Scorecard** dialog box where you can override any previously applied grouping and sorting and instead define a single waterline level parameter and new sort order. Use the waterline to assess a simple visual depiction of the projects that satisfy your criteria, the ones floating above the waterline, versus those that do not, the ones sinking below the waterline.

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> **Note**
>
> - If you choose to compare portfolios using a *calculated***Project Score**, the analysis attempts to include all code values for the selected project codes, even unassigned ones. Assign values to all project codes before comparing project scores.
> - When a waterline based on **Project Score** is applied to a scorecard, the application uses actual scores for comparing top-level project group scores, and uses averages for calculating project group scores within the hierarchy. The application re-calculates all project scores at the top level because it provides a more accurate result than using an average of lower-level averages.

**Export Spreadsheet**

Exports all data as it appears in the current view to a Microsoft Excel spreadsheet (.xlsx) file. Customize the rows to display only the data you want to export.

Portfolios Navigation Bar

Click a portfolio toolbar icon to open its corresponding page.

Screen Elements

Portfolio Analysis

Enables you to analyze portfolio data, conduct side-by-side comparisons of two project groups, and apply waterline analysis techniques to assist with executive-level critical decision making.

Capacity Planning

Enables you to analyze role allocation and cost over time. Multiple chart formats display role allocation for the projects and roles you select, enabling you to quickly identify areas of under or over allocation.

Performance Status

Enables you to view the summarized schedule and cost or labor unit data based on the performance metric you select.

Pre-response Thresholds (Risks)

Pre-response Thresholds category

Cost field

The monetary impact on the project if the risk occurs.

Probability field

The probability of the risk occurring.

Schedule field

The impact on the schedule if the risk occurs.

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Score field

The risk calculation based on the values defined for probability, cost impact, schedule impact, and any additional user-defined impacts for the risk.

Score (Text) field

The text-based risk score based on the values defined for probability, cost impact, schedule impact, and any additional user-defined impacts for the risk.

User-defined Impact fields

The fields defined by your P6 administrator that are not standard in the application but are necessary to capture additional data for your particular project or company. These impact values are calculated in the risk score.

Preferences Columns of the EPS Table

Activity % Complete from Steps option

Determines if Activity % Complete is calculated from activity steps or from manual input.

This option is cleared by default. If the option is selected, you must also set Percent Complete Type to Physical on the Activities page to view the calculation in the Activity % Complete field. This option also sets the Physical % Complete field calculation to calculate from activity steps instead of manual input.

For example, if 3 of 4 steps are marked complete, and the steps are weighted equally, the Activity % Complete and the Physical % Complete is 75%.

Activity ID Prefix field

The series of initial letters, numeric digits, or special characters you want P6 to use to auto-number all the activities in a given project. By default, this field can contain 1 to 20 characters.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Activity ID Suffix field

The numeric digits you want P6 to use to auto-number all the activities in a given project. The value must be a number between 1 and 999,999.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Activity Type list

Determines how duration and schedule dates are calculated for an activity.

Task Dependent: Activities are scheduled using the activity's calendar rather than the calendars of the assigned resources. Choose task dependent when you want to control the duration of the activity yourself (that is, no resources are assigned), or when one or more

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resources assigned to the same activity can work according to the same calendar. For example, you might have an activity to cure concrete; you know how long the task takes and the addition of resources won't complete the task any earlier. You would designate this activity as task dependent.

Resource Dependent: Activities are scheduled using the calendars of the assigned resources. This type is used when several resources are assigned to the activity, but they might work separately. Choose resource dependent when you want to schedule each resource according to his/her own time schedule, or resource calendar, not the activity calendar. The assigned resource availability determines the start and finish dates of the activity. Typically, you use this type when multiple resources assigned to the same activity can work independently, or when availability can affect the activity's duration. For example, an activity that requires an Inspector might be delayed if that resource is assigned to multiple projects or is on vacation.

Level of Effort: Activities have a duration that is determined by its dependent activities and are typically administration type. Choose level of effort to indicate that the activity's duration depends on its predecessor and/or successor activities. A level of effort activity is usually one that is ongoing, such as clerical work, Change Management, or project management tasks. For example, site cleanup could be considered a level of effort activity; it occurs repeatedly and is dependent on the completion of a phase.

Start or Finish Milestone: Milestone activities are zero-duration and are used to mark significant project events. Choose start milestone or finish milestone to indicate that the activity marks the beginning or end of a major stage in the project. A primary resource or an activity owner, and expenses can be assigned to a milestone. In an office building addition project, examples of milestones might include Project Definition Complete, Structure Complete, or End Bidding Process.

WBS Summary: Activities that are used to aggregate date, duration, and percent complete values for a group of activities that share a common WBS code level. Choose WBS Summary to indicate that the activity is a summary-level WBS activity. A WBS Summary activity represents a group of activities that share a common WBS level. The summary-level WBS activity enables roll-ups of dates for the activity group. The duration of a WBS Summary activity extends from the start of the earliest activity in a group to the finish of the latest activity. WBS codes control which activities are part of a WBS Summary activity; P6 incorporates any activities that share a component of the WBS Summary activity's WBS code into the WBS Summary activity. For example, all activities whose WBS codes begin with A (A.1, A.1.1, A.1.2, etc.) can be part of one WBS Summary activity whose WBS code is A. At a lower level, all activities whose WBS codes start with A.1 (A.1.1, A.1.2, etc.) can be part of a WBS Summary activity whose WBS code is A.1.

Allow Duplicate Resource Assignments option

Determines whether resources can work on the same activity multiple times.

Allow Negative Actual Units option

Determines if the Apply Actuals feature can record negative actual units against activities in the project via timesheets.

Baseline Option list

The baseline the project uses.

This field is disabled if the project is checked out.

Calendar field

The calendar assigned to the project.

Cost Account field

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The cost account associated with the project.

Drive Activity Dates by Default option

Determines whether assignments will drive activity dates.

Duration Type field

Determines how remaining duration, units, and units/time are calculated when you update an activity that has resources assigned. The activity's duration type should correspond to the dominant factor, that is, the least flexible factor in the project: schedule, costs/work effort, or resource availability.

Fixed Units/Time: The resource units per time are constant when the activity duration or units are changed. Use this duration type when an activity has fixed resources with fixed productivity output per time period.

Fixed Duration & Units/Time: The activity duration is constant as the units or resource units per time are changed. Use this duration type when the activity must be completed within a fixed time period regardless of the resources assigned.

Fixed Units: The activity units are constant when the duration or resource units per time are changed. Use this duration type when the total amount of work is fixed, and increasing the resources can decrease the activity duration.

Fixed Duration & Units: The duration and units remain constant as the units/time is changed. Use this duration type when the activity must be completed within a fixed time period and the total amount of work is fixed.

Fiscal year list

Determines on which month the fiscal year begins.

Increment field

The number you want P6 to add to the previous Activity ID in order to auto-number all the new activities in a given project. This field value must be between 1 and 99,999.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Link Actual and Period Actual Units and Costs option

Determines whether to recalculate actual or actual this period units and costs when one of these values is updated. This option must be marked if you plan to store period performance or edit past period actuals for a project.

Link Percent Complete with Actuals option

Determines whether the actual units and cost values are recalculated when duration percent complete is updated.

Link Planned and At Completion option

Determines whether to recalculate all of the planned unit and cost values using the remaining costs and units for activities that have not started. When this option is selected, Planned, Remaining, and At Completion values are set to equal for not started activities.

Percent Complete Type list

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Determines the way in which the application calculates the percent complete for the activity.

This default activity percent complete type will be applied to all new activities added to a project. If you change this setting for an existing project that has activities, the percent complete type of those existing activities will not be changed.

Price/Unit field

The default price/unit used to calculate the cost for activities that have labor/non-labor units but no assigned resources and for activities that have assigned resources or roles that do not have a specified price/unit.

Primary Can Complete Activity option

Determines whether primary resources can mark activities as completed.

Primary Resources Can Update Activity Dates option

Determines whether primary resources can see the Update Dates button in the Timesheets page of P6 Team Member Web.

Rate Type list

The price/unit used to calculate costs for the project.

There can be up to five rate types, with each rate type reflecting a different price/unit.

Resources Can Assign Themselves option

Determines whether resources can assign themselves to activities.

Resources Can Assign Themselves Outside OBS option

Determines whether resources can assign themselves to activities even if the resource does not have access to the relevant OBS for the activity.

Resources Status Activities Using list

Determines how P6 Team Member Web timesheet users enter their status for assignments.

Review Type list

Determines who can review status updates. Available options are **Anyone can review** and **Everyone must review**.

Status Reviewers field

The people designated to review and approve team member status updates for activities in the selected WBS.

WBS Code Separator field

The character(s), such as a period, used to separate code fields. You may use one or two characters.

The separator is also the WBS code separator for new projects by default.

When Activity Progress Removed list

Determines how units and duration are handled if activity progress is removed.

Reset planned duration and units to remaining: Determines whether the application will recalculate planned unit spreads to match the remaining units.

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Reset remaining duration and units to planned: Determines whether the application will recalculate remaining unit spreads to match the planned units.

When Updating Units or Costs field

Determines whether the application will add actual to remaining or subtract actual from at completion if activity progress is removed.

Private Documents Toolbar

Overview

The following icons and screen elements appear in this toolbar; however, their availability is subject to change based on your current selections, view settings, security permissions, window type, and other factors.

Screen Elements

 **Add Document**

Enables you to select a document from your computer or a device attached to your computer to add to the selected project.

▼ **Add Options** menu

 **Add Document**: Enables you to select a document to add.

Add from content repository: Enables you to search, browse by folder, and select a document from the repository.

Copy from existing template: Enables you to search and select a template to copy as the basis for your new document.

Create new template: Enables you to browse and select a document template to store for future use.

 **Add Folder**: Enables you to add a document folder to the repository and set its security policy.

 **Edit Details**

Enables you to view and configure the details of the selected document.

 **View Document**

Enables you to view the selected document.

▼ **View Options**

Select from one of the following options in which to view the selected document

-  **View**: Displays the selected document in a separate wind
-  **Download**: Allows you to download the document to your computer. You must select a path for where the downloaded document will be saved.

 **Assign to Project**

Enables you to reassign the selected document to a project.

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Delete

Permanently deletes the selected items.

Check out

Enables you to put a lock on a content repository document while you work on it remotely. The document cannot be modified by other users until you check it in.

Check Out Options

- **Check out**: Displays a dialog box to enter a location for where you want the document to be checked out to. Use ... to browse for a location. Use the Open Document option to determine whether or not to open the document or just check it out.
- **Check in**: Displays a dialog box to select a document to be checked in. Use ... to browse for a document. Use the comments field to enter a comment to be associated with the document. The Format and Version Type fields are read-only. Click the Check In button to keep your changes and check in the document or click cancel to close the dialog box without checking in the document.
- **Undo Check Out**: Displays a read-only dialog box displaying the Title, Version, and Path of the selected checked out document. If you continue to undo the check out, any changes made to the selected document will be lost. Click Undo Check Out to continue or click Cancel to close the dialog and keep the document checked out.

Cut

Cuts the selected item.

Move Options

- **Cut**: Cuts the selected item and applicable attributes to the temporary clipboard, removing it from its current location.
- **Paste**: Inserts an item into a new location that has been cut from its previous location.

Search

Enables you to perform a search based on the value you enter in the search bar.

Search Options

- **Search**: Displays options for finding a specific matching entry based on criteria.
- **Clear Search Results**: Removes the options based from your entered criteria to display all possible entries.

Publication columns of the EPS Table

Publication category

Enable Publication option

Determines whether the project is able to be published.

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Last Published On field

The most recent publication date for the project data. This field displays no value for projects that have never been published.

Publication Priority field

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.

Recent Documents Toolbar

Overview

The following icons and screen elements appear in this toolbar; however, their availability is subject to change based on your current selections, view settings, security permissions, window type, and other factors.

> **Note**
>
> This topic describes features available only with the installation of the P6 content repository.

Screen Elements

**Edit Details**

Enables you to view and configure the details of the selected document.

 **View Document**

Enables you to view the selected document.

View Options

Displays the following options:

- **View**: Opens the selected document in a separate window.
- **Download**: Allows you to download the document to your PC or a network volume. You can select the path that determines where the downloaded document will be saved.

**Make Private**

Changes the document accessibility, allowing access only to the owner of the document.

Make Private Options

Select from one of the following options to modify the select document:

- **Make Private**: Makes the selected document private to the owner.
-  **Assign to Project**: Reassigns the selected document to a project.

 **Delete**

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Permanently deletes the selected items.

Check out

Enables you to put a lock on a content repository document while you work on it remotely. The document cannot be modified by other users until you check it in.

Check Out Options

- **Check out** : Displays a dialog box to enter a location for where you want the document to be checked out to. Use ... to browse for a location. Use the Open Document option to determine whether to open the document or just check it out.
- **Check in** : Displays a dialog box to select a document to be checked in. Use ... to browse for a document. Use the comments field to enter a comment to be associated with the document. The Format and Version Type fields are read-only. Click the Check In icon to keep your changes and check in the document or click cancel to close the dialog box without checking in the document.
- **Undo Check Out**: Displays a read-only dialog box displaying the Title, Version, and Path of the selected checked out document. If you continue to undo the check out, any changes made to the selected document will be lost. Click Undo Check Out to continue or click Cancel to close the dialog and keep the document checked out.

Start Review

Enables you to specify the reviewers, type of review, and due date for a review.

Columns

Enables you to select the data fields you want to display as columns in the current table. Select which fields you want displayed in the portlet from the following:

- Title
- Version
- Creation Date
- Modified Date
- Project
- Access Time

Email

Enables you to send selected information about the current item to one or more recipients through email.

Resource Columns of the Assignments Table

Active option

Determines whether the resource is currently active. A selected option indicates the resource is active.

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Non-active resources might have left the organization, but are not deleted from the system since they might have actual hours.

Auto Compute Actuals option

Determines whether the activity actual and remaining units, and start and finish dates for the resource are calculated automatically using the planned dates, planned units, and the activity's schedule percent complete.

If this option is selected, the actual/remaining units and actual dates are automatically updated when project actuals are applied. This assumes that all work by the resource proceeds according to plan.

This option is not available if the **Uses Timesheets** option is selected.

Default Units/Time field

The default units/time for resource assignments in projects, which is shown as either a percentage or units/duration depending on your settings in **My Preferences**.

If you change the default setting, existing resource assignments are not affected. The default setting only applies to new resource assignments.

email Address field

The email address for the resource.

Employee ID field

The resource identifier within the organization, typically the employee number or social security number.

Max Resource Units/Time field

The maximum work units per time this resource can perform on all their assigned activities

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.

Max Role Units/Time field

The maximum work units per time this role can perform on assigned activities.

Office Phone field

The office phone number for the resource.

Other Phone field

The alternate phone numbers for the resource.

Overtime Allowed option

Determines whether the resource is allowed to log overtime hours.

Resource ID field

The unique identifier for the resource.

Resource ID Name field

The unique identifier and name of the resource.

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Resource Name field

The name of the resource assigned to the activity.

Role ID field

The unique identifier of the associated role.

Role ID Name field

The identifying code and name of the role.

Role Name field

The name of the role assigned to the activity.

Unit of Measure field

The unit of measure used for the material resource.

Resources Navigation Bar

Overview

Click an icon on the Resources Navigation Bar to open its corresponding page.

Screen Elements

Administration

Enables you to configure resources, resource teams, roles, and role teams.

Planning

Enables you to specify, review, or modify project-level and WBS-level allocation data for individual resources and roles across a project's life cycle.

Assignments

Enables you to view and configure resource assignment data in a variety of formats: Gantt chart, table, or usage spreadsheet.

Analysis

Enables you to evaluate resource and role usage and costs with a spreadsheet or histogram. You can view resource analyses in customizable histogram, stacked histogram, area chart, and pie chart formats.

Risk Exposure (Pre-response)

Risk Exposure category

Exposure field

The monetary impact value for each risk calculated from the values selected for the probability and cost impact.

Exposure provides data that is generally used during the analysis and prioritization phases of the risk management process. The difference in exposure for a risk and its associated response plan is indicative of the effectiveness of the response plan.

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Calculated as **Probability midpoint** times **Cost midpoint**. A midpoint is calculated by adding the lowest and the highest values for the threshold and dividing the sum by two.

Exposure Finish field

The latest finish date of all activities associated with the risk.

If no activities are associated with the risk, the exposure finish date is set to the project **Finish** date. If the project **Finish** date is not set, the project **Scheduled Finish** date is used. If the project **Scheduled Finish** date is not set, the project **Must Finish By** date is used. If this date is not set, **Exposure Finish** is set to the project start date.

Exposure Start field

The earliest start date of all activities associated with the risk.

If no activities are associated with the risk, the **Exposure Start** date is the project **Start** date.

Risk Exposure Calculations

Review the following field definition and examples to learn how to calculate risk exposure.

Exposure field

The monetary impact value for each risk, response action, and response plan calculated from the values selected for the probability and cost impact.

Risk exposure, also known as Value at Risk (VaR), provides data that is generally used during the analysis and prioritization phases of the risk management process. The difference in exposure for a risk and its associated response plan is indicative of the effectiveness of the response plan.

Calculated as **probability midpoint** times **cost midpoint**. A midpoint is calculated by adding the lower value and the higher value in the threshold range and dividing the sum by two. The cost midpoint for the highest threshold range is calculated as the midpoint between the lower value in the threshold range and a value that is twice the lower value.

> **Note**
>
> The cost and probability midpoint for Negligible thresholds is always 0.

For projects calculating cost impact by percentage, the cost threshold range is converted into monetary values by multiplying the lower value and the higher value in the percentage range with the project's **Planned Total Cost**. These two monetary values are then used to calculate the cost midpoint.

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Example: Calculating Risk Exposure using a Range of Monetary Values

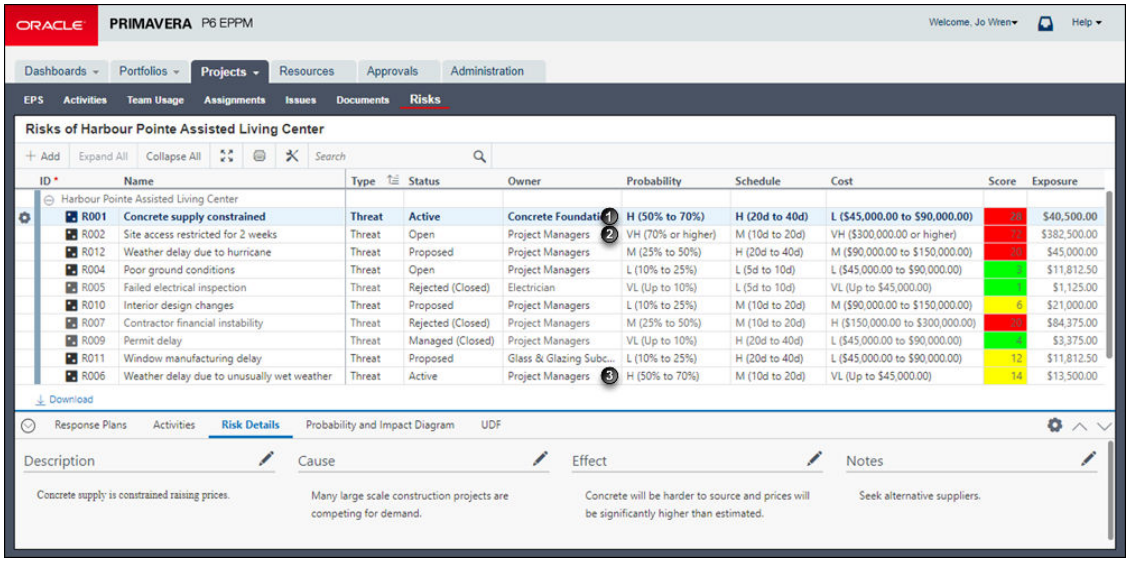


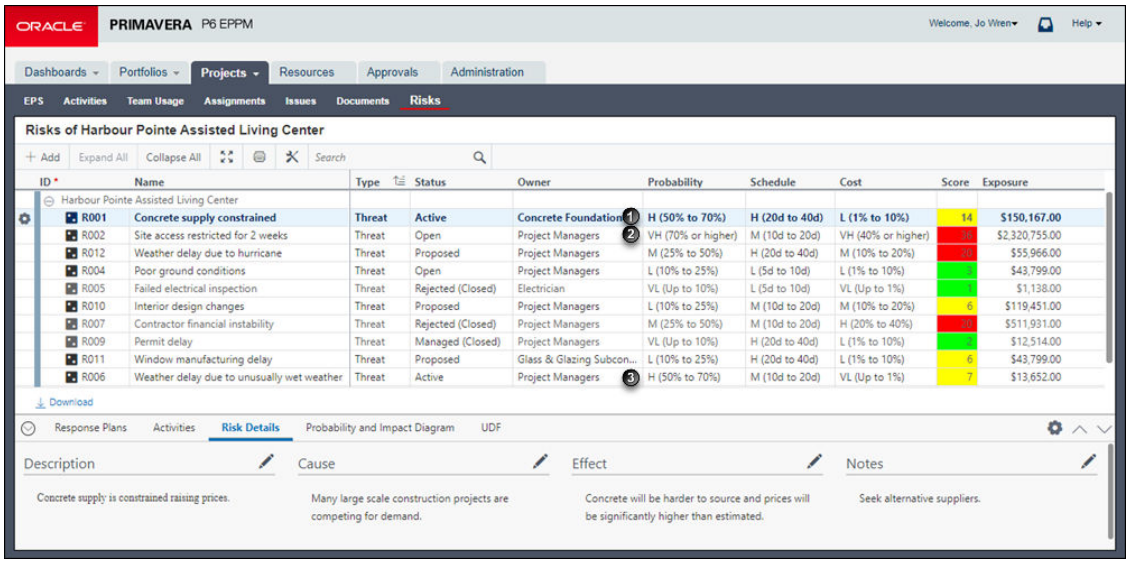
Table of Risk Exposure Examples: Calculating using Values

Item	Description
1	Calculating risk exposure: The cost midpoint calculation is (45,000 plus 90,000) divided by two equals 67,500. The probability midpoint calculation is (50% plus 70%) divided by two equals 60%. The exposure for the risk is 67,500 times 60% equals 40,500.
2	Calculating risk exposure for the highest threshold range: The cost midpoint for the highest threshold range is calculated as the midpoint between the lower value in the threshold range and a value that is twice the lower value. The cost midpoint calculation is (300,000 plus (300,000 times two)) divided by two equals 450,000. The probability midpoint for the highest threshold range is calculated as the midpoint between the lower value in the threshold range and 100%. The probability midpoint calculation is (70% plus 100%) divided by 2 equals 85%. The exposure for the risk is 450,000 time 85% equals 382,500.

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Item	Description
3	Calculating risk exposure for the lowest threshold range: The cost and probability midpoint for the lowest threshold range is calculated as the midpoint between 0 and the upper value in the range. The cost value is *Up to 45,000*, therefore the midpoint calculation is (0 plus 45,000) divided by two, which equals 22,500. The probability midpoint calculation is (50% plus 70%) divided by two equals 60%. The exposure for the risk is 22,500 times 60% equals 13,500.

Example: Calculating Risk Exposure as a Percentage of the Project's Planned Total Cost



Calculating Risk Exposure using Percentages Example

Item	Description
1	Calculating risk exposure: To convert the cost percentages into monetary values, multiply the project's Planned Total Cost by the lower value and the higher value in the percentage range. Lower value: 1% times 4,550,501 equals 45,505. Higher value: 10% times 4,550,501 equals 455,050. The cost midpoint calculation is 45,505 plus 455,050 divided by 2 equals 250,278. The probability midpoint calculation is (50% plus 70%) divided by two equals 60%. The exposure for the risk is 250,278 times 60% equals 150,168.

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Item	Description
2	Calculating risk exposure for the highest threshold range: To convert the cost percentages into monetary values, multiply the project's Planned Total Cost by the lower value and the higher value in the percentage range. Lower value: 40% times 4,550,501 equals 1,820,200. Higher value: The cost midpoint for the higher value in the threshold range is calculated as the midpoint between the lower value in the threshold range and a value that is twice the lower value. In this example, the higher value is 1,820,200 times 2 equals 3,640,400. The cost midpoint calculation is (1,820,200 plus 3,640,400) divided by two equals 2,730,300. The probability midpoint for the highest threshold range is calculated as the midpoint between the lower value in the threshold range and 100%. The probability midpoint calculation is (70% plus 100%) divided by 2 equals 85%. The exposure for the risk is 2,730,300 time 85% equals 2,320,755.
3	Calculating risk exposure for the lowest threshold range: To convert the cost percentages into monetary values, multiply the project's **Planned Total Cost** by the lower value and the higher value in the percentage range. The cost and probability midpoint for the lowest threshold range is calculated as the midpoint between 0 and the upper value in the range. Lower value: The lower value is 0 times 4,550,501 equals 0. Higher value: 1% times 4,550,501 equals 45,505. The cost midpoint calculation is (0 plus 45,505) divided by two equals 22,752. The probability midpoint calculation is (50% plus 70%) divided by two equals 60%. The exposure for the risk is 22,752 times 60% equals 13,652.

Risk Scoring Method Description

The risk scoring method is a required input to the risk scoring matrix along with threshold values for probability, tolerance, cost impact, and schedule impact to calculate risk score. Review the following field definition and example to learn more about how risk scores are calculated.

Risk Scoring Method list

The type of calculation used to obtain an overall impact value, which is then used along with the probability to determine the score used to evaluate project risk. The overall impact value is calculated using one of the following three methods:

Highest Impact: The overall impact for a risk is set to the highest of all the impacts assigned to the risk.

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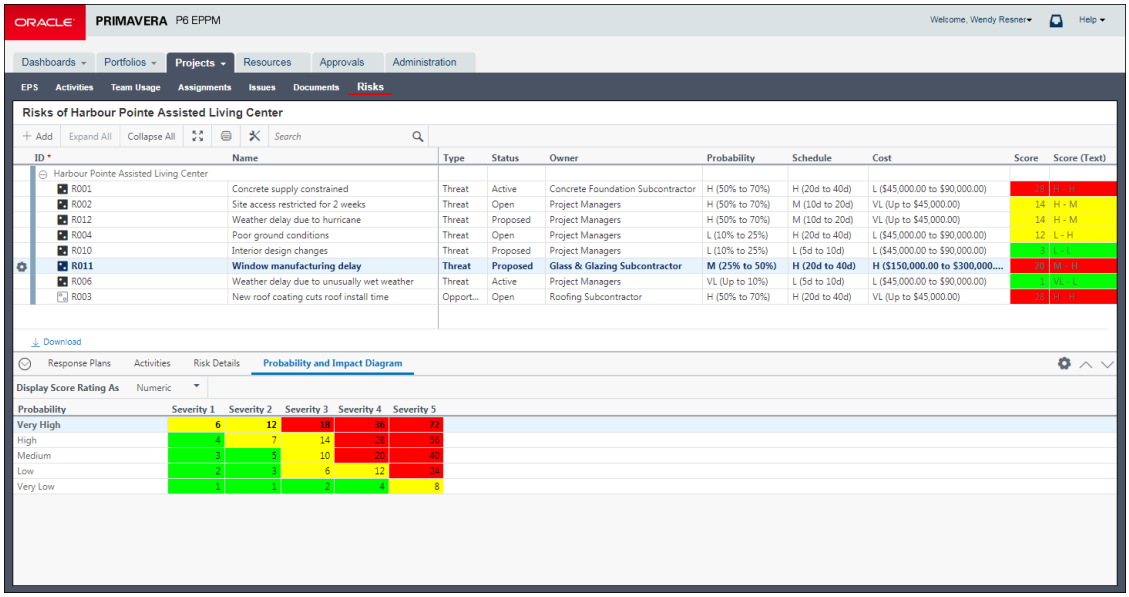
Average Impact: The overall impact is determined by calculating the average of all impact values.

Average Individual Impact: The overall impact is determined by combining the value of each impact individually with the probability from the Probability and Impact Diagram. The total of all impact scores is then divided by the number of impacts.

Example: Harbour Pointe Assisted Living Center Risk Scoring Method

The Harbour Pointe Assisted Living Center project is a long-term construction project for which many risks have been identified. The scoring method used to calculate risk for this project is the **Highest Impact** method.

Risk Register Illustrating Risk Scores using the Highest Impact Risk Scoring Method



Review the following chart to understand how the score was calculated for *Risk R001: Concrete supply constrained*, and how the score changes depending on the risk scoring method assigned to the risk scoring matrix. Note that there are two impact types (**Schedule** and **Cost**) used for the calculations in this example.

Method	Calculation Details	Score
Highest Impact	The highest impact for the activity is the **Schedule** impact, which is marked as **High**. High is equivalent to Severity 4 in the Probability and Impact Diagram (PID). Using the PID, a Severity 4 and a High Probability gives this risk a score of 28.	28
Average Impact	The overall impact for this risk is the sum of 2 (**Low Cost** impact) plus 4 (**High Schedule** impact) divided by 2 (number of impacts) equals 3. In this example, the 3 represents a **Medium** impact and is equivalent to Severity 3 in the PID. Using the PID, a Severity 3 and a High Probability gives this risk a score of 14.	14

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Average Individual Impact	The score for **Cost Impact**, given a **High Probability** and a **Low Cost Impact**, is 7. The score for **Schedule Impact**, given a **High Probability** and a **High Schedule Impact**, is 28. The **Average Individual Impact** score is 7 plus 28 divided by 2 (number of impacts), which is rounded to 18.	18

Scorecard Settings Area

The Scorecard settings area displays configurable options for viewing portfolio data in a Scorecard. Use the following fields to modify your scorecard view.

Screen Elements

Group By list

Select a field value to determine your preferred option to group your data.

Customize link

Displays customize scorecard dialog box. See Customize Scorecard Dialog Box.

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

Summarized, Published, and Live Data Usage in P6

The data you see in P6 can be of the following types:

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- **Live**: Data stored directly in the database, or calculated "on-the-fly".
  Most of the information you see in P6 is drawn live from the database. That includes information about projects, their activities, resources, roles, assignments, labor unit totals, cost totals, risks, issues, documents, and so on.
- **Published**: Data gathered by the Publication Services, that gather and calculate data as close as possible to real-time.
  These global services gather certain enterprise, project, resource, and global data that P6 uses to generate unit and cost spreads and calculated data on some pages. Published data is also used for reports. The services are triggered when sufficient changes are made to projects or when a time period specified by an administrator has elapsed.

  Project level settings control whether a project's data will be published and each project's relative priority to others.

  Application level settings control the period for which data will be published, the interval for time-distributed data, whether and how often publication services run, the triggers for a project's data to be republished, and whether resource spread, role spread, and baseline data should be published.

  For more information about publication services, see About Publication Services.
- **Summarized**: Data gathered by the Summarizer Service, that runs at scheduled times as configured by your administrator.
  This project service generates data used on some pages to show unit and cost spread data and aggregated (rolled-up) data at EPS, project, and WBS level. The summarizer is typically configured to run less frequently than the publisher and therefore changes you make might take longer to be visible in summarized data than published data.

  For more information about summary data, see About Summary Data.

> **Note**
>
> The publisher and summarizer services always use the project baseline for earned value calculations, regardless of the *Baseline to be used for earned value calculations* setting in each project's preferences. Therefore earned value data viewed in areas of the software using published or summarize data might differ from the same data viewed in areas of the software using live data. For further information see: Summarized, Published, and Live Data Usage in P6*Summarized, Published, and Live Data Usage in P6*

The following table shows which type of data is used in each area of the software.

Dashboards

Data Type	Source
Bubble charts, histograms, pie charts, score cards, side-by-side histograms, stacked histograms.	Published
• Except costs, units, dates, durations calculated using dates, and activity counts.	Summarized
Project Performance	Published
• Except earned value management calculations.	Summarized (using the Project baseline)
Open Requests for Resources	
• Roles to be staffed	Live
• Spread data	Published
My Projects	Live

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My Activities	Live
My Risks	Live
My Issues	Live
My Documents	Live
My Calendar	Live

Portfolios

Data Type	Source
Portfolio Analysis Page	Published
• Except costs, units, dates, durations calculated using dates, and activity counts.	Summarized
Capacity Planning Page	Summarized
Performance Status Page	Published
• Except earned value management calculations.	Summarized (using the Project baseline)

Projects

Data Type	Source
EPS Page	Live
• Except costs, units, dates, and activity counts.	Summarized
• Except durations.	Live (but calculated from summarized data)
Activities Page	Live
• Except Resource Availability.	Published
Team Usage Page	Published
Assignments Page	Live
• Except Resource Availability	Published
Issues Page	Live
Documents Page	Live
Risks Page	Live

Resources

Data Type	Source
Assignments Page	Live
• Except Resource Availability	Published
Planning Page	Live
• Except Resource Availability	Published
Analysis Page	Published
Administration Page	Live

Approvals

Data Type	Source
Status Updates Page	Live
Timesheets Page	Live

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Reports

Data Type	Source
All data	Published

Summary Columns of the EPS Table

Contains Summary Data option

Determines whether the project has been summarized. If the checkbox is marked, the project has been summarized.

Enable Summarization option

Determines whether a project will be summarized. If you select this option, the fields on the **Summarization** page are enabled. If this option is cleared, the project will not be summarized.

Last Summarized Date field

The date the project was last summarized. This is useful for assessing whether summary data for the project is current.

This field is blank for projects that have not been summarized or whose summary data has been deleted.

Summarize Resources/Roles by WBS option

Determines whether resource and role summaries should be created at WBS level for the project. If this option is selected, then P6 will create summary data for resources and roles to the level determined by **Summarize to WBS level**.

Summarize to WBS Level list

Determines the depth of the WBS hierarchy for which summary data will be calculated and stored in the database. Level 1 is the project level, therefore if you select to summarize to WBS level 3, summary data will be calculated at the project level and for all first- and second-level WBS elements of the project. If you want to be able to drill down to lower levels of the WBS hierarchy when viewing or reporting on summarized data, change this setting to a higher number.

Timesheet Feedback Columns of the Activity Table

Feedback from Resource field

The notes received from the resource as recorded in P6 Professional.

New Feedback option

Determines whether there is feedback from resources about this activity as recorded in P6 Professional that you haven't yet viewed. If the option is not selected, then there is no new feedback or you have already viewed the feedback.

Review Finish Date field

The finish date for the activity as proposed by the primary resource.

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If the project manager approves the activity finish date, the review finish date is copied to the actual finish.

Review Status list

The activity review status.

Primary resources can set the status to **For Review** when they believe the activity is completed, but a primary resource is not allowed to mark activities as completed.

Units Columns of the Activity Table

Actual Labor Units field

The number of units expended for all labor resources assigned to the activity.

Actual Nonlabor Units field

The number of nonlabor units that have been expended on the activity.

Actual This Period Labor Units field

The number of labor units used during this financial period.

If period performance is stored, the calculation is **Actual Labor Units** minus the sum of the stored **Actual This Period Labor Units** fields for all previous periods.

If the period performance is not stored, **Actual This Period Labor Units** is the same as **Actual Labor Units**.

Actual This Period Nonlabor Units field

The nonlabor units used during this financial period.

If period performance is stored, the calculation is **Actual Nonlabor Units** minus the sum of the stored **Actual This Period Nonlabor Units** fields for all previous periods.

If the period performance is not stored, **Actual This Period Nonlabor Units** is the same as **Actual Nonlabor Units**.

At Completion Labor Units field

The sum of the actual plus remaining units for all labor resources assigned to the activity.

It is the same as the planned labor units if the activity is not started, and the actual labor units once the activity is completed.

Calculated as **Actual Labor Units** plus **Remaining Labor Units**.

At Completion Nonlabor Units field

The non labor units at completion. The sum of the actual plus remaining units for all nonlabor resources assigned to the activity.

It is the same as the planned nonlabor units if the activity is not started, and the actual nonlabor units once the activity is completed.

Calculated as **Actual Nonlabor Units** plus **Remaining Nonlabor Units**.

BL Project Actual Labor Units field

The actual units for all labor resources assigned to the activity in the project baseline.

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BL Project Actual Nonlabor Units field

The actual units for all actual nonlabor resources assigned to the activity in the project baseline.

BL Project Labor Units field

The units for all labor resources assigned to the activity in the project baseline.

BL Project Nonlabor Units field

The units for all nonlabor resources assigned to the activity in the project baseline.

BL1 Actual Labor Units field

The actual units for all labor resources assigned to the activity in the primary baseline.

BL1 Actual Nonlabor Units field

The actual units for all nonlabor resources assigned to the activity in the primary baseline.

BL1 Labor Units field

The units for all labor resources assigned to the activity in the primary baseline.

Calculated as **Baseline Actual Labor Units** plus **Baseline Remaining Labor Units**.

BL1 Nonlabor Units field

The units for all nonlabor resources assigned to the activity in the primary baseline.

Planned Labor Units field

The planned number of units for all labor resources assigned to the activity.

Planned Nonlabor Units field

The planned units for all nonlabor resources assigned to the activities in the project.

Remaining Labor Units field

The remaining units for all labor resources assigned to the activity.

The Remaining Labor Units reflect the work remaining to be done for the activity. Before the activity is started, the remaining units are the same as the planned units. After the activity is completed, the remaining units are zero.

Remaining Nonlabor Units field

The remaining units for all nonlabor resources assigned to the activities.

The remaining units reflect the work remaining to be done for the activity. Before the activity is started, the remaining units are the same as the planned units. After the activity is completed, there are zero remaining units.

Variance BL Project - Labor Units field

The difference between baseline labor units and at completion labor units. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL Project Labor Units** minus **At Completion Labor Units**.

Variance BL Project - Nonlabor Units field

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The difference between the baseline nonlabor units and the at completion nonlabor units. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL Project Nonlabor Units** minus **At Completion Nonlabor Units**.

Variance BL1 - Labor Units field

The difference between primary baseline labor units and the at completion labor units. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Labor Units** minus **At Completion Labor Units**.

Variance BL1 - Nonlabor Units field

The difference between the primary baseline nonlabor units and the at completion nonlabor units. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Nonlabor Units** minus **At Completion Nonlabor Units**.

Units Columns of the Assignments Table

Actual Overtime Units field

The actual overtime units worked by the resource on the activity.

This value is calculated from timesheets when project actuals are applied or can be entered directly by the project manager.

Actual Regular Units field

The actual non-overtime units worked by the resource on the activity.

This value is calculated from timesheets when project actuals are applied or can be entered directly by the project manager.

Actual This Period Units field

The labor, nonlabor, and material units used during this financial period.

If period performance is stored, the calculation is **Actual Units** minus the sum of the stored **Actual This Period Units** fields for all previous periods.

If the period performance is not stored, **Actual This Period Units** is the same as **Actual Units**.

Actual Units field

The sum of the actual non-overtime and the overtime units worked by the resource on the activity.

Calculated as **Actual Regular Units** plus **Actual Overtime Units**.

Values for **Actual Regular Units** and **Actual Overtime Units** are obtained from either timesheets when project actuals are applied, or directly from the updated fields in the interface.

At Completion Units field

The sum of the actual units and remaining units for the resource assignment on the activity.

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Calculated as **Actual Units** plus **Remaining Units**.

Pend Remaining Units field

The estimate of the resource's remaining units on this activity.

The Pend Remaining Units value is entered by each resource using timesheets. This value is copied to the resource's remaining units for the activity when project actuals are applied. The project manager specifies whether resources update their percent complete or remaining units for each project.

Planned Units field

The planned units of work for the resource assignment on the activity.

Remaining Units field

The remaining units of work to be performed by the resource on the activity.

Calculated as **Planned Units** minus **Actual Units**.

Staffed Remaining Units field

The remaining units for resource assignments that have filled a role.

Unstaffed Remaining Units field

The remaining units for resource assignments that have not filled a role.

Units Columns of the EPS Table

Actual Labor Units field

The labor units expended on the project within the EPS.

Actual Nonlabor Units field

The number of nonlabor units that have been expended on the project within the EPS.

Actual This Period Labor Units field

The number of labor units used during this financial period.

If period performance is stored, the calculation is **Actual Labor Units** minus the sum of the stored **Actual This Period Labor Units** fields for all previous periods.

If the period performance is not stored, **Actual This Period Labor Units** is the same as **Actual Labor Units**.

Actual This Period Nonlabor Units field

The nonlabor units used during this financial period.

If period performance is stored, the calculation is **Actual Nonlabor Units** minus the sum of the stored **Actual This Period Nonlabor Units** fields for all previous periods.

If the period performance is not stored, **Actual This Period Nonlabor Units** is the same as **Actual Nonlabor Units**.

At Completion Labor Units field

The sum of the actual plus remaining units for all labor resources assigned to the project.

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It is the same as the planned labor units if the activities in the project are not started, and the actual labor units once the activities are completed.

Calculated as **Actual Labor Units** plus **Remaining Labor Units**.

At Completion Nonlabor Units field

The nonlabor units at completion. It is the sum of the actual plus remaining units for all nonlabor resources assigned to the activities in the project.

It is the same as the planned nonlabor units if the activities are not started, and the actual nonlabor units once the activities are completed.

Calculated as **Actual Nonlabor Units** plus **Remaining Nonlabor Units**.

BL Project Labor Units field

The planned units for all labor resources assigned to the activity in the project baseline.

Calculated as **Baseline Actual Labor Units** plus **Baseline Remaining Labor Units**.

BL Project Nonlabor Units field

The units for all nonlabor resources assigned to the project in the project baseline.

Planned Labor Units field

The planned number of units for all labor resources assigned to activities in the project.

Planned Non Labor Units field

The planned units for all non labor resources assigned to the activities in the project.

Remaining Labor Units field

The remaining units for all labor resources assigned to the activities in the project.

The Remaining Labor Units reflect the work remaining to be done for the EPS. Before the project is started, the remaining units are the same as the planned units. After the project is completed, the remaining units are zero.

Remaining Nonlabor Units field

The remaining units for all nonlabor resources assigned to the activities.

The remaining units reflect the work remaining to be done for the EPS.

Variance - Labor Units field

The difference between baseline labor units and at completion labor units.

Calculated as **Baseline Labor Units** minus **At Completion Labor Units**.

Variance - Nonlabor Units field

The difference the between baseline nonlabor units and the at completion nonlabor units.

Calculated as **Baseline Nonlabor Units** minus **At Completion Nonlabor Units**.

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9

Data Dictionary

% Allocation

% Allocation field

The percentage of the resource or role's Maximum Units/Time that is allocated to the selected project level assignment.

When you change the **% Allocation** field, P6 assigns the specified percentage of the resource or role's maximum units per time to the selected project. This does not consider their existing allocations and can therefore cause them to become overallocated. Changing the resource or role's allocation recalculates the total units for the assignment and the corresponding spread of allocated units in the spreadsheet.

Access Level

Access Level field

The list of who can access the document.

Project: If you have access to the project, you will have access to this document.

Private: Only the user who created the document will have access.

Access Time

Access Time field

The date and time you last accessed the document.

Accounting Variance

Accounting Variance field

The difference between the planned value of work scheduled and the actual cost of work performed.

A negative value indicates that actual costs have exceeded the scheduled costs.

Calculated as **Planned Value** minus **Actual Cost**.

Accounting Variance - Labor Units

Accounting Variance - Labor Units field

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The difference between the planned value of work scheduled and the actual work performed.

A negative value indicates that actual costs have exceeded the scheduled costs.

Calculated as **Planned Value Labor Units** minus **Actual Units**.

Accrual Type

Accrual Type list

The accrual type for the project expense.

Start of Activity: Indicates the entire expense costs are accrued at the start date of the activity.

End of Activity: Indicates entire expense costs are accrued at the finish date of the activity.

Uniform Over Activity: Indicates the expense costs are accrued uniformly over the duration of the activity.

Action Name field

Action Name field

The name that will appear on the Exchange Data menu.

Active Projects

Active Projects field

The number of active projects to which the resource is currently assigned.

Activity % Complete

Activity % Complete field

The percent of the activity that has been completed.

The calculation is based on the formula for the selected Percent Complete Type. The Percent Complete Type can be *Units*, *Duration*, *Physical, or Scope*.

If the selected activity's percent complete type is *Duration*, the percent complete is calculated as (**Planned Duration** minus **Remaining Duration**) divided by **Planned Duration**.

If the activity's percent complete type is *Units*, the percent complete is calculated as (**Actual Labor Units** plus **Actual Nonlabor Units**) divided by (**Actual Labor Units** plus **Actual Nonlabor Units** plus **Remaining Labor Units** plus **Remaining Nonlabor Units**).

If the activity's percent complete type is *Physical*, either the user records the percent complete manually or the field is set to calculate using steps. To calculate using steps, the **Calculate Activity % Complete from activity steps** option must be set in Project Preferences.

If the activity's percent complete type is *Scope*, the percent complete originates from Oracle Primavera Cloud and cannot be modified in P6.

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Activity Code

Activity Code field

A code used to categorize activities.

An activity code can be designated as one of three types: Global, EPS, or Project. Global activity codes can be used in all projects within the enterprise. EPS activity codes can be used only in projects that belong to a specified EPS, including its subordinate EPS nodes, if any. Project activity codes can be used only in one project. The EPS or project that an activity code is associated with is specified when the code is created.

Activity Count

Activity Count field

The number of activities in the group.

Activity Finish

Activity Finish field

The finish date of the activity to which the assignment belongs. This is the planned finish if the activity has not started, the remaining finish if the activity is in progress, or the actual finish if the activity has completed.

Activity ID

Activity ID field

The unique identifier of the activity.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Activity ID (Relationships)

Activity ID field

The unique identifying code for the predecessor or successor activity.

Activity ID Prefix

Activity ID Prefix field

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The series of initial letters, numeric digits, or special characters you want P6 to use to auto-number all the activities in a given project. By default, this field can contain 1 to 20 characters.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Activity ID Suffix

Activity ID Suffix field

The numeric digits you want P6 to use to auto-number all the activities in a given project. The value must be a number between 1 and 999,999.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Activity Status

Activity Status field

The current condition of the activity.

Valid values are **Not Started**, **In Progress**, and **Completed**.

Activity Type

Activity Type field

Determines how duration and schedule dates are calculated for an activity.

Task Dependent: Activities are scheduled using the activity's calendar rather than the calendars of the assigned resources. Choose task dependent when you want to control the duration of the activity yourself (that is, no resources are assigned), or when one or more resources assigned to the same activity can work according to the same calendar. For example, you might have an activity to cure concrete; you know how long the task takes and the addition of resources won't complete the task any earlier. You would designate this activity as task dependent.

Resource Dependent: Activities are scheduled using the calendars of the assigned resources. This type is used when several resources are assigned to the activity, but they might work separately. Choose resource dependent when you want to schedule each resource according to his/her own time schedule, or resource calendar, not the activity calendar. The assigned resource availability determines the start and finish dates of the activity. Typically, you use this type when multiple resources assigned to the same activity can work independently, or when availability can affect the activity's duration. For example, an activity that requires an Inspector might be delayed if that resource is assigned to multiple projects or is on vacation.

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Level of Effort: Activities have a duration that is determined by its dependent activities and are typically administration type. Choose level of effort to indicate that the activity's duration depends on its predecessor and/or successor activities. A level of effort activity is usually one that is ongoing, such as clerical work, Change Management, or project management tasks. For example, site cleanup could be considered a level of effort activity; it occurs repeatedly and is dependent on the completion of a phase.

Start or Finish Milestone: Milestone activities are zero-duration and are used to mark significant project events. Choose start milestone or finish milestone to indicate that the activity marks the beginning or end of a major stage in the project. A primary resource or an activity owner, and expenses can be assigned to a milestone. In an office building addition project, examples of milestones might include Project Definition Complete, Structure Complete, or End Bidding Process.

WBS Summary: Activities that are used to aggregate date, duration, and percent complete values for a group of activities that share a common WBS code level. Choose WBS Summary to indicate that the activity is a summary-level WBS activity. A WBS Summary activity represents a group of activities that share a common WBS level. The summary-level WBS activity enables roll-ups of dates for the activity group. The duration of a WBS Summary activity extends from the start of the earliest activity in a group to the finish of the latest activity. WBS codes control which activities are part of a WBS Summary activity; P6 incorporates any activities that share a component of the WBS Summary activity's WBS code into the WBS Summary activity. For example, all activities whose WBS codes begin with A (A.1, A.1.1, A.1.2, etc.) can be part of one WBS Summary activity whose WBS code is A. At a lower level, all activities whose WBS codes start with A.1 (A.1.1, A.1.2, etc.) can be part of a WBS Summary activity whose WBS code is A.1.

Actual (Units)

Actual field

The exact number of units that have been expended on the selected activity.

Actual Completed Activities

Actual Completed Activities field

The number of activities that have an actual finish date.

Actual Cost (Assignments)

Actual Cost field

The actual non-overtime plus overtime cost for the resource assignment on the activity.

Calculated as **Actual Regular Cost** plus **Actual Overtime Cost**.

Actual Cost (EPS)

Actual Cost field

The actual total cost incurred on the project as of the project data date.

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Calculated as **Actual Labor Costs** plus **Actual Nonlabor Costs** plus **Actual Material Costs** plus **Actual Expense Costs**.

Actual Cost (Expenses)

Actual Cost field

The project expense for the activity.

Calculated as **Actual Units** multiplied by **Price/Unit**.

Actual Cost (Response Plans)

Actual Cost field

The actual cost of the response plan or response action item.

Calculated as the sum of the **Actual Cost** of each response action item.

If an activity is assigned to the response action item, the field is set to display the actual cost of the activity.

Actual Duration (Activities)

Actual Duration field

The total working time from the activity **Actual Start** date to the **Actual Finish** date for completed activities, or the total working time from the **Actual Start** date to the data date for in-progress activities.

The actual working time is computed using the activity's calendar.

Actual Duration (Assignments)

Actual Duration field

The total working time from the assignment actual start date to the actual finish date for completed assignments, or the total working time from the actual start date to the data date for in-progress assignments.

Actual Duration (EPS)

Actual Duration field

The current total working time for the project, template, or EPS. For completed items, this field displays the total working time from the actual start date to the actual finish date. For items that are in-progress, this field displays the total working time from the actual start date to the data date.

Actual Expense Cost

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Actual Expense Cost field

The actual cost for all project expenses associated with the activity, WBS, project, or EPS.

Actual Finish

Actual Finish field

The date on which the item, such as an activity, assignment, or project, is complete.

When P6 is integrated with Primavera Unifier, the Actual Finish date might have been imported from Primavera Unifier rather than calculated by P6.

Actual In-Progress Activities

Actual In-Progress Activities field

The number of activities that have an actual start date, but no actual finish date.

Actual Labor Cost

Actual Labor Cost field

The actual cost for all labor resources assigned to the activity, WBS, project, or the EPS.

If no resources are assigned, calculated as the **Actual Labor Units** multiplied by **Project Default Price** divided by **Time**.

Actual Labor Units

Actual Labor Units field

The number of units expended for all labor resources assigned to the activity, WBS, project, or EPS.

Actual Material Cost

Actual Material Cost field

The actual units for all material resources assigned to the activity, WBS, project, or EPS.

Actual Name

Actual Name field

The full name of the user.

Actual Nonlabor Cost

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Actual Nonlabor Cost field

The actual costs for all nonlabor resources assigned to the activity, WBS, project, or EPS.

For activities, if no resources are assigned, calculated as the **Activity Actual Nonlabor Units** multiplied by **Project Default Price** divided by **Time**.

Actual Nonlabor Units

Actual Nonlabor Units field

The number of nonlabor units that have been expended on the activity, WBS, project, or EPS.

Actual Not-Started Activities (Activities)

Actual Not-Started Activities field

The number of activities that have no actual start date.

Actual Not-Started Activities (EPS)

Actual Not-Started Activities field

The number of activities that have no actual start date.

Actual Overtime Cost

Actual Overtime Cost field

The actual overtime cost for the resource assignment on the activity.

Calculated as **Actual Overtime Units** multiplied by **Cost per Time** multiplied by **Overtime Factor**.

Actual Overtime Units

Actual Overtime Units field

The actual overtime units worked by the resource on the activity.

This value is calculated from timesheets when project actuals are applied or can be entered directly by the project manager.

Actual Regular Cost

Actual Regular Cost field

The actual non-overtime cost for the resource assignment on the activity.

Calculated as **Actual Regular Units** multiplied by **Cost per Time**.

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Actual Regular Units

Actual Regular Units field

The actual non-overtime units worked by the resource on the activity.

This value is calculated from timesheets when project actuals are applied or can be entered directly by the project manager.

Actual Start

Actual Start field

If work has started, the date work on the activity, WBS, project, or EPS began.

If resources (labor, nonlabor, or material) or roles are assigned to the activity, the actual start date is the earliest among all the resource or role assignments.

For a WBS, project, or EPS, the actual start date is the earliest actual start date among all activities within the WBS, project, or EPS.

When P6 is integrated with Primavera Unifier, the Actual Start date might have been imported from Primavera Unifier rather than calculated by P6.

Actual This Period Cost

Actual This Period Cost field

The labor, nonlabor, and material costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Cost** minus the sum of the stored **Actual This Period Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Cost** is the same as **Actual Cost**.

Actual This Period Labor Cost

Actual This Period Labor Cost field

The labor costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Labor Cost** minus the sum of the stored **Actual This Period Labor Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Labor Cost** is the same as **Actual Labor Cost**.

Actual This Period Labor Units

Actual This Period Labor Units field

The number of labor units used during this financial period.

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If period performance is stored, the calculation is **Actual Labor Units** minus the sum of the stored **Actual This Period Labor Units** fields for all previous periods.

If the period performance is not stored, **Actual This Period Labor Units** is the same as **Actual Labor Units**.

Actual This Period Material Cost

Actual This Period Material Cost field

The material costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Material Cost** minus the sum of the stored **Actual This Period Material Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Material Cost** is the same as **Actual Material Cost**.

Actual This Period Nonlabor Cost

Actual This Period Nonlabor Cost field

The nonlabor costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Nonlabor Cost** minus the sum of the stored **Actual This Period Nonlabor Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Nonlabor Cost** is the same as **Actual Nonlabor Cost**.

Actual This Period Nonlabor Units

Actual This Period Nonlabor Units field

The nonlabor units used during this financial period.

If period performance is stored, the calculation is **Actual Nonlabor Units** minus the sum of the stored **Actual This Period Nonlabor Units** fields for all previous periods.

If the period performance is not stored, **Actual This Period Nonlabor Units** is the same as **Actual Nonlabor Units**.

Actual This Period Units

Actual This Period Units field

The labor, nonlabor, and material units used during this financial period.

If period performance is stored, the calculation is **Actual Units** minus the sum of the stored **Actual This Period Units** fields for all previous periods.

If the period performance is not stored, **Actual This Period Units** is the same as **Actual Units**.

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Actual Total Cost (Activities)

Actual Total Cost field

The actual total cost incurred for the activity as of the project data date.

Calculated as **Actual Labor Cost** plus **Actual Nonlabor Cost** plus **Actual Material Cost** plus **Actual Expense Cost.**

Actual Total Cost (EPS)

Actual Total Cost field

The actual total cost incurred on the project as of the project data date.

Calculated as **Actual Labor Costs** plus **Actual Nonlabor Costs** plus **Actual Material Costs** plus **Actual Expense Costs**.

Actual Units (Activity Expense)

Actual Units field

The actual units of the expense item used to complete the activity.

Actual Units (Assignments)

Actual Units field

The sum of the actual non-overtime and the overtime units worked by the resource on the activity.

Calculated as **Actual Regular Units** plus **Actual Overtime Units**.

Values for **Actual Regular Units** and **Actual Overtime Units** are obtained from either timesheets when project actuals are applied, or directly from the updated fields in the interface.

Added By

Added By field

The name of the user who added information in the system, such as an activity, resource, risk, or project.

Added Date

Added Date field

The date information, such as an activity, resource, risk, or project data, was added into the system.

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Annual Discount Rate

Annual Discount Rate field

The interest rate associated with the cost of an investment from your commercial bank or another funding source.

Valid values are 0 to 100. This rate is used to calculate **Total Spending Plan (Present Value)** and **Total Benefit Plan (Present Value)**.

For example, an annual growth rate of an investment such as 4.75% can be used as an annual discount rate. This rate is used when a future value is assumed and you are trying to find the required net present value.

Anticipated Finish

Anticipated Finish field

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.

If there are no children elements, the anticipated finish is the finish date listed for the item in the table.

The Anticipated Finish date is used as the Finish date if there are no activities assigned to the project or WBS.

Anticipated Start

Anticipated Start field

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.

If there are no children elements, the anticipated start is the start date listed for the item in the table.

The Anticipated Start date is used as the Start date if there are no activities assigned to the project or WBS.

Application field

Application field

Determines the application which the integration links with P6.

Applies To (Issues)

Applies To field

The activity, WBS element, or project associated with the current issue.

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Applies To (WBS)

Applies To field

The WBS or project to which the issue applies.

Approval Date (Team Member Status Updates)

Approval Date field

The date the activity status update was approved.

Approved By (Team Member Status Updates)

Approved By field

The person who approved the activity status update. An approver can be the assigned status reviewer, or a user with Admin or Project superuser privileges.

Approvers

Approvers field

The names of the workflow reviewers who have approved the task.

Assigned By

Assigned By field

The user who assigned the resource to the assignment.

Assigned Date

Assigned Date field

The date the task was assigned to you, your group, or your role.

Assigned Privileges

Assigned Privileges list

The privileges assigned to the profile.

Assignment % Complete

Assignment % Complete field

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The percent complete for the assignment. The calculation of this field depends on the percent complete type for the activity.

If the activity's percent complete type is Units % Complete, this field is calculated as Actual Units for the assignment divided by the At Completion Units for the assignment. If the assignment is not started, the Physical % Complete for the assignment is zero. If the assignment is completed, the Physical % Complete is 100%. If the assignment is completed and the actual units are zero, the Physical % Complete is also zero.

If the activity's percent complete type is Duration % Complete, this field is calculated as (Planned Duration of the assignment - Remaining Duration of the assignment) / Planned Duration of the assignment.

If the activity's percent complete type is Physical % Complete, this field is equal to the Physical % Complete for the activity.

Required for IPMDAR.

Associated Resource

Associated Resource field

The associated resource of each user.

Associated resources can be used to pair users with timesheets, personal calendars, and assignments (for email or phone updates).

At Completion Cost

At Completion Cost field

The sum of the actual costs plus remaining costs for the resource assignment on the activity.

Calculated as **Actual Costs** plus **Remaining Costs**.

At Completion Duration

At Completion Duration field

The total working time from the activity's current start date to the current finish date.

The current start date is the planned start date until the activity is started, and then it is the actual start date. The current finish date is the activity planned finish date while the activity is not started, the remaining finish date while the activity is in progress, and the actual finish date once the activity is completed. The total working time is calculated using the activity's calendar.

At Completion Expense Cost

At Completion Expense Cost field

The sum of the actual plus remaining cost for all activities or project expenses associated with the cost account.

Calculated as **Actual Expense Cost** plus **Remaining Expense Cost**.

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At Completion Labor Cost

At Completion Labor Cost field

The sum of the actual plus remaining costs for all labor resources assigned to an activity or the activities in the project.

If the activities are not started, this equals the planned labor costs. Once the activities are complete, this equals the actual labor costs.

Calculated as **Actual Labor Cost** plus **Remaining Labor Cost**.

At Completion Labor Units

At Completion Labor Units field

The sum of the actual plus remaining units for all labor resources assigned to the activity or all activities in the project.

It is the same as the planned labor units if the activities in the project are not started, and the actual labor units once the activities are completed.

Calculated as **Actual Labor Units** plus **Remaining Labor Units**.

At Completion Material Cost

At Completion Material Cost field

The material cost at completion. It is the sum of the actual plus remaining costs for all material resources assigned to the activity or all activities in the project.

It is the same as the planned material costs if the activities are not started, and the actual material costs once the activities are completed.

Calculated as **Actual Material Cost** plus **Remaining Material Cost**.

At Completion Nonlabor Cost

At Completion Nonlabor Cost field

The nonlabor cost at completion. It is the sum of the actual plus remaining costs for all nonlabor resources assigned to the activity or all activities in the project.

It is the same as the planned nonlabor costs if the activities are not started, and the actual nonlabor costs once the activities are completed.

Calculated as **Actual Nonlabor Cost** plus **Remaining Nonlabor Cost**.

At Completion Nonlabor Units

At Completion Nonlabor Units field

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The nonlabor units at completion. It is the sum of the actual plus remaining units for all nonlabor resources assigned to an activity or all activities in the project.

It is the same as the planned nonlabor units if the activities are not started, and the actual nonlabor units once the activities are completed.

Calculated as **Actual Nonlabor Units** plus **Remaining Nonlabor Units**.

At Completion Total Cost

At Completion Total Cost field

The estimated cost at completion for the activity or all activities in the project.

Calculated as the **Actual Total Cost** plus the **ETC** (estimate-to-complete) cost. The method for computing ETC depends on the Earned Value technique selected for the activity's WBS.

At Completion Units

At Completion Units field

The sum of the actual units and remaining units for the resource assignment on the activity.

Calculated as **Actual Units** plus **Remaining Units**.

Authentication Code

Authentication Code field

The Authentication Code for accessing the Primavera Unifier database.

Author

Author field

The resource who authored or created the document.

Available Template

Available Templates field

The permitted templates that you can use to apply styles to the raw data in the report.

A report template is a set of style rules applied to a report in order to best format and present its data. You can design templates using your P6 reporting software and also determine which templates should be available for users to apply to their reports.

Available To

Available To field

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Indicates the user access to various views and dashboards throughout the application.

Global: All users can access the view or dashboard.

User: Only you, the current user, can access the view or dashboard.

Multiple Users: A select group or list of users, including you, has access to the view or dashboard.

Selections vary based on your location in the application.

Bar Type

Bar Type field

The types of bars shown in the Activities, Assignments, or EPS view Gantt chart.

Activities View

Current Bar: Spans the early remaining/actual start to the early remaining/actual finish for each activity, and indicates how the schedule is progressing according to the original plan.

Float Bar: Shows the total amount of time that an activity can be delayed without delaying completion of a project.

Free Float Bar: Shows the amount of time that an activity can be delayed without causing subsequent activities to be delayed.

Late Bar: Shows the late start to the late finish of an activity.

Percent Complete Bar: Shows the completion percentage of an activity.

Plan Bar: Shows the forecasted status of planned activities, and is used for simulating the outcome of the project schedule as part of project planning.

Project Baseline Bar: Shows the project baseline start and finish dates of an activity, and indicates how the schedule is progressing according to the original plan.

User's Primary Baseline Bar: Shows the primary baseline start and finish dates of an activity, and indicates how the schedule is progressing according to the original plan.

UDF Bar: Shows the amount of time spanning the selected Activity UDF start date and the Activity UDF finish date. UDF bars can be used to show a risk adjusted schedule using dates imported from Oracle Primavera Risk Analysis.

Pre Response Bar: Shows the pre response pessimistic dates of activities calculated by Oracle Primavera Cloud.

Post Response Bar: Shows the post response pessimistic dates of activities calculated by Oracle Primavera Cloud.

Assignments View

Current Bar: Spans the early remaining/actual start to the early remaining/actual finish for each activity, and indicates how the schedule is progressing according to the original plan.

Late Bar: Shows the late start to the late finish of an activity.

Plan Bar: Shows the forecasted status of planned activities, and is used for simulating the outcome of the project schedule as part of project planning.

EPS View

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Current Bar: Spans the early remaining/actual start to the early remaining/actual finish for each activity, and indicates how the schedule is progressing according to the original plan.

Project Baseline Bar: Shows the project baseline start and finish dates of an activity, and indicates how the schedule is progressing according to the original plan.

Forecast bar: Shows the forecast start to the forecast finish dates, and indicates how the schedule is progressing according to the original forecast dates.

Base Calendar

Base Calendar field

The global calendar that is assigned to the calendar to determine work days, nonwork days (for example, global holidays), and calendar exceptions.

For example, multinational corporations will have one or more global calendars per country to represent global holidays for each region. Exceptions are used when the standard work day is modified.

Baseline Data Date

Baseline Data Date field

The last date of recorded progress for the project baseline. Status is up-to-date as of the data date.

Benefit Plan

Benefit Plan field

The anticipated or actual profit or benefit portion for each time period. Typically, the benefit plan begins after the project has completed.

BL Completed Activities

BL Completed Activities field

The number of completed activities in the project baseline.

BL Duration

BL Duration field

The planned duration for the activity in the primary baseline. Planned duration is the total working time from the activity current start date to the current finish date.

Calculated as **Actual Duration** plus **Remaining Duration**.

The total working time is calculated using the activity's calendar.

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BL Finish

BL Finish field

The current latest finish date of all activities in the project baseline.

BL In-Progress Activities

BL In-Progress Activities field

The number of in-progress activities in the project baseline.

BL Not-Started Activities

BL Not-Started Activities field

The number of activities not started in the project baseline.

BL Project Percent Complete Type

BL Project Percent Complete Type field

The percent complete type of the activity in the project baseline.

BL Project Activity % Complete

BL Project Activity % Complete field

The activity percent complete of the activity in the project baseline.

BL Project Activity Status

BL Project Activity Status field

The status of the activity in the project baseline.

BL Project Actual Duration

BL Project Actual Duration field

The actual duration of the activity in the project baseline. The duration is the total working time from the activity actual start date to the actual finish date.

The total working time is calculated using the activity's calendar.

BL Project Actual Expense Cost (Activities)

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BL Project Actual Expense Cost field

The actual cost for all project expenses associated with the activity in the project baseline.

BL Project Actual Finish

BL Project Actual Finish field

The actual finish date of the activity in the project baseline.

BL Project Actual Labor Cost (Activities)

BL Project Actual Labor Cost field

The actual cost for all labor resources associated with the activity in the project baseline.

BL Project Actual Labor Units (Activities)

BL Project Actual Labor Units field

The actual units for all labor resources assigned to the activity in the project baseline.

BL Project Actual Material Cost (Activities)

BL Project Actual Material Cost field

The actual cost for all material resources associated with the activity in the project baseline.

BL Project Actual Nonlabor Cost (Activities)

BL Project Actual Nonlabor Cost field

The actual cost for all nonlabor resources associated with the activity in the project baseline.

BL Project Actual Nonlabor Units (Activities)

BL Project Actual Nonlabor Units field

The actual units for all actual nonlabor resources assigned to the activity in the project baseline.

BL Project Actual Start

BL Project Actual Start field

The actual start date of the activity in the project baseline.

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BL Project Actual Total Cost (Activities)

BL Project Actual Total Cost field

The actual cost for all project expenses, labor, non-labor, and material resources associated with the activity in the project baseline.

BL Project Completed Activities

BL Project Completed Activities field

The number of activities that should currently be completed, according to the project baseline.

BL Project Cost % Complete

BL Project Cost % Complete field

The cost percent complete of the activity in the project baseline.

BL Project Duration

BL Project Duration field

The duration of the activity in the project baseline. The duration is the total working time from the activity current start date to the current finish date.

Calculated as **Actual Duration** plus **Remaining Duration**.

The total working time is calculated using the activity's calendar.

BL Project Duration % Complete

BL Project Duration % Complete field

The duration percent complete of the activity in the project baseline.

BL Project Early Finish

BL Project Early Finish field

The early finish date of the activity in the project baseline.

BL Project Early Start

BL Project Early Start field

The early start date of the activity in the project baseline.

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BL Project Expense Cost

BL Project Expense Cost field

The planned cost for all project expenses associated with the activity or the project in the project baseline.

BL Project Finish

BL Project Finish field

The current latest finish date of all activities in the project baseline.

BL Project Free Float

BL Project Free Float field

The free float of the activity in the project baseline.

BL Project In-Progress Activities

BL Project In-Progress Activities field

The number of in-progress activities in the project baseline.

BL Project Labor Cost

BL Project Labor Cost field

The cost for all labor resources assigned to the activity or project in the project baseline.

BL Project Labor Units

BL Project Labor Units field

The units for all labor resources assigned to the activity or project in the project baseline.

BL Project Late Finish

BL Project Late Finish field

The late finish date of the activity in the project baseline.

BL Project Late Start

BL Project Late Start field

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The late start date of the activity in the project baseline.

BL Project Match

BL Project Match field

Indicates whether the activity is present in the baseline assigned as the project baseline.

BL Project Material Cost

BL Project Material Cost field

The planned cost for all material resources assigned to the activity or project in the project baseline.

BL Project Nonlabor Cost

BL Project Nonlabor Cost field

The cost for all nonlabor resources assigned to the activity or project in the project baseline.

BL Project Nonlabor Units

BL Project Nonlabor Units field

The units for all nonlabor resources assigned to the activity or project in the project baseline.

BL Project Not Started Activities

BL Project Not Started Activities field

The number of activities not started in the project baseline.

BL Project Remaining Duration

BL Project Remaining Duration field

The remaining duration of the activity in the project baseline.

BL Project Start

BL Project Start field

The current earliest start date of all activities in the project baseline.

BL Project Total Cost

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BL Project Total Cost field

The total cost for the activity or project in the project baseline.

Calculated as **BL Project Labor Cost** plus **BL Project Nonlabor Cost** plus **BL Project Material Cost** plus **BL Project Expense Cost**.

BL Project Total Float

BL Project Total Float field

The total float of the activity in the project baseline.

BL Project Units % Complete

BL Project Units % Complete field

The units percent complete of the activity in the project baseline.

BL Start

BL Start field

The current earliest start date of all activities in the project baseline.

BL1 Percent Complete Type

BL1 Percent Complete Type field

The percent complete type of the activity in the primary baseline.

BL1 Activity % Complete

BL1 Activity % Complete field

The activity percent complete of the activity in the primary baseline.

BL1 Activity Status

BL1 Activity Status field

The status of the activity in the primary baseline.

BL1 Actual Duration

BL1 Actual Duration field

The actual duration of the activity in the primary baseline. The duration is the total working time from the activity actual start date to the actual finish date.

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The total working time is calculated using the activity's calendar.

BL1 Actual Finish

BL1 Actual Finish field

The actual finish date of the activity in the primary baseline.

BL1 Actual Labor Units

BL1 Actual Labor Units field

The actual units for all labor resources assigned to the activity in the primary baseline.

BL1 Actual Nonlabor Units

BL1 Actual Nonlabor Units field

The actual units for all nonlabor resources assigned to the activity in the primary baseline.

BL1 Actual Start

BL1 Actual Start field

The actual start date of the activity in the primary baseline.

BL1 Completed Activities

BL1 Completed Activities field

The number of activities that should be completed according to the primary baseline.

BL1 Cost % Complete

BL1 Cost % Complete field

The cost percent complete of the activity in the primary baseline.

BL1 Duration

BL1 Duration field

The duration of the activity in the primary baseline. The duration is the total working time from the activity current start date to the current finish date.

Calculated as **Actual Duration** plus **Remaining Duration**.

The total working time is calculated using the activity's calendar.

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BL1 Duration % Complete

BL1 Duration % Complete field

The duration percent complete of the activity in the primary baseline.

BL1 Early Finish

BL1 Early Finish field

The early finish date of the activity in the primary baseline.

BL1 Early Start

BL1 Early Start field

The early start date of the activity in the primary baseline.

BL1 Expense Cost

BL1 Expense Cost field

The planned cost for all project expenses associated with the activity in the primary baseline.

BL1 Finish

BL1 Finish field

The current finish date of the activity in the primary baseline. Set to the activity planned finish date while the activity is not started, the remaining finish date while the activity is in progress, and the actual finish date once the activity is completed.

BL1 Free Float

BL1 Free Float field

The free float of the activity in the primary baseline.

BL1 In-Progress Activities

BL1 In-Progress Activities field

The number of activities that should be in progress according to the primary baseline.

BL1 Labor Cost

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BL1 Labor Cost field

The cost for all labor resources assigned to the activity in the primary baseline.

BL1 Labor Units

BL1 Labor Units field

The units for all labor resources assigned to the activity in the primary baseline.

Calculated as **Baseline Actual Labor Units** plus **Baseline Remaining Labor Units**.

BL1 Late Finish

BL1 Late Finish field

The late finish date of the activity in the primary baseline.

BL1 Late Start

BL1 Late Start field

The late start date of the activity in the primary baseline.

BL1 Match

BL1 Match field

Indicates whether the activity is present in the baseline the user currently has assigned as their primary baseline.

BL1 Material Cost

BL1 Material Cost field

The planned cost for all material resources assigned to the activity in the primary baseline.

BL1 Nonlabor Cost

BL1 Nonlabor Cost field

The cost for all nonlabor resources assigned to the activity in the primary baseline.

BL1 Nonlabor Units

BL1 Nonlabor Units field

The units for all nonlabor resources assigned to the activity in the primary baseline.

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BL1 Not Started Activities

BL1 Not Started Activities field

The number of activities that should be not started according to the primary baseline.

BL1 Remaining Duration

BL1 Remaining Duration field

The remaining duration of the activity in the primary baseline.

BL1 Start

BL1 Start field

The current start date of the activity in the primary baseline.

This is set to the planned start date.

BL1 Total Cost

BL1 Total Cost field

The total cost for the activity in the primary baseline.

BL1 Total Float

BL1 Total Float field

The total float of the activity in the primary baseline.

BL1 Units % Complete

BL1 Units % Complete field

The units percent complete of the activity in the primary baseline.

Budget At Completion

Budget At Completion field

The planned total cost through activity or project completion.

Calculated as **Planned Labor Cost** plus **Planned Nonlabor Cost** plus **Planned Expense Cost** plus **Planned Material Cost**.

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Budget At Completion - Labor Units

Budget At Completion - Labor Units field

The planned total cost for labor units through activity or project completion.

Calendar

Calendar field

The calendar assigned to the activity, resource, or project.

Category (Expense)

Category field

The name of the expense category. You can use expense categories to organize and track various expense types within an organization.

Category (WBS)

Category field

The name of the WBS category. You can use custom WBS categories to organize, filter, and report WBS information in all projects.

Cause

Cause field

The description of the cause of the risk.

CBS field

CBS field

The Primavera Unifier Cost Breakdown Sheet to which you want to link an activity, assignment or expense.

Change Number

Change Number field

The number associated with the change request.

Useful for reporting or tracking changes to the original budget.

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Checked Out By

Checked Out By field

The name of the user who checked out the project.

If the project is not checked out, this field is blank.

Claimed By

Claimed By field

The personal name of the user currently handling a workflow task that had previously been broadly assigned to a group, role, or more than one user.

If the user has no P6 personal name, for example, if the user only had an account in Oracle BPM, this field will show their user ID instead.

Code (Risks)

Code field

The short name for the threshold level.

Code Assignment

Code Assignment field

The name of the activity code that is assigned to the selected activity.

Code Description

Code Description field

The description provided for the code when it was created.

Code Value

Code Value field

The value for the activity, issue, resource, or project code.

Color (Activity Codes)

Color field

The color for the activity code value.

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Color (Gantt Chart)

Color field

The colors available to display the progress line.

Color (Risks)

Color field

The color representing the threshold in the score field or probability and impact diagram (PID).

Company Short Name

Company Short Name field

The Company Short Name for accessing the Primavera Unifier database.

Completed

Completed field

The date and time the item, such as an import, milestone, or service, completed.

Constraint Date

Constraint Date field

The date for which the activity's constraint applies. Depending on the constraint type, this date could be a start or finish.

For example, for 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 is empty.

Constraint Type

Constraint Type field

The type of constraint on the activity.

A hard constraint type prevents activities from being moved. In P6, 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, 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.

Contractor Name field

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Contractor Name field

The name of the contractor working on the project. This may be your organizations's name or the name of another organization.

Cost % Complete

Cost % Complete field

The percent complete of costs for all labor resources, nonlabor resources, and expenses for the activity or project.

Calculated as **Actual Total Cost** divided by **At Completion Total Cost** multiplied by 100.

Cost % of Planned

Cost % of Planned field

The percent complete of planned costs for all labor resources, nonlabor resources, and expenses for the activity or project.

Calculated as **Actual Total Cost** divided by **Baseline Total Cost** multiplied by 100. The value can exceed 100. The baseline total cost is the activity's at completion cost from the current baseline.

Cost (Post-response Thresholds)

Cost field

The monetary impact of the risk after the response action item has been completed.

Cost (Pre-response Thresholds)

Cost field

The monetary impact on the project if the risk occurs.

Cost Account

Cost Account field

The cost account associated with the project, resource, or expense for an activity.

Cost Account IDs

Cost Account IDs field

The identifying codes of the cost accounts assigned to the activity.

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Cost Impact Threshold

Cost Impact Threshold field

The names of the cost impact thresholds assigned to the risk scoring matrix.

Each risk scoring matrix must have a cost impact, which is the monetary impact if the risk occurs, and a schedule impact, which is the amount of time the risk will increase or decrease the project schedule. User-defined impacts are optional.

Cost Performance Index

Cost Performance Index field

A measure of the value of work accomplished as a percentage of the actual costs.

Cost Performance Index (CPI) indicates whether you have spent money over the budget to date.

On the My Preferences page, you can set performance thresholds for CPI calculated values to determine whether you need to take corrective action.

Calculated as **Earned Value Cost** divided by **Actual Cost**. A value less than 1 indicates that the actual cost has exceeded the planned value.

Cost Performance Index - Labor Units

Cost Performance Index - Labor Units field

A measure of work efficiency on an activity, WBS, or project.

Calculated as **Earned Value Labor Units** divided by **Actual Labor Units**. A value less than 1 indicates that the actual units have exceeded the planned units.

Cost Variance

Cost Variance field

A measure of cost performance on an activity, WBS, or project.

A negative value indicates that the actual cost has exceeded the planned value.

Calculated as **Earned Value** minus **Actual Cost**.

Cost Variance - Labor Units

Cost Variance - Labor Units field

The difference between the earned value labor units and the actual value labor units.

A negative value indicates that actual costs have exceeded the value of work performed.

Calculated as **Earned Value Labor Units** minus **Actual Labor Units**.

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Cost Variance Index

Cost Variance Index field

The ratio of the cost variance and the earned value of work performed on the WBS, activity, or project.

Calculated as **Cost Variance** divided by **Earned Value**.

Cost Variance Index - Labor Units

Cost Variance Index - Labor Units field

The ratio of the cost variance labor units and the earned value labor units for the activity, WBS, or project.

Calculated as **Cost Variance Labor Units** divided by **Earned Value Labor Units**.

Created By (Dashboards)

Created By field

The login name of the person who created the dashboard.

Currency

Currency field

The preferred currency for viewing monetary values.

For example, US Dollars or Japanese Yen.

Currency Symbol

Currency Symbol field

The symbol used to define the currency.

Current Budget

Current Budget field

The current budget for the WBS or project.

Calculated as **Original Budget** plus the sum of the approved budget changes from the budget log.

Current Variance

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Current Variance field

The difference between the current budget and the total spending plan. This value does not aggregate.

Calculated as **Current Budget** minus **Total Spending Plan**.

Curve

Curve field

The resource's units and costs distributed over the duration of an activity.

A curve can only be assigned to activities that have a duration type of **Fixed Duration and Units** or **Fixed Duration and Units/Time**.

A manual curve type indicates that the assignment's future period resource distribution was manually entered in the **Resource Usage Spreadsheet** of P6 Professional. If you select a different curve type, the manually-entered distribution is deleted, and the units and costs for the assignment are redistributed according to the curve you select. Be sure this is the appropriate course of action before replacing a manual curve with another curve.

Dashboard Title

Dashboard Title field

The unique title for the dashboard.

Data Date

Data Date field

The progress point, or "as-of date", for activities in the project. Project status is up-to-date as of the data date. You can set the data date when you schedule the project or apply actuals, or you can set it manually. Set it manually if resources manually update activity progress and you do not plan to reschedule the project or apply actuals.

Data Mapping field (Unifier)

Data Mapping field

The data mapping document.

Date (Budget Log)

Date field

The date and time the line item was added to the budget log.

Date (Document Details)

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Date field

The date and time the document was last modified.

Date Added

Date Added field

The date and time the project was added to the EPS.

Date Checked Out

Date Checked Out field

The date and time the user checked out the project. If the project is not checked out, this field is blank.

Date Created

Date Created field

The date or date and time an element was added in the application, such as a dashboard or user interface view.

Date Initiated

Date Initiated field

The date the review began.

If the review has not started, this field is blank.

Days Late

Days Late field

The number of workperiods that an activity has been delayed.

Days Pending

Days Pending field

The total number of days the workflow has been assigned and awaiting action.

Calculated as the **Current Date** minus the **Assigned Date** of the oldest currently assigned human task for the currently logged in user.

Decimal Digits

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Decimal Digits field

The number of decimal places the currency will show.

Decimal Symbol

Decimal Symbol field

The symbol used for decimal places.

Default Format

Default Format field

The standard or proprietary file format automatically used to deliver each instance of the report. You can schedule another instance of a report where you change the actual format that is applied to another format listed in the **Available Formats** field.

For example, the default might be XML but you can decide to format the specific report instance as PDF or Microsoft Excel.

Default Template

Default Template field

The common template automatically used to apply style to the raw data in the report.

Default Title

Default Title field

Displays the default title for the rate type used for the resource or role.

Default Units/Time

Default Units/Time field

The default units/time for resource assignments in projects, which is shown as either a percentage or units/duration depending on your settings in **My Preferences**.

If you change the default setting, existing resource assignments are not affected. The default setting only applies to new resource assignments.

Delegate

Delegate field

The delegate user's login name.

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Delivery Type

Delivery Type field

The way users will access or take delivery of this report. On-demand reports can be delivered by email as attachments or downloaded as files. You can only deliver scheduled reports by email.

Deployment field

Deployment field

Determines the deployment from Primavera Gateway used by the integration.

Description

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Distributed Current Budget

Distributed Current Budget field

The sum of all budgets that were assigned to control accounts during baseline planning. These budgets are allocated for work and planning packages.

Calculated as the sum of the **Current Budget** values from one level lower. This value does not aggregate.

Document

Document field

The name of the document.

This field can be modified.

Document Number

Document Number field

The number of the invoice, purchase order, requisition, or other document related to the expense item.

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Due

Due field

The date the remaining work is scheduled to finish or, if the milestone is complete, the actual date.

> **Note**
>
> Milestone due dates depend on two factors: the Project Baseline that is currently selected and the status of the activity.
>
> If the current project is used as the Project Baseline, the due date reflects the remaining start/finish for not completed milestones and the actual start/finish for completed milestones. Otherwise, the due date reflects the Project Baseline start/finish date of the milestone activity, whether complete or not.

Due Date (Document Review)

Due Date field

The date by which all reviewers need to complete the review. If no due date is specified for the review, then this field appears blank.

Duration % Complete

Duration % Complete field

The duration percent complete for an activity, WBS, or project.

Calculated as **Planned Duration** minus **Remaining Duration** divided by **Planned Duration** multiplied by 100. The value is always between 0 and 100.

Duration % of Planned

Duration % of Planned field

The actual duration percent of planned duration for an activity or all activities for the project.

The baseline duration is the activity's at complete duration from the current baseline.

Calculated as **Actual Duration** divided by **Baseline Duration** multiplied by 100. The value can exceed 100.

Duration Percent

Duration Percent field

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The percent complete of the activity duration.

The planned duration is taken from the current plan, not from the baseline.

The type of percent you see depends on the percent complete type you select for the activity in the **General** section of the **Activity Form** page.

Calculated as (**Planned Duration** minus **Remaining Duration**) divided by **Planned Duration** multiplied by 100. Always in the range 0 to 100.

Duration Type

Duration Type field

Determines how remaining duration, units, and units/time are calculated when you update an activity that has resources assigned. The activity's duration type should correspond to the dominant factor, that is, the least flexible factor in the project: schedule, costs/work effort, or resource availability.

Fixed Units/Time: The resource units per time are constant when the activity duration or units are changed. Use this duration type when an activity has fixed resources with fixed productivity output per time period.

Fixed Duration & Units/Time: The activity duration is constant as the units or resource units per time are changed. Use this duration type when the activity must be completed within a fixed time period regardless of the resources assigned.

Fixed Units: The activity units are constant when the duration or resource units per time are changed. Use this duration type when the total amount of work is fixed, and increasing the resources can decrease the activity duration.

Fixed Duration & Units: The duration and units remain constant as the units/time is changed. Use this duration type when the activity must be completed within a fixed time period and the total amount of work is fixed.

Earliest Early Start Date

Earliest Early Start Date field

The earliest possible date the activity can start.

When scheduling on the forward pass, if the activity has any driving resource assignments, the application calculates the early start date as the earliest Early Start date of all driving resource assignments.

Early Finish

Early Finish field

The earliest possible date the activity can finish. Early finish dates can change as the project progresses and changes are made to the project management plan.

This date is calculated based on network logic, schedule constraints, and resource availability. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.

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Early Start

Early Start field

The earliest possible date the remaining work for the activity can begin.

This date is calculated based on network logic, schedule constraints, and resource availability. Early start dates can change as the project progresses and as changes are made to the project management plan. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.

Earned Value Cost

Earned Value Cost field

The portion of the project baseline total cost of an activity or all activities in the project that are actually completed as of the project data date.

Budget at completion is calculated from the project baseline.

Calculated as **Budget At Completion** multiplied by **Performance Percent Complete**. The method for computing performance percent complete depends on the Earned Value technique selected for the activity's WBS.

Earned Value Labor Units

Earned Value Labor Units field

The portion of baseline labor units that are complete as of the project data date.

Activity Level:

Calculated as **BL Project Labor Units** or **BL1 Labor Units**, depending on project settings, multiplied by **Performance % Complete**.

WBS Level:

Calculated as **BL Project Labor Units** multiplied by **Performance % Complete**.

Effect

Effect field

The resulting effect of the presence of the risk.

Effective End Date field

Effective End Date field

The end date of the XML file.

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Effective Start date field

Effective Start date field

The start date of the XML file.

Email

Email field

The Email address for the user.

Employee ID

Employee ID field

The resource identifier within the organization, typically the employee number or social security number.

End Date (Timesheet period)

End Date field

The last day of the timesheet period for the selected timesheet.

EPS ID

EPS ID field

An identifier that is unique to the EPS node.

Estimate At Completion - Labor Units

Estimate At Completion - Labor Units field

The estimated labor units at completion.

Calculated as **Actual Labor Units** plus **Estimate to Complete Labor Units**. Estimate to complete labor units is calculated based off of the Earned Value setting on the EPS.

Estimate At Completion Cost

Estimate At Completion Cost field

The expected total cost of a schedule activity, a work breakdown structure component, or the project when the defined scope of work will be completed.

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Calculated as **Actual Cost** plus **Estimate to Complete Cost**. The method for calculating estimate to complete depends on the earned value technique selected for the activity's WBS.

Estimate To Complete

Estimate To Complete field

The estimated cost to complete the activity, WBS, or project.

Calculated as **Remaining Total Cost** for the activity or the **Performance Factor** multiplied by (**Budget At Completion** minus **Earned Value**), depending on the Earned Value technique selected for the activity's WBS (calculated from the primary baseline). Budget at completion is calculated from the project baseline.

Estimate To Complete Labor Units

Estimate To Complete Labor Units field

The estimated quantity to complete the activity, WBS, or project.

Calculated as either the **Remaining Total Units** for the activity or as **Performance Factor** multiplied by (**BL Labor Units** minus **Earned Value**) depending on the earned-value technique selected for the activity's WBS.

Estimated Time To Complete

Estimated Time To Complete field

The projected duration required to complete the remaining scope of work, work based on labor efficiency to date, assuming current performance trends continue. This estimate helps you to assess labor efficiency, forecast resource availability, and identify potential over-run of work due to declining productivity.

Calculated as **Original Duration** divided by **Schedule Performance Index (SPI)**.

Estimated Time To Complete - Labor Units

Estimated Time To Complete Units field

The projected labor effort needed to complete the remaining scope of work, based on labor efficiency to date. This estimate helps you to assess labor efficiency, forecast resource availability, and identify potential over-run of work due to declining productivity.

Calculated as **Planned Labor Units** divided by **Schedule Performance Index - Labor Units**.

Exchange Rate

Exchange Rate field

The exchange rate between the selected currency and the base currency.

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Expected Finish

Expected Finish field

The date on which the primary resource, the person who assigns the expected finish date, anticipates work on the activity will finish.

Only the primary resource can edit this field if the activity has started.

Expense Category

Expense Category field

The classification code or name for the expense category.

Expense categories are useful for organizing and tracking various expense types within an organization.

Expense Cost % Complete

Expense Cost % Complete field

The percent complete of cost for all expenses associated with the activity, WBS, or project.

Calculated as **Actual Expense Cost** divided by **At Completion Expense Cost** multiplied by 100. Always in the range 0 to 100.

Expense Item

Expense Item field

The name for the expense that is unique for the activity.

The same name can be used for expenses associated with other activities.

Expenses

Expenses field

The expenses assigned to the activity.

Expired Date

Expired Date field

The date when the workflow task expires.

Export OBS field

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Export OBS field

The structure to export as the Organizational Breakdown Structure for the project. This can be either the OBS or an Activity Code which represents the OBS.

Exposure

Exposure field

The monetary impact value for each risk, response action, and response plan calculated from the values selected for the probability and cost impact.

Risk exposure, also known as Value at Risk (VaR), provides data that is generally used during the analysis and prioritization phases of the risk management process. The difference in exposure for a risk and its associated response plan is indicative of the effectiveness of the response plan.

Calculated as **probability midpoint** times **cost midpoint**. A midpoint is calculated by adding the lower value and the higher value in the threshold range and dividing the sum by two. The cost midpoint for the highest threshold range is calculated as the midpoint between the lower value in the threshold range and a value that is twice the lower value.

> **Note**
>
> The cost and probability midpoint for Negligible thresholds is always 0.

For projects calculating cost impact by percentage, the cost threshold range is converted into monetary values by multiplying the lower value and the higher value in the percentage range with the project's **Planned Total Cost**. These two monetary values are then used to calculate the cost midpoint.

Exposure Finish

Exposure Finish field

The latest finish date of all activities associated with the risk.

If no activities are associated with the risk, the exposure finish date is set to the project **Finish** date. If the project **Finish** date is not set, the project **Scheduled Finish** date is used. If the project **Scheduled Finish** date is not set, the project **Must Finish By** date is used. If this date is not set, **Exposure Finish** is set to the project start date.

Exposure Start

Exposure Start field

The earliest start date of all activities associated with the risk.

If no activities are associated with the risk, the **Exposure Start** date is the project **Start** date.

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External Early Start

External Early Start field

The early start date for imported activities with external relationships to projects that do not exist in the database.

This field is the relationship early finish date when the lost relationship type is Finish to Start or Start to Start. When the relationship type is Start to Finish or Finish to Finish, this field is calculated as **Relationship Early Finish Date** minus **Remaining Duration** of the successor.

External Late Finish

External Late Finish field

The late finish date for imported activities with external relationships to projects that do not exist in the database.

This field is the relationship early finish date when the lost relationship type is Finish to Start or Finish to Finish. When the relationship type is Start to Start or Start to Finish, this field is calculated as **Relationship Late Start** plus **Remaining Duration** of the predecessor.

Financial Period

Financial Period field

The unique identifier of the associated financial period.

Finish (Response Plans)

Finish field

The latest finish date of all response action items.

The scheduled finish date for the project is the default finish date for a response action item. If the scheduled finish date is not set for the project, the project must finish by date is used. If that date is not set, then the project start date is used.

If an activity is assigned to the response action item, this field is set to display the finish date for the activity.

Finish Date (Activities)

Finish Date field

The current finish date for the activity. For not started activities, this is the planned finish date. For in-progress activities, this is the remaining early finish date. For completed activities, this is the actual finish date.

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Finish Date (Planning)

Finish Date field

The current finish date of a portfolio, project, WBS, or resource or role assignment. The finish dates for portfolios, projects, and WBS elements are calculated.

Portfolio: The latest scheduled finish date rolled up from the assignments of the projects or WBS elements in the portfolio.

Project: The scheduled finish date of the project.

WBS: The latest finish date for the assignments of the WBS element. When a role or resource is assigned directly to the WBS element using Assign Resource, the finish date displayed is one day later than the planned start date. When an allocation of that role or resource is entered on the spreadsheet, the date displayed in the Finish Date field changes to the date of the latest allocation.

When a resource is assigned to the WBS element using Assign by Search, the date displayed is the project's scheduled finish date.

Finish Date (Projects)

Finish Date field

The current finish date of the project. For not started and in-progress projects, this is the latest early finish date from all activities in the project. For completed projects, this is the latest actual finish date derived from all activities. For projects with no activities, the Finish Date is equal to the Anticipated Finish date if one is defined. For projects with no activities and no Anticipated Finish date, the Finish Date field is blank.

Finish Date (Timesheet Periods)

Finish Date field

The date the timesheet period ends.

Float Path

Float Path field

The integer representing the critical path this activity is on.

Value 1 is the most critical path, and value 2 is the second most critical path.

Float Path Order

Float Path Order field

The integer representing the order in which this object was found on one of the critical paths.

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Forecast at Completion: Cost (Earned Value Performance)

Forecast at Completion: Cost field

The estimated cost at completion.

Calculated as **Budget at Completion** multiplied by **Cost Variance Index (CVI)**. Where **CVI** equals **Cost Variance** divided by **Earned Value Cost**.

Forecast at Completion: Cost (Schedule Performance)

Forecast at Completion: Cost field

The estimated cost at completion.

Calculated as **Budget at Completion** minus **Estimate at Completion**.

Forecast at Completion: Labor Units (Earned Value Performance)

Forecast at Completion: Labor Units field

The estimated labor units at completion.

Calculated as **Baseline (BL) Labor Units** multiplied by **Cost Variance Index (CVI) Labor Units**. Where **CVI** equals **Cost Variance** divided by **Earned Value Labor Units**.

Forecast at Completion: Labor Units (Schedule Performance)

Forecast at Completion: Labor Units field

The estimated labor units at completion.

Calculated as **Budget at Completion Labor Units** minus **Estimate at Completion Labor Units**.

Forecast at Completion: Schedule (Earned Value Performance)

Forecast at Completion: Schedule field

The estimated schedule variance at completion.

For costs, calculated as **Budget at Completion** multiplied by **Schedule Variance Index (SVI)**. Where **SVI** equals **Schedule Variance** divided by **Planned Value Cost**.

For labor units, calculated as **Baseline (BL) Labor Units** multiplied by **Schedule Variance Index (SVI) Labor Units**. Where **SVI** equals **Schedule Variance** divided by **Planned Value Labor Units**.

Forecast at Completion: Schedule (Schedule Performance)

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Forecast at Completion: Schedule field

The estimated schedule variance at completion.

Calculated as **Remaining Finish Date** minus **Baseline Finish Date**.

Forecast Finish Date

Forecast Finish Date field

The planned finish date of a project or WBS based on a what-if scenario designed to simulate project performance and outcomes and to plan resource allocation.

Forecast Start Date

Forecast Start Date field

The planned start date of a project or WBS based on a what-if scenario designed to simulate project performance and outcomes and to plan resource allocation.

Free Float

Free Float field

The amount of time the activity can be delayed before delaying the start date of any successor activity.

Fund Share

Fund Share field

The percentage of the total fund that is allocated to the current project or EPS.

Funding Source

Funding Source field

Funding sources are the agencies, businesses, or groups that provide funding for a project.

You can maintain a hierarchical list of funding sources as part of your enterprise project data and then assign specific funding sources to a project or EPS elements as they develop. You can assign the same funding source multiple times with varying amounts and share contributions for different levels of the EPS. The amount contributed by a specific funding source is called the fund share value.

Global Security Profile

Global Security Profile field

Determines the user's access to application-wide information. The global security profile provides read-only access to all global data except cost and resource data. Privileges can be

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added to global security profiles to allow users to add, edit, and delete global data, and view global cost data.

ID

ID field

A unique identifier for an element in the application.

ID's are created for projects, activities, roles, resources, risks, and workflow instances to name a few.

Identified By (Issues)

Identified By field

The user name of the person who identified the issue.

Identified By (Risks)

Identified By field

The name of the resource who identified the risk.

Identified Date

Identified Date field

The date the issue was identified.

Identified Date

Identified Date field

The date the risk was identified.

Import to field

Import to field

Determines where the project is imported. To enable this field, you must select **Primavera XML** from the **Import Type** list.

Increment

Increment field

The number you want P6 to add to the previous Activity ID in order to auto-number all the new activities in a given project. This field value must be between 1 and 99,999.

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In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Independent ETC Labor Units

Independent ETC Labor Units field

The user-entered estimate to complete total labor for the WBS or project.

Independent ETC Total Cost

Independent ETC Total Cost field

The user-entered estimate to complete total cost for the WBS or project.

Initiated Date

Initiated Date field

The date the workflow instance was originally initiated.

Initiator

Initiator field

The name of the user who initiated an action in the application, such as a document review, a service, or a workflow.

Integrated Project

Integrated Project field

The type of system integration, if any, in place at your organization. Data within this project will be shared with the integrated solution.

The default value is <none>.

Integrated Resource

Integrated Resource field

Indicates whether the resource came from another Enterprise Resource Planning (ERP) system that is integrated with this application. A blank field indicates that this is not an integrated resource.

ERP indicates the resource is integrated with another ERP system.

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Integration API Server URL

Integration API Server URL field

The URL of the Integration API server which will perform the calculations for Update Baseline, Schedule Compare, and XML Import and Export for P6 Professional.

IP Address

IP Address field

The IP address for each user.

Issue Code

Issue Code field

The name of the issue code.

Labor Cost % Complete

Labor Cost % Complete field

The percent complete of costs for all labor resources assigned to the activity, WBS, project, or EPS.

Calculated as **Actual Labor Cost** divided by **At Completion Labor Cost** multiplied by 100. Always in the range 0 to 100.

Labor Units % Complete

Labor Units % Complete field

The percent complete of units for all labor resources for the activity, WBS, project, or EPS.

Calculated as **Actual Labor Units** divided by **At Completion Labor Units** multiplied by 100. Always in the range 0 to 100.

Lag

Lag field

The amount of time the predecessor activity was delayed, affecting the ability of its successor activity to start or finish. Lag can be positive (indicating a delay) or negative (indicating that the successor can begin a set time before the predecessor completes).

This value is specified by the project manager and is used by the project scheduler when scheduling activities.

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Last Active Duration

Last Active Duration field

The duration (in days) since the last time the user was active in the application.

Calculated as the difference between the Last Active Time and the current date and time. A value of zero means the user most recently logged in today.

Last Active Time

Last Active Time field

The date and time that the user was last active in the application.

Last Apply Actuals Date

Last Apply Actuals Date field

The last date actuals were applied to this project.

Last Date Status Changed

Last Date Status Changed field

The date when this timesheet's status was last modified.

Last Leveled

Last Leveled Date field

The most recent date when the project was leveled.

Last Modified By

Last Modified By field

The name of the user who last modified a selected element in the application.

Last Modified Date

Last Modified Date field

The date a selected element in the application was last modified.

Last Published On

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Last Published On field

The most recent publication date for the project data. This field displays no value for projects that have never been published.

Last Reviewer

Last Reviewer field

The user who most recently reviewed the timesheet.

Last Run

Last Run field

The last time the service ran.

Last Scheduled

Last Scheduled Date field

The most recent date when the project was scheduled.

Last Update Date

Last Update Date field

The date that the baseline was last updated.

This field is blank for baselines that have not been updated.

Late Finish

Late Finish field

The latest possible date the activity can finish without delaying the project finish date.

This date is calculated based on activity relationships, schedule constraints, and resource availability. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.

Late Start

Late Start field

The latest possible date the remaining work for the activity can begin without delaying the project finish date.

This date is calculated based on activity relationships, schedule constraints, and resource availability. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.

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Latest Early Finish Date

Latest Early Finish Date field

The latest possible date that the activity can finish.

This date is calculated when the project is scheduled and is used to calculate total float.

Latitude

Latitude field

The geographical coordinate for the latitude of the location.

Enter the coordinate manually or complete the address fields and click **Locate** to let P6 find it.

Limit field

Limit field

The maximum units per time for the resource.

This field is only available in the Spreadsheet view format of the Overallocated Resources view.

Location

Location field

The geographical location.

Login Name

Login Name field

The login name for the user.

Longitude

Longitude field

The geographical coordinate for the longitude of the location.

Enter the coordinate manually or complete the address fields and click **Locate** to let P6 find it.

Material Cost % Complete

Material Cost % Complete field

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The percent complete of cost for all material resources assigned to the activity, WBS, project, or EPS.

Calculated as **Actual Material Cost** divided by **At Complete Material Cost** multiplied by 100. Always in the range 0 to 100.

Matrix Size

Matrix Size field

The dimensions of the risk scoring matrix, which are defined by the number of levels required for the probability threshold and the impact thresholds.

The visual representation of the risk scoring matrix is the probability and impact diagram (PID).

Max Resource Units/Time

Max Resource Units/Time field

The maximum work units per time this resource can perform on all their assigned activities

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.

Max Role Units/Time

Max Role Units/Time field

The maximum work units per time this role can perform on assigned activities.

Max Units/Time (Resources)

Max Units/Time field

The maximum work units per time this resource can perform on all their assigned activities

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.

Max Units/Time (Roles)

Max Units/Time field

The maximum work units per time this role can perform on assigned activities.

This number should correspond to the number of people who can fill this role.

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Maximum Code Value Weight

Maximum Code Value Weight field

The maximum allowed weight value for a specific project code type.

Maximum Duration

Maximum Duration field

The longest duration for the activity. Required for three point estimation if quantitative risk analysis will be performed in Oracle Primavera Cloud.

Maximum Length

Maximum Length field

The maximum number of characters used for a code value name.

Maximum Percent to Over Allocate Resources

Maximum percent to over allocate resources field

The maximum percentage by which resource availability can be increased.

You can make adjustments to this field value each time you level resources. For example, if an important resource assignment does not fit within the available float using your first over allocation limit, you can try again using a higher limit.

Minimum Duration

Minimum Duration field

The shortest duration for the activity. Required for three point estimation if quantitative risk analysis will be performed in Oracle Primavera Cloud.

Minimum Preserved Float

Minimum preserved float field

The minimum amount of float maintained for each activity during leveling.

Module Access

Module Access field

The modules assigned to the user.

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Most Likely Duration

Most Likely Duration field

The most likely duration for the activity. Required for three point estimation if quantitative risk analysis will be performed in Oracle Primavera Cloud.

Must Finish By

Must Finish By field

The optional date constraint you can specify for the project end date.

Name (Risk Categories)

Name field

The name for a particular type of risk classification.

Net Present Value

Net Present Value field

The difference between the present value (PV) of the future cash flows from an investment and its investment cost.

Present value of the expected cash flows is computed by discounting them at the required rate of return or discount rate. Positive net present value (NPV) is an indicator of projects that should be pursued.

Calculated as **Total Benefit Plan (Present Value)** minus **Total Spending Plan (Present Value)**.

New Data Date

New Data Date field

The new date that is set for project data. This date affects the outcome when applying actuals.

Nonlabor Cost % Complete

Nonlabor Cost % Complete field

The percent complete of cost for all non-labor resources assigned to the activity, WBS, project, and EPS.

Calculated as **Actual Nonlabor Cost** divided by **At Completion Nonlabor Cost** multiplied by 100. It is always in the range of 0 to 100.

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Nonlabor Units % Complete

Nonlabor Units % Complete field

The percent complete of units for all nonlabor resources for the activity, WBS, project, or EPS.

Calculated as **Actual Nonlabor Units** divided by **At Completion Nonlabor Units** multiplied by 100. Always in the range 0 to 100.

Office Phone

Office Phone field

The office phone number for the resource.

On Driving Path

On Driving Path field

Shows whether the activity is on the a driving path. This field is true if all relationships with predecessor activities are driving.

Required for IPMDAR.

Online Help

Online Help URL field

The help URL that will allow users to access help for P6 Professional. If this field is left blank, the Online Help option will not be available and Local help will always launch when the F1 key or Help shortcut are used.

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.

Using the hosted version ensures that you always have the most current help content.

Original Assignee

Original Assignee field

The user originally assigned to the task when this workflow was initiated.

As a workflow advances to its next stages, the task might be reassigned, claimed, or modified by other users; however, this field will continue to display the first assigned user.

Original Budget

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Original Budget field

The estimate of the total amount you require for the selected WBS or project, including all contributed funds.

Other Phone

Other Phone field

The alternate phone numbers for the resource.

Out of Sequence Activities

Out of sequence activities field

The activities that have started before their predecessor activity has completed.

Overallocated Resource

Overallocated Resource field

The name of the resource whose demand exceeds current availability.

Overhead Reg/OT

Overhead Reg/OT field

The sum of the number of overhead hours and overhead overtime hours.

Overtime Factor

Overtime Factor field

The overtime factor used to compute the overtime price for the resource. The default overtime factor is 1.5.

Calculated as **Standard Price** multiplied by **Overtime Factor**.

Owner

Owner field

The resource or user responsible for a particular function or area of the project.

This field is used throughout the application to identify the owner of activities, projects, documents, risks, issues, and services.

Parent

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Parent field

The ID and name of the WBS that is the parent of the selected WBS.

In this context, the selected WBS has inherited the attributes of its parent and is formed one level beneath its parent in the hierarchy.

Parent Resource

Parent Resource field

A resource categorized at a higher level than the current resource, in a resource hierarchy.

The parent resource is generally the larger department or organization for which you work.

For example, a salesperson might be assigned to an element of the resource hierarchy called Region 1 Sales.

Payback Period

Payback Period field

An estimate of the length of time that will transpire before net profits recover the initial and periodic costs of an investment to carry out the selected project.

It is calculated using projections depending on the timescale you select and the number of work days in a standard work week in the project calendar since the first time period in which a spending amount was entered for this project or the Project Start Date, whichever occurred earliest. Payback Period is calculated as the length of time that transpires before the cumulative value of income minus costs, usually negative when a project is just beginning, first exceeds zero.

Because it is based on cumulative values, it can be computed using the difference between present values (adjusted using the discount rate) or non-adjusted values for (Total Spending Plan) + Total Benefit Plan; the results will be the same. It is the point in time where the Spending Plan (PV) curve crosses the Benefit (PV) curve.

Pend Remaining Units

Pend Remaining Units field

The estimate of the resource's remaining units on this activity.

The Pend Remaining Units value is entered by each resource using timesheets. This value is copied to the resource's remaining units for the activity when project actuals are applied. The project manager specifies whether resources update their percent complete or remaining units for each project.

Pending % Complete

Pending % Complete field

The estimate of the percentage of the resource's units of work completed on this activity.

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The pending percent complete is entered by each resource using timesheets. This value is used to compute the resource's remaining units for the activity when project actuals are applied. The project manager specifies whether resources update their percent complete or remaining units for each project.

Pending Reviewers

Pending Reviewers field

The names of the users who are assigned to the review and have not yet responded.

Pending Tasks

Pending Tasks field

The total number of pending tasks for the current stage of the workflow.

Pending User

Pending User field

The name of the user, role, or group of users assigned to the oldest pending task that is holding up the workflow's advancement to the next stage.

Percent Complete

Percent Complete field

The percent of the item, such as an activity, project, or milestone, has been completed.

Percent Complete Type

Percent Complete Type field

Determines the way in which the application calculates the percent complete for the activity.

The type can be *Units*, *Duration*, *Physical, or Scope*. If the Percent Complete Type is *Units*, percent complete is calculated from the actual and remaining units. If the Percent Complete Type is *Duration*, the percent complete is calculated from the actual and remaining duration. If the Percent Complete Type is *Physical*, the user will enter the percent complete for the activity. If the Percent Complete Type is *Scope*, the percent complete is calculated by Oracle Primavera Cloud and cannot be modified in P6.

Performance % Complete

Performance % Complete field

The percentage of the activity or project planned work that is currently complete.

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Performance % Complete is used to calculate earned value. It can be based on the activity percent complete, on the 0/100 rule, on the 50/50 rule, depending on the technique for computing earned-value percent complete for the activity's WBS.

Performance % Complete - Labor Units

Performance % Complete - Labor Units field

The percentage of the activity or project planned work that is currently complete as measured by labor units.

Calculated as **Earned Value Labor Units** divided by **Budget at Complete Labor Units** multiplied by 100. Always in the range 0 to 100.

Personal Name

Personal Name field

The personal name for the user. This name might be a nickname, full name, reference to a role or department, or include any information recognized by your organization to identify the user.

Physical % Complete

Physical % Complete field

The activity percent complete, which is either user-entered or calculated from activity steps.

To calculate **Physical % Complete** from activity steps, the **Calculate Activity % Complete from activity steps** option must be enabled for the project.

Planned (Units)

Planned field

The expected number of units required to complete the activity.

Planned Cost

Planned Cost field

The expected total cost of the item, such as an assignment, expense, or response plan.

Planned Duration (Activities)

Planned Duration field

The expected amount of time required to complete an activity.

The planned working time is calculated using the activity's calendar. The duration is measured from the activity's planned start date to its planned finish date.

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Planned Duration (Assignments)

Planned Duration field

The resource's total working time on the activity from the **Planned Start** date to the **Planned Finish** date.

Planned Duration (EPS)

Planned Duration field

The total working time from the project planned start date to the planned finish date.

Planned Expense Cost

Planned Expense Cost field

The planned total cost of all expenses associated with the activity, project, or EPS.

Planned Finish (Activities)

Planned Finish field

The date the activity is scheduled to finish if the activity has not started.

This date is calculated by the project scheduler but can be updated manually by the project manager. This date is not changed by the project scheduler after the activity has started.

Planned Finish (Assignments)

Planned Finish field

The date the assignment is scheduled to be finished.

This date is calculated by the project scheduler but can be updated manually by the project manager. This date is not changed by the project scheduler after the activity has started. This is the finish date that P6 Team Member Web timesheet users follow and that schedule variance is measured against.

Planned Finish (Risks)

Planned Finish field

The latest scheduled finish date of all the response action items.

The planned finish date for the project is the default finish date for a response action item. If the scheduled finish date is not set for the project, the project must finish by date is used. If that is not set, then the project start date is used.

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If an activity is assigned to the response action item, this field is set to display the planned finish date for the activity.

Planned Finish Date

Planned Finish Date field

The latest planned finish date of all projects or templates within the EPS.

Planned Labor Cost (Activities)

Planned Labor Cost field

The planned costs for all labor resources assigned to the activity.

If no resources are assigned, calculated as **Activity Planned Labor Units** multiplied by **Project Default Price/Unit** divided by **Time**.

Planned Labor Cost (EPS)

Planned Labor Cost field

The planned costs for all labor resources assigned to activities in the project.

Planned Labor Units (Activities)

Planned Labor Units field

The planned number of units for all labor resources assigned to the activity.

Planned Labor Units (EPS)

Planned Labor Units field

The planned number of units for all labor resources assigned to activities in the project.

Planned Lag

Planned Lag field

The planned time lag between the activity's planned start date and the resource's planned start date on the activity.

If the resource is planned to start work when the activity is planned to start, the planned lag is zero.

Planned Material Cost

Planned Material Cost field

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The planned cost for all material resources assigned to the activity, project, or EPS.

Planned Non Labor Cost

Planned Non Labor Cost field

The planned costs for all non labor expenses associated with the project or EPS.

Planned Non Labor Units

Planned Non Labor Units field

The planned units for all non labor resources assigned to the activities in the project.

Planned Non-Labor Units

Planned Non-Labor Units field

The expected number of units or the expected total cost required to complete the activity.

Planned Nonlabor Cost

Planned Nonlabor Cost field

The planned costs for all nonlabor resources assigned to the activity.

If no resources are assigned, calculated as **Activity Planned Nonlabor Units** multiplied by **Project Default Price** divided by **Time**.

Planned Nonlabor Units

Planned Nonlabor Units field

The planned units for all nonlabor resources assigned to the activities in the project.

Planned Start (Activities)

Planned Start field

The date the activity is scheduled to start.

This date the activity is scheduled to begin is calculated by the project scheduler but can be updated manually by the project manager. This date is not changed by the project scheduler after the activity has started.

Planned Start (Assignments)

Planned Start field

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The date work on the assignment is scheduled to begin.

This date is calculated by the project scheduler but can be updated manually by the project manager. This date is not changed by the project scheduler after the activity has been started. This is the start date that P6 Team Member Web timesheet users follow and schedule variance is measured against.

Planned Start (Risks)

Planned Start field

The earliest scheduled start date of all response plan action items.

The project planned start date is the default planned start date for the response action item.

If an activity is assigned to the response action item, the field is set to display the planned start date of the activity.

Planned Start Date (EPS)

Planned Start Date field

The date the project is scheduled to start.

Planned Total Cost

Planned Total Cost field

The planned cost for all expenses associated with the activity, project, or EPS.

Planned Units (Assignments)

Planned Units field

The planned units of work for the resource assignment on the activity.

Planned Units (Expenses)

Planned Units field

The planned number of units for the selected expense.

Planned Units/Time

Planned Units/Time field

The planned units per time at which the resource is to perform work on the activity.

For example, a person assigned full time would perform 8 hours of work per day. A department of five people might perform at 5 days per day.

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Planned Value Cost

Planned Value Cost field

The portion of the baseline total cost of the activity or project that is scheduled to be completed as of the project data date.

Planned Value Cost (Activities)

Planned Value Cost field

The portion of the baseline total cost of the activity that is scheduled to be completed as of the project data date.

Also known as the work scheduled to be performed for the activity. The schedule percent complete specifies how much of the activity's project baseline duration has been completed so far. Budget at completion is calculated from the baseline.

Calculated as **Budget At Completion** multiplied by **Schedule Percent Complete**.

Planned Value Cost (EPS)

Planned Value Cost field

The portion of the baseline total cost of the project that is scheduled to be completed as of the project data date. This is also known as Budgeted Cost of Work Scheduled (BCWS).

Calculated as **Schedule % Complete** multiplied by **Budget at Completion**.

Planned Value Labor Units (Activities)

Planned Value Labor Units field

The product of the budget at completion and the schedule percent complete.

The schedule percent complete specifies how much of the activity's baseline duration has been completed so far. Budget at completion is calculated from the baseline.

Calculated as **Budget At Completion** multiplied by **Schedule Percent Complete**.

Planned Value Labor Units (EPS)

Planned Value Labor Units field

The portion of baseline labor units that are scheduled to be complete as of the project data date.

The schedule percent complete specifies how much of the activity's baseline duration has been completed so far. The baseline labor units are taken from the current baseline.

Calculated as **Baseline Labor Units** multiplied by **Schedule Percent Complete**.

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Post Response Pessimistic Finish

Post Response Pessimistic Finish field

The Post Response Pessimistic Finish date calculated by Oracle Primavera Cloud during quantitative risk analysis.

Post Response Pessimistic Start

Post Response Pessimistic Start field

The Post Response Pessimistic Start date calculated by Oracle Primavera Cloud during quantitative risk analysis.

Pre Response Pessimistic Finish

Pre Response Pessimistic Finish field

The Pre Response Pessimistic Finish date calculated by Oracle Primavera Cloud during quantitative risk analysis.

Pre Response Pessimistic Start

Pre Response Pessimistic Start field

The Pre Response Pessimistic Start date calculated by Oracle Primavera Cloud during quantitative risk analysis.

Predecessor

Predecessor field

The activity required to start or finish *before* an activity in the activity relationship starts or finishes, depending on the relationship type.

Preserve Minimum Activity Float

Preserve minimum activity float field

The minimum amount of total float time expressed in hours that you want to maintain for each activity during leveling.

This setting limits the amount of float an activity can use when being delayed in order to level the schedule.

For example if the float for an activity is 5 days and you set the value of this field to 2 days (or 16 hours assuming 1 day equals 8 hours) the activity cannot be moved more than 3 days.

You can specify any unit of time, for example `2w` or `3d`, and P6 will convert it into hours for you.

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Price/Unit (Assignments)

Price/Unit field

The non-overtime price per unit of time for the resource or role.

When the option to **Calculate Costs from Units** is selected, this price is used to compute costs for the activity assignment, using the formula: **Cost** equals **Units** multiplied by **Price** divided by **Unit**.

For resources and roles that have specified rates, Price/Unit corresponds to the Rate Source and Rate Type applied to the activity and is not editable. If an assigned resource or role does not have specified rates, the project default price/unit is used and cannot be edited on this tab. To manually enter a Price/Unit for the activity assignment, you must select Override as the Rate Source.

If the project default price/unit is applied to the activity, a caret symbol (^) appears beside the value. 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.

Price/Unit (EPS)

Price/Unit field

The default price/unit used to calculate the cost for activities that have labor/non-labor units but no assigned resources and for activities that have assigned resources or roles that do not have a specified price/unit.

Price/Unit (Expenses)

Price/Unit field

The planned price per unit for the activity expense.

This number is multiplied by the planned number of units to compute the planned cost.

Price/Unit (Resources)

Price/Unit fields

The non-overtime rates expressed as a series of price per unit values for the resource as of the effective date.

The rates are used to compute resource assignment costs for activities. You can define up to five rates for a resource for a time span starting on the effective date. Your organization can define text titles for each rate type as part of enterprise data.

For example, enter 54 as a **Standard Rate**, 49 as an **Internal Rate**, and 64 as an **External Rate**. The application will automatically format the rates per unit of time, for example, *54/h*.

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Price/Unit (Roles)

Price/Unit fields

The non-overtime rate for the role, which is used to compute costs for any activities to which the role is assigned.

You can define up to five rate types for a role. Your organization can define text titles for each rate type as part of enterprise data.

Primary Constraint Date

Primary Constraint Date field

The constraint date for the activity, if the activity has a constraint. The activity's constraint type determines whether this is a start date or finish date.

Activity constraints are used by the project scheduler.

Primary Resource

Primary Resource field

The person primarily responsible for performing or overseeing work related to a specific activity or assignment.

Primavera Unifier URL

Primavera Unifier URL field

The Primavera Unifier URL that will enable users to access Primavera Unifier from P6.

Priority (Issues)

Priority field

The level of importance assigned to the issue.

Private Location

Private Location field

The private file location of the selected document. Typically, the private location is found on the user's personal computer rather than a location that anyone could access.

Privilege

Privileges list

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The security privileges available to the selected profile.

Probability (Post-mitigated Thresholds)

Probability field

The probability of the risk occurring after the response action item has been completed.

Probability (Pre-response Thresholds)

Probability field

The probability of the risk occurring.

Probability Threshold

Probability Threshold field

The name of the probability threshold assigned to the risk scoring matrix.

The probability threshold defines the likelihood of the risk occurring.

Proficiency

Proficiency field

The skill level of the resource. If you do not have appropriate privilege, you cannot access this field.

Project Access

Project Access field

The OBS level that determines the projects a user is allowed to access.

Project Forecast Start

Project Forecast Start field

The planned start date of the project based on a what-if scenario designed to simulate project performance and outcomes.

Project ID

Project ID field

The unique identifying code for the project.

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Project Leveling Priority

Project Leveling Priority field

The priority of each project during leveling.

You can enter a value from 1 to 100, with 1 being the highest priority.

Project Name field (Unifier)

Project Name field

The Unifier project to which you want to link this P6 project.

Project Owner

Project Owner field

The resource designated as responsible for the project.

The project owner designation provides a user with viewing access for the project.

Project Planned Start

Project Planned Start field

The expected start date for the project.

Project Risk Exposure

Project Risk Exposure field

The sum of the Pre-Response Risk Exposure values for all risks in the project that are in a *Proposed*, *Open*, or *Active* state, and are identified as a threat to the project.

Project Risk Score

Project Risk Score field

The sum of the Pre-Response Scores for all risks in the project that are in a *Proposed*, *Open*, or *Active* state, and are identified as a threat to the project.

Project Score

Project Score field

The project score, based on all project code types assigned to this project.

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Project Security Profile

Project Security Profile field

Determines the project access granted to the user.

Project Template ID

Template ID field

The unique alphanumeric short name you assign to your new project template.

The name can have up to 40 characters.

Project Website URL

Project Website URL field

The address of the project's website.

Proposed Budget

Proposed Budget field

The proposed budget for the WBS or project.

Calculated as **Original Budget** plus the sum of the Approved and Pending Budgets from the budget log.

Publication Priority

Publication Priority field

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.

Range (Risk Thresholds)

Range field

The user-defined range for each threshold level where the breadth of the range specifies the amount of risk associated with the assigned level.

You can enter text or numeric data in this field depending on the threshold type.

Probability: The value is a percentage.

Tolerance: The value is a number.

Cost Impact by value: The value is the cost.

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Schedule Impact by value: The value is a duration.

Cost Impact by percentage: The value is a percentage.

Schedule Impact by percentage: The value is a percentage.

User-defined Impact: The value is text.

Rate Source

Rate Source field

The value that indicates which price/unit will be used to calculate costs for the assignment, such as *Resource*, *Role*, and *Override*.

When a resource, and only a resource, is assigned to an activity assignment, the rate source will automatically equal *Resource*. When a role, and only a role, is assigned to an activity assignment, the rate source will automatically equal *Role*. When both a resource and role are assigned to the activity assignment, the rate source can be either *Resource* or *Role* determined by your rate source preference. In any case, the *Override* value allows you to specify a different value for Price/Unit.

The default rate source preference can be changed on the **My Preferences** page under **Resource Assignments**.

Reason

Reason field

A short description summarizing the events or circumstances prompting the proposed change to the budget.

This field can also be used to store the decision justifying the budget line item's status.

Reference Number

Reference Number field

The reference or catalog number of a document.

The reference number is defined by the user.

This field is not available when you access document details from the **My Documents** portlet.

Relationship Type

Relationship Type field

The type of relationship between two activities.

Valid values are:

Finish to Start: The successor activity cannot start until its predecessor finishes.

Finish to Finish: The successor activity cannot finish until its predecessor finishes.

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Start to Start: The successor activity cannot start until its predecessor starts.

Start to Finish: The successor activity cannot finish until its predecessor starts.

Remaining (Units)

Remaining field

The number of units required to complete the activity.

Remaining Cost (Assignments)

Remaining Cost field

The remaining cost for the resource assignment on the activity.

Calculated as **Remaining Units** multiplied by **Cost/Time**.

Remaining Cost (Expenses)

Remaining Cost field

The remaining total cost for the activity, including labor resources, nonlabor resources, and project expenses.

Before actual expenses are made, the remaining cost should be the same as the 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.

Calculated as **Remaining Labor Costs** plus **Remaining Nonlabor Costs** plus **Remaining Expense Costs**.

Remaining Cost (Response Plans)

Remaining Cost field

The remaining total cost required to complete the response action item in the response plan.

If the status of the response action item is rejected, the cost will not aggregate in the remaining cost total.

If an activity is assigned to the response action item, the field is disabled and the remaining cost of the activity displays.

Remaining Duration (Activities)

Remaining Duration field

The total working time from the activity remaining start date to the remaining finish date.

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The remaining working time is calculated using the activity's calendar. Before the activity is started, the remaining duration is the same as the planned duration. After the activity is completed the remaining duration is zero.

Remaining Duration (Assignments)

Remaining Duration field

The remaining working time for the resource assignment on the activity, from the resource's remaining start date to the remaining finish date.

The remaining working time is calculated using the calendar determined by the activity type. Resource dependent activities use the resource's calendar; other activity types use the activity's calendar. Before the activity is started, the **Remaining Duration** is the same as the **Planned Duration**. After the activity is completed, the remaining duration is zero.

Remaining Duration (EPS)

Remaining Duration field

The total working time from the project remaining start date to the remaining finish date.

Remaining Early Finish (Activities)

Remaining Early Finish field

The date the remaining work for the activity is scheduled to finish.

If this activity is not started, this date is the planned finish. This date can be updated manually by the user, but it is overwritten when you schedule the project.

Remaining Early Finish (Assignments)

Remaining Early Finish field

The date the assignment is scheduled to be finished.

This date can be updated manually by the user. Before the activity is started, this date is the same as the **Planned Finish** date.

Remaining Early Start (Activities)

Remaining Early Start field

The date the remaining work for the activity is scheduled to begin.

This date can be updated manually by the user. Before the activity is started, this date is the same as the planned start.

Remaining Early Start (Assignments)

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Remaining Early Start field

The date the assignment is scheduled to begin.

This date can be updated manually by the user. Before the activity is started, this date is the same as the **Planned Start** date.

Remaining Expense Cost (Activities)

Remaining Expense Cost field

The remaining costs for all project expenses associated with the activity.

Remaining Expense Cost (EPS)

Remaining Expense Cost field

The remaining costs for all project expenses associated with the activities in the EPS.

Remaining Float

Remaining Float field

The amount of time remaining by which the activity can be delayed before delaying the project finish date.

Calculated as **Late Finish** minus **Remaining Finish**. If the remaining finish is the same as the early finish (in general, when the activity is not started), then the remaining float is the same as the total float.

Remaining Labor Cost (Activities)

Remaining Labor Cost field

The remaining costs for all labor resources assigned to the activity.

If no resources are assigned, calculated as the **Activity Remaining Labor Units** multiplied by **Project Default Price** divided by **Time**.

Remaining Labor Cost (EPS)

Remaining Labor Cost field

The remaining costs for all labor resources assigned to the activities in the EPS.

The remaining cost reflects the cost remaining for the EPS.

Remaining Labor Units (Activities)

Remaining Labor Units field

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The remaining units for all labor resources assigned to the activity.

The Remaining Labor Units reflect the work remaining to be done for the activity. Before the activity is started, the remaining units are the same as the planned units. After the activity is completed, the remaining units are zero.

Remaining Labor Units (EPS)

Remaining Labor Units field

The remaining units for all labor resources assigned to the activities in the project.

The Remaining Labor Units reflect the work remaining to be done for the EPS. Before the project is started, the remaining units are the same as the planned units. After the project is completed, the remaining units are zero.

Remaining Lag

Remaining Lag field

The time lag between the activity's remaining start date and the resource's remaining start date on the activity.

If the resource's remaining work starts on the activity's remaining start date, the lag is zero. Before the activity is started, the remaining lag is the same as the planned lag.

Remaining Late Finish (Activities)

Remaining Late Finish field

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, this field is blank.

Remaining Late Finish (Assignments)

Remaining Late Finish field

The latest possible date the assignment must be finished to not delay 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, this field is blank.

Remaining Late Start (Activities)

Remaining Late Start field

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 relationship, schedule constraints, and resource availability.

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Remaining Late Start (Assignments)

Remaining Late Start field

The latest possible date the assignment must begin to not delay the project finish date.

This date is calculated by the project scheduler based on activity relationships, schedule constraints, and resource availability.

Remaining Material Cost (Activities)

Remaining Material Cost field

The sum of all material resource remaining costs.

Remaining Material Cost (EPS)

Remaining Material Cost field

The remaining material costs for all project expenses associated with the activities in the EPS.

Remaining Nonlabor Cost (Activities)

Remaining Nonlabor Cost field

The remaining costs for all nonlabor resources assigned to the activity.

If no resources are assigned, calculated as **Activity Remaining Nonlabor Units** multiplied by **Project Default Price** divided by **Time**.

Remaining Nonlabor Cost (EPS)

Remaining Nonlabor Cost field

The remaining nonlabor costs for all project expenses associated with the activities in the EPS.

Remaining Nonlabor Units (Activities)

Remaining Nonlabor Units field

The remaining units for all nonlabor resources assigned to the activities.

The remaining units reflect the work remaining to be done for the activity. Before the activity is started, the remaining units are the same as the planned units. After the activity is completed, there are zero remaining units.

Remaining Nonlabor Units (EPS)

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Remaining Nonlabor Units field

The remaining units for all nonlabor resources assigned to the activities.

The remaining units reflect the work remaining to be done for the EPS.

Remaining Total Cost

Remaining Total Cost field

The remaining total cost for the activity or project, including labor resources, nonlabor resources, material resources, and project expenses.

Remaining Units (Activities)

Remaining Units field

The remaining units of work to be performed by the resource on the activity.

Calculated as **Planned Units** minus **Actual Units**.

Remaining Units (Assignments)

Remaining Units field

The units remaining to complete the assignment.

Calculated as **Remaining Duration** multiplied by **Remaining Units per Time**.

Remaining Units/Time

Remaining Units/Time field

The units per time required for the resource assignment to complete the activity.

Report Location

Report Location field

The path to the predefined source report in the folders shared by P6 and your P6 reporting software.

Report Recipients

Report Recipients field

The distribution list showing each Email user set to receive the report.

Reporting End Date field

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Reporting End Date field

The effective end date of the XML file.

Reporting Start Date field

Reporting Start Date field

The effective start date of the XML file.

Requested Units

Requested Units field

The number of resource or role units to assign to the project.

Requested Units/Time

Requested Units/Time field

The units/time of work that the resource is being asked to perform on the activity.

This field does not display if the activity has a resource curve assigned or when multiple activities are selected in the **Resource Staffing** dialog box.

Resolution Date

Resolution Date field

The date the selected issue was resolved.

Resource Access

Resource Access field

The resource access for the user.

The resource may have access to all resources, up to five selected resources, or no resources. This field is blank if the user does not have access to a resource.

Resource Codes

Resource Codes field

The names of the resource codes used to search for a resource to staff the activity.

If you select the **all applied** option, you can specify only one code value for each resource code you select.

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Resource Curve

Resource Curve field

The resource curve associated with the selected activity.

This field displays in place of the **Requested Units/Time** field if a curve is associated with this resource assignment.

This field does not display when multiple activities are selected in the **Resource Staffing** dialog box.

Resource ID

Resource ID field

The unique identifier for the resource.

Resource ID Name

Resource ID Name field

The unique identifier and name of the resource.

Resource Teams

Resource Teams field

The list of resource teams to which the resource is assigned.

Resource Type

Resource Type field

The type of resource/role assignment.

Valid values are:

Labor: Indicates that the selected resource performs labor, which is measured in units of time.

Nonlabor: Indicates that the selected resource does not perform labor, but its work is measured in units of time.

Material: Indicates that the selected resource does not perform labor, and its work is measured in units you specify.

Resources (Resource Teams)

Resources field

The list of resources assigned to the resource team.

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Resources (Resources)

Resources field

The names of the resources to use in a search.

The displayed hierarchy includes only those resources to which you have access based on resource security and project resources. If you select the option to show results that match all criteria, you can specify only one resource.

Resources (Roles)

Resources field

The list of resources assigned to the role.

Resources IDs

Resource IDs field

The identifiers of the resources assigned to the activity.

Response Total Cost

Response Total Cost field

The total cost of the active response plan.

If a response plan is active, this field is disabled and displays the sum of the **Remaining Cost** plus **Actual Cost** fields for all response action items in the response plan. Rejected response action items are not included in the calculation.

Responsible

Responsible field

The name of the person with signature approval for the budget log line item.

Responsible Resource

Responsible Resource field

The primary resource, if any, associated with the milestone. The resource associated with a milestone is specified in the Primary Resource column. You cannot assign a resource to a milestone in the Assignments detail window of the Activity Page.

Resume Date

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Resume Date field

The date when a suspended task or activity is resumed.

The resume date must be later than the suspend date and earlier than the actual finish date.

The suspend/resume period behaves like non-work time on the activity calendar.

Return on Investment

Return on Investment field

A calculation of the expected return or benefit over and above the investment costs of a project or portfolio expressed as a percentage.

Calculated as the **Net Present Value** divided by the **Total Spending Plan (Present Value)**.

For example, a project is expected to cost 1.0 million dollars with a total benefit of 1.2 million dollars. Its Net Present Value is $200,000. The Return on Investment is 20%.

Review Finish Date

Review Finish Date field

The finish date for the activity as proposed by the primary resource.

If the project manager approves the activity finish date, the review finish date is copied to the actual finish.

Review Status

Review Status field

The current review status of the document.

The review statuses are *Blank*, *In Review*, *Approved*, *Rejected*, and *Terminated*. If the document is not under review, this field is blank.

This field is not available when you access document details from the **My Documents** portlet.

Reviewed Date

Reviewed Date field

The date when the timesheet was last reviewed.

Reviewers (Documents)

Reviewers field

The selected users assigned to review the document.

You can use the arrows to move the selected users up or down in the sequence; this is the order in which they will review if you select the option **Everyone Must Review in Sequence**.

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Revision Date

Revision Date field

The date of the last update of the document.

Risk Scoring Matrix

Risk Scoring Matrix field

The name of the risk scoring matrix assigned to the project.

Role ID

Role ID field

The unique identifier of the associated role.

Role ID Name

Role ID Name field

The identifying code and name of the role.

Role on Project

Roles on Project field

The resource's assigned roles for the project.

Role Teams

Role Teams field

The list of role teams assigned to the role.

Roles (Activities)

Roles field

The name of the roles assigned to the activity resources.

Roles (Role Teams)

Roles field

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The list of roles assigned to the selected role team.

Schedule % Complete (Activities)

Schedule % Complete field

The activity schedule percent complete, which specifies how much of the activity's project baseline duration is complete so far.

Calculated based on where the current data date falls relative to the activity's project baseline start and finish dates.

If the data date is earlier than the baseline start, the schedule percent complete is 0. If the data date is later than the baseline finish, the schedule percent complete is 100. The schedule percent complete indicates how much of the activity duration should currently be complete, relative to the selected project baseline.

Schedule % Complete (EPS)

Schedule % Complete field

The measure of how much of the project baseline is complete so far.

Calculated as the Planned Value Cost *100 / Budget At Completion Cost.

At the EPS level, Planned Value Cost and Budget At Completion Cost are rolled-up values.

Schedule (Risk Pre-response Thresholds)

Schedule field

The impact on the schedule if the risk occurs.

Schedule (Risk Response Plans)

Schedule field

The schedule impact of the risk after the response action item has been completed.

Schedule ID

Schedule ID field

A unique system-generated identifier assigned by your P6 reporting software to each report schedule.

Schedule Impact Threshold

Schedule Impact Threshold field

The schedule impact threshold for the selected risk matrix.

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Schedule Performance Index (Earned Value)

Schedule Performance Index field

A measure of the work accomplished as a percentage of the work scheduled.

Schedule Performance Index indicates whether you are meeting earned and planned values within your schedule. A value less than 1 indicates that less work was performed than was scheduled.

Calculated as **Earned Value** divided by **Planned Value**.

Schedule Performance Index (Index Performance)

Schedule Performance Index field

A measure of the work accomplished as a percentage of the work scheduled.

Schedule Performance Index (SPI) indicates whether you are meeting earned and planned values within your schedule. You can set performance thresholds for SPI calculated values to determine whether you need to take corrective action.

Calculated as **Earned Value of Cost** or **Quantity** divided by **Planned Value of Cost** or **Quantity**.

The variance percentage is calculated as **Earned Value** divided by **Planned Value**.

Schedule Performance Index - Labor Units

Schedule Performance Index - Labor Units field

The ratio of the earned value of labor units to the planned value of labor units.

Calculated as **Earned Value Labor Units** divided by **Planned Value Labor Units**.

Schedule Sheet field

Schedule Sheet field

The Unifier schedule sheet to which you want to link this project.

Schedule Variance

Schedule Variance field

The measure of schedule performance on a project.

A negative value indicates that less work was actually performed than was scheduled.

Calculated as **Earned Value** minus **Planned Value**.

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Schedule Variance - Labor Units

Schedule Variance - Labor Units field

The difference between the earned value of work performed and the work scheduled to be performed.

Calculated as **Earned Value Labor Units** minus **Planned Value Labor Units**.

Schedule Variance Index (Activities)

Schedule Variance Index field

The ratio of the schedule variance and the work scheduled to be performed.

Calculated as **Schedule Variance** divided by **Planned Value**.

Schedule Variance Index (EPS)

Schedule Variance Index field

The ratio of schedule variance labor units and the planned value labor units.

Calculated as **Schedule Variance Labor Units** divided by **Planned Value Labor Units**.

Schedule Variance Index - Labor Units

Schedule Variance Index - Labor Units field

The ratio of schedule variance labor units and the planned value labor units.

Calculated as **Schedule Variance Labor Units** divided by **Planned Value Labor Units**.

Scheduled Finish

Scheduled Finish field

The calculated latest early finish date, which is based on the schedule most recently generated for the project.

Scope % Complete

Scope % Complete field

The percent complete for the activity if the percent complete type is set to scope. Scope is calculated in Oracle Primavera Cloud when P6 is integrated with Oracle Primavera Cloud for scope management.

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Score (Pre-response Thresholds)

Score field

The risk calculation based on the values defined for probability, cost impact, schedule impact, and any additional user-defined impacts for the risk.

Score (Resource Search Results)

Score field

The number of units the resource will have available after being assigned to the activity.

Calculated as **Available units of the resource across the expanded activity time frame** minus **Total Requested Units**.

If a resource is assigned to projects which have not been published recently, the score cannot be calculated.

Score (Response Plans)

Score field

The risk score after the response action item has been completed.

Score (Text) (Post-mitigated Response Plans)

Score (text) field

The text-based risk score values after the response action item has been completed.

Score (Text) (Pre-response Thresholds)

Score (Text) field

The text-based risk score based on the values defined for probability, cost impact, schedule impact, and any additional user-defined impacts for the risk.

Scoring Matrix

Scoring Matrix field

The name of the risk scoring matrix assigned to the project.

Secondary Constraint

Secondary Constraint field

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The secondary constraint type for the selected activity.

This field is only available if a primary constraint has been selected.

Secondary Constraint Date

Secondary Constraint Date field

The date for the activity's secondary constraint, if the activity has a secondary constraint.

The activity's constraint type determines whether this is a start date or finish date. This field is only available if a primary constraint has been selected.

Service

Service field

The type of service.

Severity

Severity fields

The ranges and values assigned to the chosen thresholds.

The number of severity fields is determined by the number of levels chosen for the impact thresholds.

Shift Start Hour

Shift Start Hour field

The start time of the assigned shift.

Shift start time is a value in a shift calendar assigned to a resource in P6 Professional. If a shift calendar is assigned to a resource, then the fields in the Units and Prices detail window are disabled. If a shift calendar does not exist for a resource, this field is disabled.

Show Activities

Show activities field

Determines for how many upcoming days the portlet will display scheduled activities.

Source/Destination Deployment field

Source/Destination Deployment field

Determines the source or destination deployment to connect to.

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Spending Plan

Spending Plan field

The anticipated or actual project spending for the corresponding time period.

Staffed Remaining Cost

Staffed Remaining Cost field

The remaining cost for resource assignments that have a filled role.

Staffed Remaining Units

Staffed Remaining Units field

The remaining units for resource assignments that have filled a role.

Staffed Units

Staffed Units field

The total units currently assigned to individual resources for each role.

Stage

Stage field

The name of the current workflow phase.

The stage also provides an indication of the workflow's current progress within the total sequence of all its defined phases. For example, *Stage 1: Just Initiated* vs. *Stage 5: Final Review*.

Start (Response Plans)

Start field

The earliest start date of all response plan action items.

The project start date is the default start date for the response action item.

If an activity is assigned to the response action item, the field is set to display the start date of the activity.

Start Date (Activities)

Start Date field

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The current start date of the activity. For started activities, this is the actual start date. For not started activities, this is the planned start date until the project is scheduled. When scheduled, the start date field is set to the remaining early start date.

Start Date (Financial Periods)

Start Date field

The date the financial period begins.

Start Date (Projects)

Start Date field

The current start date of the project. For a not started project, this is the project's planned start date. For a project that has started or is complete, this is the project's actual start date. For projects with no activities, the start date is equal to the anticipated start date if one is defined; if no anticipated start is defined, then the start date is equal to the project's planned start date.

Start Date (Timesheet Period)

Start Date field

The first day of the timesheet period for the selected timesheet.

Start Date (Timesheet Periods)

Start Date field

The date the timesheet period begins.

Status

Status field

The current status of the item.

Status (Issues)

Status field

The current status of the project issue.

Step % Complete

Step % Complete field

The completed percentage for each step.

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Step Weight

Step Weight field

The weight assigned to the step.

Step weight indicates the step's importance to the activity. The higher the value, the greater the importance. Step weight is used to calculate Physical Percent Complete and Activity Percent Complete.

If you do not enter a step weight, the application assigns the step a default weight of one.

Step Weight Percent

Step Weight Percent field

The step weight as a percentage.

Calculated as (**Step Weight** divided by **Sum of Weight** for all steps) multiplied by 100.

Steps

Steps field

The names of the steps assigned to the activity.

Steps Completed

Steps Completed field

The number of steps marked complete.

Steps In Progress

Steps In Progress field

The number of steps on which work has started but is not yet complete.

Steps Not Started

Steps Not Started field

The number of steps that are not yet started.

Strategic Priority

Strategic Priority field

The project's priority in the strategic plan.

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This priority value ranges from 1 to 10,000 with a default of 500. Use of the priority value, such as whether to place higher priority at the lower end of the scale, toward the endpoint 1, or at the higher end, toward 10,000, is at the discretion of the user. This field is not used for calculating data.

Submitted (Import/Export)

Submitted field

The date and time the import was scheduled.

Submitted (Services)

Submitted field

The date the service was submitted.

Submitted By (Team Member Status Updates)

Submitted By field

The person responsible for the activity update.

Submitted Date (Team Member Status Updates)

Submitted Date field

The date the activity status update was made by the team member.

Submitted Date (Timesheet Approval)

Submitted Date field

The date the timesheet was submitted.

Successor

Successor field

The activity required to start or finish *after* an activity in the activity relationship has started or finished, depending on the relationship type.

Suspend Date

Suspend Date field

The date work has temporarily stopped on a given activity.

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For example, an event might force an activity to be interrupted or resource constraints might put an activity on hold.

The suspend date must be later than the actual start date, which the activity must have. Activity progress can resume when the Resume Date is set. The suspend/resume period behaves like non-work time on the activity calendar or resource calendar for task and resource dependent activities.

Table Name field

Table Name field

The name of the table to be configured for auditing.

Target

Target field

The user-defined goal for each check.

You select this value using the **Target** selector in the **Check Schedule** dialog box.

Task Status - Completion

Task Status - Completion field

Shows the completion status of the activity and the associated tasks.

Task Status - Dates

Task Status - Dates field

Shows whether any of the tasks assigned to the activity has dates outside of the activity dates.

Task Status - Indicator

Task Status - Indicator field

Shows an alert if any tasks dates are outside the activity dates, all task assigned to an incomplete activity are completed, or any tasks assigned to a completed activity are incomplete.

Template Name (Import/Export)

Template Name field

The name for the import or export template.

This field is required and can contain up to 40 characters.

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Template Name (Step Templates)

Template Name field

The name of the activity step template.

Template Name field

Template Name field

The name of the template that will show in the Select Template dialog box.

Timesheet Approval Manager

Timesheet Approval Manager field

The resource manager assigned to approve timesheets for the resource.

Timesheet Notes History

Timesheet Notes History field

The notes added for the timesheet.

Each note is automatically stamped with the date, time, and user name when added. The notes are listed in chronological order.

Title

Title field

The name of the item, such as the name of the document, activity, or portfolio.

To Complete Performance Index (Earned Value)

To Complete Performance Index field

The ratio of the remaining work to the remaining funds.

Calculated as (**Budget at Completion** minus **Earned Value**) divided by (**Estimate at Completion** minus **Actual Units** or **Cost**).

To Complete Performance Index (Index Performance)

To Complete Performance Index field

A measure of the value of the project work that is remaining.

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To Complete Performance Index (TCPI) is essentially a ratio of the *remaining work* to the *remaining funds*. It helps determine the level of performance that must be achieved on the remaining work to meet recognized business goals, such as the Budget at Completion (BAC) or the Estimate at Completion (EAC).

You can set performance thresholds for calculated TCPI values to display visual indicators that help you determine whether you need to take corrective action.

Calculated as (**BAC** minus **Earned Value**) divided by (**EAC** minus **Actual Units** or **Cost**). Where BAC equals **Base Equipment Cost** plus **Base Expense Cost** plus **Base Work Cost** plus **Base Material Cost**; EAC equals (**Actual Equipment Cost** plus **Actual Expense Cost** plus **Actual Work Cost** plus **Actual Material Cost**) plus (**Remaining Equipment Cost** plus **Remaining Expense Cost** plus **Remaining Work Cost** plus **Remaining Material Cost**); Actual Cost equals **Actual Equipment Cost** plus **Actual Expense Cost** plus **Actual Work Cost** plus **Actual Material Cost**.

To Date: Cost

To Date: Cost field

Determines project performance by calculating the variance between earned value and actual cost.

Calculated as **Earned Value Cost** minus **Actual Cost**.

To Date: Labor Units

To Date: Labor Units field

Determines project performance by calculating the variance between the actual and the scheduled labor units. This value is accompanied by a convenient visual indicator mapped to performance thresholds you can define.

Calculated as **Earned Value Labor Units** minus **Actual Labor Units**.

To Date: Schedule (Earned Value)

To Date: Schedule field

Determines project performance by calculating the variance between actual and scheduled labor units or cost.

This variance helps address the basic question, "How did we do so far?" It provides concise answers such as *4 days early*, *No Progress*, *on schedule*, or *12 days late*.

For costs, calculated as **Earned Value Cost** minus **Planned Value Cost**.

For labor units, calculated as **Earned Value Labor Units** minus **Planned Value Labor Units**.

To Date: Schedule (Schedule Performance)

To Date: Schedule field

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Determines project performance by calculating the variance between the baseline schedule and the actual schedule to date.

This variance helps address the basic question, "How did we do so far?" It provides concise answers such as *4 days early*, *No Progress*, *on schedule*, or *12 days late*.

This value is expressed in units of time accompanied by a convenient visual indicator mapped to performance thresholds you can define. The value can be derived based on costs or labor units and will often yield different results.

Calculated as (**Baseline Duration** multiplied by **Performance % Complete**) minus (**Baseline Duration** multiplied by **Schedule % Complete**). Where **Performance % Complete** equals **Earned Value** divided by **Budget at Completion** and **Schedule % Complete** equals **Planned Value** divided by **Budget at Completion**.

Tolerance Threshold

Tolerance Threshold field

The name of the tolerance threshold that is assigned to the risk scoring matrix.

The tolerance threshold is the acceptability or manageability of a risk on a project.

Topic

Topic field

The name of the associated notebook topic.

Total (Timesheet Approval)

Total field

The total number of hours reported per day for the currently displayed activities. Red text indicates variance units are negative.

Total Activities

Total Activities field

The number of activities in the project.

Total Benefit Plan

Total Benefit Plan (Present Value) field

The sum of the monthly benefit plan. When you select an EPS node, project code, or portfolio in the hierarchy, this is the sum of Total Benefit for all projects in the group.

Calculated as **Plan Period $** divided by (**1** plus **Annual Discount Rate**) multiplied by **n**. Where n equals the Current Discount Application Period Value (e.g., for yearly over 8 years, values are calculated for n equals year 0, year 1, year 2, ... year 7). The Project Start Date is used as

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the beginning of period 0. If the **Project Start Date** or **Annual Discount Rate** change, **Total Spending Plan PV**, **Total Benefit Plan PV**, **NPV**, **ROI**, and **Payback Period** are recalculated.

Total Duration

Total Duration field

The activity's actual duration plus its remaining duration.

Total Float

Total Float field

The amount of time the activity can be delayed before risking a delay to the project finish date.

A float of zero hours indicates that the activity cannot be delayed at all and a negative float indicates that the project is already behind schedule. In a complex schedule, negative total float on some activities might not cause a delay to the project finish date.

Calculated as **Late Start** minus **Early Start** or as **Late Finish** minus **Early Finish**.

Total Float (Hours)

Total Float (hours) field

The total number of hours an activity can be delayed before risking a delay to the project finish date.

A float of zero hours indicates that the activity cannot be delayed at all and a negative float indicates that the project is already behind schedule. In a complex schedule, negative total float on some activities might not cause a delay to the project finish date.

Total Funding

Total Funding field

The total amount contributed to the project from funding sources.

Total Hours (Standard Work Week)

Total Hours field

The total number of work hours for each day.

Total Hours (Timesheet Approval)

Total Hours field

The sum of the hours in the **Project Reg/OT** and **Overhead Reg/OT** fields.

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Total Hours field (Timesheet Approval)

Total Hours field

The total number of hours reported for the entire timesheet period for each activity.

P6 also adds the total hours for all activities together and displays this value in the lower right corner of the table.

Total Links

Total Links field

The total number of links to or from activities in open projects. This number includes links that exist between activities in open projects and activities in closed projects.

Total Present Value (Discounted): Benefit Plan

Total Present Value (Discounted): Benefit Plan field

The calculated total of spending and benefit plans for all periods, reduced to current dollars by the discount rate.

Current dollars for individual spending plan and benefit plan periods are calculated as **Plan Period $** divided by ((**1** plus **Discount Rate**) to the **nth** power). Where n equals the Current Discount Application Period Value (for example, for yearly over 8 years, values are calculated for n equals year 0, year 1, year 2, ... year 7). The **Project Start Date** is used as the beginning of period 0. If the **Project Start Date** or the **Discount Rate** change, **Total Spending Plan PV**, **Total Benefit Plan PV**, **NPV, ROI**, and **Payback Period** are recalculated.

Total Present Value (Discounted): Spending Plan

Total Present Value (Discounted): Spending Plan field

The projected project spending for the corresponding time period.

Numbers can be positive or negative, and should be entered as non-discounted dollars.

Total Requested Units

Total Requested Units field

The number of work units the resource is being asked to perform on the activity.

If more than one activity is selected in the Resource Staffing dialog box, this field displays the total remaining units of all the activities.

Total Spending Plan

Total Spending Plan (Present Value) field

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The sum of the monthly spending plan. When you select an EPS node, project code, or portfolio in the hierarchy, this is the sum of Total Spending for all projects in the group.

Calculated as **Plan Period $** divided by (**1** plus **Annual Discount Rate**) multiplied by **n**. Where n equals the Current Discount Application Period Value (e.g., for yearly over 8 years, values are calculated for n equals year 0, year 1, year 2, ... year 7). The Project Start Date is used as the beginning of period 0. If the Project Start Date or the Annual Discount Rate change, Total Spending Plan PV, Total Benefit Plan PV, NPV, ROI, and Payback Period are recalculated.

Total Units

Total Units field

Project or WBS: The total number of units rolled up from assignments in the project or WBS.

Resource: The total number of units allocated to the resource.

Role: The total number of units allocated to the role.

The units are displayed in the Time Units Format you selected in your user preferences.

Type (Baseline Types)

Type field

The type of baseline.

You can use the baseline type name to categorize your baselines by purpose; for example, customer sign-off, initial planning, management sign-off, mid-project status, and what-if baselines.

Type (Codes)

Type field

The type of the code. This field describes the scope of the code: Global, EPS, or Project.

Type (EPS)

Type field

The type of element, whether project or EPS.

Type (Portfolio Views)

Type

The type of chart to be displayed.

If you change the type to **Scorecard**, the information that displays on the page changes so you can input scorecard details.

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Type (Project Risks)

Type field

The type of risk.

Type (Risk Scorning Matrices)

Type field

The type of impact threshold assigned to the risk scoring matrix.

Impact threshold types include schedule, cost, and user-defined. You must define a cost and schedule impact for a risk scoring matrix. User-defined impacts are optional.

UDF Type (Project UDFs)

UDF Type field

Indicates whether a formula is specified for the field.

A formula is any custom calculation created for the field to automatically determine field values.

Unallocated Budget (EPS)

Unallocated Budget field

The difference between the total current and distributed current budget.

Calculated as **Total Current Budget** minus **Distributed Current Budget**.

Unallocated Budget (WBS)

Unallocated Budget field

The sum of a budget that has not been allocated to the selected WBS.

Under/Overallocated field

Under/Overallocated field

The underallocated or overallocated units for the resource.

This field is calculated by summing the Actual Units and Remaining Early Units and then subtracting the Limit. Positive values show that the resource is overallocated. Negative values show that the resource is underallocated. This field is only available in the Spreadsheet view format of the Overallocated Resources view.

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Unit Abbreviation

Unit Abbreviation field

The abbreviation for the unit name.

Unit of Measure (Expenses)

Unit of Measure field

The unit of measure used for the project expense.

Unit of Measure (Resources)

Unit of Measure field

The unit of measure used for the material resource.

Units % Complete (Activities)

Units % Complete field

The percent complete of units for all labor and nonlabor resources assigned to the activity.

The percent complete is always in the range 0 to 100.

Calculated as **Actual Units** divided by **At Completion Units** multiplied by 100.

Units % Complete (Assignments)

Units % Complete field

The percent complete of units for the resource assignment on the activity.

The percent complete is always in the range 0 to 100.

Calculated as **Actual Units** divided by **At Completion Units** multiplied by 100.

Units % Complete (EPS)

Units % Complete field

The percent complete of units for the resource assignments in the EPS.

The percent complete is always in the range 0 to 100.

Calculated as **Actual Units** divided by **At Complete Units** multiplied by 100.

Unread Comments

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Unread Comments field

The number of comments posted to the activity since you last reviewed the comments in the Discussion detail window.

Unstaffed Remaining Cost

Unstaffed Remaining Cost field

The remaining cost for resource assignments that do not have a filled role.

Unstaffed Remaining Units

Unstaffed Remaining Units field

The remaining units for resource assignments that have not filled a role.

Unstaffed Units

Unstaffed Units field

The total units that require resource assignments for each role.

Units for all roles are totaled at the level by which you organize.

Usage

Usage field

Displays the allocation for the resource or role per time period.

Available: The number of units available during the specified time period. The values in this row are calculated by subtracting enterprise-wide allocation from the assigned resource's limit as defined in the resource's calendar for the specified time period. If a resource calendar is not available, the default Global calendar is used. If the Committed option is selected, Allocated units are subtracted from Available units. The Available row does not exist for assigned roles.

Allocated: The units allocated in the specified time period.

User (Document Details)

User field

The name of the user who performed the action.

User (Schedule Reports)

User field

The identifier for the user who created the scheduled job.

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User Count

User Count field

The number of users assigned to each module.

User Defined Field (Activity Form)

User Defined Field field

The name of the selected user defined field.

Click a name to display a page on which you can enter a value for the selected UDF.

User Defined Field (Enterprise Data)

User Defined Field field

The name of the user defined field.

User Defined Field Value

User Defined Field Value field

The value of the corresponding user defined field.

User Defined Fields

User Defined fields

The fields defined by your P6 administrator that are not standard in the application but are necessary to capture additional data.

User Defined Title

User Defined Title field

The descriptive title for the rate type.

User Impact Threshold

User Impact Threshold field

The user impact threshold for the selected risk matrix.

User Interface View

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User Interface View field

The user interface view assigned to the user.

User Interface View For New Users

User Interface View for new users field

The default user interface view automatically assigned to new users.

User Login

User Login field

The login name for the timesheet user login.

User Name

User Name field

The system-compliant user login name.

User Status

User Status field

An indication of the relative state of the user account in both the LDAP repository and P6.

By default, the user accounts shown in your search results on this dialog box are grouped hierarchically by the following status types:

User does not exist in the database: Shows users who exist in the LDAP repository but not in the P6 database. When you select these accounts and click **Import**, they are imported as new records in P6.

User modified: Shows user accounts that have similar information in both P6 and the LDAP repository, but that also have been modified in the P6 EPPM database or LDAP repository. When you select these accounts and click **Import**, the two account records are synchronized.

User records match: Shows users who have the same information in both P6 and the LDAP repository.

User's Primary Baseline

User's Primary Baseline field

The user's primary baseline for the selected project.

Value (Customize Scorecard)

Value field

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Enter a value for the field to complete the waterline level limit.

For example, enter 100 in the field to complete a limit where the **Parameter** field is set to *Total Activities* and the **Is** field is set to *Is less than*.

Value (EPS)

Value field

The value assigned to the selected project code. This field shows the hierarchy of the Code Value selected by showing each level of the hierarchy separated by dots.

Value (Report Settings)

Value field

The parameter value for the field displayed in the **Field Name** column.

The data entered in a text field must be accurate, or the report will fail to run.

Value (Resources)

Value field

The resource code value assigned to the selected resource. This field shows the hierarchy of the Code Value selected by showing each level of the hierarchy separated by dots.

Variance - Duration

Variance - Duration field

The duration between the activity's baseline duration and the at complete duration.

Calculated as **Baseline Duration** minus **At Completion Duration**.

Variance - Expense Cost

Variance - Expense Cost field

The difference between project baseline expense cost and the at completion expense cost.

Calculated as **Project Baseline Expense Cost** minus **At Completion Expense Cost**.

Variance - Finish Date

Variance - Finish Date field

The duration between the finish date in the current project and the baseline finish date.

Calculated as **Finish Date** minus **Baseline Finish Date**.

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Variance - Labor Cost

Variance - Labor Cost field

The difference between the project baseline labor cost and the at completion labor cost.

Calculated as **BL Labor Cost** minus **At Completion Labor Cost**.

Variance - Labor Units

Variance - Labor Units field

The difference between baseline labor units and at completion labor units.

Calculated as **Baseline Labor Units** minus **At Completion Labor Units**.

Variance - Material Cost

Variance - Material Cost field

The difference between the project baseline planned material cost and the at completion material cost.

Calculated as **Project Baseline Planned Material Cost** minus **At Completion Material Cost**.

Variance - Nonlabor Cost

Variance - Nonlabor Cost field

The difference between the project baseline nonlabor cost and at completion nonlabor cost.

Calculated as **BL Nonlabor Cost** minus **At Completion Nonlabor Cost**.

Variance - Nonlabor Units

Variance - Nonlabor Units field

The difference the between baseline nonlabor units and the at completion nonlabor units.

Calculated as **Baseline Nonlabor Units** minus **At Completion Nonlabor Units**.

Variance - Start Date

Variance - Start Date field

The duration between the start date in the current project and the baseline start date.

Calculated as **Start Date** minus **Baseline Start Date**.

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Variance - Total Cost

Variance - Total Cost field

The difference between the project baseline total cost and at completion total cost.

Calculated as **BL Total Cost** minus **At Completion Total Cost**.

Variance At Completion

Variance At Completion field

The difference between the baseline total cost and the current estimate of total cost. A negative value indicates an estimated cost overrun.

Budget At Completion is calculated from the current baseline.

Calculated as **Budget At Completion** minus **Estimate At Completion**.

Variance At Completion - Labor Units

Variance At Completion - Labor Units field

The difference between the baseline planned total labor units and the estimate at completion labor units.

Calculated as **Project Baseline Planned Total Labor Units** minus **Estimate At Completion Labor Units**.

Variance BL Project - Duration

Variance BL Project - Duration field

The duration between the activity's baseline duration and the at completion duration. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Planned Duration** minus **At Completion Duration**.

Variance BL Project - Expense Cost

Variance BL Project - Expense Cost field

The difference between the baseline project expense cost and the at completion expense cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL Project Expense Cost** minus **At Completion Expense Cost**.

Variance BL Project - Finish Date

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Variance BL Project - Finish Date field

The duration between the current project finish date in the baseline project finish date. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Finish** minus **BL Project Finish**.

Variance BL Project - Labor Cost

Variance BL Project - Labor Cost field

The difference between the baseline planned labor cost and at completion labor cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Planned Labor Cost** minus **At Completion Labor Cost**.

Variance BL Project - Labor Units

Variance BL Project - Labor Units field

The difference between baseline labor units and at completion labor units. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL Project Labor Units** minus **At Completion Labor Units**.

Variance BL Project - Material Cost

Variance BL Project - Material Cost field

The difference between baseline material cost and at completion material cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL Project Material Cost** minus **At Completion Material Cost**.

Variance BL Project - Nonlabor Cost

Variance BL Project - Nonlabor Cost field

The difference between the baseline planned nonlabor cost and at completion nonlabor cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Planned Nonlabor Cost** minus **At Completion Nonlabor Cost**.

Variance BL Project - Nonlabor Units

Variance BL Project - Nonlabor Units field

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The difference between the baseline nonlabor units and the at completion nonlabor units. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL Project Nonlabor Units** minus **At Completion Nonlabor Units**.

Variance BL Project - Start Date

Variance BL Project - Start Date field

The duration between the current project start date and the baseline start date. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Start** minus **BL Project Start**.

Variance BL Project - Total Cost

Variance BL Project - Total Cost field

The difference between the baseline planned total cost and the at completion total cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Planned Total Cost** minus **At Completion Total Cost**.

Variance BL1 - Duration

Variance BL1 - Duration field

The duration between the activity's primary baseline duration and the at completion duration. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Duration** minus **At Completion Duration**.

Variance BL1 - Expense Cost

Variance BL1 - Expense Cost field

The difference between the primary baseline expense cost and the at completion expense cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Primary Baseline Expense Cost** minus **At Completion Expense Cost**.

Variance BL1 - Finish Date

Variance BL1 - Finish Date field

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The duration between the current project finish date and the primary baseline finish date. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Finish** minus **BL1 Finish**.

Variance BL1 - Labor Cost

Variance BL1 - Labor Cost field

The difference between primary baseline labor cost and the at completion labor cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Labor Cost** minus **At Completion Labor Cost**.

Variance BL1 - Labor Units

Variance BL1 - Labor Units field

The difference between primary baseline labor units and the at completion labor units. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Labor Units** minus **At Completion Labor Units**.

Variance BL1 - Material Cost

Variance BL1 - Material Cost field

The difference between the baseline planned material cost and the at completion material cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Material Cost** minus **At Completion Material Cost**.

Variance BL1 - Nonlabor Cost

Variance BL1 - Nonlabor Cost field

The difference between the primary baseline nonlabor cost and the at completion nonlabor cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Nonlabor Cost** minus **At Completion Nonlabor Cost**.

Variance BL1 - Nonlabor Units

Variance BL1 - Nonlabor Units field

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The difference between the primary baseline nonlabor units and the at completion nonlabor units. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Nonlabor Units** minus **At Completion Nonlabor Units**.

Variance BL1 - Start Date

Variance BL1 - Start Date field

The duration between the current project start date and the primary baseline start date. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **Start** minus **BL1 Start**.

Variance BL1 - Total Cost

Variance BL1 - Total Cost field

The difference between the primary baseline total cost and the at completion total cost. Baseline variance columns only use data from visible activities. If you need to see variance for the whole project, remove any filters applied to the view.

Calculated as **BL1 Total Cost** minus **At Completion Total Cost**.

Vendor

Vendor field

The name of the vendor providing the product or service associated with the expense.

Version

Version field

The version number of the document. Version 1 is the original version of the document.

If the version number is a link, you can click the link to view that version of the document.

WBS

WBS field

The name of the WBS element.

WBS Category

WBS Category field

The category of the selected WBS.

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Use this category to organize, filter, and report WBS information in all projects. The category applies to this WBS in all projects to which the WBS item is assigned.

WBS Code (Activity)

WBS Code field

The unique identifier of the WBS for the associated activity.

WBS ID

WBS ID field

The unique identifier of the WBS for the activity.

WBS Path

WBS Path field

A series of WBS codes that represent the position of the WBS within the project hierarchy.

For example, if you have a parent WBS named WBS1, a child named WBS2, and WBS2 has a child called WBS3, the WBS Path for WBS3 is WBS1.WBS2.WBS3.

Website Root Directory

Website Root Directory field

The root directory for storing project Website files before they are published to the Web server.

Weight

Weight field

The weight of the item in relation to other items. The weight value determines the importance of the item.

For example, an item with a weight of 1 has a lower measure of importance than an item with a weight of 10.

Weight Percent

Weight Percent field

The project code weight divided by the total of all project code weights.

Work Package ID

Work Package ID field

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The ID of the work package in Oracle Primavera Cloud.

Work Package Name

Work Package Name field

The name of the work package in Oracle Primavera Cloud.

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10

CSH

Access Tab of the Customize Dashboard Page

Overview

Use this tab to set user access to the current dashboard.

Screen Elements

This dashboard is available to options

Determines which user accounts can access the current dashboard:

Current User: Limits access to only the current user.

All Users: Provides access to all users.

List of Users: Limits access to a specified list of users. Select the users from a common set of controls.

> **Tip**
>
> You must have the appropriate security privilege to specify **All Users** access. You cannot change the access setting for a multi-user dashboard created by another user.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, click **Customize**.
4. On the **Dashboard Details** page, click the **Access** tab.

Access tab of the Manage Views Dialog Box of the Activities Page, EPS Page or Assignments Page

Overview

Use this tab to assign access for users to a multiple user view.

Screen Elements

Search

Enables you to perform a search based on the value you enter in the search bar.

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Available users list

The list of all available users.

Add column to Selected Columns (Ctrl + Shift + Right Arrow)

Adds the selected item or items from the available list to the selected list.

Remove column from Selected Columns (Ctrl + Shift + Left Arrow)

Removes the selected item or items from the selected list.

Selected users list

The users you selected from the Available Users list.

Advances the selected item up in the sequence (moves a table column to the left).

Advances the selected item down in sequence (moves a table column to the right).

Getting Here

1. Click **Navigation Menu**
2. On the **Navigation Menu**, either:
   - Expand **Projects** and click **Activities** or **EPS**.
   - Expand **Resources** and click **Assignments**.
3. Click the **Views** menu and select **Manage Views...**.
4. In the **Manage Views** dialog box, select a view in the Multiple Users group and then click **Access**.

Action Required Tab of the Document Reviews Portlet of the Dashboards Page

Overview

Use this tab to view and approve or reject documents you have been assigned to review.

Screen Elements

Action Required Tab toolbar

See Action Required for Document Reviews Toolbar.

Name field

The name of the document.

Initiator field

The name of the user who initiated the review.

Date Initiated field

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The date the review began.

If the review has not started, this field is blank.

Due Date field

The date by which all reviewers need to complete the review. If no due date is specified for the review, then this field appears blank.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Document Reviews** portlet and click the **Action Required** tab.

Activities Detail Window of the Risks Page

Overview

Use this detail window to assign and view activities that are impacted by the risk.

> **Note**
>
> You cannot edit activity information on this detail window.

Screen Elements

Activity ID field

The unique identifier of the activity.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Activity Name field

The name of the activity.

The activity name does not have to be unique.

Early Start field

The earliest possible date the remaining work for the activity can begin.

This date is calculated based on network logic, schedule constraints, and resource availability. Early start dates can change as the project progresses and as changes are made to the project management plan. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.

Early Finish field

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The earliest possible date the activity can finish. Early finish dates can change as the project progresses and changes are made to the project management plan.

This date is calculated based on network logic, schedule constraints, and resource availability. If you schedule a project using Retained Logic this date will always be visible, even if an activity is completed.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Risks**.
2. On the **Risks** page, click the **Activities** detail window.

Activities Page

Overview

Use this page as your central project management tool for all project activities and their most important details. This includes WBS elements, activities, relationships, resource assignments, and status details. The Activities page can display schedules for a single project or group of projects you have opened. Tabbed navigation, inline editing, and a streamlined interface help you quickly update project activities.

Screen Elements

Schedule... (F9)

Opens the schedule dialog box.

Actions menu

Apply Actuals: Opens the Apply Actuals dialog box.

Define Baselines: Opens the Define Baselines dialog box.

Leveler: Opens the Level Resources dialog box.

Publish Projects: Creates a service to publish data from all open projects, including resource and role spreads.

Recalculate Assignment Costs: Opens the Recalculate Assignment Costs dialog box.

Store Period Performance: Opens the Store Period Performance dialog box.

Summarize Projects: Creates a service to summarize data from all open projects.

Auto Reorganize: Automatically moves items in the list to the appropriate list position or grouping band when they are changed.

Check Schedule:

Run Check Schedule: Opens the Check Schedule Settings tab of the Check Schedule dialog box.

View Report: Opens the Report tab of the Check Schedule dialog box.

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 EPPM and the configuration of the integration.

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Import:

Create Import Template: Enables you to create an Excel template for importing activities.

Import from Excel: Enables you to import new activities into P6 EPPM.

Open Dependent Projects: Enables you to view and open the dependent projects of the selected activity's project. An activity only has dependent projects when the activity shares a cross-project relationship to an activity in another project.

Report:

Project Checker: Opens the Project Checker Report dialog box. You must be logged in to P6 as a user with the *Admin Superuser* global security profile to see this menu item.

Delete Published Data: Deletes all published data for the open projects.

Delete Summarized Data: Deletes all summarized data for the open projects.

Dissolve: Removes the selected activity from the schedule and links all its predecessors to all its successors.

Link Selected Activities: Creates a relationship between the selected activities. The default relationship is Finish to Start. The link is visible on the Gantt chart.

Expand All

Expands all grouping bands to show all data items.

Collapse All

Collapses all grouping bands to the top level.

Views menu

Manage Views...: Opens the Manage Views dialog box.

Import/Export Views: Opens the Import Export Views dialog box.

Select a view name to open it.

Grid View

Enables you to view and configure data in a grid format. You can customize which columns are available in the grid.

Gantt View

Enables you to view data as a graphical representation of sequence and duration.

Activity Network View

Enables you to view activities and their relationships as a network.

Progress Spotlight (Ctrl+Alt+S)

Enables you highlight activities which should progress during a specified time. Progress Spotlight is available if you have selected Gantt View.

Filters menu

Manage Filters: Opens the manage filters dialog box.

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Full Screen

Expands the current work area so it fills the entire display.

Show Hint Help (Alt+F1)

Shows a description of the column when you hover over the column heading.

Print

Opens the Print Options dialog box.

Customize View

Opens the Customize View dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Activities work area

The main work area for viewing project data in your choice of the following customizable formats:

- Grid View Format of the Activities Page
- Gantt View Format of the Activities Page
- Activity Network Format of the Activities Page

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Show/Hide Tabs

Enables you to configure which tabs are shown and hidden.

Activity detail windows:

Assignments Detail Window of the Activities Page

Codes Detail Window of the Activities Page

Discussion Detail Window of the Activities Page

Documents Detail Window of the Activities Page

Expenses Detail Window of the Activities Page

General Detail Window of the Activities Page

Issues Detail Window of the Activities Page

Notebooks Detail Window of the Activities Page

Relationships Detail Window of the Activities Page

Risks Detail Window of the Activities Page

Status Detail Window of the Activities Page

Steps Detail Window of the Activities Page

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Tasks Detail Window of the Activities Page

Trace Logic Detail Window of the Activities Page

Update History Detail Window of the Activities Page

UDF Detail Window of the Activities Page

Project and **WBS** detail windows

> **Note**
>
> Project-level and WBS-level detail windows are visible if a view is grouped by Project or WBS.

Project Codes Detail Window of the Activities Page

WBS Budget Log Detail Window of the Activities Page

WBS Documents Detail Window of the Activities Page

WBS Earned Value Detail Window of the Activities Page

WBS General Detail Window of the Activities Page

WBS Issues Detail Window of the Activities Page

WBS Milestones Detail Window of the Activities Page

WBS Notebooks Detail Window of the Activities Page

Project or WBS UDF Detail Window of the Activities Page

Getting Here

1. On the ☰ **Navigation Menu**, expand **Projects** and click **Activities**.

Activity Codes - EPS Page

Overview

Use this page to configure all existing enterprise project structure (EPS)-level activity codes and values for your organization. You can define unlimited hierarchical activity codes to fulfill the filtering, sorting, and reporting requirements for your activities, and arrange them hierarchically for easier management and assignment. EPS activity codes organize activities within a specific branch or node of the enterprise project structure (EPS).

Screen Elements

Add menu

Add Code: Creates a new code.

Add Code Value: Creates a code value for the selected code.

Add Child Code Value: Creates a child code value for the selected code value.

Analyze Data Usage button

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Analyzes the usage of the data items listed in the grid.

Expand All button

Enables you to see all of the items in the hierarchical list or grouped view.

Collapse All button

Enables you to hide subordinate items in the hierarchical list or grouped view.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add Code: Creates a new code to help you organize data.

Add Code Value: Creates a code value for the selected code.

Add Child Code Value: Creates a subordinate code value for a selected code value.

Delete: Deletes the selected data items or table rows permanently.

Move to Global: Moves the selected activity code to the global level.

Cut: Cuts the selected item.

Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

Fill Down: Copies the data from the first cell selected to all other selected cells in the same column. Use CTRL or SHIFT to select multiple cells.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Move Right: Moves the selected item one level lower in the hierarchical arrangement.

Move Left: Moves the selected item one level higher in the hierarchical arrangement.

Expand: Enables you to expand and view all of the items in a hierarchical list.

Collapse: Enables you to collapse and hide subordinate items in a hierarchical list.

Name field

The name of the code. This column is always visible on this page.

Description field

A description of the code or the code value.

Maximum Length field

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The maximum number of characters used for a code value name.

Color field

The color for the activity code value.

Secure option

Determines whether the code is a secure code.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Activity Codes - EPS**.

Activity Codes - Global Page

Overview

Use this page to configure all existing global activity codes and values for your organization. You can define unlimited hierarchical activity codes to fulfill the filtering, sorting, and reporting

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requirements for your activities, and arrange them hierarchically for easier management and assignment. Global activity codes organize activities across all projects in an organization.

Screen Elements

Add menu

Add Code: Creates a new code.

Add Code Value: Creates a code value for the selected code.

Add Child Code Value: Creates a child code value for the selected code value.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Expand All button

Enables you to see all of the items in the hierarchical list or grouped view.

Collapse All button

Enables you to hide subordinate items in the hierarchical list or grouped view.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add Code: Creates a new code to help you organize data.

Add Code Value: Creates a code value for the selected code.

Add Child Code Value: Creates a subordinate code value for a selected code value.

Delete: Deletes the selected data items or table rows permanently.

Cut: Cuts the selected item.

Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

Fill Down: Copies the data from the first cell selected to all other selected cells in the same column. Use CTRL or SHIFT to select multiple cells.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Move Right: Moves the selected item one level lower in the hierarchical arrangement.

Move Left: Moves the selected item one level higher in the hierarchical arrangement.

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Expand: Enables you to expand and view all of the items in a hierarchical list.

Collapse: Enables you to collapse and hide subordinate items in a hierarchical list.

Name field

The name of the code. This column is always visible on this page.

Description field

A description of the code or the code value.

Maximum Length field

The maximum number of characters used for a code value name.

Color field

The color for the activity code value.

Secure option

Determines whether the code is a secure code.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Activity Codes - Global**.

Activity Codes - Project Page

Overview

Use this page to configure all project activity codes and values specific to the projects you select. You can define unlimited hierarchical activity codes to fulfill the filtering, sorting, and reporting requirements for your activities, and arrange them hierarchically for easier management and assignment. Project activity codes categorize activities based on specific features within a project.

Screen Elements

Add menu

Add Code: Creates a new code.

Add Code Value: Creates a code value for the selected code.

Add Child Code Value: Creates a child code value for the selected code value.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Open Project... button

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Opens the Open Projects dialog box to enable you to view, add, delete, and modify codes specific to those projects.

Expand All button

Enables you to see all of the items in the hierarchical list or grouped view.

Collapse All button

Enables you to hide subordinate items in the hierarchical list or grouped view.

Expand All button

Enables you to see all of the items in the hierarchical list or grouped view.

Collapse All button

Enables you to hide subordinate items in the hierarchical list or grouped view.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add Code: Creates a new code to help you organize data.

Add Code Value: Creates a code value for the selected code.

Add Child Code Value: Creates a subordinate code value for a selected code value.

Delete: Deletes the selected data items or table rows permanently.

Move to Global: Moves the selected activity code to the global level.

Move to EPS: Moves the selected activity code to the EPS level.

Cut: Cuts the selected item.

Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

Fill Down: Copies the data from the first cell selected to all other selected cells in the same column. Use CTRL or SHIFT to select multiple cells.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Move Right: Moves the selected item one level lower in the hierarchical arrangement.

Move Left: Moves the selected item one level higher in the hierarchical arrangement.

Expand: Enables you to expand and view all of the items in a hierarchical list.

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Collapse: Enables you to collapse and hide subordinate items in a hierarchical list.

Name field

The name of the code. This column is always visible on this page.

Description field

A description of the code or the code value.

Maximum Length field

The maximum number of characters used for a code value name.

Color field

The color for the activity code value.

Secure option

Determines whether the code is a secure code.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

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> **Tip**
>
> You can specify the maximum Activity Code tree levels on the **Data Limits** page of the **Application Settings** pane in P6.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Activity Codes - Project**.

Activity Data Tab of the Update Baselines Dialog Box of the Activities Page or EPS Page

Overview

Use this tab to determine which activities should be updated in the baseline.

Screen Elements

Specify the activities to include option

Select from one of the following options to determine which activities in the baseline should be updated.

All Activities: Select to update all the activities in the baseline. All activities in the baseline will be overwritten.

Activities within the following filters: Select whether to update activities within all or any of the selected filters.

selected filters: Select a filter from the list.

To overwrite all activity data, select **All Activities** and all of the activity data options on the **Update Options** tab.

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.

Add new activities and activity data (except actuals) option

Determines whether to add to the baseline activities that exist in the project but not the baseline.

Delete from baseline any activities no longer in the current project option

Determines whether to remove activities from the baseline if there is no longer a matching activity in the project.

If you choose to update activities that fall within a filter, this option is not available because you cannot create a filter that selects activities that have been deleted from a project.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page, click the **Actions** menu and select **Define Baselines**.

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3. In the **Define Baselines** dialog box, select a baseline and click **Update.**
4. Select the **Activity Data** tab.

Activity Editing Tab of the User Interface View Details Page

Overview

Use this tab to configure the columns a user can edit in activities or resource assignments.

Screen Elements

Edit option

Determines whether users assigned to the current user interface view are permitted to edit the selected available field or column.

Name

Displays all available columns.

> **Tip**
>
> - For all categories except for Activity Code and User Defined Field options, marking the check box at the category level selects all options under the category. For example, you can mark the check box of the Dates category to select all options under Dates, then selectively clear check boxes of options that you do not want to select.
> - You can select or clear multiple options by selecting **Fill Down** from the **Context** menu.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Interface Views**.
2. On the **User Interface Views** page, click **Activity Editing**.

Activity Form Page

Overview

On this page you can view and edit information and attributes of an activity such as predecessor and successor relationships between activities, completion status, weighted milestones, notebooks and documents related to the activity, and other information.

Screen Elements

General section

See General Section of the Activity Form Page.

Resources section

See Resources Section of the Activity Form Page.

Steps section

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See Steps Section of the Activity Form Page.

Notebook section

See Notebook Section of the Activity Form Page.

User Defined section

See User Defined Section of the Activity Form Page.

Relationships section

See Relationships Section of the Activity Form Page.

Codes section

See Codes Section of the Activity Form Page.

Status section

See Status Section of the Activity Form Page.

Expenses section

See Expenses Section of the Activity Form Page.

Documents section

See Documents Section of the Activity Form Page.

Return button

Navigates to the Dashboard page.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand any portlet containing activities.
4. In the portlet, click an activity.

Activity List for WBS Dialog Box

Overview

Use this dialog box to view activities by WBS from within a portfolio scorecard.

Screen Elements

Customize button

Configures the columns that appear in the list.

Activity Name field

The name of the activity.

The activity name does not have to be unique.

Start field

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The current start date of the activity. For started activities, this is the actual start date. For not started activities, this is the planned start date until the project is scheduled. When scheduled, the start date field is set to the remaining early start date.

Finish field

The current finish date for the activity. For not started activities, this is the planned finish date. For in-progress activities, this is the remaining early finish date. For completed activities, this is the actual finish date.

Activity % Complete field

The percent of the activity that has been completed.

The calculation is based on the formula for the selected Percent Complete Type. The Percent Complete Type can be *Units*, *Duration*, *Physical, or Scope*.

If the selected activity's percent complete type is *Duration*, the percent complete is calculated as (**Planned Duration** minus **Remaining Duration**) divided by **Planned Duration**.

If the activity's percent complete type is *Units*, the percent complete is calculated as (**Actual Labor Units** plus **Actual Nonlabor Units**) divided by (**Actual Labor Units** plus **Actual Nonlabor Units** plus **Remaining Labor Units** plus **Remaining Nonlabor Units**).

If the activity's percent complete type is *Physical*, either the user records the percent complete manually or the field is set to calculate using steps. To calculate using steps, the **Calculate Activity % Complete from activity steps** option must be set in Project Preferences.

If the activity's percent complete type is *Scope*, the percent complete originates from Oracle Primavera Cloud and cannot be modified in P6.

Tip

- Click **Customize** to include the Activities column in the scorecard.
- This dialog box is also available by expanding projects and WBS elements on the **Performance Status** page.

Getting Here

1. In the context selector, select **Portfolios**.
2. In the context selector:
   - Click **Open Portfolio** to select a group of projects by portfolio type, EPS node, or project code.
   - Or choose a portfolio in the Most Recently Used list.
3. On the **Navigation Menu**, expand **Portfolios** and select **Portfolio Analysis**.
4. On the **Portfolio Analysis** page, select a scorecard from the **View** field.
5. In the scorecard, select a WBS.
6. In the **Activities** column, click the **View** link.

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Activity Network Format of the Activities Page

Overview

Use the Activity Network format to view activities and their relationships as a network.

Screen Elements

Activity Network work area

The area in which you can view the activity network.

Activity boxes outlined in red are critical activities; activity boxes outlined in black are not critical activities. Solid red lines between boxes represent critical relationships, while black lines represent non-critical relationships. Solid lines represent driving relationships, while dashed lines represent non-driving relationships. The selected box has a heavy blue border. Boxes with a black diamond in the corner represent milestones. A status icon in the corner of the box identifies **In Progress**, **Completed**, and **Critical** activities.

Activity boxes show the Activity Name, Activity ID, Start Date and Finish Date. You cannot customize activity boxes in Standard View.

Floating Toolbar

Toolbar Handle: Enables you to drag the toolbar to a new location.

Zoom In: Magnifies items in the work area so they appear larger.

Zoom Out: Minimizes items in the work area so they appear smaller.

Zoom to 100%: Restores the magnification of the current work area to its default size of 100%.

Zoom to Fit: Adjusts the height and width or timescale of the current view to fit as much of the data as possible into the current work area.

Show Driving Relationships: Hides non-driving relationships.

Show Critical Activities: Dims all activities which are not critical.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Click **Activity Network View**.

Activity Network tab of the Customize View Dialog Box of the Activities Page

Overview

Use this tab to modify the fields displayed in the Activity Network.

Screen Elements

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Customize Activity Box Fields section

One field per line option

Determines whether to show each field on a separate line in the box.

Field One list

Determines the field to be used in position one of the Activity Network box.

Field Two list

Determines the field to be used in position two of the Activity Network box.

Field Three list

Determines the field to be used in position three of the Activity Network box.

Field Four list

Determines the field to be used in position four of the Activity Network box.

Field Five list

Determines the field to be used in position five of the Activity Network box. To show this field, clear the One field per line option.

Field Six list

Determines the field to be used in position six of the Activity Network box. To show this field, clear the One field per line option.

Field Seven list

Determines the field to be used in position seven of the Activity Network box. To show this field, clear the One field per line option.

Field Eight list

Determines the field to be used in position eight of the Activity Network box. To show this field, clear the One field per line option.

Preview section

Preview area

Provides a preview of how the selected options will look.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, click the **Views** menu and select **Manage Views...**.
3. In the **Manage Views** dialog box, click **Activity Network**.

Activity Tab of the IPMDAR Template Dialog Box of the Import/Export Project Dialog Box

Overview

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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.

Screen Elements

Task Fields tab:

Task Subtype ID field

The activity level code or user defined field to export as the task subtype ID for activities.

Task Planning Level ID field

The activity level code or user defined field to export as the task planning level ID for activities.

Control Account ID field

The activity level code or activity or WBS user defined field to export as the control account ID for activities.

Work Package ID field

The activity level code or activity or WBS user defined field to export as the work pacakge ID for activities.

IMP Element ID field

The activity level code or user defined field to export as the lowest level IMP element associated with activities.

SOW Reference field

The activity level code or user defined field to export as the SOW reference for activities.

Subcontractor Reference field

The activity level code or user defined field to export as the subcontractor reference for activities.

Earned Value Technique ID field

The activity level code or user defined field to export as the earned value technique.

Other Earned Value Technique field

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 field

Activity level code or user defined field to export as the Subproject Reference for activities.

Source Task Reference field

Activity level code or user defined field to export as the source task reference for activities.

Comments field

The activity level code or user defined field to export as comments about tasks.

Task Custom Fields tab:

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> **Note**
>
> The US Department of Defense validation accepts a maximum of ten custom fields in total. This limit applies to the number of codes plus the number of user defined fields assigned on this page.

Codes area

Group By list

Enables you to group items in the table. Grouping gathers, or groups, together all of the data that contain the same value for the selected data field.

Search

Enables you to perform a search based on the value you enter in the search bar.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

Custom Field Name field

The name of a custom field selected for export.

Custom Field Description field

The description of a custom field selected for export.

UDF area

Group By list

Enables you to group items in the table. Grouping gathers, or groups, together all of the data that contain the same value for the selected data field.

Search

Enables you to perform a search based on the value you enter in the search bar.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

Custom Field Name field

The name of a custom field selected for export.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Export** tab.
4. On the **Export** tab:
   a. In the **Export Type** list, select **IPMDAR Format**.
   b. In the **Project** field, click **Browse** and select a project.

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c. Click **Manage Templates**.

5. In the **Manage IPMDAR Templates for Project** dialog box:
   - Click **Add** to create a new template.
   - Or select **Context** and select **Edit** to modify an existing template.
6. In the **IPMDAR Template** dialog box, click the **Activity** tab.

Activity Tab of the MSP Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use this tab to configure activity import and export options.

Screen Elements

Import milestones with resource assignments as options

Start milestones with expenses: Imports milestones as start milestone activities with related expenses. If selected, the **Import Microsoft Project's fixed costs as expenses** option should be selected to ensure that expenses related to milestones are imported.

Activities with resource assignments: Imports task dependent activities with associated resource assignments.

Import Microsoft Project's Task ID field to options

Activity ID: Imports the **Task ID** field to the Activity ID of P6.

User defined text field: Imports the **Task ID** field to a user-defined text field.

Import Microsoft Project's fixed costs as expenses option

Determines whether to import Microsoft Project fixed costs to P6 expenses.

This option causes expenses related to milestones to be imported if the option **Start Milestones with Expenses** was previously selected.

Export section:

Export Activity ID to Microsoft Projects task field option

Determines whether to export a P6 activity ID to a Microsoft Project task field.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Import** or **Export** tab.
   a. On the **Import** tab:
      - In the **Import Type** list, select **Microsoft Project XML**.
      - On the **Import** tab, click **Browse** in the **File** field and select a Microsoft Project XML file to import.

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- Click **Manage Templates**.

b. Or on the **Export** tab:

- In the **Export Type** list, select a Microsoft Project XML file type to export.
- Click **Manage Templates**.

4. In the **Manage Templates** dialog box, click a template.
5. In the **Modify Template** dialog box, click the **Activity** tab.

Activity Tab of the UN/CEFACT Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use the Activity tab of the Add/Modify Template dialog box to specify activity data to be exported to a UN/CEFACT file.

Screen Elements

Template Name field

The name for the import or export template.

This field is required and can contain up to 40 characters.

Notes tab:

+**Add Notes...** button

Adds a note item to the list.

list

The type for the note field.

Content list

The project notebook topic to export as the selected note type the file.

Miscellaneous tab:

RiskLevelDescription list

The UDF to export as the Risk Level Description.

PriorityRankingNumeric list

The UDF to export as the Priority Ranking Numeric.

EarnedValueMethodCode list

The UDF to export as the Earned Value Method Code.

ScheduleLevelNumeric list

The UDF to export as the Schedule Level.

MileStoneWeightNumeric list

The UDF to export as the Milestone Weight.

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ControlAccountID list

The UDF to export as the Control Account ID.

ScheduleLevel list

The UDF to export as the Schedule Level.

WorkPackageID list

The UDF to export as the Work Package ID.

PlanningLevelCode list

The UDF to export as the Planning Level Code.

Dates and Durations tab:

> **Note**
>
> The following fields are repeated in three groupings, for Best Case, Most Lkely and Worst Case.

Duration list

The field to export as the duration.

> **Note**
>
> In addition to User Defined Duration fields, the Duration list includes:
>
> - Minimum Duration as caulcuated by Risk Analysis for the Best Case duration.
> - Maximum Duration as caulcuated by Risk Analysis for the Most Likely duration.
> - Most Likely Duration as caulcuated by Risk Analysis for the Worst Case duration.

Early Start Date list

The user defined Start Date field to be exported as the Early Start Date.

Early Finish Date list

The user defined Finish Date field to be exported as the Early Finish Date.

Late Start Date list

The user defined Start Date field to be exported as the Late Start Date.

Late Finish Date list

The user defined Finish Date field to be exported as the Late Finish Date.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click the **Actions** menu and select **Import/Export Projects**.

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3. In the **Import/ExportProject** dialog box, click the **Export** tab.
   a. Or on the **Export** tab:
      - In the **Export Type** list, select **UN/CEFACT XML Format 6**.
      - In the **Project** field, click **Browse** and select a project.
      - Click **Manage Templates**.
4. In the **Manage Templates** dialog box, click a template.
5. In the **UN/CEFACT Template** dialog box, click the **Activity** tab.

Activity UDFs Page

Overview

Use this page to add and configure user defined fields for activities.

Screen Elements

Add (Ins)

Creates a new entry in the current table.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently. The data will no longer be available to views, filters, calculations, reports, and waterlines.

User Defined Field field

The name of the user defined field. This column is always visible on this page.

Data Type list

The name of the type of data that corresponds to each user-defined field. The data type you select determines the type of data you can specify in a field. The following data types are available:

Text: Allows you to use text or a combination of text and numbers.

Start Date: Allows you to enter Start Date information only.

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Finish Date: Allows you to enter Finish Date information only.

Cost: Allows you to enter currency values.

Number: Allows you to use numerals with two decimal places.

Integer: Allows you to use numeric data, but not a number related to money.

Indicator: Allows you to use an indicator field that you can use to icons in columns.

This column is always visible on this page.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Tip

- Right-click any field to add or delete a UDF.
- When a user-defined field (UDF) is deleted, all its values are also deleted from all of their respective appearances throughout the application. This includes user interface views, activity views, calculated UDFs, reports, Activity Networks, filters, sorts, groupings, waterlines, and columns.

Getting Here

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1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Activity UDFs**.

Add Document Dialog Box of the Activities Page or Documents Page (with content repository)

Overview

Use this dialog box to add a document to your project.

Screen Elements

Select Folder area

Select the documents folder which contains the document to add to the project.

File field

Enables you to browse to the file to add.

Upload button

Uploads the selected file to the specified folder and closes the Add Document dialog box.

Tip

- You can create folders to organize documents in the Documents tab of the Projects page.
- The documents you upload in this window are available in the Documents tab of the Projects page.

Getting Here

From the Activities page:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page.
3. Click the **Documents** detail window.
4. Click **Add** and select **Document**.

From the Documents page (with content repository):

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. Select a project.
4. Click **Add Document**.

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Add Folder Dialog Box

Overview

Use this dialog box to add a document folder to the repository and set its security policy.

Screen Elements

Folder Name field

The unique name to identify the folder.

Security Policy list

The security policy for the selected document or folder:

Personal: Can be viewed, modified, or deleted only by the user who added it to the project.

Read-Only: Can be viewed by any project team member, but team members cannot modify or delete it.

Shared: Can be viewed, modified, or deleted by any project team member.

This list is not available when you access document details from the **My Documents** portlet.

Getting Here

From the Documents page:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Projects** tab.
3. On the **Projects** tab, select a document and click **Add Options** **Add Folder**.

From the Dashboards page:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Documents** portlet.
4. In the **My Documents** portlet, select a document and click **Add Options** **Add Folder**.

Add Location Dialog Box of the Locations Page

Overview

Use this dialog box to create new locations.

If you know the longitude and latitude of the location, you can enter them. Alternatively you can enter a street address and click the Locate button to have P6 find the longitude and latitude.

Screen Elements

Name field

The name of the location, for example "Head Office."

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Street field

The address, typically made up of the building name or number and street name.

City field

The city name.

State/Province field

The state or province.

Postal Code field

The zip code or postal code of the location.

Country field

The country name.

Longitude field

The geographical coordinate for the longitude of the location.

Enter the coordinate manually or complete the address fields and click **Locate** to let P6 find it.

Latitude field

The geographical coordinate for the latitude of the location.

Enter the coordinate manually or complete the address fields and click **Locate** to let P6 find it.

Locate button

Finds the longitude and latitude of the address.

Add button

Adds the address to the locations list. This button is not available until a longitude and latitude have been entered.

> **Tip**
>
> If you enter a street address directly into the **Street** field, P6 will automatically populate the appropriate fields when you select a different field. You must enter commas to separate each part of the address. P6 only populates the **Street**, **City**, and **State/Province** fields automatically.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Locations**.
3. On the **Locations** page, click **Add** (Ins).

Add Project Dialog Box of the EPS Page

Overview

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Use this dialog box to define the unique qualities of a new project. You can start with an empty project and add new activities or base your new project on an existing template or project.

Screen Elements

General tab

See: General Tab of the Add Project Dialog Box of the EPS Page

Advanced tab

See: Advanced Tab of the Add Project Dialog Box of the EPS Page

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select an EPS element where you want to add the new project, then click **Context** and select **Add Project**.

Add Project Dialog Box of the Portfolio Analysis Page

Overview

Use this tab to define the unique qualities of a new project and add it to the selected Portfolio.

Screen Elements

Project ID field

The unique identifying code for the project.

Project Name field

The name of the project.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

EPS field

The node in the EPS hierarchy where this project belongs.

Click **Select** to select an EPS element from the dialog box.

Responsible Manager field

The organizational breakdown structure (OBS) assigned to the project.

A responsible manager is required for each project and each level of the EPS.

Project Planned Start field

The expected start date for the project.

Must Finish By field

The optional date constraint you can specify for the project end date.

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Getting Here

1. On the **Navigation Menu**, expand **Portfolios** and select **Portfolio Analysis**.
2. Click **Add Project**.

Add Project Template Dialog Box of the EPS Page

Overview

Use this dialog box to define the properties of a new project template. You can start with a clean template and add new activities or base your new template on an existing template or project.

Screen Elements

General tab

See: General tab of the Add Project Template Dialog Box of the EPS Page

Advanced tab

See: Advanced Tab of the Add Project Template Dialog Box of the EPS Page

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select an EPS element where you want to add the new project, then click **Context** and select **Add Project Template**.

Add Schedule Dialog Box or Schedule Details Dialog Box of the Reports Page

Overview

Use this dialog box to define scheduling options, including run frequency and dates, report format, delivery method, and report parameters.

Screen Elements

Report Settings dialog box tabs:

Options tab

See: Options tab of the Add Schedule Dialog Box, Schedule Detail Dialog Box, or Run Report Dialog Box of the Reports Page

Parameters tab

See: Parameters tab of the Add Schedule Dialog Box, Schedule Details Dialog Box or Run Report Dialog Box of the Reports Page

Schedule tab

See: Schedule Tab of the Add Schedule Dialog Box and the Schedule Details Dialog Box

Getting Here

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From a report:

1. On the **Navigation Menu**, select **Reports**.
2. On the **Reports** page:
   a. Click the **Reports** tab.
   b. Select a report, and then click the **Schedule** detail window.
3. In the **Schedule** detail window, click **+ Add Schedule...**.

From a report schedule:

1. On the **Navigation Menu**, select **Reports**.
2. On the **Reports** page:
   a. Click the **Reports** tab.
   b. Select a report, and then click the **Schedule** detail window.
   c. Select a schedule, click **Context** and then click **Duplicate**.

To view the report settings in read-only mode for scheduled report runs:

1. On the **Navigation Menu**, select **Reports**.
2. On the **Reports** page:
   a. Click the **Reports** tab.
   b. Select a report, and then click the **Schedule** detail window.
   c. Select a schedule, and then click **View Details.**

Add User Dialog Box

Overview

Use this dialog box to create a new user account by specifying a unique login name, a more "user-friendly" personal name, and password.

Screen Elements

Login Name field

The unique login name for the user account. Your user name can be a maximum of 30 characters.

Personal Name field

The personal name for the user. This name might be a nickname, full name, reference to a role or department, or include any information recognized by your organization to identify the user.

Password field

The series of letters or numbers required to be entered to log into the user account.

When the **Password Policy** is enabled, the password must be between 8 and 20 characters and contain at least one number and one letter. The policy is enabled by default.

When the **Password Policy** is disabled, the password must be between 1 and 20 characters. The application does not allow blank passwords.

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Confirm Password field

A field used to verify the accuracy of the Password field. To confirm the password, enter it again here.

When the **Password Policy** is enabled, the password must be between 8 and 20 characters and contain at least one number and one letter. The policy is enabled by default.

When the **Password Policy** is disabled, the password must be between 1 and 20 characters. The application does not allow blank passwords.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. In the **User Administration** pane, click **Users**.
3. On the **Users** tab, click **Add** (Ins).

Add Users from LDAP Dialog Box, Add Users from LDIF Dialog box, or Update Users From LDAP Dialog Box of the Users Page

Overview

Use this dialog box to search for, import and update users in P6 from your LDAP repository. You can add users from the LDAP repository when your global profile has the privilege *Provision Users From LDAP*. You can import multiple users at once. Periodically, you can check back to view any user accounts that were modified within the LDAP repository and update those users to keep P6 up to date.

Screen Elements

Search

Enables you to perform a search based on the value you enter in the search bar.

All Users option

Enables you to update all users from the LDAP repository. To see this option select to update users from LDAP.

Selected Users option

Enables you to update only the users in the Selected Users list from the LDAP repository. To see this option select to update users from LDAP.

Available Users list

The list of users that satisfy the search criteria.

Select Items (Ctrl+Shift+Right Arrow)

Adds the selected item or items from the available list to the selected list.

Deselect Items (Ctrl+Shift+Left Arrow)

Removes the selected item or items from the selected list.

Selected users list

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The users you selected from the Available Users list.

Copy Preferences from (optional) field

Enables you to copy all user preferences including the user interface view, resource access, OBS access, module access, and security profiles from an existing user when adding new users from LDAP.

Create Resource field

Opens the Select Parent Resource dialog box to enable you to create corresponding resources for the new users when adding new users from LDAP.

Add button

Adds users from LDAP or LDIF to the Users page. This button is available in the Add Users From LDAP dialog box.

Update button

Updates the specified users from the LDAP repository. This button is available in the Update Users From LDAP dialog box.

> **Tip**
>
> You must be logged in as an LDAP user to add another LDAP user to the application.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. In the User Administration pane, click **Users**.
3. On the **Users page** either:
   - Click **Add** and select **Users fromLDAP** or **Users fromLDIF**.
   - Click **Actions** and select **Update Users from LDAP**.

Advanced Search Dialog Box of the Documents Page (with content repository)

Overview

Use this dialog box to use your content repository's search functionality to find a specific document.

> **Note**
>
> The Advanced Search dialog box is available for content repositories using Oracle Webcenter Content Core Capabilities (WCCC), Object storage or Oracle Database. CMIS and Microsoft SharePoint do not have access to the Advanced Search dialog box.

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Screen Elements

Document Name section

Enables you to search for documents whose name **equals** or **contains** text you specify.

Author Name section

Enables you to search for documents by the author you specify. The author is the user who uploaded the document to P6.

Creation Date section

Enables you to search for documents within a range of dates you specify.

Limit results to

Enables you to limit the number of documents returned by the search.

Getting Here

From the Documents page:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **WP & Docs** tab.
3. On the **WP & Docs** tab, click **Advanced Search**.

From the Dashboards page:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Documents** portlet and click the **WP & Docs** tab.
4. On the **WP & Docs** tab, click **Advanced Search**.

Advanced Tab of the Add Project Dialog Box of the EPS Page

Overview

Use this tab to choose the project, WBS, activity, and baseline data you want to copy from an existing project to use as a basis for a new project.

Screen Elements

Copy from Existing Project or Template field

The predefined project or template that the application will copy to create a new project.

Project & WBS Data or **WBS Data** options:

Documents option

Determines whether to copy document data.

Funding Sources option

Determines whether to copy funding source data. This option is only visible if you are copying a project or template.

Issues option

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Determines whether to copy issue data. This option is only visible if you are copying a project or WBS.

Risks option

Determines whether to copy risk data. This option is only available if you are copying a project or WBS.

Activities option

Determines whether to copy activity data.

Notebooks option

Determines whether to copy project notebook data.

WBS Milestones option

Determines whether to copy WBS milestone data.**High Level Resource Planning Assignments** option

Determines whether to copy high-level (project and WBS-level) resource planning assignments.

Reports option

Determines whether to copy report data. This option is only visible if you are copying a project or template.

Summary Data option

Determines whether to copy summary data. This option is only visible if you are copying a project or template.

Project Codes option

Determines whether to copy project codes. This option is only visible if you are copying a project or WBS.

Secure Project Codes option

Determines whether to copy secure project codes. This option is only visible if you are copying a project or WBS. You must be signed in as a user with privileges to view and edit secure codes for both the source and destination to be able to copy secure codes.

Activity Data options:

Activity Codes option

Determines whether to copy activity code data.

If selected, global and project activity codes are copied. EPS activity codes are only copied if the data is pasted within the same EPS node as the data you copied.

Expenses option

Determines whether to copy expense data. This option is only visible if you are copying a project or template.

Notebooks option

Determines whether to copy activity notebook data to the project or template.

Relationships option

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Determines whether to copy relationship data.

Resource and Role Assignments option

Determines whether or not to copy resources and role assignment data.

Steps option

Determines whether to copy step data to the project or template.

Financial Period Data option

Determines whether to copy financial period data to the project.

Risks option

Determines whether to copy risk data to the project or template.

WP and Docs option

Determines whether to copy Work Product and Document data to the project. This option is only visible if you are copying a project or template.

Risks option

Determines whether to copy risk data to the project.

WP and Docs option

Determines whether to copy Work Products and Documents to the project.

Baselines option

Determines whether to copy baselines to the project.

> **Note**
>
> When you add a project and choose to copy data from another project, the new project might not appear immediately. The process runs as a background service and you will see a notification once it has completed.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select an EPS element where you want to add the new project, then click **Context** and select **Add Project**.
3. Click the **Advanced** tab.

Advanced Tab of the Add Project Template Dialog Box of the EPS Page

Overview

Use this tab to select project, WBS, and activity data that you want to copy from an existing project or template to use as a basis for a new project template.

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Screen Elements

Use Actual Costs and Units option

Determines whether the application uses actual units and costs. If this option is not selected, the **Use Planned Costs and Units** option is automatically selected.

This option is only available if you have elected to create the new project by copying an existing project or template. The **Use Actual Costs and Units** option is only enabled if the existing project or template contains actuals.

Copy from Existing Project or Template field

The predefined project or template that the application will copy to create a new project.

Project & WBS Data options:

Funding Sources option

Determines whether to copy funding source data. This option is only visible if you are copying a project or template.

Risks option

Determines whether to copy risk data. This option is only available if you are copying a project or WBS.

Activities option

Determines whether to copy activity data.

Notebooks option

Determines whether to copy project notebook data.

WBS Milestones option

Determines whether to copy WBS milestone data.

Activity Data options:

Activity Codes option

Determines whether to copy activity code data.

If selected, global and project activity codes are copied. EPS activity codes are only copied if the data is pasted within the same EPS node as the data you copied.

Expenses option

Determines whether to copy expense data. This option is only visible if you are copying a project or template.

Notebooks option

Determines whether to copy activity notebook data to the project or template.

Relationships option

Determines whether to copy relationship data.

Resource and Role Assignments option

Determines whether or not to copy resources and role assignment data.

Steps option

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Determines whether to copy step data to the project or template.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select an EPS element where you want to add the new project, then click **Context** and select **Add Project Template**.
3. Click the **Advanced** tab.

Advanced Tab of the Primavera Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use this dialog box to view and modify global data present in the XML file being imported. Global data includes codes, UDFs, calendars, and resources.

Screen Elements

Template Name field

The name for the import or export template.

This field is required and can contain up to 40 characters.

Import Type list

Determines whether the template is available for **XER** file imports, **XML** file imports, or **XER and XML** file imports. This list is only visible on the **Manage Import Templates** dialog box.

Codes tab

See: Codes Tab of the Import Template Dialog Box of the Import/Export Project Dialog Box

UDFs tab

See: UDFs Tab of the Import Template Dialog Box of the Import/Export Project Dialog Box

Calendars tab

See: Calendars Tab of the Import Template Dialog Box of the Import/Export Project Dialog Box

Resources tab

See: Resources Tab of the Import Template Dialog Box of the Import/Export Project Dialog Box

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click the **Actions** menu and select **Manage Import Templates** or **Import/Export Projects**.
3. In the **Import/ExportProjects** dialog box:
   a. Click the **Import** tab.
   b. Click the **Import Type** list and select **Primavera XML.**
   c. Click the **File** field and select a file to import.

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d. Click the **Manage Templates** button.

4. In the **Manage Primavera Templates** or **Manager Primavera XER and XML Templates** dialog box, click the name of a template.
5. In the **Primavera Template** or **Primavera XER and XML Template** dialog box, click the **Advanced** tab.

Advanced Tab of the Schedule Dialog Box of the Activities Page

Overview

Use this tab to specify calculations specific to multiple float paths.

Screen Elements

Use scheduling options from list

The project whose scheduling options will be used when scheduling multiple projects.

Calculate multiple float paths option

Determines whether to calculate multiple critical float paths (sequences of activities) in the project schedule.

Multiple Path Float Method options

Determines whether to calculate multiple paths using Total Float or Free Float.

Total Float: Based on the activity you want the paths to end on, P6 determines which predecessor activity has the most critical Relationship Total Float on the backward pass. This process repeats until an activity is reached that has no relationship. P6 begins the forward pass from this activity and determines which successor activity has the most critical Relationship Successor Total Float. These activities represent the most critical float path. The process begins again until the remaining sub-critical paths are calculated.

Free Float: Defines critical float paths based on longest path. The most critical path will be identical to the critical path that is derived when you select **Define critical activities as: Longest Path** on the **General** tab. In a multi-calendar 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, P6 will calculate the remaining sub-critical paths.

Display multiple float paths ending with the following activity field

The activity in the WBS to represent the end of the float paths.

Typically, this is a milestone activity or some other significant activity that has a start date or end date that cannot change.

Number of paths to calculate field

The number of critical float paths the application will calculate.

For example, if you calculate five float paths, a value of 1 is stored in the **Float Path** field for each activity in the most critical float path; a value of 5 is stored for each activity in the least critical float path.

If you specify five, the application will calculate the five most critical float paths ending with the activity you selected. The application ranks each float path from most critical to least critical and stores the value for each activity in the **Float Path** field.

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To view the critical float paths after you schedule the project, on the **Activities** page, create a view that groups activities by **Float Path** and sort them by **Float Path Order**. A **Float Path** value of 1 indicates that those activities are part of the most critical float path. The **Float Path Order** value indicates the order in which the activities were processed.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, click **Schedule...**.
3. In the **Schedule** dialog box, click **Settings**.

Analysis Page

Overview

Use this page to compare resource utilization between resource teams, role teams, resources, and roles all from one central location.

The Resource Analysis view offers multiple chart options (histogram, stacked histogram, and area chart) and a spreadsheet to help you examine allocation data for individual resources, as well as total values for resource teams, primary roles, assignment codes, and resource codes. The Role Analysis view also offers charts and a spreadsheet and allows you to examine allocation data for individual roles, as well as view total values for role teams, role codes, and assignment codes.

The usage data displayed on this page is based on published data, so it reflects values as of the last date the project was published. Assignment changes within a project after that date will not be reflected until the project is republished. However, an option on the My Preferences page allows you to display stored financial period data in the chart on this page

> **Note**
>
> An application level setting determines whether cost spreads account for changes in resource and role rates over time.

Screen Elements

Resource button

Enables you to filter the current page with data from Resources.

Role button

Enables you to filter the current page with data from Roles.

Resource view

See: Resource View of the Analysis Page

Role view

See: Role View of the Analysis Page

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> **Tip**
>
> To view rolled up data for assignments in projects to which you do not have access, customize your view and on the General tab, select to show usage for All projects and select the Include assignments in restricted projects option.

Getting Here

On the **Navigation Menu**, expand **Resources** and click **Analysis**.

Analytics & Services Tab of the Project Preferences Dialog Box of the EPS Page

Overview

Use this page to configure settings for storing historical data for use in Primavera Analytics and to configure summarization and publication options for the selected project. If an EPS node is selected, the data shown here represents the default settings for the fields.

Screen Elements

Summarization section

Enable Summarization option

Determines whether a project will be summarized. If you select this option, the fields on the **Summarization** page are enabled. If this option is cleared, the project will not be summarized.

Summarize Project based on options

Determines whether the project is summarized based on high-level resource planning or detailed activity resource assignments.

High level resource planning: Select this option to show data associated with the assignments configured on the Planning page of the Resources section on all pages using summarized data.

Detailed activity resource assignments: Select this option to summarize in-progress projects when you want to review detailed activity-level summarized data. For example, when evaluating detailed resource usage against planned allocation or for earned value reporting.

> **Note**
>
> : If you change the **Summarize Project based on** option, then next time the project is summarized existing summary data will be removed.

Summarize to WBS Level list

Determines the depth of the WBS hierarchy for which summary data will be calculated and stored in the database. Level 1 is the project level, therefore if you select to summarize to WBS level 3, summary data will be calculated at the project level and for all first- and second-level

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WBS elements of the project. If you want to be able to drill down to lower levels of the WBS hierarchy when viewing or reporting on summarized data, change this setting to a higher number.

Last Summarized On field

The date the project was last summarized. This is useful for assessing whether summary data for the project is current.

This field is blank for projects that have not been summarized or whose summarized data has been deleted.

Publication section

Enable Publication option

Determines whether the project is able to be published.

Publication Priority field

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 field

The most recent publication date for the project data. This field displays no value for projects that have never been published.

Publish resource and role data based on option

Determines which role and resource data to publish.

High level resource planning: Select this option to show data associated with the committed assignments configured on the Planning page of the Resources section on all pages using published data.

Detailed activity resource assignments: select this option to show data associated with assignments made at the activity level on all pages using published data.

Analytics section

History Level list

Determines the type of historical project data stored for use in Primavera Analytics.

None: Data is not stored for this project.

Project: Project-level data is stored.

WBS: Project-level and WBS data is stored.

Activity (Daily): Project-level, WBS, activity and resource assignment data is stored. Activity and resource assignment data is stored at a daily interval, regardless of the option selected in the History Interval field.

Activity (Weekly): Project-level, WBS, activity and resource assignment data is stored. Activity and resource assignment data is stored at a weekly interval, regardless of the option selected in the History Interval field.

Activity (Monthly): Project-level, WBS, activity and resource assignment data is stored. Activity and resource assignment data is stored at a monthly interval, regardless of the option selected in the History Interval field.

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History Interval - Project or WBS list

Choose to store historical spread data by month, week, quarter, year, or financial period for project and WBS data.

Data Warehouse Update Frequency list

Choose to store historical project data in the Primavera Data Warehouse through scheduled or immediate runs.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page select a project or EPS node, click the **Context** menu and select **Set Project Preferences**.
3. Click the **Analytics & Services** tab.

Application Settings Pane

Overview

Use this pane to select pages where you configure application settings.

Screen Elements

Audit Page

See Audit Page.

Consent Notice page

See P6 EPPM and P6 Professional tab of the Consent Notice Page and Team Member and P6 Mobile tab of the Consent Notice Page.

Data Limits page

See Data Limits Page.

Earned Value page

See Earned Value Page.

Eventing page

See General Tab of the Eventing Page and Configuration Tab of the Eventing Page.

Gateway page

See Gateway Page.

General page

See General Page.

ID Lengths page

See ID Lengths Page.

Integration and Allow Lists page

See Integration and Allow Lists Page

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Notifications page

See Notifications Page

Reports page

See Reports Page.

Services page

See Services Page.

Timesheets page

See Timesheets Page.

Time Periods page

See Time Periods Page.

Getting Here

On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.

Apply Criteria step of the Global Search & Replace Wizard of the EPS Page

Overview

Use this step to review changes, exclude rows, and modify specific rows before committing to a Global Search & Replace.

Screen Elements

Template Name

The name of the Global Search & Replace template.

Customize View

Opens the Customize View dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Apply Criteria step columns

Only the default fields which cannot be removed from the **Apply Criteria** step are described below.

Selected/Unselected option

Determines whether the row will be included in the Global Search & Replace process.

Locked field

Shows whether the project is opened exclusively.

Global Search & Replace cannot change data in projects which are opened exclusively.

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Previous

Moves to the previous step in the wizard.

Replace

Replaces data according to the criteria of the **Define Search And Replace Criteria** step and the exclusions and modifications made in the **Apply Criteria** step.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the EPS page, click the **Actions** menu and select **Global Search & Replace**.

Approve Document Review Dialog Box

Overview

Use this dialog box to approve a document in review. You also have the option of making comments or attaching another document. For example, you might attach an electronic copy of a signed document with your approval comments.

Screen Elements

Name field

The name of the review.

Description field

The details of the review as defined in the **Start Review** dialog box.

If no description is specified for the review, then this field appears blank.

Initiator field

The name of the user who initiated the review.

Due Date field

The date by which all reviewers need to complete the review. If no due date is specified for the review, then this field appears blank.

Comments field

The comments about the document review.

You can type any comments or responses you have for the review.

Approve button

Approves the document review and stores any accompanying comments or attached files.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Document Reviews** portlet and click the **Action Required** tab.

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4. On the **Action Required** tab, select a document and click **Approve**.

Assign by Search Dialog Box of the Planning Page

Overview

Use the Assign by Search dialog box of the Planning page to search for and assign a resource using new search criteria or from a existing template. You can also create a new search template. If you use this dialog box to assign a resource, on the Planning page the Search Criteria field for each row you assigned will show *Yes* . On the Planning page, you can click the *Yes* link in the Search Criteria field for an assignment to see the search criteria used to find the resource for that assignment.

Screen Elements

Start field

The date the resource or role is expected to begin working on the selected project.

Finish field

The date the resource or role is expected to finish working on the selected project.

Requested Units field

The number of resource or role units to assign to the project.

Match options

Determine what criteria are used in your search.

All applied: List resources which meet all the search criteria you specify.

Any applied: List resources which match any of the search criteria you specify.

Role Status field

The name of the primary job title or skill for the resource.

Roles field

The name of the roles to use in a search.

Unless you specify only one resource and no other criteria, you must specify a primary role. When you select a single resource with no other criteria, the search criteria will include the primary role of the resource you specify. If a resource you select does not have a primary role, P6 will prompt you to select one of the resource's roles to use for the assignment.

Proficiency field

The skill level of the resource. If you do not have appropriate privilege, you cannot access this field.

Resources field

The names of the resources to use in a search.

The displayed hierarchy includes only those resources to which you have access based on resource security and project resources. If you select the option to show results that match all criteria, you can specify only one resource.

Resource Codes field

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The names of the resource codes used to search for a resource to staff the activity.

If you select the **all applied** option, you can specify only one code value for each resource code you select.

Sort results by availability option

Determines whether to sort the results by resource availability.

Do not show overallocated resources option

Determines whether to show overallocated resources.

Show only labor resources option

Determines whether to show only labor resources. Select this option to filter out nonlabor and material resources from the search results. You cannot assign nonlabor or material resources on the Planning page.

Save Template button

Saves the current search criteria as a template to use again.

Copy from Template button

Opens the **Select Template Search** dialog box.

Run Search button

Displays a list of available resources that meet the specified criteria.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Planning**.
2. On the Planning page, select a project.
3. Select **Assign...** , and then select **Resource Requests**.

Assign Codes Panel

Overview

Use this panel to configure codes for the selected items.

Screen Elements

Available codes

The list of all available codes.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Filter by list

Filters the list of codes by Global, EPS, or Project specific activity codes.

This filter is only available when you are assigning activity codes.

Name field

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The name of the code or code value.

ID field

The ID of the code or code value.

Code Value field

The name of the new code value to add to the selected code. To see this field, select Add Code Value from the **Add** menu.

Code Description field

The description of the new code value to add to the selected code. To see this field, select Add Code Value from the **Add** menu.

Code Name field

The name of the new code to add to the database. To see this field, select Add Code from the **Add** menu.

Max Length field

The maximum length for code values of the new code to add to the database. To see this field, select Add Code from the **Add** menu.

Add menu

Add Code: Enables you to add a new code with the name you supply in the Code Name field.

Add Code Value: Enables you to add a new code value with the name and description you supply in the Code Value and Code Description fields.

Reset: Clears the fields.

Add to Selected

Adds the selected items from the available list to the selected list.

Remove from Selected

Removes the selected items from the selected list.

Selected codes

The list of codes that you have selected from the Available codes list.

Name field

The name of the code or code value.

ID field

The ID of the code or code value.

Manage Codes button

Opens the relevant codes page in Enterprise Data. To see this button, you must have access to Enterprise Data through your user interface view or in My Preferences.

Getting Here

1. Click **Navigation Menu**.

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2. On the **Navigation Menu**, either:
   - Expand **Projects** and select **Activities** or **EPS**.
   - Expand **Resources** and select **Administration** then click **Resources** or **Roles**.
3. Expand **Resources** and select **Assignments**.
4. Select the items to which you want to assign codes, then either:
   - Click the **Codes** detail tab, then click **Assign...**.
   - Click **Context** and click **Assign**, then **Codes..**.
   - Click **Context** and click **Assign Codes**.

Assign Project Manager Delegate Dialog Box of the Timesheet Approval Page

Overview

Use this dialog box to assign and activate a project manager delegate. After selecting a delegate, you can activate and deactivate the delegate's approval rights at any time.

Screen Elements

Search field

The text or numeric value you want to use to search for projects by ID or name.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

> **Note**
>
> You can switch on delegation independently for each project.

Project ID field

The unique identifying code for the project.

Project Name field

The name of the project.

Delegate field

The delegate user's login name.

Getting Here

1. On the **Navigation Menu**, expand **Approvals** and click **Timesheets**.
2. Click the **Actions** menu and select **Assign Project Manager Delegate**.

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Assign Relationships Panel

Overview

Use this panel to configure predecessor and successor relationships for the selected activities.

Screen Elements

Assign Predecessors section

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Project / **WBS** / **Start** / **Finish** button**Project** / **WBS** / **Start** / **Finish** button

Groups the grid by Project, WBS, activity start date, or activity finish date.

Remove Predecessors

Removes the relationships to the selected predecessor activities.

Assign Predecessors

Creates Finish to Start relationships to the selected activities.

Context menu

Expand All: Expands all grouping bands in the grid.

Collapse All: Collapses all grouping bands in the grid.

ID/Code field

The unique identifier of the activity or WBS.

Name field

The name of the activity or WBS.

Separator control

Moves the separator between the sections of the page.

Assign Successors section

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Project / **WBS** / **Start** / **Finish** button**Project** / **WBS** / **Start** / **Finish** button

Groups the grid by Project, WBS, activity start date, or activity finish date.

Remove Successors

Removes the relationships to the selected successor activities.

Assign Successors

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Creates Finish to Start relationships to the selected activities.

Context menu

Expand All: Expands all grouping bands in the grid.

Collapse All: Collapses all grouping bands in the grid.

ID/Code field

The unique identifier of the activity or WBS.

Name field

The name of the activity or WBS.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select the activities to which you want to assign relationships.
3. Click **Context** and select **Assign Predecessors** or **Assign Successors**.

Assign Resource Manager Delegate Dialog Box of the Timesheet Approval Page

Overview

Use this dialog box to assign and activate rights for a resource manager delegate. After selecting a delegate, you can activate or deactivate the delegate's approval rights at any time.

Screen Elements

Select your delegate Resource Manager selector

Enables you to select a user to act in your place as an approval manager.

Make this delegate active option

Enables you to specify whether the user selected as your delegate Resource Manager is currently able to approve and reject timesheets.

Getting Here

1. On the **Navigation Menu**, expand **Approvals** and click **Timesheets**.
2. Click the **Actions** menu and select **Assign Resource Manager Delegate**.

Assign Resource or Assign Role Dialog Box

Overview

Use the Assign Resource or Assign Role dialog box to find and assign an appropriate resource or role.

Screen Elements

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View Resources By list

Determines which resources to show in the resource list in the Select a Resource dialog box.

Active Resources: Shows all active resources.

All Resources: Shows both active and inactive resources, in the resource hierarchy.

Opened Projects: Shows all resources assigned to the projects you have open. This option will show all assigned resources, regardless of your resource access.

Primary Role: Shows all active resources, grouped by primary role.

Resource Code: Shows all active resources, grouped by resource code.

Resource Team: Shows all active resources, grouped by resource team.

View Roles By list

Determines which roles to show in the role list in the Select a Role dialog box.

Role Hierarchy: Shows all roles in the role hierarchy.

RoleTeam: Shows all roles, grouped by role team.

Role Code: Shows all roles, grouped by role codes.

Search field

Activates the search based on your search criteria.

If you are searching for a resource, select a resource field to search.

Show Units/Costs option

Determines whether to display the resource or role usage as units or costs.

This option applies only when showing resource or role usage.

Show Usage For list

Determines which data to show in the usage chart.

All Projects: Shows published usage data from all projects.

Project: Shows published usage data from the project to which the selected activity belongs.

Chart timeframe list

Determines the timeframe used for the usage chart.

Custom Dates: Shows resource or role usage between the start and finish date you specify.

Activity Dates: Shows resource or role usage for the duration of the selected activity.

Project Data Date: Shows resource or role usage for 15 time periods beginning at the data date of the project (if only one project is open) or from the earliest project data date of the activities selected in the main grid. The duration of the chart is determined by the timescale of the chart.

Start field

Enables you to set a start date for the spread chart. This setting is saved per view.

Finish field

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Enables you to set a finish date for the spread chart. This setting is saved per view.

Resource List

Displays the resources that match your search criteria.

Show Usage » / **Hide Usage** « button

Shows or hides the resource or role usage.

> **Note**
>
> An application level setting determines whether cost spreads account for changes in resource and role rates over time.

Assign button

Assigns the selected resources or roles.

> **Tip**
>
> - An exclamation point against a resource icon signifies that the resource is overallocated at some point in the past three months or in the next year. The overallocated assignment will have a Start date between today and three months from today, a Finish date between today and a year from today, or both.
> - When you show resource usage, the Start and Finish dates you select determine whether a resource will show as overallocated in the list according to live database data. The resource usage chart is populated from published data. If a resource is marked with an exclamation point but the usage chart does not show overallocation, republish resource spreads.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **Assignments** detail window.
3. Select the **Assign** menu and select **Resource** or **Role**.

Assign UDFs Dialog Box

Overview

Use this dialog to select user defined fields to add to a UDF detail window or tab. You can also add new UDFs on this page.

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> **Note**
>
> The UDFs available in this dialog box depend on the route you took to get here. Any UDFs you create in this dialog box will be available only for the relevant data type. For example, if you get to this dialog box from the Issues page, only Issue UDFs will be available and any UDFs you create here will be Issue UDFs.

Screen Elements

Add

Opens the Add UDF dialog box.

Available UDFs list

The list of UDFs available for display.

Search

Enables you to perform a search based on the value you enter in the search bar.

Add column to Selected Columns (Ctrl + Shift + Right Arrow)

Adds the selected item or items from the available list to the selected list.

Remove column from Selected Columns (Ctrl + Shift + Left Arrow)

Removes the selected item or items from the selected list.

Selected UDFs list

The UDFs you selected from the Available UDFs list. Double-clicking a column in the Selected UDFs list removes it from the list.

Getting Here

1. On the **Navigation Menu**, expand **Projects** or **Resources**.
   - If you expanded **Projects**, click **Activities**, **Assignments**, **EPS**, **Documents**, **Issues**, or **Risks**.
   - If you expanded **Resources**, click **Assignments**.
2. Select an item in the grid and click the **UDF** detail window.
3. Click **Assign...**.

Assignment Codes Page

Overview

Use this page to add and configure assignment codes and code values for role and resource assignments to activities.

Screen Elements

Add menu

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Add Code: Creates a new code.

Add Code Value: Creates a code value for the selected code.

Add Child Code Value: Creates a child code value for the selected code value.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Expand All button

Enables you to see all of the items in the hierarchical list or grouped view.

Collapse All button

Enables you to hide subordinate items in the hierarchical list or grouped view.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add Code: Creates a new code to help you organize data.

Add Code Value: Creates a code value for the selected code.

Add Child Code Value: Creates a subordinate code value for a selected code value.

Delete: Deletes the selected data items or table rows permanently.

Cut: Cuts the selected item.

Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

Fill Down: Copies the data from the first cell selected to all other selected cells in the same column. Use CTRL or SHIFT to select multiple cells.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Move Right: Moves the selected item one level lower in the hierarchical arrangement.

Move Left: Moves the selected item one level higher in the hierarchical arrangement.

Expand: Enables you to expand and view all of the items in a hierarchical list.

Collapse: Enables you to collapse and hide subordinate items in a hierarchical list.

Name field

The name of the code. This column is always visible on this page.

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Description field

A description of the code or the code value.

Maximum Length field

The maximum number of characters used for a code value name.

Secure option

Determines whether the code is a secure code.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Assignment Codes**.

Assignment UDFs Page

Overview

Use this page to add and configure user defined fields for assignments.

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Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently. The item will be deleted permanently.

User Defined Field field

The name of the user defined field. This column is always visible on this page.

Data Type list

The name of the type of data that corresponds to each user-defined field. The data type you select determines the type of data you can specify in a field. The following data types are available:

Text: Allows you to use text or a combination of text and numbers.

Start Date: Allows you to enter Start Date information only.

Finish Date: Allows you to enter Finish Date information only.

Cost: Allows you to enter currency values.

Number: Allows you to use numerals with two decimal places.

Integer: Allows you to use numeric data, but not a number related to money.

Indicator: Allows you to use an indicator field that you can use to icons in columns.

This column is always visible on this page.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

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Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

> **Tip**
>
> - Right-click any field to add or delete a UDF.
> - When a user-defined field (UDF) is deleted, all its values are also deleted from all of their respective appearances throughout the application. This includes user interface views, activity views, calculated UDFs, reports, Activity Networks, filters, sorts, groupings, waterlines, and columns.

Getting Here

To access enterprise data:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Assignment UDFs**.

Assignments Detail Window of the Activities Page

Overview

Use this detail window to assign resources or roles to the selected activity. You can also revise an assignment, specify details (such as units, costs, and rate), and remove an assigned resource.

Screen Elements

Assign menu

The assign menu contains the following options for adding new assignments to an activity:

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Resource: Opens the Select a Resource dialog box.

Role: Opens the Select a Role dialog box.

Customize View

Opens the Customize View dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Assignments detail window columns

Only the default fields that appear as columns in the **Assignments** detail window are described below.

Actual Units field

The sum of the actual non-overtime and the overtime units worked by the resource on the activity.

Calculated as **Actual Regular Units** plus **Actual Overtime Units**.

Values for **Actual Regular Units** and **Actual Overtime Units** are obtained from either timesheets when project actuals are applied, or directly from the updated fields in the interface.

At Completion Cost field

The sum of the actual costs plus remaining costs for the resource assignment on the activity.

Calculated as **Actual Costs** plus **Remaining Costs**.

Planned Units field

The planned units of work for the resource assignment on the activity.

Planned Units/Time field

The planned units per time at which the resource is to perform work on the activity.

For example, a person assigned full time would perform 8 hours of work per day. A department of five people might perform at 5 days per day.

Price/Unit field

The non-overtime price per unit of time for the resource or role.

When the option to **Calculate Costs from Units** is selected, this price is used to compute costs for the activity assignment, using the formula: **Cost** equals **Units** multiplied by **Price** divided by **Unit**.

For resources and roles that have specified rates, Price/Unit corresponds to the Rate Source and Rate Type applied to the activity and is not editable. If an assigned resource or role does not have specified rates, the project default price/unit is used and cannot be edited on this tab. To manually enter a Price/Unit for the activity assignment, you must select Override as the Rate Source.

If the project default price/unit is applied to the activity, a caret symbol (^) appears beside the value. 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

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the start of the activity and a time-varying rate is also in effect within the activity assignment duration.

Primary Resource option

Determines whether this resource is the main resource for the activity.

Rate Source field

The value that indicates which price/unit will be used to calculate costs for the assignment, such as *Resource*, *Role*, and *Override*.

When a resource, and only a resource, is assigned to an activity assignment, the rate source will automatically equal *Resource*. When a role, and only a role, is assigned to an activity assignment, the rate source will automatically equal *Role*. When both a resource and role are assigned to the activity assignment, the rate source can be either *Resource* or *Role* determined by your rate source preference. In any case, the *Override* value allows you to specify a different value for Price/Unit.

The default rate source preference can be changed on the **My Preferences** page under **Resource Assignments**.

Remaining Units field

The remaining units of work to be performed by the resource on the activity.

Calculated as **Planned Units** minus **Actual Units**.

Resource Name field

The name of the resource assigned to the activity.

Role Name field

The name of the role assigned to the activity.

Getting Here

1. On the ☰ **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **Assignments** detail window.

Assignments Page of the Projects Section

Overview

Use this page to view and modify resource assignment data using filters, which enables you to view resource assignment data for only the resources or projects that you need to view. You can see data for all your open projects in this page. Use the Overallocated Resources view of this page to analyze and resolve overallocation.

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> **Note**
>
> - In the Overallocated Resources view of this page, some fields are provided for context and are read only. If you have the necessary privileges, you can edit the following fields in the Overallocated Resources view: Resource Name, Resource ID, Role Name, Role ID, Start, Finish, Remaining Units/Time, Planned units, Actual Units, and Remaining Unit.
> - To see data for overallocated resources, you must run the Check Overallocation service.

Screen Elements

Actions menu

Auto Reorganize: Automatically moves items in the list to the appropriate list position or grouping band when they are changed.

Check Overallocation...: Runs the Check Overallocation service. Select **Check Overallocation Last Run Status** to see when the logged in user most recently ran the service.

Export: Enables you to export the spreadsheet view including all spread columns as a Microsoft Excel file.

Expand All

Expands all grouping bands to show all data items.

Collapse All

Collapses all grouping bands to the top level.

Views menu

Manage Views...: Opens the Manage Views dialog box.

Overallocated Resources: Opens the Overallocated Resources view.

Default View: Opens the default view.

Select a view name to open it.

> **Note**
>
> The Overallocated Resources view is not available in the Manage Views dialog box.

Grid View

Enables you to view and configure data in a grid format. You can customize which columns are available in the grid.

Gantt View

Enables you to view data as a graphical representation of sequence and duration.

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Spreadsheet View

Enables you to view data as a spreadsheet.

> **Note**
>
> An application level setting determines whether cost spreads account for changes in resource and role rates over time.

Filters menu

Manage Filters: Opens the manage filters dialog box. You cannot filter the Overallocated Resources view.

Full Screen

Expands the current work area so it fills the entire display.

Show Hint Help (Alt+F1)

Shows a description of the column when you hover over the column heading.

Print

Opens the Print Options dialog box.

Customize View

Opens the Customize View dialog box. You cannot customize the Overallocated Resources view.

Search

Enables you to perform a search based on the value you enter in the search bar.

Assignments work area

The main work area for viewing assignment data in your choice of the following customizable formats:

- Grid View Format of the Assignments Page of the Projects Section
- Gantt View Format of the Assignments Page of the Projects Section
- Spreadsheet View Format of the Assignments Page of the Projects Section

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Assignments detail windows:

UDF Detail Window of the Assignments Page

Codes Detail Window of the Assignments Page

Earned Value Detail Window of the Assignments Page

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Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Assignments**.

Assignments Page of the Resources Section

Overview

Use this page to view and modify resource assignment data using filters, which enables you to view resource assignment data for only the resources or projects that you need to view.

From this page you can also view a Gantt chart of your start and finish dates for an assignment.

Screen Elements

Actions menu

Auto Reorganize: Automatically moves items in the list to the appropriate list position or grouping band when they are changed.

Export: Enables you to export the grid and spreadsheet view including all spread columns as a Microsoft Excel file.

> **Note**
>
> When Assignment spreads are exported to Microsoft Excel using this Action menu item, numbers might be stored as text in the exported file to improve performance. See: Why Are Numbers Stored as Text when Exporting to Excel from the Projects, Assignments or Resources, Assignments Actions, Export menu option? (KB614381)

Expand All

Expands all grouping bands to show all data items.

Collapse All

Collapses all grouping bands to the top level.

Views menu

Manage Views...: Opens the Manage Views dialog box.

Import/Export Views: Opens the Import Export Views dialog box.

Select a view name to open it.

Grid View

Enables you to view and configure data in a grid format. You can customize which columns are available in the grid.

Gantt View

Enables you to view data as a graphical representation of sequence and duration.

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Spreadsheet View

Enables you to view data as a spreadsheet.

> **Note**
>
> An application level setting determines whether cost spreads account for changes in resource and role rates over time.

Filters menu

Manage Filters: Opens the manage filters dialog box.

Full Screen

Expands the current work area so it fills the entire display.

Show Hint Help (Alt+F1)

Shows a description of the column when you hover over the column heading.

Print

Opens the Print Options dialog box.

Customize View

Opens the Customize View dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Assignments work area

The main work area for viewing assignment data in your choice of the following customizable formats:

- Grid View Format of the Assignments Page of the Resources Section
- Gantt View Format of the Assignments Page of the Resources Section
- Spreadsheet View Format of the Assignments Page of the Resources Section

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Assignments detail windows:

UDF Detail Window of the Assignments Page

Codes Detail Window of the Assignments Page

Earned Value Detail Window of the Assignments Page

Getting Here

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On the **Navigation Menu**, expand **Resources** and click **Assignments**.

Audit Page

Overview

Use this page to configure table auditing.

Screen Elements

Interval to store user login information (in days) field

The default duration for user login and consent data to be stored. This setting is used to store data for reports which show user login information.

Interval to store audit information (in days) field

The default duration for audit table data to be stored.

Select the tables and operations to audit list

Enables you to select a table or operation to configure for auditing.

Add button

Adds a table to the Audit Tables section.

Enable auditing for selected tables option

Switches on auditing for the tables you add to the Audit Tables section and configure for auditing.

Table Name field

The name of the table to be configured for auditing.

Audit Insert option

Determines whether insertions to this table will be audited.

Audit Update option

Determines whether updates to this table will be audited.

Audit Delete option

Determines whether deletions on this table will be audited.

Remove field

Removes the table from the section.

> **Tip**
>
> **Cloud Only**: To collect audit data on BLOB fields, submit a Service Request in My Oracle Support. See: How To Retrieve PAUDIT Audit Data From Audit-Enabled Tables With A Blob Field Column Type (KB529380)

Getting Here

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1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Audit**.

Audit Panel

Overview

Use this panel to view audit data collected by the table auditing feature.

Screen Elements

Subject Area list

Determines the subject areas for which audit data will be displayed in the panel.

Date list

Determines the date range of audit data to be shown.

equals: Specifies the single date for which audit data will be shown. If you select this option, you must also select a date in the From date picker.

is greater than: Specifies the earliest date for which audit data will be shown. If you select this option, you must also select a date in the From date picker.

is less than: Specifies the latest date for which audit data will be shown. If you select this option, you must also select a date in the To date picker.

within range: Specifies the range of dates for which audit data will be shown. If you select this option, you must also select a date in both the From and the To date picker.

covers audit data range: Specifies that all available audit data for the projects will be shown. If you select this option, the From and To dates will be changed by P6 to show the earliest and latest dates for which audit data is available.

From field

Specifies the date for which to show audit data when *equals* is selected on the date list, or the earliest date for which to show data when *is greater than* or *is within range of* are selected on the date list.

To field

Specifies the latest date for which to show data when *is less than* or *is within range of* are selected on the date list.

Filters menu

Manage Filters: Opens the manage filters dialog box.

Print

Opens the Print Options dialog box.

Customize View

Opens the Customize View dialog box.

Refresh

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Refreshes the current screen with any new, updated, or removed data.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

> **Tip**
>
> You can drag the edge of the slider to increase or decrease its width.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select the projects for which you want to view audit data, then click **Context** menu and select **View Audit Data.**

Bars tab of the Manage Views Dialog Box of the Activities Page, EPS Page or Assignments Page

Overview

Use this tab to configure the bar type, height, and color options of bars for the Gantt chart.

Screen Elements

Configure button

Displays the Configure panel.

Preview button

Displays the Preview panel.

Add menu

Bar: Adds a new bar.

Label: Adds a new label.

Reset button

Restores all options to default settings.

Theme list

Determines the color theme for the bars.

Configure panel

Bar Type field

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The type of bar in the Gantt.

Current Bar: Spans the early remaining/actual start to the early remaining/actual finish for each activity, and indicates how the schedule is progressing according to the original plan.

Late Bar: Shows the late start to the late finish of an activity.

Early Bar: Shows the early start to the early finish of an activity.

Planned Bar: Shows the forecasted status of planned activities, and is used for simulating the outcome of the project schedule as part of project planning.

Project Baseline Bar: Shows the project baseline start and finish dates of an activity, and indicates how the schedule is progressing according to the original plan.

User's Primary Baseline Bar: Shows the primary baseline start and finish dates of an activity, and indicates how the schedule is progressing according to the original plan.

Float Bar: Shows the total amount of time that an activity can be delayed without delaying completion of a project.

Free Float Bar: Shows the amount of time that an activity can be delayed without causing subsequent activities to be delayed.

Percent Complete Bar: Shows the completion percentage of an activity.

Pre Response Bar: Shows the pre response pessimistic dates of activities calculated by Oracle Primavera Cloud.

Post Response Bar: Shows the post response pessimistic dates of activities calculated by Oracle Primavera Cloud.

User Defined Bar: Shows the amount of time spanning the selected Activity UDF start date and the Activity UDF finish date. UDF bars can be used to show a risk adjusted schedule using dates imported from Oracle Primavera Risk Analysis.

Label Field list

Determines the field to be used as the label for the bar. You can use any field that is editable at the group level, or any field whose values can be rolled up to group level. If you select to use a Summary Bar label, the label shows the rolled-up value of the field you select or the value of the field if the field is editable at the group level. To see this list, select a bar label in the preview area.

For example, if your view is grouped by WBS and you select Activity Count, then the summary bar will be labelled with the number of activities in the group. However, if you select a WBS UDF, the summary bar will be labelled with the value of the UDF at the group level.

Progress Color picker

Determines the color of progress bars. To see this picker, select **Current Bar** as the bar type and the **Show Progress** option.

⇄ **Swap Colors** button

Swaps the Progress Color and Bar Color. To see this button, select **Current Bar** as the bar type.

Bar Color picker

Determines the color of bars.

Height list

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Determines the height of the bar.

Bar Name field

The name you want to assign to the bar. To see this field, select **User Defined** as the bar type.

Progress Color by Activity Code option

Determines that the color of progress on a current bar is dependent on the colors assigned to the values of the selected activity code. To see this option, select Current on the Bar Type list. To see this option, select **Current Bar** as the bar type and the **Show Progress** option.

Progress Color by Activity Code list

Determines the activity code to use for color coding progress on a current bar. To see this list, select Current on the Bar Type list. To see this list, select **Current Bar** as the bar type and the **Show Progress** option.

Configure link

Click to customize the colors assigned to values of the selected activity code. To see this link, enable the Progress Color by Activity Code option.

Bar Color by Activity Code option

Determines that the color of the bar is dependent on the colors assigned to the values of the selected activity code.

Bar Color by Activity Code list

Determines the activity code to use for color coding the bar.

Show Expanded Summary Bars option

Determines whether the summary bar will show for expanded groups as well as collapsed groups. If this option is selected, the summary bar will be shown for both collapsed and expanded groups. If this option is not selected, the summary bar will only show for collapsed groups. To see this option, select the summary bar in the preview area

Configure link

Click to customize the colors assigned to values of the selected activity code. To see this link, enable the Bar Color by Activity Code option.

Start Date Field list

Determines the user defied date field to use for the start date of the bar. To see this list, select **User Defined** as the bar type.

Show Progress option

Determines whether to display progress for the activity, project, or assignment. To see this option, select **Current Bar** as the bar type.

Finish Date Field list

Determines the user defied date field to use for the finish date of the bar. To see this list, select **User Defined** as the bar type.

Show Critical option

Determines how to show critical activities in the Gantt chart. Select the option to represent critical activities with a red bar instead of the color you selected for the Current Bar. To see this option, select **Current Bar** as the bar type.

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Progress Style list

Determines the style for progress bars. To see this option, select **Current Bar** as the bar type and the **Show Progress** option.

Preview panel

Preview area

Provides a preview of how the selected options will look.

Getting Here

1. Click **Navigation Menu**
2. On the **Navigation Menu**, either:
   - Expand **Projects** and click **Activities** or **EPS**.
   - Expand **Resources** and click **Assignments**.
3. Click the **Views** menu and select **Manage Views...**.
4. In the **Manage Views** dialog box, click **Bars**.

Baseline Types Page

Overview

Use this page to add and configure baseline types for projects.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

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Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Type field

The type of baseline.

You can use the baseline type name to categorize your baselines by purpose; for example, customer sign-off, initial planning, management sign-off, mid-project status, and what-if baselines.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of baselines currently using the corresponding data item. The number reported in this column includes all baselines in which the data item is assigned, regardless of your access. To see a list of the baselines using the corresponding data item, click the link. The list you see is restricted to those baselines to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Baseline Types**.

Basic Tab of the Primavera XML or Primavera XER Template Dialog Box of the Import/Export Project Dialog Box

Overview

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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.

Screen Elements

Template Name field

The name for the import or export template.

This field is required and can contain up to 40 characters.

Import Type list

Determines whether the template is available for **XER** file imports, **XML** file imports, or **XER and XML** file imports. This list is only visible on the **Manage Import Templates** dialog box.

Global Data tab

See Global Data tab of the Primavera XML or Primavera XER Template Dialog Box of the Import/Export Project Dialog Box

Project Data tab

See Project Data tab of the Primavera XML or Primavera XER Template Dialog Box of the Import/Export Project Dialog Box

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click the **Actions** menu and select **Manage Import Templates** or **Import/Export Projects**.
3. In the **Import/ExportProjects** dialog box:
   a. Click the **Import** tab.
   b. Click the **Import Type** list and select **Primavera XER** or **Primavera XML.**
   c. Click the **File** field and select a file to import.
   d. Click the **Manage Templates** button.
4. In the **Manage Primavera Templates** or **Manager Primavera XER and XML Templates** dialog box, click the name of a template.
5. In the **Primavera Template** or **Primavera XER and XML Template** dialog box, click the **Basic** tab.

BEI - Activities with No Project Baseline Finish Date Section of the Schedule Check Report Dialog Box

Overview

Use this section to view the data on activities that matched the requirements for the Baseline Execution Index (BEI) check. This check measures the number of activities that have been completed as a ratio to those activities that should have been completed according to the baseline.

Only a subset of the activities in the open projects are checked to see if they are complete or should have been completed. WBS summary activities, activities with no actual finish date, milestones, and Level of Effort activities are removed from the subset to create the list of

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completed activities. WBS summary activities, milestones, Level of Effort activities, and activities with a baseline finish later than the data date are removed to create the list of activities that should have been completed. The number of completed activities is then divided by the number of activities that should have been completed to find the BEI ratio.

> **Note**
>
> If an activity does not have a Baseline Finish, then the application assumes that it should have finished. If one or more activities have no Baseline Finish, then they are listed in the schedule check report under the heading BEI - Activities with no project baseline finish date.

Screen Elements

Project ID field

The unique identifying code of the project containing the activity which failed the check. Click this link to view the project.

Activity ID field

The unique identifying code for the activity which failed the check. Click this link to view the activity.

Activity Name field

The name of the listed activity. Click this link to view the activity.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
   a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Budget Log Detail Window of the EPS Page

Overview

Use this detail window to create, delete, or modify the budget log for a project. A budget log specifies details about each budget change line item, including who has signature approval, the approval status, and the reason why any changes were made to the original budget.

Screen Elements

Original Budget field

The estimate of the total amount you require for the selected WBS or project, including all contributed funds.

Current Budget field

The current budget for the WBS or project.

Calculated as **Original Budget** plus the sum of the approved budget changes from the budget log.

Proposed Budget field

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The proposed budget for the WBS or project.

Calculated as **Original Budget** plus the sum of the Approved and Pending Budgets from the budget log.

Add button

Adds an item to the table.

Budget log table area:

Context menu

Add: Adds a new item to the list.

Delete: Deletes the selected item.

Amount field

The value in units of currency of the budget change request.

Change Number field

The number associated with the change request.

Useful for reporting or tracking changes to the original budget.

Date field

The date and time the line item was added to the budget log.

Reason field

A short description summarizing the events or circumstances prompting the proposed change to the budget.

This field can also be used to store the decision justifying the budget line item's status.

Responsible field

The name of the person with signature approval for the budget log line item.

Status field

The approval status of the line item.

Tip

- You can change the order of the columns in the Budget log table area by dragging the column headings.
- If more than one project is selected, the detail window will not be visible.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select a project and click the **Budget Log** detail window.

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Calculations Tab of the Project Preferences Dialog Box of the EPS Page

Overview

Use this page to set options that determine how the application will handle project calculations for activities, earned value, and units and costs for the selected project. If an EPS node is selected, the data shown here represents the default settings for the fields.

> **Note**
>
> Options may be disabled if a project is checked out, opened exclusively, or if you do not have the *Edit Project Details Except Costs/Financials* permission.

Screen Elements

Resource Assignments section

When updating units or costs options

Add actual to remaining: Determines whether P6 will calculate a new at completion value when the remaining units or actual units change. At Completion Units equal Remaining Units plus Actual Units.

Subtract actual from at completion: Determines whether P6 will calculate a new remaining units value when the at completion or actual units change. Remaining Units equal At Completion Units minus Actual Units.

Recalculate actual units and cost when Duration % Complete changes option

Determines whether the actual units and cost values are recalculated when duration percent complete is updated.

Link actual to date and actual this period units and costs option

Determines whether to recalculate actual or actual this period units and costs when one of these values is updated. This option must be marked if you plan to store period performance or edit past period actuals for a project.

Earned Value section

Baseline to be used for earned value calculations options

Determines whether the **Project Baseline** or **User's Primary Baseline** will act as the baseline for earned value calculations. This option is honored for the calculation of earned value for all live data and for storing period performance. Summarized and published data is always calculated using the Project baseline.

For further information see: Summarized, Published, and Live Data Usage in P6*Summarized, Published, and Live Data Usage in P6*

Activities section

When changing an activity to not started options

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Determines how units and duration are handled if activity progress is removed.

Reset planned duration and units to remaining: Determines whether the application will recalculate planned unit spreads to match the remaining units.

Reset remaining duration and units to planned: Determines whether the application will recalculate remaining unit spreads to match the planned units.

Calculate Activity % Complete from activity steps option

Determines if Activity % Complete is calculated from activity steps or from manual input.

This option is cleared by default. If the option is selected, you must also set Percent Complete Type to Physical on the Activities page to view the calculation in the Activity % Complete field. This option also sets the Physical % Complete field calculation to calculate from activity steps instead of manual input.

For example, if 3 of 4 steps are marked complete, and the steps are weighted equally, the Activity % Complete and the Physical % Complete is 75%.

Link planned and at completion for not started activities option

Determines whether to recalculate all of the planned unit and cost values using the remaining costs and units for activities that have not started. When this option is selected, Planned, Remaining, and At Completion values are set to equal for not started activities.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page select a project or EPS node, click the **Context** menu and select **Set Project Preferences**.
3. Click the **Calculations** tab.

Calendar Details Dialog Box

Overview

Use this dialog box to view the details of a calendar being imported and compare the details between the calendar in the import file and the version in your database. On the exceptions tab, you can analyze whether there are differences between the exceptions defined in the version of the calendar in your database and the version in the import file.

Screen Elements

Source list

Displays the source of the calendar you are viewing. If a calendar with the same name exists in both the import file and database, this list allows you to select whether to view the details of the calendar from the import file or the database.

Import File: Shows the details of the version of the calendar that exists in the import file.

Database: Shows the details of the version of the calendar that exists in the database.

Summary tab

Standard Work Week area:

Standard Work Week table

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Enables you to see an overview of the work time periods configured for each day of the week in the calendar.

Base Calendar area:

Base Calendar field

The global calendar that is assigned to the calendar to determine work days, nonwork days (for example, global holidays), and calendar exceptions.

For example, multinational corporations will have one or more global calendars per country to represent global holidays for each region. Exceptions are used when the standard work day is modified.

Time Periods area:

Hours per Time Period fields

The values that will be used as conversion factors when users choose to display time units and durations in units other than hours.

Calendar tab

Today button

Returns to the current day, week, month, or year.

Previous

Displays the previous day, week, month, or year.

Next

Displays the next day, week, month, or year.

Day button

Displays a single day view.

Week button

Displays a single week view.

Month button

Displays a single month view.

Year button

Displays a single calendar year view.

Print

Opens the Print Options dialog box.

Calendar View area

Enables you to view a day, week, month, or year of the calendar to identify standard time, nonwork time and calendar exceptions.

Standard Work Week tab

Print

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Opens the Print Options dialog box.

Day label

The name of each day.

Total Hours field

The total number of work hours for each day.

Calendar View area

Enables you to view a day, week, month, or year of the calendar to identify standard time, nonwork time and calendar exceptions.

Work Period display

Displays a box that represents each work period in a day. If you change the number of hours covered by the work period boxes for a day, P6 updates the Total Hours field.

Exception tab

Start Date field

The date of the period or range.

End Date field

The last day of the period or range.

Group By list

Enables you to group items in the table. Grouping gathers, or groups, together all of the data that contain the same value for the selected data field.

Select **Source** to group the list according to the calendar source (Import File or Database), **Date (Months)** to group by calendar month of exceptions, or **None** to view the exceptions as a flat list.

Print

Opens the Print Options dialog box.

Date field

The date of the calendar exception.

Time Period field

The start and end time of the calendar exception.

In Database option

Indicates whether the row item exists in the database into which you are importing the file.

From Import File option

Indicates whether the row item exists in the import file.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

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1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProjects** dialog box:
   a. Click the **Import** tab.
   b. Click the **Import Type** list and select **Primavera XML.**
   c. Click the **File** field and select a file to import.
   d. Click the **Manage Templates** button.
4. In the **Manage Primavera Templates** dialog box, click the name of a template.
5. In the **Primavera Template** dialog box, click the **Advanced** tab.
6. On the **Advanced** tab, click the **Calendars** tab.
7. On the **Calendars** tab, click **View Calendar Details**.

Calendar Replacement Complete Dialog Box

Overview

Use this dialog box to view, print, or download the list of calendar assignments that were replaced.

Screen Elements

Print

Prints the current page, table, chart, or item.

Search field

Activates the search based on your search criteria.

Download link

Enables you to download the currently displayed data as a Microsoft Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all columns are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, select the **Global Calendars**, **Project Calendars**, or **Resource Calendars** page.
3. On the **Global Calendars**, **Project Calendars**, or **Resource Calendars** page, click the **Used By** tab.
4. On the **Used By** tab, expand the groupings, then select **Context** and choose **Assign Global Calendar**, **Assign Project Calendar**, or **Assign Resource Calendar**.
5. In the **Select Replacement Calendar** dialog box, select a calendar and select **Assign**.

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Calendar Tab of the Global Calendars Page

Overview

Use this tab to view and specify work hours for the global calendar.

Screen Elements

Today button

Returns to the current day, week, month, or year.

Previous

Displays the previous day, week, month, or year.

Next

Displays the next day, week, month, or year.

Day button

Displays a single day view.

Week button

Displays a single week view.

Month button

Displays a single month view.

Year button

Displays a single calendar year view.

Print

Opens the Print Options dialog box.

Full Screen

Expands the current work area so it fills the entire display.

Calendar View area

Enables you to view a day, week, month, or year of the calendar to identify standard time, nonwork time and calendar exceptions.

Calendar Tab detail window:

Select Calendar to Copy Dialog Box

Legend area

Displays the standard, exception, and nonwork colors represented in the chart.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Global Calendars**.

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3. On the **Global Calendars** page, click the **Calendar** tab.

Calendar Tab of the My Calendar dialog box, Project Calendars Page, or Resource Calendars Page

Overview

Use this tab to view and specify work hours for your personal calendar, a project calendar, or a resource calendar.

Screen Elements

Today button

Returns to the current day, week, month, or year.

Previous

Displays the previous day, week, month, or year.

Next

Displays the next day, week, month, or year.

Day button

Displays a single day view.

Week button

Displays a single week view.

Month button

Displays a single month view.

Year button

Displays a single calendar year view.

Print

Opens the Print Options dialog box.

Full Screen

Expands the current work area so it fills the entire display.

Calendar View area

Enables you to view a day, week, month, or year of the calendar to identify standard time, nonwork time and calendar exceptions.

Legend area

Displays the standard, exception, nonwork, global exception, and global nonwork colors represented in the chart.

Getting Here

From the **Enterprise Data** page:

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1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page:
   - Expand **Resources** and click **Resource Calendars**.
   - Or expand **Projects** and click **Project Calendars**
3. On the **Resource Calendars** or **Project Calendars** page, click the **Calendar** tab.

From the **My Calendar** dialog box:

1. Click the **User** menu and select **My Calendar**.
2. In the **My Calendar** dialog box, select the **Calendar** tab.

Calendars Tab of the Import Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use this tab to use, demote, or remove calendars and to rename calendars present in the XML file.

Screen Elements

Global/Resource Calendars list

Determines how global and resource calendars are imported.

Table area:

Context menu

Delete From Template: Enables you to remove the selected calendar from the template.

You cannot delete a calendar from the template if it exists in the file you are currently importing.

Name list

Displays the name of the calendar.

Calendars that have not been imported using this template before are listed under New. Calendars that have been imported using this template and saved to the template in the past are listed under Saved.

Type list

Displays whether the calendar is a global calendar, personal resource calendar, or shared resource calendar. Project calendars are not listed.

Details list

Displays the calendar's details. Click **View Calendar Details** to examine the details of the calendar and compare differences between the version in the import file and the version in your database. If the calendar you are examining has been saved to the template but does not exist in the import file or database, only the definition of the standard work week is available.

Action list

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Determines whether the calendar is imported without change, or converted to a project or shared resource calendar when it is imported.

New Name field

The new name for the calendar after it has been imported.

Renaming a calendar when it is imported to your database can help to prevent calendars with the same name in your database from being updated unintentionally during the import process.

From Import File option

Indicates whether the row item exists in the import file.

In Database option

Indicates whether the row item exists in the database into which you are importing the file.

In Template option

Indicates whether the calendar has previously been added to this import template.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click the **Actions** menu and select **Manage Import Templates** or **Import/Export Projects**.
3. In the **Import/ExportProjects** dialog box:
   a. Click the **Import** tab.
   b. Click the **Import Type** list and select **Primavera XML.**
   c. Click the **File** field and select a file to import.
   d. Click the **Manage Templates** button.
4. In the **Manage Primavera Templates** or **Manager Primavera XER and XML Templates** dialog box, click the name of a template.
5. In the **Primavera Template** or **Primavera XER and XML Template** dialog box, click the **Advanced** tab.
6. On the **Advanced** tab, click the **Calendars** tab.

Capacity Planning Page

Overview

Use this page to analyze role allocation and cost over time. Multiple chart formats display role allocation for the projects and roles you select, enabling you to quickly identify areas of under or over allocation.

Using this page, you can perform what-if analysis, graphically change project forecast dates, and apply waterline analysis techniques to assist with critical, executive-level decision making. After conducting your analysis, you can create portfolios containing only the projects that meet your planning criteria.

Screen Elements

Create Portfolio... button

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Creates a portfolio using the selected projects. This enables you to view data from multiple projects at one time.

Display across list

Determines whether usage will display across all projects or current portfolio projects only.

Grid View

Enables you to view and configure data in a grid format. You can customize which columns are available in the grid.

Gantt View

Enables you to view data as a graphical representation of sequence and duration.

Full Screen

Expands the current work area so it fills the entire display.

Customize View

Opens the Customize View dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Go to date selector

Enables you to move the spreadsheet and histogram or chart to show a specific timeframe.

Scorecard area

The scorecard displays project data in spreadsheet format.

When you select an option in the scorecard, the project's role allocation is included in the Capacity Planning chart at the bottom of the page.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Show waterline option

Determines whether to display the waterline on the scorecard. Selecting this option overrides grouping and sorting defined elsewhere.

Gantt Chart area

The Gantt chart displays current and forecast data according to the timescale you specify when you customize the page. Each project in the scorecard has two corresponding bars: the **Current Bar** (top) and **Forecast Bar** (bottom).

The **Current Bar** is based on the project start and finish dates; blue indicates current project progress, while green indicates remaining work. The **Forecast Bar** spans from the project's forecast start date to the forecast finish date. If forecast dates have not been defined, the Forecast Bar spans from the remaining start date to the remaining finish date.

When the page displays the latest summarized data, you can move the Forecast Bar by entering a new Project Forecast Start in the grid. You can never move the Current Bar.

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If the project group you are viewing is an EPS containing child EPS nodes, the Gantt chart displays a yellow Summary Bar rather than an orange Forecast Bar because forecast dates do not apply to EPS nodes.

Collapse Dock

Collapses the dock.

Capacity Planning Chart area

In the lower half of the work area, the Capacity Planning Chart area consists of the following components:

Role selector: Displays roles according to the Group By or Search options you specify.

Capacity Planning chart: For each role you select in the role selector, the chart displays role allocation over time for the projects you select in the scorecard or for all projects in the database.

Chart legend: Displays the name of projects with their associated color so you can understand what the chart is depicting.

Role selector

The role selector displays roles according to the Group By or Search options you specify and enables you to perform a search based on the value you enter in the search bar.

When the page displays the latest summarized data for current projects, roles are grouped by the current portfolio projects. When the page displays data for all projects, you can also choose to group roles by the role hierarchy or role teams. The allocations for the roles you select are displayed in the Capacity Planning chart at the bottom of the page. For example, if you only choose the Project Manager role in the role selector, the Capacity Planning chart only displays allocation for the Project Manager role. You can use this information to determine which projects or time periods the Project Manager role is under- or over-allocated.

Display list

Determines the display format for the dock.

Area Chart: The capacity planning chart is displayed as an area chart. The chart data displays total allocated amount (units or cost) across time.

Net Availability: The capacity planning chart as a net availability chart. This chart displays the role's availability over time; how much the role is over or under-allocated. The Net Availability Chart is only available for units and is always grouped by role.

Spreadsheet: Enables you to view the actual source data used to generate the chart.

Stacked Histogram: The display of the capacity planning chart as a stacked histogram. Categorized data can be grouped, or stacked, to assist with comparisons. Stacked histograms are useful when analyzing relative parts of a whole.

Stacked by list

Select a value for stacking or dividing the presentation of data in your capacity planning histogram, area chart, or spreadsheet. Choose one of the pre-defined general options or a project code. The Stacked by field is not available for the Net Availability Chart.

Stack the chart by project to display the total at completion units or costs, per project.

Stack the chart by role to display the total at completion units or costs per role.

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Stack the chart by staffed vs. unstaffed units to display the total staffed and unstaffed units over time.

Stack the chart by current projects vs. other projects to display the aggregate total at completion units or costs for the combination of selected roles across all projects, split into two values. One value represents the role allocation for the projects selected in the current project group (current projects); the other value represents the role allocation for all other projects in the database (other projects).

> **Note**
>
> The option to stack the chart by Current Projects vs. Other Projects is only available if All Projects is selected in the Display Across list.

Stack the chart by project code to display the total at completion units or costs for associated roles and projects.

Chart Settings

Enables you to configure settings for the chart.

Display Units and **Display Costs:** Determines whether the chart will be displayed by **Costs** or **Units**.

Show Limit: Determines whether to show the role limit.

Show Allocation Limit: Determines whether to show the allocation limit.

Capacity Planning Chart work area

The Capacity Planning chart displays the latest summarized data according to the type of chart you choose to view, the roles and projects you select, the customize options you choose, and global preference settings for calculating role limits.

Whichever chart type you choose, when you hover over a color-coded section of the chart, the application displays the data pertaining to that section. For each role you select in the role selector, the Capacity Planning chart displays role allocation over time for the projects you select in the scorecard or for all projects in the database (click **Customize** to choose options). The chart can display role allocation as a stacked histogram, area chart, net availability chart, or spreadsheet. You can choose to display role allocation per project, role, or project code, or you can choose to display staffed versus unstaffed units or costs. Additionally, you can compare data for the current project group's roles versus roles assigned to all other projects.

> **Note**
>
> An application level setting determines whether cost spreads account for changes in resource and role rates over time.

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> **Tip**
>
> - To display the Financial Period timescale, projects must be summarized by financial period and financial periods must be properly configured. To display a calendar timescale (for example, Month/Week), projects must be summarized by calendar intervals.
> - The scorecard on this page does not display WBS rows, only project rows. On the Portfolio Analysis page and the Portfolio View portlet, scorecards display WBS rows along with project rows.

Getting Here

1. In the context selector, select **Portfolios**.
2. In the context selector:
   - Click **Open Portfolio** to select a group of projects by portfolio type, EPS node, or project code.
   - Or choose a portfolio in the Most Recently Used list.
3. On the **Navigation Menu**, expand **Portfolios** and click **Capacity Planning**.

Card View Format of the Status Updates Page

Overview

Use this page to review updates your team members made to their assigned activities. On this page you can modify the data, approve status updates, or place a hold on a status update to reconcile at a later time.

Screen Elements

Switch to Grid View link

Opens the grid view of the Status Updates page.

Project Selection area

Determines which status updates will appear in the list.

Search

Enables you to perform a search based on the value you enter in the search bar.

Group By list

Enables you to select whether to view status updates grouped by Review, Resource or None. You must be assigned the Admin Superuser global security profile or the Project Superuser global security profile to group the view by review status.

Selected / Unselected option

Enables you to select or clear the selection of an item in a list.

Project field

The ID and name of the project with status updates for your attention.

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Pending field

The number of pending status updates per project.

Held field

The number of held status updates per project.

Rejected field

The number of rejected status updates per project.

Pending button

Filters the view to show only your pending status updates.

Held button

Filters the view to show only your held status updates.

Rejected button

Filters the view to show only your rejected status updates.

Accept All button

Accepts all visible status updates. The indicator on this button shows how many updates will be accepted.

Reject All button

Rejects all visible status updates. The indicator on this button shows how many updates will be rejected.

Filter button

Opens the Manage Filters dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Status Updates area

Displays the status updates for your attention. Status updates are grouped by Project.

Status Updates card

Provides information about the status update, including:

Activity: The name and ID of the updated activity.

Updated Resource: The name of the resource assigned to the activity.

Submitting Resource: The name of the resource who made the update.

Project: The ID and name of the project for the activity.

WBS: The name of the WBS for the activity.

Send Email button: Enables you to send an email to the resource.

Discussion button: Opens the **Discussions** dialog box.

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More... button: Opens the **Details** dialog box. The details dialog box provides information about the submitted date, held date, activity codes, and UDFs assigned to the activity.

Documents button: Opens the **Documents** dialog box. The documents dialog box enables you to view any attachments, work product documents, and documents to the status update that have been uploaded from P6 for Android and P6 for iOS. If a content repository has been configured, you can view all documents uploaded to the content repository for the project on the Project tab of the Documents window. The Work Product Documents tab shows documents that have been linked to the project and provide a file path.

Accept button: Accepts the status update and applies the changes to the activity.

Hold button: Moves the card from the **Pending** list to the **Held** list. This button is only visible when you are viewing pending updates and after the initial update for an activity updated in P6 Team Member has been accepted.

Remove Hold button: Moves the card from the **Held** list to the **Pending** list. This button is only visible when you are viewing held updates.

Override button: Opens the **Override Updates** dialog box. In the Override Updates dialog box, you can provide new values for any of the changed fields. This button is only visible after the initial update for an activity updated in P6 Team Member has been accepted.

Reject button: Moves the card from the **Pending** list to the **Rejected** list and opens the **Reject Status Updates** dialog box.

Changed Field: The name of the field that has been changed during the status update.

Old: The old value of the changed field.

New: The new value of the changed field.

> **Tip**
>
> You will not see pending status updates for projects that are checked out in the P6 Professional or are opened exclusively.

Getting Here

To view status updates for all open projects:

1. On the **Navigation Menu**, expand **Approvals** and click **Status Updates**.

Change Password Dialog Box of the Users Page

Overview

Use this dialog box to change the password for the selected user.

Screen Elements

New Password field

When the **Password Policy** is enabled, the password must be between 8 and 20 characters and contain at least one number and one letter. The policy is enabled by default.

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When the **Password Policy** is disabled, the password must be between 1 and 20 characters. The application does not allow blank passwords.

Confirm New Password field

To confirm the change, enter the new password.

When the **Password Policy** is enabled, the password must be between 8 and 20 characters and contain at least one number and one letter. The policy is enabled by default.

When the **Password Policy** is disabled, the password must be between 1 and 20 characters. The application does not allow blank passwords.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. In the **User Administration** pane, click **Users**.
3. On the **Users** page, right-click a Login Name and click **Change Password** (Ctrl+Shift+F9).

Chart tab of the Customize View Dialog Box of the Team Usage Page or the Analysis page

Overview

Use this tab to modify the chart in the view.

Screen Elements

Resource section:

Display Fields options

Determines which fields to display for resources.

Actual Units/Costs: Determines whether to show the actual non-overtime plus overtime units or costs for the resource assignment on the activity.

Remaining Units/Costs: Determines whether to show the remaining units or costs for the resource assignment on the activity.

Role section:

Display Fields options

Determines which fields to display for roles.

Actual Units/Costs: Determines whether to show the sum of the actual non-overtime and the overtime units or costs worked by resources assigned to the role on the activity.

Staffed Units/Costs: Determines whether to show the total units or costs currently assigned to individual resources for each role.

Unstaffed Units/Costs: Determines whether to show the total units or costs that require resource assignments for each role.

General section:

Limit options

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Determines whether to display maximum Resource and Role availability. These options are based on live data to help you evaluate usage against the benchmark.

Horizontal Lines option

Determines whether to display horizontal lines in the chart to aid reference against the scale.

Legend option

Determines whether to display a legend for the chart.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Team Usage**.
2. Click **Customize View**.
3. In the **Customize View** dialog box, click **Chart**.

Or:

1. On the **Navigation Menu**, expand **Resources** and click **Analysis**.
2. Click **Customize View**.
3. In the **Customize View** dialog box, click **Chart**.

Check Schedule Dialog Box of the Activities Page

Overview

Use this dialog box to define and select criteria on which to run a report and check the health of the schedule.

Screen Elements

Logic option

Determines whether the report will check activity logic.

This check identifies activities that do not have a predecessor and successor. This helps to identify how well the schedule is linked together. The default target is less than 5 percent.

Negative Lags option

Determines whether the report will check for activities with negative lags.

This check identifies relationships with a lag duration of less than 0 between activities. This helps to avoid critical path and total float distortion in the schedule. The default target is less than 1 percent.

Lags option

Determines whether the report will check relationship lag duration.

This check identifies positive lag relationships between activities, showing the relationships that might constrain a schedule. The default target is less than 5 percent.

Long Lags option

Determines whether the report will check for activities with a long lag. The default long lag value is 352h (44 days at 8 hours per day).

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This check identifies lags that are longer than the value you specify. The default target is less than 5 percent.

Relationship Types option

Determines whether the report will check the relationship types between activities.

This check identifies Finish to Start relationships. The default target is greater than 90 percent.

Hard Constraints option

Determines whether the report will check for hard constraints.

This check identifies the constraints that prevent activities from being moved because of schedule logic. The default target is less than 1 percent.

Soft Constraints option

Determines whether the report will check for soft constraints.

This check identifies the constraints that do not prevent an activity from being moved because of schedule logic. The default target is less than 5 percent.

Large Float option

Determines whether the report will check for activities with a large float. The default large float value is 352h (44 days at 8 hours per day).

This check identifies activities with a total float longer than the value you specify. Activities with a large float might be missing predecessors or successors. A high number of large floats might indicate that the network is unstable and not logic driven. The default target is less than 1 percent.

Negative Float option

Determines whether the report will check for activities with a negative float.

This check identifies activities with a total float less than 0. Activities with a negative float need to be justified. Negative float might indicate that the schedule needs to be corrected. The default target is less than 1 percent.

Large Durations option

Determines whether the report will check for activities with a large duration. The default large duration value is 352h (44 days at 8 hours per day).

This check identifies activities with a remaining duration greater than the value you specify. Large duration activities could potentially be broken down into more discrete activities that provide better insight into cost and schedule. The default target is less than 5 percent.

Invalid Progress Dates option

Determines whether the report will check for invalid progress dates.

This check identifies actual dates that occur after the data date or incomplete activity dates scheduled before the data date. This helps to identify activities with invalid dates. The default target is less than 1 percent.

Resource/Cost option

Determines whether the report will check for activities that do not have an expense or resource assigned.

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This check identifies the resources/costs assigned to each activity. A plan without resources and costs is not as meaningful. The default target is less than 1 percent.

Late Activities option

Determines whether the report will check for late activities.

This check identifies activities that are planned to finish later than their baseline finish. This indicates how well the project is performing against the currently selected baseline. The default target is less than 5 percent.

BEI option

Determines whether the report will calculate the Baseline Execution Index (BEI) ratio.

This check measures the number of activities that have been completed as a ratio to those activities that should have been completed according to the baseline. The default target is a BEI of 0.95 or greater.

Target selector

Determines the value associated with the option. If the value follows a < symbol, the target is to have the option item be less than the listed value. If the value follows a > symbol, the target is to have the option item be greater than the listed value. The value is a percentage for all checks except BEI which is a ratio.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, click the **Actions** menu and select **Check Schedule**.

Check Schedule Settings Tab of the Check Schedule Dialog Box

Overview

Use this dialog box to determine the settings to use for the check schedule tool.

Screen Elements

Use Check Schedule Options from list

The list of open projects whose check schedule options you can use.

Relationships - Activities missing predecessors or successors option

Determines whether the report should 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. Finish milestones are not required by this analysis to have successors. Completed activities and WBS summary activities are not included in this analysis.

Target: The acceptable percentage of activities that can have no predecessor or successor.

Dangling Start - Activities with start dates that are not driven by predecessors option

Determines whether the report should analyze the percentage of activities that have start dates that are not driven by the activity's predecessor.

Target: The acceptable percentage of activities that can have a start date not driven by predecessors.

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Dangling Finish - Activities with finish dates that do not drive successors option

Determines whether the report should analyze the percentage of activities that have finish dates that do not drive successors.

Target: The acceptable percentage of activities that can have a finish date that does not drive successors.

Negative Lags - Relationships with a lag duration of less than 0 option

Determines whether the report should analyze the percentage of relationships with a lag duration less than zero. Relationships between completed activities are not included in this analysis.

Target: The acceptable percentage of relationships that can have negative lag.

Lags - Relationships with a positive lag duration option

Determines whether the report should analyze the percentage of relationships with positive lag applied. Relationships between completed activities are not included in this analysis.

Target: The acceptable percentage of relationships that can have lag.

Long Lags - Relationships with a lag duration greater than option

Determines whether the report should 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 configured on the Time Periods page of Application Settings. Relationships between completed activities are not included in this analysis.

Target: 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 option

Determines whether the report should analyze relationship types. Relationships between completed activities are not included in this analysis.

Target: The acceptable percentage of relationships that must have a relationship type of Finish to Start.

Hard Constraints - Constraints that prevent activities being moved option

Determines whether the report should 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 and Mandatory Finish. Completed activities, WBS Summary activities, Level of Effort activities, and start constraints applied to started activities are not included in this analysis.

Target: The acceptable percentage of activities that can have hard constraints.

Soft Constraints - Constraints that do not prevent activities being moved option

Determines whether the report should 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, Start On or Before, Start On or After, Finish On, 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.

Target: The acceptable percentage of activities that can have a soft constraint applied.

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Out-of-Sequence - Activities which are completed or in-progress before their predecessors option

Determines whether the report should analyze the percentage of activities that are out-of-sequence according to the schedule logic. Whether an activity is out-of-sequence depends on the predecessor's status and the activity's relationship with the predecessor, however in general an activity is considered out of progress if:

The activity is in progress and:

- Any predecessor is not started.
- A predecessor with a Finish to Start relationship is not yet completed.

The activity is completed and:

- Any predecessor is not started.
- A predecessor with a Finish to Start or Finish to Finish relationship is not yet completed.

Target: The acceptable percentage of activities that can be out-of-sequence.

Large Float - Activities with total float greater than option

Determines whether the report should analyze the percentage of activities calculated by the scheduler to have a float 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 configured on the Time Periods page of Application Settings. Completed, WBS Summary, and Level of Effort activities are not included in this analysis.

Target: 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 option

Determines whether the report should 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.

Target: The acceptable percentage of activities that can have negative float.

Large Durations - Activities that have a remaining duration greater than option

Determines whether the report should analyze the percentage of activities that have a remaining 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 configured on the Time Periods page of Application Settings. Completed activities, WBS Summary activities, and Level of Effort activities are not included in this analysis.

Target: The acceptable percentage of activities that can have a large remaining duration.

Invalid Progress Dates - Activities with invalid progress dates option

Determines whether the report should analyze the percentage of activities with invalid dates. Invalid dates for not started activities are start or remaining 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.

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Target: The acceptable percentage of activities that can have invalid progress dates.

Resource / Cost - Activities that do not have an expense or a resource assigned option

Determines whether the report should analyze the percentage of activities that have not been assigned at least one resource 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 or at least one 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.

Target: The acceptable percentage of activities that can have no resources or expenses assigned.

Late Activities - Activities scheduled to finish later than the project baseline option

Determines whether the report should analyze the percentage of activities that have a remaining early finish date that is later than the remaining finish date of the corresponding activity in the project baseline. Activities without a corresponding activity in the project baseline are considered to fail this test. Milestones, WBS Summary activities, and Level of Effort activities are not included in this analysis.

Target: 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 option

Determines whether the report should 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, 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.

Target: 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.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Click **Actions** and select **Check Schedule**, then select **Run Check Schedule**.

Check Summary Section of the Schedule Check Report Dialog Box

Overview

Use this section to view a summary of project health based on the checks in the report.

Screen Elements

Check field

The type of check that was run for the schedule check report.

Examples of check types include *Logic*, *Hard Constraints*, and *Negative Float*.

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Description field

The brief summary of the check.

Target field

The user-defined goal for each check.

You select this value using the **Target** selector in the **Check Schedule** dialog box.

Actual field

The percentage of the items found that match the check divided by the total number of items checked.

The **Actual** field for the BEI check displays a ratio. The cell is green if you hit your target, red if the target was missed.

Found field

The number of items found that match the check criteria.

Total field

The total number of items that were checked when the report ran.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
   a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Codes Detail Window of the Activities Page

Overview

Use this detail window to assign codes to activities.

Screen Elements

Assign... button.

Opens the Select Code Value dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Delete: Deletes the selected item.

Codes detail window columns

Name field

The name of the code used to categorize activities.

An activity code can be designated as one of three types: Global, EPS, or Project. Global activity codes can be used in all projects within the enterprise. EPS activity codes can be used only in projects that belong to a specified EPS, including its subordinate EPS nodes, if any.

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Project activity codes can be used only in one project. The EPS or project that an activity code is associated with is specified when the code is created.

Value field

The alphanumeric or descriptive value of the activity code. This field shows the hierarchy of the Code Value selected by showing each level of the hierarchy separated by dots.

Description field

The description provided for the code or code value when it was created.

Type field

The type of the code. This field describes the scope of the code: Global, EPS, or Project.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **Codes** detail window.

Codes Detail Window of the Assignments Page

Overview

Use this detail window to assign codes to resource and role assignments. You can also view assigned project, activity, resource, and role codes when you select the relevant grouping band. The data you see in project, activity, resource, and role grouping bands is read only on this page.

Screen Elements

Assign... button.

Opens the Select Assignment Code dialog box. To see this button, you must select an assignment.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Delete: Deletes the selected item.

Codes detail window columns

Name field

The name of the code.

Value field

The alphanumeric or descriptive value of the code.

Description field

A description of the code or the code value.

Getting Here

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1. Click **Navigation Menu**.
2. On the **Navigation Menu:**
   - Expand **Projects** and click **Assignments**.
   - Or expand **Resources** and click **Assignments**.
3. Select an assignment.
4. Click the **Codes** detail window.

Codes Detail Window of the Assignments Page

Overview

Use this detail window to assign codes to resource and role assignments. You can also view assigned project, activity, resource, and role codes when you select the relevant grouping band. The data you see in project, activity, resource, and role grouping bands is read only on this page.

Screen Elements

Assign... button.

Opens the Select Assignment Code dialog box. To see this button, you must select an assignment.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Delete: Deletes the selected item.

Codes detail window columns

Name field

The name of the code.

Value field

The alphanumeric or descriptive value of the code.

Description field

A description of the code or the code value.

Getting Here

1. Click **Navigation Menu**.
2. On the **Navigation Menu:**
   - Expand **Projects** and click **Assignments**.
   - Or expand **Resources** and click **Assignments**.
3. Select an assignment.
4. Click the **Codes** detail window.

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Codes Detail Window of the EPS Page

Overview

Use this detail window to assign codes to projects, edit a code value assignment, or remove a code assignment.

Screen Elements

Assign... button

Opens the Select Project Code dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Delete: Deletes the selected item.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Name field

The name of the code.

Value field

The value assigned to the selected project code. This field shows the hierarchy of the Code Value selected by showing each level of the hierarchy separated by dots.

> **Tip**
>
> If more than one project is selected, the detail window will not be visible.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select a project and click the **Codes** detail window.

Codes Detail Window of the Issues Page

Overview

Use this detail window to assign codes to issues, edit a code value assignment, or remove a code assignment. If you select a project grouping row, this detail window displays a read only list of the codes assigned to the project.

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Screen Elements

Assign... button

Opens the Select Issue Code dialog box. To see this button, select an issue.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Delete: Deletes the selected item.

No Actions Available: Indicates that the selected data item is read only.

Issue Code field

The name of the issue code.

Code Value field

The value of the assigned issue code.

Code Description field

The description provided for the code when it was created.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Issues**.
2. Click the **Codes** detail window.

Codes Detail Window of the Resources Tab of the Administration Page

Overview

Use this detail window to view and assign resource codes to the selected resource.

Screen Elements

Assign... button

Opens the Select Resource Code dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Delete: Deletes the selected item.

Name field

The name of the code.

Value field

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The resource code value assigned to the selected resource. This field shows the hierarchy of the Code Value selected by showing each level of the hierarchy separated by dots.

Description field

The description of the associated resource code.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab, click the **Codes** detail window.

Codes Detail Window of the Risks Page

Overview

Use this detail window to displays a read only list of the codes assigned to the project associated with the risk.

Screen Elements

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

No Actions Available: Indicates that the selected data item is read only.

Name field

The name of the code or code value.

Value field

The alphanumeric or descriptive value of the code.

Description field

The description provided for the code or code value when it was created.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Risks**.
2. Select a project grouping row and click the **Codes** detail window.

Codes Detail Window of the Roles Tab of the Administration Page

Overview

Use this detail window to view and assign role codes to the selected role.

Screen Elements

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Assign... button

Opens the Select Role Code dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Delete: Deletes the selected item.

Name field

The name of the code.

Value field

The role code value assigned to the selected role. This field shows the hierarchy of the code value selected by showing each level of the hierarchy separated by dots.

Description field

The description of the associated role code.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Roles**.
3. On the Roles tab, click the **Codes** detail window.

Codes Section of the Activity Form Page

Overview

Use this section to assign activity codes and edit and remove code assignments.

Screen Elements

Assign Activity Codes link

Opens a dialog box in which you can search for and select an activity code to assign.

Activity Code field

A code used to categorize activities.

An activity code can be designated as one of three types: Global, EPS, or Project. Global activity codes can be used in all projects within the enterprise. EPS activity codes can be used only in projects that belong to a specified EPS, including its subordinate EPS nodes, if any. Project activity codes can be used only in one project. The EPS or project that an activity code is associated with is specified when the code is created. Click an activity code to display the **Details** page for the activity code.

Code Value field

The alphanumeric or descriptive value of the activity code. This field shows the hierarchy of the Code Value selected by showing each level of the hierarchy separated by dots.

Description field

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A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand any portlet containing activities.
4. In the portlet, click an activity.
5. On the **Activity Form** page, expand the **Codes** section.

Codes Tab of the Import Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use this tab to use, demote, or remove codes and to rename codes and code values present in the XML file.

Screen Elements

Global Activity Codes and Values list

Determines how global activity codes and code values are imported. To see this list, select the Activity subject area in the Advanced section.

EPS Activity Codes and Values list

Determines how EPS specific activity codes and code values are imported. To see this list, select the Activity subject area in the Advanced section.

Project Codes and Values list

Determines how project codes and code values are imported. To see this list, select the Project subject area in the Advanced section.

Resource Codes and Values list

Determines how resource codes and code values are imported. To see this list, select the Resource subject area in the Advanced section.

Assignment Codes and Values list

Determines how assignment codes and code values are imported. To see this list, select the Assignment subject area in the Advanced section.

Role Codes and Values list

Determines how role codes and code values are imported. To see this list, select the Role subject area in the Advanced section.

Select Subject Area list

Determines the area of the product for which you want to define codes.

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Table area:

Name list

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 list

Displays the scope of an Activity Code.

Action list

Determines if the code is used, demoted, or removed.

Secure indicator

Indicates whether the code is a secure code. To see this column, you must be logged in as a user assigned the view secure codes privilege.

New Name field

The new name for the code and code values.

> **Tip**
>
> To understand how the import of secure codes is handled, see the *P6 EPPMImporting and Exporting Guide*.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click the **Actions** menu and select **Manage Import Templates** or **Import/Export Projects**.
3. In the **Import/ExportProjects** dialog box:
   a. Click the **Import** tab.
   b. Click the **Import Type** list and select **Primavera XML.**
   c. Click the **File** field and select a file to import.
   d. Click the **Manage Templates** button.
4. In the **Manage Primavera Templates** or **Manager Primavera XER and XML Templates** dialog box, click the name of a template.
5. In the **Primavera Template** or **Primavera XER and XML Template** dialog box, click the **Advanced** tab.
6. On the **Advanced** tab, click the **Codes** tab.

Columns Tab of the Customize Risks Portlet Dialog Box

Overview

Use this tab to configure the columns in the My Risks portlet on a dashboard.

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Screen Elements

Customize Columns area

Available columns or values

The list of all the available fields or values for the item you are configuring. If arranged in a hierarchy, click **Expand** to view the sub-items in the group.

Selected columns or values

The list of selected fields or values you want to appear in your customized list, table, view, scorecard, or other entity. The order of the items in the list from top to bottom corresponds to their order in the table from left to right.

Select Items (Ctrl+Shift+Right Arrow)

Adds the selected item or items from the available list to the selected list.

Deselect Items (Ctrl+Shift+Left Arrow)

Removes the selected item or items from the selected list.

Move Item Up

Advances the selected item up in the sequence (moves a table column to the left).

Move Item Down

Advances the selected item down in sequence (moves a table column to the right).

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Risks** portlet and click **Customize**.
4. In the **Customize Risks** dialog box, click the **Columns** tab.

Columns tab of the Customize View Dialog Box

Overview

Use this tab to modify the planning columns on the Planning page.

Screen Elements

Search

Enables you to perform a search based on the value you enter in the search bar.

Available Columns list

The list of columns available for display.

Select Items (Ctrl+Shift+Right Arrow)

Adds the selected item or items from the available list to the selected list.

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Deselect Items (Ctrl+Shift+Left Arrow)

Removes the selected item or items from the selected list.

Selected Columns list

The columns you selected from the Available Columns list. Double-click a column in the Selected Columns list to remove it from the list. If the view includes pinned columns, they are listed first and separated from the other columns in the list.

Move Item Up

Advances the selected item up in the sequence (moves a table column to the left).

Move Item Down

Advances the selected item down in sequence (moves a table column to the right).

Getting Here

1. Click **Customize View**.
2. In the Customize View dialog box, click **Columns**.

Columns tab of the Manage Views Dialog Box of the Activities Page, EPS Page or Assignments Page

Overview

Use this tab to modify the columns in the grid view.

Screen Elements

Search

Enables you to perform a search based on the value you enter in the search bar.

Available Columns list

The list of columns available for display.

Add column to Selected Columns (Ctrl + Shift + Right Arrow)

Adds the selected item or items from the available list to the selected list.

Remove column from Selected Columns (Ctrl + Shift + Left Arrow)

Removes the selected item or items from the selected list.

Selected Columns list

The columns you selected from the Available Columns list. Double-click a column in the Selected Columns list to remove it from the list. If the view includes pinned columns, they are listed first and separated from the other columns in the list.

Advances the selected item up in the sequence (moves a table column to the left).

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Advances the selected item down in sequence (moves a table column to the right).

Show Discussion Indicator option

Determines whether to show the discussion indicator column in the view.

Highlight Read-only cells option

Determines whether cells that cannot be edited will be greyed out in the view.

Getting Here

1. Click **Navigation Menu**
2. On the **Navigation Menu**, either:
   - Expand **Projects** and click **Activities** or **EPS**.
   - Expand **Resources** and click **Assignments**.
3. Click the **Views** menu and select **Manage Views...**.
4. In the **Manage Views** dialog box, click **Columns**.

Communication Center Portlet of the Dashboards Page

Overview

Use this portlet to share data and communicate with other P6 users who are associated with a project, including the project owner. All projects you are associated with are listed in the portlet; you can select to communicate with all of a project's team members or with members you select.

Screen Elements

Name field

The project name and the user's Personal Name or Resource Name for Project Team Members.

Office Phone field

The office phone number for the resource.

Project association field

The team member's association with the project.

Send an email link

Sends an email to the resource team.

The link displays a dialog box that displays the email address(es) of the selected team members and allows for you to enter alternate email addresses in the Cc field.

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Tip

- The "No information is available" message displays in this portlet if no project teams or team members meet the filtering criteria specified for a dashboard.
- Click a project name link to open its activities page.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Communication Center** portlet.

Configuration Tab of the Eventing Page

Overview

Use this page to configure the business objects and special operations which trigger events (on premises only). Refer to the *P6 EPPM Business Object Events Guide* for additional information.

Screen Elements

Business Objects page.

Business Object field

The name of the business object to be used for eventing.

Create option

Determines whether to trigger an event when business objects are created.

Update option

Determines whether to trigger an event when business objects are updated.

Special Operations page.

Operation field

The name of the operation to be used for eventing.

Enabled option

Determines whether to trigger an event when a special operation is performed.

Getting Here

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Eventing**.
3. Click the **Configuration** tab.

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Content Tab of the Customize Dashboard Page

Overview

Use this tab to configure which portlets display on the dashboard. What information the portlets contain is also defined on this tab.

Screen Elements

Click one of the links below for detailed screen definitions.

- General Section of the Content Tab of the Customize Dashboard Page
- Portfolio Views Section of the Content Tab of the Customize Dashboard Page
- Project Performance Section of the Content Tab of the Customize Dashboard Page
- Resources Section of the Content Tab of the Customize Dashboard Page
- Personal Information Section of the Content Tab of the Customize Dashboard Page
- Custom Portlets Section of the Content Tab of the Customize Dashboard Page

Tip

- You cannot customize a multi-user dashboard created by another user.
- The options that display in the **General** section of the **Content** tab are dependent on the user access settings you specify on the **Access** tab; therefore, if you need to change settings on both the **Content** and **Access** tabs, you should change the **Access** tab first.
- By default, you can select up to 12 portlets on a single dashboard.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, click **Customize**.
4. On the **Dashboard Details** page, click the **Content** tab.

Content Tab of the User Interface View Details Page

Overview

Use this tab to configure the menu items, pages, and dashboards users of the current user interface view are permitted to view.

Screen Elements

Name field

The unique name for the user interface view.

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The naming scheme you choose for user interface views might reflect the roles or permissions of their intended users. For example, *Intern*, *Associate*, *Project Staff*, *Manager*, and *Executive* are all possible user interface view names in a series offering distinct but sometimes overlapping access to menus and pages.

Start Page field

The page which will show first when a user logs in.

Date Created

The date the user interface view was created.

Dashboards section

Enables you to customize which functions you can access from the **Dashboards** menu.

Move Up button

Moves the selected item one level higher in the list.

Move Down button

Moves the selected item one level lower in the list.

Context menu

Assign: Enables you to assign a dashboard to the view.

Remove: Enables you to remove a dashboard from the view.

Selected / Unselected option

Enables you to select or clear the selection of an item in a list.

Menu Items options

Determines which functions you can access under the **Dashboards** menu. By selecting the Menu Items option, you can access all menu items.

Manage Dashboards: Enables you to access the Manage Dashboards page where you can create, customize, assign, and delete dashboards.

Displayed Dashboards option

Lists the dashboards you can access, based on what your P6 administrator assigned to you.

Portfolios section

Enables you to customize which functions you can access from the **Portfolios** menu and which pages you can access within the Portfolios section.

Move Up button

Moves the selected item one level higher in the list.

Move Down button

Moves the selected item one level lower in the list.

Selected / Unselected option

Enables you to select or clear the selection of an item in a list.

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Menu Items options

Determines which functions you can access from the **Portfolios** menu. By selecting the Menu Items option, you can access all menu items.

Open Portfolio: Enables you to open a group of projects by EPS, code, or portfolio.

Manage Portfolios: Enables you to review the list of projects in each portfolio, and to create, modify, and delete portfolios.

Manage Portfolio Views: Enables you to create, modify, and delete portfolio views. A portfolio view is a scorecard or chart providing high-level information spanning an entire group of projects.

Pages options

Determines which pages display on the Portfolios navigation bar. If you select the Pages option, you can access all pages.

Portfolio Analysis: Use this page to analyze portfolio data, conduct side-by-side comparisons of two project groups, and apply waterline analysis techniques to assist with executive-level critical decision making.

Capacity Planning: Use this page to analyze role allocation and cost over time.

Performance Status: Use this page to display summarized schedule and cost or labor unit data based on the performance metric you select.

Projects section

Enables you to customize which functions you can access from the **Projects** menu and which pages you can access within the Projects section.

Move Up button

Moves the selected item one level higher in the list.

Move Down button

Moves the selected item one level lower in the list.

Selected / Unselected option

Enables you to select or clear the selection of an item in a list.

Menu Items options

Determines which functions you can access from the **Projects** menu. By selecting the Menu Items option, you can access all menu items.

Open Projects: Enables you to open projects by EPS, project code, or portfolio.

Pages options

Determines which pages are available on the Projects navigation bar. If you select the Pages option, you can access all pages.

EPS: Use this page to manage the Enterprise Project Structure (EPS) and its projects. The EPS page displays schedules for any single project or group of projects you choose with detail windows, a Gantt chart, and a table.

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Activities: Use this page as your central project management tool for all project activities and their associated details. This includes all WBS elements, activities, steps, issues, notebooks, resource assignments, risks, and other details.

Team Usage: Use this page to view cost or usage data at the team level and for individual roles and resources assigned to the project you are working with.

Assignments: Use this page to view and modify resource assignment data using filters, which enables you to view resource assignment data for only the resources or projects that you need to view.

Issues: Use this page to view a list of all the issues for the currently open projects or portfolios.

Documents:

With a content repository enabled: Use this page to view, check in, check out, and download selected documents from one or more projects, associate additional items with a selected document, and compare documents across projects.

Without a content repository enabled: Use this page to view document details and send email about a document. This page also enables you to associate an activity, WBS, issue, or another document with a document and edit document information.

Risks: Use this page to add, modify, or delete project risks.

View field

The view that will be used by default when a user assigned to the User Interface View opens the associated page.

Resources section

Enables you to customize which functions you can access from the Resources menu and which pages you can access within the Resources section.

Move Up button

Moves the selected item one level higher in the list.

Move Down button

Moves the selected item one level lower in the list.

Selected / Unselected option

Enables you to select or clear the selection of an item in a list.

Pages options

Determines which pages are available on the Resources navigation bar. If you select the Pages option, you can access all pages.

Administration: Use this page to create, modify, and delete resources, resource teams, roles, and role teams.

Planning: Use this page to specify, review, or modify project-level and WBS-level allocation data for individual resources and roles across a project life cycle.

Assignments: Use this page to view and modify resource assignment data using filters, which enables you to view resource assignment data for only the resources or projects that you need to view.

Analysis: Use this page to compare resource utilization between resource teams, role teams, resources, and roles all from one central location.

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View field

The view that will be used by default when a user assigned to the User Interface View opens the associated page.

Approvals section

Enables you to customize which approvals pages you see.

Move Up button

Moves the selected item one level higher in the list.

Move Down button

Moves the selected item one level lower in the list.

Selected / Unselected option

Enables you to select or clear the selection of an item in a list.

Pages options

Determines which pages are available on the Approvals navigation bar. If you select the Pages option, you can access all pages.

Status Updates: Use this page to review updates your team members made to their assigned tasks. From this dialog you can modify the data, approve status updates, or place a hold on a status update to reconcile at a later time.

Timesheets: Use this page to process timesheets. This includes approving or rejecting timesheets, notifying resources about timesheet status, adding timesheet notes, and determining if a resource has not started or has not submitted a timesheet. If you are a timesheet approval manager, you can assign delegates to act in your place when you are not available.

Administration section

Enables you to customize which administration functions you can access.

Move Up button

Moves the selected item one level higher in the list.

Move Down button

Moves the selected item one level lower in the list.

Selected / Unselected option

Enables you to select or clear the selection of an item in a list.

Menu Items options

Determines which Administration items you can access. By selecting the Menu Items option, you can access all menu items.

Application Settings: Enables your organization to define a series of application-wide parameters and values that apply globally and to set defaults and settings that affect how the application behaves. For example, configure general application settings including calendar and activity duration defaults, URLs for related applications, summarization time periods (also used to store past period performance actuals), and also enable the optional password policy setting.

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Enterprise Data: Enables you to define series of application-wide data that apply to all projects. For example, you can set global data, such as currencies and financial periods; project data, such as baseline types and funding sources; activity data, such as activity codes and step templates; resource data, such as rate types and units of measure; risk data, such as risk categories and scoring matrices; issue data, such as issue codes and UDFs; and document data, such as document categories and statuses.

Scheduled Services:

Global Scheduled Services: Enables you to create and configure services to publish global data to use in reporting, including enterprise data, enterprise summary data, resource management data, security data, and audit data.

Project Scheduled Services: Enables you to create and configure services to schedule routine recurring project management jobs, including apply actuals, export, import, level, schedule, sumnarize, and send to schedule sheet.

User Administration: Enables you to create user accounts, assign access, manage the organizational breakdown structure (OBS) and configure profiles.

User Interface Views: Enables you to create pre-configured sets of options you assign to users so their view of Dashboards, Portfolios, Projects, Resources, and Administration is optimized for their role. User interface views permit visibility to features essential for a user's role while hiding functionality that is not applicable.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Interface Views**.
2. On the **User Interface Views** page, click **Content**.

Cookies Policy P6

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Copy Activity Options Dialog Box of the Activities Page

Overview

Use this dialog box to select the activity data that will be copied along with the activities.

Screen Elements

Resource and Role Assignments option

Determines whether or not to copy resources and role assignment data.

Assignment Codes option

Determines whether or not to copy assignment code data.

Secure Assignment Codes option

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Determines whether to make copies of secure codes assigned to assignments. You must be signed in as a user with privileges to view and edit secure codes for both the source and destination to be able to copy secure codes.

Relationships option

Determines whether to copy relationship data.

Only between copied Activities option

Determines whether to copy relationship data for only the activities being copied. If you select this option, relationships to activities you are not copying will not be included.

Expenses option

Determines whether to copy expense data. This option is only visible if you are copying a project or template.

Activity Codes option

Determines whether to copy activity code data.

If selected, global and project activity codes are copied. EPS activity codes are only copied if the data is pasted within the same EPS node as the data you copied.

Secure Activity Codes option

Determines whether to copy secure activity code data. You must be signed in as a user with privileges to view and edit secure codes for both the source and destination to be able to copy secure codes.

Notebook Items option

Determines whether to copy notebook data.

Steps option

Determines whether to copy step data to the project or template.

Financial Period Data option

Determines whether to copy financial period data to the project.

WP and Docs option

Determines whether to copy Work Product and Document data to the project. This option is only visible if you are copying a project or template.

Risks option

Determines whether to copy risk data. This option is only available if you are copying a project or WBS.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
    a. Select the activities to copy, click **Context** and select **Copy**.
    b. Select a project or WBS node to paste the activities into, click **Context** and select **Paste**.

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Copy Project Options Dialog Box of the EPS Page or Copy WBS Options Dialog Box of the Activities Page

Overview

Use this dialog box to select the project or WBS data that will be copied along with the project, WBS or template.

Screen Elements

Project & WBS Data or **WBS Data** options:

Documents option

Determines whether to copy document data.

Funding Sources option

Determines whether to copy funding source data. This option is only visible if you are copying a project or template.

Issues option

Determines whether to copy issue data. This option is only visible if you are copying a project or WBS.

Risks option

Determines whether to copy risk data. This option is only available if you are copying a project or WBS.

Activities option

Determines whether to copy activity data.

Notebooks option

Determines whether to copy project notebook data.

WBS Milestones option

Determines whether to copy WBS milestone data.**High Level Resource Planning Assignments** option

Determines whether to copy high-level (project and WBS-level) resource planning assignments.

Reports option

Determines whether to copy report data. This option is only visible if you are copying a project or template.

Summary Data option

Determines whether to copy summary data. This option is only visible if you are copying a project or template.

Project Codes option

Determines whether to copy project codes. This option is only visible if you are copying a project or WBS.

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Secure Project Codes option

Determines whether to copy secure project codes. This option is only visible if you are copying a project or WBS. You must be signed in as a user with privileges to view and edit secure codes for both the source and destination to be able to copy secure codes.

Activity Data options:

Activity Codes option

Determines whether to copy activity code data.

If selected, global and project activity codes are copied. EPS activity codes are only copied if the data is pasted within the same EPS node as the data you copied.

Secure Activity Codes option

Determines whether to copy secure activity code data. You must be signed in as a user with privileges to view and edit secure codes for both the source and destination to be able to copy secure codes.

Copy EPS codes at project level option

Determines whether to make copies of EPS codes assigned to activities in the WBS as project-specific activity codes if you are copying the WBS to an EPS that does not have access to the EPS code. This option is only visible if you are copying a WBS.

Expenses option

Determines whether to copy expense data. This option is only visible if you are copying a project or template.

Notebook Items option

Determines whether to copy notebook data.

Relationships option

Determines whether to copy relationship data.

Only between copied Activities option

Determines whether to copy relationship data for only the activities being copied. If you select this option, relationships to activities you are not copying will not be included.

Resource and Role Assignments option

Determines whether or not to copy resources and role assignment data.

Assignment Codes option

Determines whether or not to copy assignment code data.

Secure Assignment Codes option

Determines whether to make copies of secure codes assigned to assignments. You must be signed in as a user with privileges to view and edit secure codes for both the source and destination to be able to copy secure codes.

Steps option

Determines whether to copy step data to the project or template.

Financial Period Data option

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Determines whether to copy financial period data to the project.

Risks option

Determines whether to copy risk data. This option is only available if you are copying a project or WBS.

WP and Docs option

Determines whether to copy Work Product and Document data to the project. This option is only visible if you are copying a project or template.

Baselines options:

Select the **Include** option for each baseline with data that you want to copy to the project. This option is only visible if you are copying a project or template.

Enable publication for copied projects option

Determines whether to enable the Enable Publication option for the pasted copies of the projects. This option is only visible if you are copying a project or template.

Tip

- You can copy multiple projects or WBS elements, or a single EPS element. You cannot copy multiple EPS elements.
- You cannot copy and paste a project unless you have the privilege to view costs for a project.
- When you copy and paste some types of data, including when you copy multiple WBS nodes, or when you copy a project, the new data might not appear immediately. The process runs as a background service and you will see a notification once it has completed.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **EPS** page:
   a. Select the project or template to copy, click **Context** and select **Copy**.
   b. Select an EPS node to paste the project or template into, click **Context** and select **Paste**.
3. On the **Activites** page:
   a. Select the WBS to copy, click **Context** and select **Copy**.
   b. Select a project or WBS node to past the WBS into, click **Context** and select **Paste**.

Copy User Settings Dialog Box

Overview

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Use this dialog box to copy user settings from one user to other users. The copied settings include global and project security profiles, module access, OBS access, resource access and User Interface View access.

Screen Elements

Copy settings from field

The user whose settings you want to copy.

Select setting types to copy field

Enables you to select the settings to copy.

Module Access: Select this option to copy the list of modules to which the user has access on the Module Access tab of the Users page.

Resource Access: Select this option to copy the list of resources to which the user has access on the Resource Access tab of the Users page.

User Interface Views: Select this option to copy the list of User Interface Views to which the user has access in the User Interface Views column of the Users page.

Global Security Profile: Select this option to copy the Global Security Profile assignment for the user.

Project Access: Select this option to copy the list of Responsible Manager and Project Security Profile pairings to which the user has access on the Project Access tab of the Users page.

P6 User Preferences: Select this option to copy all the settings of the My Preferences page in P6 and the User Preferences dialog box in P6 Professional.

> **Note**
>
> Most of the preferences settings are common to both P6 and P6 Professional, however there are a few settings for each application that are not common. Settings specific to one application or the other are not copied when you copy user preferences.

Select the users you want to update

Searches the view for data matching the criteria entered into the box. The list of users is automatically filtered as you type.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

Selected / Unselected option

Enables you to select or clear the selection of an item in a list.

Login Name field

The login name for the user.

Personal Name field

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The personal name for the user. This name might be a nickname, full name, reference to a role or department, or include any information recognized by your organization to identify the user.

Email field

The Email address for the user.

Phone field

The telephone number for the user.

Global Security Profile field

Determines the user's access to application-wide information. The global security profile provides read-only access to all global data except cost and resource data. Privileges can be added to global security profiles to allow users to add, edit, and delete global data, and view global cost data.

Module Access field

The modules assigned to the user.

Project Access field

The OBS level that determines the projects a user is allowed to access.

Resource Access field

The resource access for the user.

The resource may have access to all resources, up to five selected resources, or no resources. This field is blank if the user does not have access to a resource.

User Interface View field

The list of user interface views to which the user has access.

Download link

Enables you to download the currently displayed data as a Microsoft Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all columns are downloaded.

Restrict users from editing preferences option

Select to prevent users to whom the User Settings are copied from changing their user preferences.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. Click the **Actions** menu and select **Copy User Settings**.

Copy/Paste Project/Template Log dialog box

Overview

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Use this log to view details for a Copy/Paste Project service. If you copy several projects or an EPS node containing several projects, you will not see a separate log for each project. The software copies all the projects simultaneously and produces one log to cover them all.

Screen Elements

Copy Activities field

Shows whether the project's activities were copied successfully by the service.

Copy Activity Code Assignments field

Shows whether assignments for the project's activity codes were copied successfully by the service.

Copy Activity Codes field

Shows whether the activity code associated with activities in the project were copied successfully by the service.

Copy Activity Costs field

Shows whether expenses assigned to the project's activities were copied successfully by the service.

Copy Activity Documents field

Shows whether Work Products and Documents associated with the project's activities were copied successfully by the service.

Copy Activity Memos field

Shows whether the memo items associated with activities in the project were copied successfully by the service.

Copy Activity Notes field

Shows whether notes associated with the project's activities were copied successfully by the service.

Copy Activity Relationship Summary field

Shows whether the summary data associated with the relationships between the project's activities was copied successfully by the service.

Copy Activity Relationships field

Shows whether the relationships between the project's activities, including relationships with activities in other projects, were copied successfully by the service.

Copy Activity Resource Financials field

Shows whether financial information associated with the project's activities was copied successfully by the service.

Copy Activity Resource Summary field

Shows whether the summary data for the project's activities' resource assignments was copied successfully by the service.

Copy Activity Steps field

Shows whether the project's activities' steps were copied successfully by the service.

Copy Activity Summary field

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Shows whether summary data for the project's activities was copied successfully by the service.

Copy Activity Users field

Shows whether the project's activities' users were copied successfully by the service.

Copy Assignments field

Shows whether the project's resource and role assignments were copied successfully by the service.

Copy Budget Change field

Shows whether the project's budget change was copied successfully by the service.

Copy EPS Activity Codes field

Shows whether the EPS-specific activity codes associated with activities in the project were copied successfully by the service.

Copy Project field

Shows whether the new project was created successfully by the service.

Copy Project Calendar field

Shows whether the project's calendar was copied successfully by the service.

Copy Project Codes field

Shows whether the Project Codes assigned to the project were copied successfully by the service.

Copy Project Forms field

Shows whether project forms were copied successfully by the service.

Copy Project Funds field

Shows whether the project funds were copied successfully by the service.

Copy Project Issues field

Shows whether the issues associated with the project were copied successfully by the service.

Copy Project Issues History field

Shows whether history of issues associated with the project were copied successfully by the service.

Copy Project Properties field

Shows whether the project's properties were copied successfully by the service.

Copy Project Risks field

Shows whether the project's risks were copied successfully by the service.

Copy Project Thresholds field

Shows whether the project's thresholds were copied successfully by the service.

Copy Project-specific Activity Codes field

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Shows whether the project-specific activity codes associated with the project were copied successfully by the service.

Copy Reports field

Shows whether the project's reports were copied successfully by the service.

Copy Risk Mitigations field

Shows whether the project's risk mitigations were copied successfully by the service.

Copy Risk Responses field

Shows whether the project's risk responses were copied successfully by the service.

Copy UDF Values field

Shows whether the values for Project UDFs, WBS UDFs, Activity UDFs, Expense UDFs, Step UDFs, Assignment UDFs, and Issue UDFs were copied successfully. Resource UDFs, Risk UDFs, and Document UDFs are copied with their respective data items by the service.

Copy View Properties field

Shows whether the view properties were copied successfully by the service.

Copy WBS field

Shows whether the project's WBS structure was copied successfully by the service.

Copy WBS Budget field

Shows whether the budget information associated with the project's WBS elements was copied successfully by the service.

Copy WBS Memo field

Shows whether the memo items associated with the project's WBS elements were copied successfully by the service.

Copy WBS Resource Quantity field

Shows whether resource quantities assigned to the project's WBSes were copied successfully by the service.

Copy WBS Resources field

Shows whether resource assignments made at the WBS level in the project were copied successfully by the service.

Copy WBS steps field

Shows whether the project's WBS steps were copied successfully by the service.

Run on field

The date and time at which the service ran.

> **Tip**
>
> To view the Recalculate Assignment Costs log, you must first recalculate the assignment costs for a project.

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Getting Here

1. Click the **User** menu and select **View Service Status...**.
2. In the Service Status dialog box, select a Copy/Paste Project job and click **View Log**. The log will show details for the selected service.

Cost Accounts Page

Overview

Use this page to add and configure cost accounts.

Screen Elements

Add menu

Add: Creates a category.

Add Child: Creates a subcategory, subordinate to the selected category.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Actions menu

Analyze Usage Data: Opens the Display Usage Data dialog box.

Delete All Candidates: Deletes the selected enterprise data items permanently.

Expand All button

Enables you to see all of the items in the hierarchical list or grouped view.

Collapse All button

Enables you to hide subordinate items in the hierarchical list or grouped view.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Add Child: Creates a new item, subordinate to the selected item.

Delete: Removes the selected items permanently.

Cut: Cuts the selected item.

Copy: Copies the selected item.

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Paste: Pastes a previously cut or copied item into the selected position.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Move Right: Moves the selected item one level lower in the hierarchical arrangement.

Move Left: Moves the selected item one level higher in the hierarchical arrangement.

Expand: Enables you to expand and view all of the items in a hierarchical list.

Collapse: Enables you to collapse and hide subordinate items in a hierarchical list.[Added for PSIX-353523]

ID field

The identifier of the cost account.

Name field

The name you assign to the cost account. Cost accounts are established in a hierarchy.

Description field

The description of each corresponding cost account.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

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Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

> **Tip**
>
> - By clicking ID, Name, or Description, the fields can be arranged in an ascending, descending, or the standard order of creation for each.
> - The project count includes assignments to projects, expenses, and assignments.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the Enterprise Data page, expand **Activities** and click **Cost Accounts**.

Create Portfolio View/Portfolio View Details Page

Overview

Use this page to create a portfolio view, or modify details about an existing portfolio view. You can specify the type of project information you want to display in the view, and choose who can access it.

Screen Elements

The screen elements you see on the page will change based on the type of view you select.

Title field

The name of the portfolio view. The title can contain up to 255 characters, and it does not have to be unique.

A visual indicator appears before the title to help you identify the type of view and determine whether it is available to just you or shared globally by all users. For example, you might see the user histogram icon for a personal histogram called *Spending for My Projects*, and the global histogram icon for a shared histogram called *Spending for All Projects*.

Type

The type of chart to be displayed.

If you change the type to **Scorecard**, the information that displays on the page changes so you can input scorecard details.

X-Axis

The data field represented in the X-axis of the chart.

This field is not displayed for a pie chart.

Y-Axis

The data field represented in the Y-axis of the chart.

This field is not displayed for a Pie chart.

Group By list

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The data field used to group projects in the chart. Grouping gathers, or groups, together all of the projects that contain the same value for the selected data field.

This field is not displayed for a Histogram.

Bubble Size list

Determines the size of bubbles that display in a Bubble chart.

Color Theme

The type of colors included in the chart: pastel or primary.

Show 3-D

Displays the chart in 3-D format. Clearing this option displays the chart in 2-D format.

Show horizontal gridlines option

Displays horizontal gridlines in the chart. This field is not displayed for a Pie chart.

Show vertical gridlines

Displays vertical gridlines in the chart. This field is not displayed for a Pie chart.

Show all values on axis, not just assigned values

Displays all values on the X axis and Y axis, even if there is no assigned value. For example, if you choose to display Project Status on the X axis, the X axis displays all types of Project Status (Active, Inactive, What-If), even if no projects are assigned to a status type. This option only applies when you choose to display project code or project status on the X or Y axis. This option is not displayed for a Pie chart.

Data list

The data field represented in a Pie chart.

Show pie data label

For each section of the Pie chart, displays the value for the customize option you select in the Data field. For example, if the data you choose to display in the Pie chart is Actual Cost, the chart displays the Actual Cost value next to each section of the Pie chart.

Show group by label option

For each section of the Pie chart, displays the value for the customize option you select in the Group By field. For example, if you choose to group the chart by Project, the chart displays the Project Name next to each section of the Pie chart.

Show percentage

Displays the percentage of each slice of the Pie chart.

Select user access to this view

Specify user access to the view. You can make the view available only to you (Current User) or for another user you select. If you have the required security privilege, you can make the view available to all users with module access to portfolio views, indicating it is a global portfolio view.

Select the custom columns to display area

Enables you to select the columns you want to display in the scorecard from a complete list of available fields or columns. The top to bottom order of the fields in the *Selected Columns* list

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determines how the columns will appear from left to right in the scorecard. You can also use this area to set the sort field and order.

The available list of columns is the same as the list of columns available on the **EPS** page with the following differences: the *Preferences* and *Publication* columns are not available in the scorecard; however, *User Defined (WBS)* columns are available on the scorecard but not on the **EPS** page.

Sort by

Use the Sort by list to specify how you want to sort all projects in the scorecard. If you choose to display a waterline on the scorecard, the fields you select to sort by in the Select waterline options section override your selection for this field.

Sort Order

From the Sort Order list, you can select to list projects in the scorecard in either ascending (e.g., A to Z) or descending (e.g., Z to A) order.

Show Project Requests option

Determines whether to analyze potential projects along with approved projects in the scorecard. If you select this option, only a limited number of columns will display values for the requested projects. If you choose to show requested projects, they will not be included in a scorecard if the page on which you are viewing the scorecard is filtered by a portfolio. Filter by code or EPS element instead to view project requests.

Select the fields to group by

Choose up to ten levels, or fields, by which you want to group projects in the scorecard. Grouping gathers, or groups, all of the projects together that contain the same value for the selected field. For example, if you select to group by Project Status, all projects with a Planned status are grouped together, all projects with an Active status are grouped together, all projects with an Inactive status are grouped together, and all projects with a What-if status are grouped together. Group by options are not available when you have a waterline displayed in the scorecard.

Select waterline options

Specify waterline options to help analyze projects in the scorecard. Waterlining ranks projects into two groups by sorting and applying a constraining limit. When you display a waterline, the projects in the scorecard are sorted into two separate groups based on the defined constraint limit and sort by options you specify. The projects above the waterline, displayed with a white background, are those that collectively meet the constraint limit value; all other projects, displayed with a light blue background, appear below the waterline.

Getting Here

1. On the **Navigation Menu**, expand **Portfolios** and select **Portfolio Analysis**.
2. Click **Create Portfolio View**.
3. In the **Create View** dialog box, select a new portfolio view from the list and select Select.

Currencies Page

Overview

Use this page to configure the monetary unit or base currency used to store cost data for all projects in the database. You can also add and configure monetary units on this page.

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Screen Elements

Add button

Enables you to create a new currency.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Customize View

Opens the Customize View dialog box.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Duplicate: Creates a new item as a copy of the selected item.

Fill Down: Copies the data from the first cell selected to all other selected cells in the same column. Use CTRL or SHIFT to select multiple cells.

ID field

The abbreviation (ID) for the currency.

Name field

The name chosen for the currency.

Currency Symbol field

The symbol used to define the currency.

Decimal Digits field

The number of decimal places the currency will show.

Decimal Symbol field

The symbol used for decimal places.

Digit Grouping Symbol list

The available options to group digits.

Exchange Rate field

The exchange rate between the selected currency and the base currency.

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Negative Format field

The format used to show the currency value as negative.

Positive Format field

The format used to show the currency value as positive.

To see the following columns, click Analyze Data Usage.

User Count field

The number of users currently using the corresponding data item. To see a list of the users using the corresponding data item, click the link.

Resource Count field

The number of resources currently using the corresponding data item. To see a list of the resources using the corresponding data item, click the link.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Currencies**.

Curve Definition Detail Window of the Resource Curves Page

Overview

Use this detail window to view and configure the graphical representation of the selected resource curve. Resource curves allow the user to specify the allocation of resources and costs 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 add a new curve, which is based on the default linear curve, or copy and modify one of the default resource curves or an existing global curve to create a custom global resource curve.

Screen Elements

Prorate button

Enables you to adjust values in the curve window proportionally to retain the curve's shape while making the bars equal to 100%. If the curve does not equal 100%, the curve will automatically prorate when you click save.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource Curves**.
3. On the **Resource Curves** page, click the **Curves Definition** detail window.

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Custom Field Mapping Tab of the MSP Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use this tab to customize field mappings for imports and exports.

Screen Elements

Select Subject Area list

Determines the area of the product for which you want to define custom field mappings.

P6 field list

The user defined field to map to the Microsoft Project field.

Microsoft Project field list

The field from Microsoft Project for which you can map to a user defined field in P6.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Import** or **Export** tab.
   a. On the **Import** tab:
      - In the **Import Type** list, select **Microsoft Project XML**.
      - On the **Import** tab, click **Browse** in the **File** field and select a Microsoft Project XML file to import.
      - Click **Manage Templates**.
   b. Or on the **Export** tab:
      - In the **Export Type** list, select a Microsoft Project XML file type to export.
      - Click **Manage Templates**.
4. In the **Manage Templates** dialog box, click a template.
5. In the **Modify Template** dialog box, click the **Custom Field Mapping** tab.

Custom Portlet of the Dashboards Page

Overview

Use this portlet as a convenient access point to frequently used web sites, intranets, and other online data.

Screen Elements

Title field

The name of the custom portlet.

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This title appears in the portlet's title bar on the dashboard to identify the custom portlet.

URL content

The content (strings, parameters, and syntax) associated with the URL you specified for this custom portlet. For example, to set up a custom portlet to a website, simply type its full web address:

```
http://www.hostname.domainsuffix
```

P6 also allows you to use special keywords in braces that are dynamically replaced with the data that corresponds to the currently logged in user, password, and open project. The order of the optional keywords does not matter.

- **{USER}**: the name of the logged in user
- **{USER_ID}**: the ID of the logged in user
- **{PASS}**: the password of the logged in user
- **{PROJ}**: the project name for the currently open project
- **{PROJ_ID}**: the project short name for the currently open project

For example, on a dashboard, a custom portlet URL may be specified as:

```
http://www.hostname?user={USER}&pass={PASS}&userid={USER_ID}
```

On a custom portlet URL for the currently open and selected project may be specified as:

```
http://www.hostname?
user={USER}&pass={PASS}&userid={USER_ID}&proj={PROJ}&projid={PROJ_ID}
```

> **Note**
>
> - On the Dashboard page, you can use the USER and USER_ID keywords.
> - Some Web sites do not allow their pages to be displayed within a portlet. If you specify a URL that has this restriction, the custom site will occupy the entire browser window and you will be unable to access P6. To recover, exit the browser and log in to P6 again appending the `?safemode=1` parameter to your P6 server URL in your browser's address bar as shown in the example below. After typing the safemode URL, press **Enter**, then click **Login**. When you log in using safe mode, the custom portlets are prevented from loading. Customize the dashboard to remove or revise the custom portlet URL. Then, log out to exit safe mode and log in again using your standard P6 server URL.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Custom** portlet.

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Custom Portlets Section of the Content Tab of the Customize Dashboard Page

Overview

Use this section to create and modify portlets that link out to URLs that you specify.

Screen Elements

Add link

Adds a new portlet ready for customization.

Custom Portlet option

Determines whether to display a customized portlet with a specific title and URL.

Title field

The name of the custom portlet.

This title appears in the portlet's title bar on the dashboard to identify the custom portlet.

URL content

The content (strings, parameters, and syntax) associated with the URL you specified for this custom portlet. For example, to set up a custom portlet to a website, simply type its full web address:

```
http://www.hostname.domainsuffix
```

P6 also allows you to use special keywords in braces that are dynamically replaced with the data that corresponds to the currently logged in user, password, and open project. The order of the optional keywords does not matter.

- **{USER}**: the name of the logged in user
- **{USER_ID}**: the ID of the logged in user
- **{PASS}**: the password of the logged in user
- **{PROJ}**: the project name for the currently open project
- **{PROJ_ID}**: the project short name for the currently open project

For example, on a dashboard, a custom portlet URL may be specified as:

```
http://www.hostname?user={USER}&pass={PASS}&userid={USER_ID}
```

On a custom portlet URL for the currently open and selected project may be specified as:

```
http://www.hostname?
user={USER}&pass={PASS}&userid={USER_ID}&proj={PROJ}&projid={PROJ_ID}
```

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, click the **Customize** button.

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4. On the Dashboard Details page, click the **Content** tab.
5. On the Content tab, expand the **Custom Portlets** section.

Customize Dashboard Page

Overview

Use this page to create a new dashboard, customize the selected dashboard for the current user, or to configure the selected shared dashboard for other users. This includes any of the following:

- Showing or hiding a portlet
- Setting a dashboard filter
- Designing the layout of portals
- Restoring default settings

Screen Elements

Content tab

See Content Tab of the Customize Dashboard Page.

Layout tab

See Layout Tab of the Customize Dashboard Page.

Access tab

See Access Tab of the Customize Dashboard Page.

Getting Here

From the **Manage Dashboards** page:

1. In the context selector, select **Dashboard** and then click **Manage Dashboards**.
2. On the **Manage Dashboards** page, expand **Displayed Dashboards** or **Available Dashboards** and select a dashboard.

From the **Dashboards** page:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, click **Customize**.

Customize Risks Dialog Box

Overview

Use this dialog box to customize the columns and filters applied to the My Risks or Project Risks portlets.

Screen Elements

Columns tab

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See Columns Tab of the Customize Risks Portlet Dialog Box.

Filter tab

See Filter Tab of the Customize Risks Dialog Box.

Tip

- You can customize the **My Risks** portlet for any dashboard you create.
- You cannot customize the portlet for multi-user dashboards created by another user, even if you have access to view the dashboard.
- For global dashboards, you must have the required security privileges to edit global dashboards to customize the portlet.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Risks** portlet and click **Customize**.

Customize Scorecard Columns Tab

Overview

The Columns Tab displays configurable options for modifying displayed columns in the scorecard view.

Screen Elements

Select the custom columns to display area

Configure the columns to display in the scorecard. See Selecting Items from a List of Available Items.

The available list of columns is the same as the list of columns available on the EPS page with the following differences: the Preferences and Publication columns are not available in the scorecard; however, User Defined (WBS) columns are available on the scorecard but not on the EPS page.

Sort by

Use the Sort by list to specify how you want to sort all projects in the scorecard. If you choose to display a waterline on the scorecard, the fields you select to sort by in the Select waterline options section override your selection for this field.

Sort Order list

Determines whether to display data in an ascending or descending order.

Show Project Requests option

Determines whether to display project requests.

Default button

Changes all fields to default settings.

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Getting Here

1. On the **Navigation Menu**, expand **Portfolios** and select **Portfolio Analysis**.
2. On the **Portfolio Analysis** page, in a scorecard click **Customize**.
3. In the **Customize View** dialog box, click the **Columns** tab.

Customize Scorecard Dialog Box

Overview

The Customize Scorecard Dialog Box displays configurable options for viewing portfolio data in a scorecard. Use the following fields to modify your scorecard view.

Screen Elements

Columns Tab

See Customize Scorecard Columns Tab.

Group Tab

See Customize Scorecard Group Tab.

Waterline Tab

See Customize Scorecard Waterline Tab.

Getting Here

1. On the **Navigation Menu**, expand **Portfolios** and select **Portfolio Analysis**.
2. On the **Portfolio Analysis** page, in a scorecard click **Customize**.

Customize View Dialog Box

Overview

Use this dialog box to configure the appearance and properties of your view.

> **Note**
>
> The view you are in determines which tabs are available.

Screen Elements

Columns tab

See: Columns tab of the Customize View Dialog Box

Filtering tab

See: Filtering tab of the Customize View Dialog Box

Grouping tab

See: Grouping tab of the Customize View Dialog Box

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Sorting tab

See: Sorting tab of the Customize View Dialog Box

Waterline tab

See: Waterline tab of the Customize View Dialog Box

Getting Here

1. Click **Customize View**.

Customize View Dialog Box of the Planning Page

Overview

Use this dialog box to modify the planning spreadsheet.

Screen Elements

Columns tab

See: Columns tab of the Customize View Dialog Box

Sorting tab

See: Sorting tab of the Customize View Dialog Box

Spreadsheet tab

See: Spreadsheet tab of the Customize View Dialog Box

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Planning**.
2. Click **Customize View**.

Customize View Dialog Box of the Steps Detail Window of the Step Templates Page

Overview

Use this tab to modify the columns in the step templates detail page.

Screen Elements

Search

Enables you to perform a search based on the value you enter in the search bar.

Available Columns list

The list of columns available for display.

Select Items (Ctrl+Shift+Right Arrow)

Adds the selected item or items from the available list to the selected list.

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Deselect Items (Ctrl+Shift+Left Arrow)

Removes the selected item or items from the selected list.

Selected Columns list

The columns you selected from the Available Columns list. Double-click a column in the Selected Columns list to remove it from the list. If the view includes pinned columns, they are listed first and separated from the other columns in the list.

Move Item Up

Advances the selected item up in the sequence (moves a table column to the left).

Move Item Down

Advances the selected item down in sequence (moves a table column to the right).

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Step Templates**.
3. On the **Step Templates** page, click the **Steps** detail window.
4. Click **Customize View**.

Customize View Dialog Box of the Team Usage Page or the Analysis page

Overview

Use this dialog box to configure spreadsheet or chart display and timescale.

Screen Elements

General tab

See: General tab of the Customize View Dialog Box of the Team Usage Page or the Analysis page

Spreadsheet tab

See: Spreadsheet tab of the Customize View Dialog Box of the Team Usage Page or the Analysis page

Chart tab

See: Chart tab of the Customize View Dialog Box of the Team Usage Page or the Analysis page

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Team Usage**.
2. Click **Customize View**.

Or:

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1. On the **Navigation Menu**, expand **Resources** and click **Analysis**.
2. Click **Customize View**.

Dangling Finish - Activities With Finish Dates That Do Not Drive Successors Section of the Schedule Check Report Dialog Box

Overview

Use this section 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.

Screen Elements

Project ID field

The unique identifying code of the project containing the activity which failed the check. Click this link to view the project.

Activity ID field

The unique identifying code for the activity which failed the check. Click this link to view the activity.

Activity Name field

The name of the listed activity. Click this link to view the activity.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
   a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Dangling Start - Activities With Start Dates That Are Not Driven by Predecessors Section of the Schedule Check Report Dialog Box

Overview

Use this section to identify activities with start dates that are not driven by the activity's 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.

Screen Elements

Project ID field

The unique identifying code of the project containing the activity which failed the check. Click this link to view the project.

Activity ID field

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The unique identifying code for the activity which failed the check. Click this link to view the activity.

Activity Name field

The name of the listed activity. Click this link to view the activity.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
   a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Dashboards Page

Overview

Use this page to view and work with dashboards where you can arrange portlets containing information about the portfolios, projects, resources, and activities specific to your needs. The information in dashboards is controlled by your module access, security settings, administrator configuration, user interface view settings, activity and project assignments, filtering criteria, and how you customize your content and layout.

> **Note**
>
> The **Dashboards** page displays dashboards available to you as defined in your user interface view. If you have no user interface view, the default **Personal Workspace** dashboard will appear when you first log into the application.

You can customize the Dashboards page to display user-defined (private), multi-user, and global dashboards. Each dashboard appears as a named tab on the Dashboards page.

> **Note**
>
> Some values on this page are calculated from published or summarized data. The publisher and summarizer services always use the project baseline for earned value calculations, regardless of the *Baseline to be used for earned value calculations* setting in each project's preferences. Therefore earned value data viewed on this page might differ from the same data viewed in areas of the software using live data. For further information see: Summarized, Published, and Live Data Usage in P6*Summarized, Published, and Live Data Usage in P6*

Screen Elements

Expand All link

Expands all portlets revealing the data inside each one.

Collapse All link

Collapses all portlets hiding their data and displaying only their title bars.

Customize link

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Click to customize the content, layout, and access of dashboards if you have the required security privilege.

Filter by field

The portfolio, project code, or project that the application uses to filter the dashboard. The portlets only display information that meets the selected filtering criteria.

All data displayed on a dashboard is filtered by the portfolio, project code value, or project. For example, the **Project Health** portlet only displays performance and schedule information for projects that meet the selected filtering criteria.

You can change the **Filter by** option for a private (user-defined) dashboard, and for any multi-user or global dashboard you create. For multi-user and global dashboards you have access rights to view, you can change the **Filter by** option only if the **Restrict users from changing dashboard filter** option is not selected on the **Customize Dashboard** page.

Note

- When you organize the Filter by dialog box by project code, you cannot select a project code; you must expand the project codes to display and select a project code value. Similarly, when you organize the Filter by dialog by project, you cannot select an EPS; you must expand the EPS nodes to display and select a project.
- You can only choose one portfolio, project code value, or project as the dashboard filter.

Tip

- You can display multiple dashboards on the **Dashboards** page. If there is not enough room to display all tabs on the page, a black triangular arrow ▶ appears after the last tab. Click it to view a list of dashboards and select one.
- You cannot modify multi-user dashboards created by another user, even if you have access rights to view the dashboard.

Getting Here

On the ☰ **Navigation Menu**, expand **Dashboard** and click a dashboard.

Data Limits Page

Overview

Use this page to specify maximum levels for hierarchical structures. You can also specify baseline and activity code maximums.

Screen Elements

Maximum Tree Levels section

Select a value for each of the following fields:

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EPS/WBS: Enter the maximum number of levels for the EPS and WBS hierarchies.

OBS: Enter the maximum number of levels for the OBS hierarchy.

Resource: Enter the maximum number of levels for Resources hierarchies.

Role: Enter the maximum number of levels for Role hierarchies.

Cost Account: Enter the maximum number of levels for Cost Account hierarchies.

Activity Code: Enter the maximum number of levels for Activity Code hierarchies.

Assignment Code: Enter the maximum number of levels for Assignment Code hierarchies.

Resource Code: Enter the maximum number of levels for Resource Code hierarchies.

Role Code: Enter the maximum number of levels for Role Code hierarchies.

Project Code: Enter the maximum number of levels for Project Code hierarchies.

Maximum Codes and Baselines section

Select a value for each of the following fields:

Activity Codes per Project: Enter the maximum number of activity codes allowable per project.

Baselines per Project: Enter the maximum number of baselines allowable per project.

Baselines copied with Project: Enter the maximum number of baselines to be copied per project.

Stored Images section

Select a value for each of the following fields:

Maximum Count: Enter the maximum number of images to store in the database.

Maximum Height: Enter the maximum allowable height for stored images (in pixels).

Maximum Width: Enter the maximum allowable width for stored images (in pixels).

Maximum Limit section

Select a value for each of the following fields:

Excel Import File Size (KB): Enter the maximum size (in KB) of the .xlsx or .csv file uploaded during import.

Filter Portfolio Stale Period: Enter a time period of inactivity that indicates a filtered portfolio should be refreshed when a user views the projects of a filtered portfolio in either a dashboard or portfolio view.

Loaded Resource/Role in Team Usage and Resource Analysis: Enter the maximum number of resources or roles that can open in the Team Usage and Resource Analysis views.

Portlets per Dashboard: Enter the maximum number of portlets that can be added to a dashboard on the Dashboards Home page. If this number is smaller than the existing number of portlets on some dashboards, you will not be able to add any more portlets to those dashboards until you remove some of the existing portlets from them.

Resource Chart Group Limit: Enter the maximum number of charts that are allowed while grouping the project in Resource Analysis views.

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Most Recently Used List Items: Enter the maximum number of items that can display in the lists of Projects and Portfolios that a user has used recently.

Financial Period Calendars: Enter the maximum number of financial period calendars that can be created.

Maximum Financial Periods, Portfolios and Views section

Select a value for each of the following fields:

Users for Shared View and Portfolio: Enter the maximum number of users that can be added to a shared view or portfolio in the Manage Portfolios dialog box or the Create Portfolios dialog box.

Projects per Portfolio View: Enter the maximum number of projects that can display in a portfolio view on the Portfolio Analysis tab and in Portfolio View portlets on dashboards.

Projects In Portfolio: Enter the maximum number of projects returned when creating a portfolio with a filter.

Activities per Activity View: Enter the maximum number of activities that can display in the Activities tab of the Projects section.

Financial Periods per Activity View: Enter the maximum number of financial periods that can display in the Activities tab of the Projects section.

Assignments per Assignment View: Enter the maximum number of assignments that can appear in an assignment view.

Assignments per Resource Planning View: Enter the maximum number of assignments that can appear in a resource planning view.

Maximum Loaded Resource Planning Projects: Enter the maximum number of projects to load when you navigate to or refresh the Resource Planning page.

EPS and Projects per EPS View: Enter the maximum number of EPS nodes and projects that can appear in an EPS view.

Rows per Audit View: Enter the maximum number of rows that can appear on the Audit panel.

> **Tip**
>
> If you change maximum hierarchy level settings, the new settings apply only when you add new elements or edit existing elements.

Getting Here

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Data Limits**.

Define Baselines Dialog Box of the Activities Page or EPS Page

Overview

Use this dialog box to manage project baselines.

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Screen Elements

Add

Adds a new baseline for the currently selected project.

Update Baseline button

Opens the Update Baseline dialog box.

Context menu

Add: Saves the current state of the project as a new baseline for the current project.

Delete: Deletes the selected baseline.

Duplicate: 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 Baseline: Opens the Update Baseline dialog box.

Convert existing project to baseline: Converts another project into a baseline of the current project.

Restore Baseline: Restores the selected baseline as a separate project that you can manually modify.

Publish Baseline: Publishes the selected baseline for reporting.

Expand: Expands the selected project to show the baselines assigned to the project.

Collapse: Collapses the selected project.

Baseline ID field

The unique identifier of the selected baseline.

Baseline Name field

The name of the selected baseline.

Baseline Type list

The baseline type; this can be used to categorize the baseline's purpose.

Data Date field

The progress point, or "as-of date", for activities in the project. Project status is up-to-date as of the data date. You can set the data date when you schedule the project or apply actuals, or you can set it manually. Set it manually if resources manually update activity progress and you do not plan to reschedule the project or apply actuals.

Project Baseline field

The project baseline for the selected project.

User's Primary Baseline field

The user's primary baseline for the selected project.

User's Secondary Baseline field

The user's secondary baseline for the selected project.

User's Tertiary Baseline field

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The user's tertiary baseline for the selected project.

Publish option

Determines whether to enable publishing baseline data for reporting.

Last Update Date field

The date that the baseline was last updated.

This field is blank for baselines that have not been updated.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** page, click the **Actions** menu and select **Define Baselines**.

Define Search And Replace Criteria step of the Global Search & Replace Wizard of the EPS Page

Overview

Use this step to define search and replace criteria for Global Search & Replace templates.

Screen Elements

Template Name

The name of the Global Search & Replace template.

Subject Area list

Enables you to select the subject area for the data you want to manipulate.

Define search criteria section

Match any/all of the following rules list

Determines whether the filter should match any or all rules.

Context menu

Add Above: Adds a new item to the list above the selected item.

Add Below: Adds a new item to the list below the selected item.

Add Filter Group Above: Adds a filter group above the selected item.

Add Filter Group Below: Adds a filter group below the selected item.

Delete: Deletes the selected item.

Move Left: Moves the selected item out of the current filter group.

Move Right: Moves the selected item into an existing filter group.

Move Into New Group: Creates a filter group below the selected item and moves the selected item into the new filter group.

Parameter list

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Determines what parameter will act as a variable in the filter statement.

Is field

Determines the logical relationship between the **Parameter** field and your entry in the associated **Value** field.

Value field

The specific entry criteria (a currency amount, number of units, code value, etc.) used to evaluate the associated field data in order to determine which data satisfies the filter and which data does not. This value completes the filter definition, <**Parameter** field><**Is** field><**Value** field>; for example, < `Original Budget> <is less than or equals> <500,000>`.

Add a Search/Replace condition link

Adds a line to the conditions list.

Define replace criteria section

Context menu

Add Above: Adds a new item to the list above the selected item.

Add Below: Adds a new item to the list below the selected item.

Delete: Deletes the selected item.

Parameter list

Determines what parameter will be replaced for data items which match the search criteria.

Is field

Determines the logical relationship between the **Parameter** field and your entry in the associated **Value** field.

Value field

The value to use when replacing data in the **Parameter** field for data items which match the search criteria. This value completes the replace definition, <**Parameter** field><**Is** field><**Value** field>.

Add a Search/Replace condition link

Adds a line to the conditions list.

Previous

Moves to the previous step in the wizard.

Save

Saves the Global Search and Replace template.

Apply button

Applies the selected template and opens the Review Changes page of the Global Search & Replace dialog box.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.

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2. On the EPS page, click the **Actions** menu and select **Global Search & Replace**.

Delete Notebook Topics dialog box

Overview

When you delete a notebook topic, you can choose whether to reassign existing descriptions associated with that topic to a different notebook topic.

Screen Elements

Append associated descriptions to

Allows existing descriptions associated with the notebook topic to be retained and appended to a different notebook topic that you select.

Delete notebook topic and associated descriptions

Deletes the notebook topic and all associated descriptions.

> **Note**
>
> You should choose this option only if you are confident that the notebook topic is redundant and that no useful data will be lost if the notebook and all its associated descriptions are deleted. Deleting a notebook topic cannot be undone.

> **Tip**
>
> Tips

When you delete a notebook topic, if you choose to append its associated descriptions to another notebook topic, descriptions with no text are ignored.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Notebook Topics**.
3. Hover over a notebook topic you want to delete and on the **Context** menu, select **Delete**.

Description Detail Window of the Reports Page

Overview

This detail window provides a read-only description for the currently selected report.

Screen Elements

Description field

The unique descriptive summary for this report.

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The report description is useful in distinguishing among reports with similar titles or to help users better understand the utility of the report within your organization.

Getting Here

1. On the **Navigation Menu**, select **Reports**.
2. On the **Reports** page:
   a. Select a report and click the **Description** detail window.

Or

1. Click the **Schedules** tab.
2. Select a report and click the **Description** detail window.

Description Tab of the Document Details Page (with content repository)

Overview

Use this tab to enter and format notes about the document.

Screen Elements

Style list

Select Normal or a type of Heading to apply to the structure of the selected text.

Font list

Select from a list of available fonts to apply to the selected text.

Bold

Applies the bold font style to the selected text.

Italic

Applies the italics font style to the selected text.

Underline

Applies the underline font style to the selected text.

Increase Font Size

Increases the font size of the selected text.

Decrease Font Size

Decreases the font size of the selected text.

Font Color

Changes the font color of the selected lines of text.

Background Color

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Enables you to customize the text color of the selected background or highlighting.

Align Left

Formats the selected lines of text to the left margin.

Align Center

Formats the selected lines of text to the center of the page.

Align Right

Aligns the selected text with the right margin of the page.

Create Hyperlink

Creates a hyperlink from the selected text.

Numbered List

Applies numbered list formatting to the selected text.

Bulleted List

Applies bulleted list formatting to the selected text.

View HTML Source button

Enables you to view the HTML source of the selected text.

Work area

Enter a description for the document.

> **Tip**
>
> The document you select and where you access it might change which tabs are visible.

Getting Here

From the Documents page:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab, select a document and click the **Description** tab.

From the Dashboards page:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the **Dashboard** tab, expand the **My Documents** portlet and click the **Private Documents** tab.
4. On the **Private Documents** tab, select a document and click **Edit Details**.

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5. In the **Document Details** dialog box, click the **Description** tab.

Description Tab of the Documents Details Page or Dialog Box (without content repository)

Overview

Use this tab to enter and format notes about the document.

Screen Elements

Font list

Select from a list of available fonts to apply to the selected text.

Bold

Applies the bold font style to the selected text.

Italic

Applies the italics font style to the selected text.

Underline

Applies the underline font style to the selected text.

Increase Font Size

Increases the font size of the selected text.

Decrease Font Size

Decreases the font size of the selected text.

Font Color

Changes the font color of the selected lines of text.

Background Color

Enables you to customize the text color of the selected background or highlighting.

Align Left

Formats the selected lines of text to the left margin.

Align Center

Formats the selected lines of text to the center of the page.

Align Right

Aligns the selected text with the right margin of the page.

Create Hyperlink

Creates a hyperlink from the selected text.

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Numbered List

Applies numbered list formatting to the selected text.

Bulleted List

Applies bulleted list formatting to the selected text.

View HTML Source button

Enables you to view the HTML source of the selected text.

Work area

Enter a description for the document.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page:
   a. Expand a project and select a document from the left pane.
   b. Click the **Description** tab.

Details Dock of the Timesheets Page

Overview

Use this dock to review the activities assigned to a resource on the currently selected timesheet. The activity data provided is designed to assist you in evaluating whether you should approve or reject the resource's timesheet.

Screen Elements

Activity Filter

Enables you to filter the Details dock to show only **Regular Activities**, only **Overhead Activities** or **All Activities**.

Group By List

Arranges similar values in a table or list into groups based on a selected field.

None: Organizes risk thresholds alphabetically without grouping them into categories.

Levels: Organizes risk thresholds into level categories.

Type: Organizes risk thresholds into type categories.

Customize View

Opens the Customize View dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Activity ID field

The unique identifying code for the activity to which the resource is assigned.

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Activity Name field

The name for the activity to which the resource is assigned.

Activity Status field

The current condition of the activity.

Valid values are **Not Started**, **In Progress**, and **Completed**.

Actual Overtime Units field

The actual overtime units worked by the resource on the activity.

This value is calculated from timesheets when project actuals are applied or can be entered directly by the project manager.

Actual Regular Units field

The actual non-overtime units worked by the resource on the activity.

This value is calculated from timesheets when project actuals are applied or can be entered directly by the project manager.

Approved Units field

The number of units already approved for this assignment. This is the total number of approved units for the assignment, regardless of whether those units have been applied to the activity using Apply Actuals.

Calculated as the sum of all actual regular units plus all overtime units for the assignment across all approved timesheets.

Auto Compute Actuals option

Determines whether the activity actual and remaining units, and start and finish dates for the resource are calculated automatically using the planned dates, planned units, and the activity's schedule percent complete.

If this option is selected, the actual/remaining units and actual dates are automatically updated when project actuals are applied. This assumes that all work by the resource proceeds according to plan.

This option is not available if the **Uses Timesheets** option is selected.

Discussion

Opens the Discussion dialog box.

email Address field

The email address for the resource.

Employee ID field

The resource identifier within the organization, typically the employee number or social security number.

Office Phone field

The office phone number for the resource.

Other Phone field

The alternate phone numbers for the resource.

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Overtime Factor field

The overtime factor used to compute the overtime price for the resource. The default overtime factor is 1.5.

Calculated as **Standard Price** multiplied by **Overtime Factor**.

Pend Remaining Units field

The estimate of the resource's remaining units on this activity.

The Pend Remaining Units value is entered by each resource using timesheets. This value is copied to the resource's remaining units for the activity when project actuals are applied. The project manager specifies whether resources update their percent complete or remaining units for each project.

Pending % Complete field

The estimate of the percentage of the resource's units of work completed on this activity.

The pending percent complete is entered by each resource using timesheets. This value is used to compute the resource's remaining units for the activity when project actuals are applied. The project manager specifies whether resources update their percent complete or remaining units for each project.

Planned Units field

The planned units for the assignment.

Price/Unit field

The non-overtime price per time for the resource or role's work on this activity.

This price is used to compute costs for any activities to which the resource or role is assigned. When the resource or role is assigned to the activity, the relevant price is copied to the assignment based on the effective date of the price and the activity start date. The price is refreshed whenever resource and role prices are synchronized for the project.

Project ID field

The unique identifying code for the project.

Project Name field

The name of the project.

Rate Source field

The value that indicates which price/unit will be used to calculate costs for the assignment, such as *Resource*, *Role*, and *Override*.

When a resource, and only a resource, is assigned to an activity assignment, the rate source will automatically equal *Resource*. When a role, and only a role, is assigned to an activity assignment, the rate source will automatically equal *Role*. When both a resource and role are assigned to the activity assignment, the rate source can be either *Resource* or *Role* determined by your rate source preference. In any case, the *Override* value allows you to specify a different value for Price/Unit.

The default rate source preference can be changed on the **My Preferences** page under **Resource Assignments**.

Rate Type list

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Determines which of the five user-defined resource and role rate types will be used to calculate the cost for the assignment.

Remaining Units field

The remaining units of work to be performed by the resource on the activity.

Calculated as **Planned Units** minus **Actual Units**.

Resource ID field

The unique identifier for the resource.

Resource ID Name field

The unique identifier and name of the resource.

Resource Name field

The name of the resource assigned to the activity.

Role ID field

The unique identifier of the associated role.

Role ID Name field

The identifying code and name of the role.

Role Name field

The name of the role assigned to the activity.

Status field

The current state of the timesheet.

WBS Code field

The unique identifier of the WBS for the associated activity.

WBS Name field

The name of the WBS element.

Timesheet Activity Hours splitter bar

An adjustable bar you can drag to customize your view of two sets of data dividing or "splitting" a table. Drag the bar to the right to view more timesheet activity data and drag the bar to the left to view more of the timesheet hours table showing the hours reported for each activity.

Timesheet Hours table

A table consisting of rows for each activity and columns for each day in the timesheet period. Each cell in the table shows the hours reported for the activity for a particular day.

Total field

The total number of hours reported per day for the currently displayed activities. Red text indicates variance units are negative.

Variance Units field

The difference between the planned units and the approved units for the assignment. A negative number in this field indicates that more units have been approved for this assignment than were planned.

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Calculated as planned units minus approved units.

Getting Here

1. On the **Navigation Menu**, expand **Approvals** and click **Timesheets**.
2. Select **Expand Dock**.

Discussion Detail Window of the Activities Page

Overview

Use the Discussion detail window to have conversations with members of your project team about an activity. You can ask questions, respond to questions, and post general information about the activity. If you have the relevant privilege, you can also delete comments from the conversation if they are no longer relevant. The conversation is saved with the activity, allowing you to refer back to the conversation at a later time.

You can also use the Discussion detail window to communicate with your team members who are using P6 Team Member Web, P6 for Android, or P6 for iOS.

Screen Elements

Add button

Adds an item to the table.

Show list

Determines how the messages are displayed.

All: Displays all messages to and from the project manager and team members.

Sent: Displays only the messages sent by you.

Received: Displays only the messages sent from other users, those using P6 Team Member Web, P6 for Android, P6 for iOS, or P6.

Sort list

Determines the order in which the messages are displayed. You can sort by newest to oldest or oldest to newest.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Delete: Deletes the selected item.

Name field

The name of the user who entered the discussion comment.

Discussion Comment field

Displays message about the activity. Anyone with access to the project can view these comments.

New Comment field

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Enter your message into the text box.

Post button

Adds your message to the Comments field.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **Discussion** detail window.

Display Format Section of Global Tab of the My Preferences Page

Overview

Use this section to specify a currency, date, time, duration, time units and units/time settings to be used throughout the application.

> **Note**
>
> P6 calculates and stores time unit values in hourly increments. When you specify a display time increment other than hours, P6 uses the Hours per Time Period or the assigned calendar to convert hours to the time increment you specify. The **Use assigned calendar to specify the number of work hours for each time period** option on the Time Periods page of the Application Settings pane in P6 determines whether the Hours per Time Period or the assigned calendar is used.

Screen Elements

Currency field

The preferred currency for viewing monetary values.

For example, US Dollars or Japanese Yen.

Show decimal places option

Determines whether to display decimal places.

Show currency symbol option

Determines whether to display the chosen currency symbol.

Date format list

Determines how dates will display in the application. Your selection determines the order of the day, month, and year.

Four digit year option

Determines whether years are displayed as four-digit numbers.

Month name option

Determines whether the month name is displayed in place of a month number.

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Leading zeros option

Determines whether months and days are displayed as two-digit numbers.

Separator list

Determines whether a forward slash, hyphen, or period is used to separate dates in the application.

Time Format list

Determines the format used to display time in the application:

12 hour (1:30pm): Times will display in twelve hour format, with am or pm.

24 hour (13:30): Times will display in twenty four hour format, without am or pm.

Do not show time: Times will not be displayed.

Show minutes option

Determines whether to show minutes when displaying times in the application.

Duration Format list

Select to display durations from the following options:

Hour: Durations will display in hours.

Day: Durations will display in days.

Week: Durations will display in weeks.

Month: Durations will display in months.

Year: Durations will display in years.

Show sub units option

Determines whether to show sub units. Select the **Show sub units** option to display sub units in the next smaller time increment.

Show duration label option

Determines whether to show the time unit abbreviation with the duration value.

Decimal places list

Select to display 0, 1, or 2 decimal places.

Time units format list

Determines which time unit is used to display time in the application:

Hour: Time units will display in hours.

Day: Time units will display in days.

Week: Time units will display in weeks.

Month: Time units will display in months.

Year: Time units will display in years.

Show sub units option

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Determines whether to show sub units. Select the **Show sub units** option to display sub units in the next smaller time increment.

Show unit label option

Determines whether to show the unit abbreviation with time units.

Decimal places list

Select to display 0, 1, or 2 decimal places.

Units/Time Format

Select one of the following to display resource units/time:

Show as a percentage: Determines whether units/time will display as a percentage.

Show as units/duration: Determines whether units/time will display as units/duration.

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).

Display Density list

Determines the density of information shown in the application:

Compact: Reduces the vertical space around data, to allow you to see more data at once.

Cozy: A compromise between showing a lot of data and allowing differentiation between lines of data.

Comfortable: Maximizes the vertical space around data, to make it easier for you to use P6 on a touch-operated device.

Show report accessibility warning option

Clear this option to disable the warning which appears when you run a report in a format other than HTML.

Specify how to display code values option

Determines whether to show code values as the code value or the code description.

Columns section:

Load financial period data option

Determines whether to show Financial Period Value columns and Financial Period Value Total columns in views.

Start field

Determines the beginning of the financial period range that will be available to view. Only financial periods whose start date falls after this date will be available to view.

Finish field

Determines the end of the financial period range that will be available to view. Only financial periods whose finish date falls before this date will be available to view.

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> **Tip**
>
> When you select to Load financial period data, the Activities Financial Period Calendar label displays the name of the Financial Period Calendar in use for the activities view and the Activities Financial Period Count displays the number of financial periods available in that calendar between the start and finish dates you selected.

Getting Here

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Global** tab.
3. On the **Global** tab, select **Display Format**.

Document Categories Page

Overview

Use this page to add and configure document categories.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Name field

The name of the document.

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To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download link

Enables you to download the currently displayed data as a Microsoft Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all columns are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Documents** and click **Document Categories**.

Document Details Dialog Box

Overview

Use this dialog box to view the details for a document if you have the content repository configured. With the appropriate access, based on a document's security policy, you can edit a document's details.

Screen Elements

General tab

See General Tab of the Document Details Page or Dialog Box (with content repository).

Description tab

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See Description Tab of the Document Details Page (with content repository). This tab is available when you are viewing a document on the **Project** tab of the **Documents** portlet.

Related Items tab

See Related Items Tab of the Document Details Page (with content repository). This tab is available when you are viewing a document on the **Project** tab of the **Documents** portlet.

Version tab

See Version Tab of the Document Details Page or Dialog Box (with content repository).

History tab

See History Tab of the Document Details Page or Dialog Box (with content repository).

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Documents** portlet and click the **Private Documents** tab.
4. On the **Private Documents** tab, select a document and click **Edit Details**.

Document Details Section of the Documents Page (with content repository)

Overview

Use this section to view a project document's details. Also, with the appropriate access, based on the security policy assigned to a document, you can edit the details of the document.

Screen Elements

General tab

See General Tab of the Document Details Page or Dialog Box (with content repository).

Description tab

See Description Tab of the Document Details Page (with content repository).

Related Items tab

See Related Items Tab of the Document Details Page (with content repository).

Version tab

See Version Tab of the Document Details Page or Dialog Box (with content repository).

History tab

See History Tab of the Document Details Page or Dialog Box (with content repository).

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab and select a document.

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Document Review Details Dialog Box

Overview

Use this dialog box to view detailed review information. You can only view this dialog box if the content repository is configured and the document is currently in review or has already been reviewed.

Screen Elements

Name field

The name of the review.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Initiator field

The name of the user who initiated the review.

Due Date field

The date by which all reviewers need to complete the review. If no due date is specified for the review, then this field appears blank.

Review Type list

Determines the type of review:

Anyone May Review: Enables any one of the listed reviewers to approve or reject the document version. Once one reviewer approves it, the review status changes to Review Approved; once one reviewer rejects it, the review status changes to Review Rejected.

Everyone Must Review: Requires each listed reviewer to respond to the document review to complete it. To change the review status to Review Approved, all reviewers must approve the document. To change the review status to Review Rejected, only one reviewer needs to reject the document.

Everyone Must Review in Sequence: Requires each listed reviewer to respond to the document review in a designated sequence to complete it. To change the review status to Review Approved, all reviewers must approve the document. To change the review status to Review Rejected, only one reviewer needs to reject the document. Once one reviewer rejects the document, the review is complete.

Pending Reviewers field

The names of the users who are assigned to the review and have not yet responded.

Getting Here

From the Documents page:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.

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3. On the **Project** tab, select a document and click the **Version** tab.
4. On the **Version** tab, click the **Review Status**.

From the Dashboards page:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Documents** portlet and click the **Recent Documents** tab.
4. On the **Recent Documents** tab, select a document and click **Edit Details**.
5. In the **Document Details** dialog box, click the **Version** tab.
6. On the **Version** tab, click the **Review Status**.

Document Reviews Portlet of the Dashboards Page

Overview

Use this portlet to view document reviews that either you have initiated or that require action from you. The data displayed in this portlet is independent of the portfolio, project, and project code filtering specified in the dashboard's Filter by field.

The Document Reviews portlet is unavailable if the content repository is not installed in your P6 environment. For information about the status of the content or workflow repositories, contact your P6 administrator.

Screen Elements

Action Required tab

See Action Required Tab of the Document Reviews Portlet of the Dashboards Page.

My Reviews tab

See My Reviews Tab of the Document Reviews Portlet of the Dashboards Page.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Document Reviews** portlet.

Document Statuses Page

Overview

Use this page to add and configure document statuses.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

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Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Name field

The name of the document status.

Download link

Enables you to download the currently displayed data as a Microsoft Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all columns are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Documents** and click **Document Statuses**.

Document UDFs Page

Overview

Use this page to add and configure user defined fields for documents.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Print

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Prints the Grid View.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently. The data will no longer be available to views, filters, calculations, reports, and waterlines.

User Defined Field field

The name of the user defined field. This column is always visible on this page.

Data Type list

The name of the type of data that corresponds to each user-defined field. The data type you select determines the type of data you can specify in a field. The following data types are available:

Text: Allows you to use text or a combination of text and numbers.

Start Date: Allows you to enter Start Date information only.

Finish Date: Allows you to enter Finish Date information only.

Cost: Allows you to enter currency values.

Number: Allows you to use numerals with two decimal places.

Integer: Allows you to use numeric data, but not a number related to money.

Indicator: Allows you to use an indicator field that you can use to icons in columns.

This column is always visible on this page.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

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The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download link

Enables you to download the currently displayed data as a Microsoft Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all columns are downloaded.

> **Tip**
>
> - Right-click any field to add or delete a UDF.
> - When a user-defined field (UDF) is deleted, all its values are also deleted from all of their respective appearances throughout the application. This includes user interface views, activity views, calculated UDFs, reports, Activity Networks, filters, sorts, groupings, waterlines, and columns.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Documents** and click **Document UDFs**.

Documents Detail Window of the Activities Page

Overview

Use this detail window to relate or remove documents from an activity or to view a related document.

> **Note**
>
> Your ability to manage document relationships depends on two factors: your application security privileges and the security policy of an individual document (if the document was added from the content repository).

Screen Elements

Add menu

The add menu contains the following options for adding documents to an activity:

Document: Enables you to upload a document. This feature requires a content repository to be configured.

WP & Docs: Enables you to add a document path or URL without uploading the document.

Assign... button

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Opens the Select Document dialog box.

Customize View

Opens the Customize View dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

View Document: Opens the document.

View: Opens the document in a new window.

Remove: Removes the document from the list.

Document Category list

The classification label used to organize documents.

Title field

The names of the documents assigned to the activity.

Status field

The current status of the document.

Location field

The file location of the selected document. All project participants can view this file.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **Documents** detail window.

Documents Page (with content repository)

Overview

Use this page to view, check in, check out, and download selected documents from one or more projects, associate additional items with a selected document, and compare documents across projects. With appropriate privileges, you can edit document information or use a selected document as a template for creating new documents of the same type for multiple projects.

Screen Elements

Project tab

See Project Tab of the Documents Page (with content repository).

WP & Docs tab

See WP and Docs Tab of the Documents Page (with content repository).

Document Details section

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See Document Details Section of the Documents Page (with content repository).

Tip

- The actions that are available for a document depend on the document security policy.
- The ability to start a review is only available with an installed and configured content repository.
- Depending on the configuration of your content repository, the ability to search by author might not be available.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.

Documents Page (without content repository)

Overview

Use this page to view document details and send email about a document. This page also enables you to associate an activity, WBS, issue, or another document with a document and edit document information.

Screen Elements

Refresh Documents

Refreshes the current screen with any new, updated, or removed data.

Add Document

Adds a file you select from your computer or a device attached to your computer to the currently selected open project.

Delete

Permanently deletes the selected items.

Email Document Details

Enables you to configure and send an email about a document.

Search

Enables you to perform a search based on the value you enter in the search bar.

Documents pane

Presents an expandable list of the currently open projects.

Documents Details tabs:

General Tab of the Documents Details Page or Dialog Box (without content repository)

Description Tab of the Documents Details Page or Dialog Box (without content repository)

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Related Items Tab of the Document Details Page or Dialog Box (without content repository)

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.

Documents Section of the Activity Form Page

Overview

Use this section to assign documents to activities and view the details of these documents.

Screen Elements

Assign Documents link

Opens a dialog box with all possible documents that can be assigned to the activity.

Title field

The names of the documents assigned to the activity.

Document Category list

The classification label used to organize documents.

Status field

The current status of the document.

Public Location field

The publicly-accessible file location of the selected document. All project participants can view this file.

This field only contains data for WP&Doc documents, or documents that were not added from the content repository. This field is blank for documents that were added from the content repository.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand any portlet containing activities.
4. In the portlet, click an activity.
5. On the **Activity Form** page, expand the **Documents** section.

Earned Value Detail Window of the Assignments Page

Overview

Use this detail window to view the earned value fields for the selected resource assignment.

Screen Elements

Assignment % Complete field

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The percent complete for the assignment. The calculation of this field depends on the percent complete type for the activity.

If the activity's percent complete type is Units % Complete and the assignment is in progress, this field is equal to the Units % Complete for the activity. If the assignment is not started, the Units % Complete for the assignment is zero. If the assignment is completed, the Units % Complete is 100%. If the assignment is completed and the actual units are zero, the Units % Complete is zero.

If the activity's percent complete type is Duration % Complete, this field is calculated as (Planned Duration of the assignment - Remaining Duration of the assignment) / Planned Duration of the assignment.

If the activity's percent complete type is Physical % Complete, this field is equal to the Physical % Complete for the activity.

If the activity's percent complete type is Scope % Complete, this field is equal to the Scope % Complete for the activity.

Earned Value Units field

The portion of baseline assignment units that are complete as of the project data date.

Calculated as **Budget At Completion Units** multiplied by **Performance Percent Complete**. The method for computing performance percent complete depends on the Earned Value technique selected for the activity's WBS.

Earned Value field

The portion of the baseline total cost of the assignment that is actually completed as of the project data date.

Budget at completion is calculated from the baseline.

Calculated as **Budget At Completion** multiplied by **Performance Percent Complete**. The method for computing performance percent complete depends on the Earned Value technique selected for the activity's WBS.

Budget at Completion Units field

The planned total units or at completion units for the resource assignment taken from the baseline project.

Budget at Completion field

The planned total cost or at completion cost for the resource assignment taken from the baseline project.

Estimate to Complete Units field

The estimated units to complete the assignment.

Calculated as either the **Remaining Total Cost** for the assignment, or as **Performance Factor** multiplied by (**Budget At Completion** minus **Earned Value**), depending on the earned-value technique selected for the activity's WBS. Budget at completion is calculated from the project baseline.

Estimate to Complete field

The estimated cost to complete the assignment.

Calculated as either the **Remaining Total Cost** for the assignment, or as **Performance Factor** multiplied by (**Budget At Completion** minus **Earned Value**), depending on the earned-value

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technique selected for the activity's WBS. Budget at completion is calculated from the project baseline.

Estimated Time To Complete field

The projected duration required to complete the remaining scope of work, work based on labor efficiency to date, assuming current performance trends continue. This estimate helps you to assess labor efficiency, forecast resource availability, and identify potential over-run of work due to declining productivity.

Calculated as **Original Duration** divided by **Schedule Performance Index (SPI)**.

Estimated Time To Complete Units field

The projected labor effort needed to complete the remaining scope of work, based on labor efficiency to date. This estimate helps you to assess labor efficiency, forecast resource availability, and identify potential over-run of work due to declining productivity.

Calculated as **Planned Labor Units** divided by **Schedule Performance Index - Labor Units**.

Getting Here

1. Click **Navigation Menu**.
2. On the **Navigation Menu:**
   - Expand **Projects** and click **Assignments**.
   - Or expand **Resources** and click **Assignments**.
3. Select an assignment.
4. Click the **Earned Value** detail window.

Earned Value Page

Overview

Use this page to specify default settings for calculating earned value. You can change the settings for specific WBS elements in the Earned Value detail window in Activities page.

> **Note**
>
> The publisher and summarizer services always use the project baseline for earned value calculations, regardless of the *Baseline to be used for earned value calculations* setting in each project's preferences. Therefore earned value data viewed in areas of the software using published or summarize data might differ from the same data viewed in areas of the software using live data. For further information see: Summarized, Published, and Live Data Usage in P6*Summarized, Published, and Live Data Usage in P6*

Screen Elements

Technique for computing performance percent complete section

In this section, choose one of the following for computing performance percent complete:

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Activity Percent Complete: Select to calculate the earned value according to activity completion percentages.

WBS Milestones: Select to calculate the earned value by defining milestones at the WBS level and assigning a weight to each of them.

0/100: Select to calculate the earned value as 100 percent after the activity ends.

50/50: Select to calculate the earned value as 50 percent after the activity starts and until it ends. After the activity ends, the activity's earned value is 100 percent.

Custom Percent Complete: Select to enter a percent to calculate earned value 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) section

Determines whether estimate to complete (ETC) is equal to remaining cost or a performance factor (PF) multiplied by (Budget at Completion minus Earned Value).

Earned Value Calculation section

Determines how earned value is calculated from a baseline and whether updating baselines will update with planned or current dates.

Getting Here

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Earned Value**.

Earned Value Performance Portlet of the Dashboards Page

Overview

Use this portlet to view both current and forecast earned value schedule variance (SV), cost variance (CV), or labor unit variance calculations. Data are calculated and displayed in either costs or labor units, depending on your preference. Negative values indicate unfavorable performance. Status indicators help you gauge whether a variance is within an acceptable range or whether you will need to take corrective action, based on the thresholds you define.

Screen Elements

Legend

Key to performance threshold indicators. Use these visual indicators to quickly scan values based on thresholds you define:

Critical: Indicates that a WBS, project, or portfolio requires significant corrective action.

Warning: Indicates that a WBS, project, or portfolio needs attention and is performing below expectations.

Acceptable: Indicates that a WBS, project, or portfolio is performing within an expected range.

Exceptional: Indicates that a WBS, project, or portfolio is exceeding expectations.

To Date: Schedule field

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Determines project performance by calculating the variance between actual and scheduled labor units or cost.

This variance helps address the basic question, "How did we do so far?" It provides concise answers such as *4 days early*, *No Progress*, *on schedule*, or *12 days late*.

For costs, calculated as **Earned Value Cost** minus **Planned Value Cost**.

For labor units, calculated as **Earned Value Labor Units** minus **Planned Value Labor Units**.

To Date: Labor Units field

Determines project performance by calculating the variance between the actual and the scheduled labor units. This value is accompanied by a convenient visual indicator mapped to performance thresholds you can define.

Calculated as **Earned Value Labor Units** minus **Actual Labor Units**.

To Date: Cost field

Determines project performance by calculating the variance between earned value and actual cost.

Calculated as **Earned Value Cost** minus **Actual Cost**.

Forecast at Completion: Schedule field

The estimated schedule variance at completion.

For costs, calculated as **Budget at Completion** multiplied by **Schedule Variance Index (SVI)**. Where **SVI** equals **Schedule Variance** divided by **Planned Value Cost**.

For labor units, calculated as **Baseline (BL) Labor Units** multiplied by **Schedule Variance Index (SVI) Labor Units**. Where **SVI** equals **Schedule Variance** divided by **Planned Value Labor Units**.

Forecast at Completion: Labor Units field

The estimated labor units at completion.

Calculated as **Baseline (BL) Labor Units** multiplied by **Cost Variance Index (CVI) Labor Units**. Where **CVI** equals **Cost Variance** divided by **Earned Value Labor Units**.

Forecast at Completion: Cost field

The estimated cost at completion.

Calculated as **Budget at Completion** multiplied by **Cost Variance Index (CVI)**. Where **CVI** equals **Cost Variance** divided by **Earned Value Cost**.

Tip

- The **Earned Value Performance** portlet calculates and displays data in cost or labor units based on the option selected on the **Global** tab in **My Preferences**.
- You can click a project name in the portlet to display the **Earned Value** page.
- On the Dashboards page, ff a dashboard's **Filter by** option is set to a portfolio or project code, the portlet lists each project included in the portfolio or project code filter and displays each project's earned value performance data.

Getting Here

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1. On the ☰ **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Earned Value Performance** portlet.

Edit Allow List Dialog Box

Overview

Use this dialog box to add sites or web services to the allow lists.

> **Note**
>
> Web services must be specified using CIDR (Classless Inter-Domain Routing) notation.

Screen Elements

Add button

Adds an item to the table.

Print

Opens the Print Options dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

Address field

The address of a site or web services which is allowed.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the ☰ **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Integration & Allow Lists** or **Web Services IP Allow List**.
3. On the **Integration & Allow Lists** page in the Site Allow List or Web Services IP Allow List section, click **Edit List**.

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Edit View of the Print Options Dialog Box

Overview

Use this dialog box to customize the header, content, and footer for printing the view. The settings and options you see in this view depend on the content of your view.

Screen Elements

Overview area

Provides a high level preview of how the selected options will look, including an estimate of the number of pages.

Edit Header area

Header Content area

The area in which you can edit the content of the header.

Edit Header or **Edit Footer** toolbar

Bold: Sets the format of the selected text to bold.

Italic: Sets the format of the selected text to italic.

Underline: Sets the format of the selected text to underline.

Font Size: Determines the size of the selected text.

Font Color: Determines the color of the selected text.

Alignment: Determines whether the selected text will be alighted to the left, center, or right.

Insert Link: Opens the Insert Link dialog box where you can se the link text, link URL, and determine whether the link will open in the current tab, or a new tab or window.

Legend: Adds a legend for the Gantt. The legend is created automatically.

Add Image: Enables you to add an image from a list of images uploaded to the database.

Add Revision Box: Adds a revision box.

Add Field: Enables you to add a field from a list of relevant fields.

Toggle Dividers: Determines whether dividers will be shown between the different sections of the header or footer.

Number of Sections: Determines whether the header or footer comprises one, two, or three sections.

Edit Content area

Content Preview area

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Provides a preview of how the selected options will look. You can click other pages in the Overview area to view previews of those pages.

Edit Footer area

Edit Header or **Edit Footer** toolbar

Bold: Sets the format of the selected text to bold.

Italic: Sets the format of the selected text to italic.

Underline: Sets the format of the selected text to underline.

Font Size: Determines the size of the selected text.

Font Color: Determines the color of the selected text.

Alignment: Determines whether the selected text will be alighted to the left, center, or right.

Insert Link: Opens the Insert Link dialog box where you can se the link text, link URL, and determine whether the link will open in the current tab, or a new tab or window.

Legend: Adds a legend for the Gantt. The legend is created automatically.

Add Image: Enables you to add an image from a list of images uploaded to the database.

Add Revision Box: Adds a revision box.

Add Field: Enables you to add a field from a list of relevant fields.

Toggle Dividers: Determines whether dividers will be shown between the different sections of the header or footer.

Number of Sections: Determines whether the header or footer comprises one, two, or three sections.

Footer Content area

The area in which you can edit the content of the footer.

Settings area

Show Header On list

Determines whether the header should be shown on only the first page, only the last page, or on all pages.

To see this setting, select **Edit Header** or **Edit Footer** in the preview area.

Show Footer On list

Determines whether the footer should be shown on only the first page, only the last page, or on all pages.

To see this setting, select **Edit Header** or **Edit Footer** in the preview area.

Options tab

Data Date option

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Select to include the data date line on the Gantt chart.

To see this setting, select **Edit Content** in the preview area.

Relationship lines option

Select to show relationship lines in the Gantt chart.

To see this setting, select **Edit Content** in the preview area.

Sight lines option

Determines whether to display sight lines for the smallest increment of the timeline on the Gantt chart.

To see this setting, select **Edit Content** in the preview area.

Progress spotlight option

Determines whether to show the progress spotlight on the Gantt chart.

To see this setting, select **Edit Content** in the preview area.

Columns tab

Show all columns option

Determines whether to display all the columns in the grid.

To see this setting, select **Edit Content** in the preview area.

Search

Enables you to perform a search based on the value you enter in the search bar.

To see this setting, select **Edit Content** in the preview area.

Columns list

The available columns to show in the output. This list includes all the columns in the current view. To hide a column from the output, click **Show**/**Hide**.

To see this setting, select **Edit Content** in the preview area.

Timescale tab

Timescale list

The Gantt chart time interval options. Select from one of the following intervals:

Week/Day: The Gantt View is divided into weeks which are then divided into days.

Month/Week: The Gantt View is divided into months which are then divided into weeks.

Quarter/Month: The Gantt View is divided into quarters which are then divided into months.

Year/Month: The Gantt View is divided into years which are then divided into months.

Year/Quarter: The Gantt View is divided into years which are then divided into quarters.

Financial Period: The Gantt chart is divided into years which are then divided into financial periods.

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To see this setting, select **Edit Content** in the preview area.

Use rolling dates option

Determines whether to use rolling dates for the Start Date and End Date fields.

To see this setting, select **Edit Content** in the preview area.

Start Date field

The date to use for the start of the timescale when the **Use rolling dates** option is not selected.

To see this setting, select **Edit Content** in the preview area.

Start fields

The date and modifiers to use for the start of the timescale when the **Use rolling dates** option is selected. Select a date from the list, a number on the spinner, and time period from the list.

To see this setting, select **Edit Content** in the preview area.

End Date field

The finish date to use for the start of the timescale when the **Use rolling dates** option is not selected.

To see this setting, select **Edit Content** in the preview area.

End fields

The date and modifiers to use for the end of the timescale when the **Use rolling dates** option is selected. Select a date from the list, a number on the spinner, and time period from the list.

To see this setting, select **Edit Content** in the preview area.

Return to Preview button

Navigates to the Preview view.

Getting Here

1. Click **Print**.
2. On the **Print Options** dialog box, click **Edit Header**, **Edit Content**, or **Edit Footer**.

Email Notifications Section of the Global Tab of the My Preferences Page

Overview

Use this section to configure email notifications for issues and resource assignments..

Screen Elements

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Issues section

Send me a notification when

Use the following options to determine whether you receive a notification and when.

Issues are added with priority of option

Determines whether issues that are added with a priority equal to or higher than the value you specify, generate notifications.

Issues are assigned issue code field

The issue code that will cause a notification to be sent when it is assigned to an issue. If you select this option you must select an issue code in the issue code field.

Issues are modified option

Determines whether notifications are sent when issues are modified.

Only notify me about Issues for Projects if I

The following options determine whether you are notified about issues for Projects when one or multiple selections are made:

have project access rights option

Determines whether you are notified about issues for Projects if you have Project access rights.

have issue access rights option

Determines whether you are notified about issues for Projects if you have Issue access rights.

am the Project Owner option

Determines whether you are notified about issues for Projects if you are the Project Owner.

am the Issue Owner option

Determines whether you are notified about issues for Projects if you are the Issue Owner.

am assigned as a resource to that activity option

Determines whether you are notified about issues for Projects if you are assigned as a resource to the specified activity.

Resource Assignments section

Send email to resources upon adding or removing assignments option

When a resource is replaced on an activity, an email is sent to the removed resource and to the replacement resource.

When the automatic email option is on, confirmation messages are sent to you, indicating the names of the recipients. If a resource does not have an email address stored in the project database, no email can be sent. In this case, you will know that the resource was not notified because you will not receive a confirmation message with that resource's name.

Prompt before sending email option

Determines whether to prompt you before sending an email.

Getting Here

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1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Global** tab.
3. On the **Global** tab, select **Email Notifications**.

EPS Budget Log Detail Window of the EPS Page

Overview

Use this detail window to create, delete, or modify an EPS element's budget log. A budget log specifies details about each budget change line item, including who has signature approval, the approval status, and the reason why any changes were made to the original budget.

Screen Elements

Original Budget field

The estimate of the total amount you require for the selected project or EPS, including all contributed funds.

Current Budget field

The current budget for the project or EPS.

Calculated as **Original Budget** plus the sum of the approved budget changes from the budget log.

Proposed Budget field

The proposed budget for the project or EPS.

Calculated as **Original Budget** plus the sum of the approved and pending budgets from the budget log.

+ **Add** button

Adds an item to the table.

Budget log table area:

Context menu

Add: Adds a new item to the list.

Delete: Deletes the selected item.

Amount field

The value in units of currency of the budget change request.

Change Number field

The number associated with the change request.

Useful for reporting or tracking changes to the original budget.

Date field

The date and time the line item was added to the budget log.

Reason field

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A short description summarizing the events or circumstances prompting the proposed change to the budget.

This field can also be used to store the decision justifying the budget line item's status.

Responsible field

The name of the person with signature approval for the budget log line item.

Status field

The approval status of the line item.

> **Tip**
>
> - You can change the order of the columns in the Budget log table area by dragging the column headings.
> - If you have more than one EPS selected, the detail window will not be visible.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select an EPS and click the **Budget Log** detail window.

EPS Funding Detail Window of the EPS Page

Overview

Use this detail window to assign, configure, or remove funding sources from an EPS node.

Screen Elements

Assign... button.

Opens the Select Funding Source dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Delete: Deletes the selected item.

Funding Source field

The name of a funding source assigned to the current project or EPS.

Amount field

The value in units of currency of the funding item.

Fund Share field

The percentage of the total fund that is allocated to the current project or EPS.

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> **Tip**
>
> - If you have more than one EPS selected, the detail window will not be visible.
> - EPS detail windows appear only when you group the EPS view by all EPS levels and select an EPS.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select an EPS node and click the **Funding** detail window.

EPS General Detail Window of the EPS Page

Overview

Use this detail window to add or modify information about the selected EPS element.

Screen Elements

EPS field

An identifier that is unique to the EPS node.

EPS Name field

The name of the EPS.

Responsible Manager field

The organization breakdown structure (OBS) assigned to the project or EPS.

Planned Dates section:

Anticipated Start field

The expected start date of the project used during the planning phase. This date is manually entered and is not affected by scheduling.

If there are no children elements, the anticipated start is the start date listed for the project in the table.

Anticipated Finish field

The expected finish date of the project used during the planning phase. This date is manually entered and is not affected by scheduling.

If there are no children elements, the anticipated finish is the finish date listed for the project in the table.

> **Tip**
>
> - If you have more than one EPS selected, the detail window will not be visible.
> - EPS detail windows appear only when you group the EPS view by all EPS levels and select an EPS.

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Getting Here

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select an EPS node and click the **General** detail window.

EPS Notebooks Detail Window of the EPS Page

Overview

Use this detail window to assign a notebook topic to an EPS; view, add, or assign a notebook topic; or remove a topic assignment.

Screen Elements

Assign... button

Opens the **Select Notebook Topic** dialog box.

⚙ **Context** menu

Delete: Deletes the selected item.

Topic field

The name of the associated notebook topic.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Tip

- If you have more than one EPS selected, the detail window will not be visible.
- EPS detail windows appear only when you group the EPS view by all EPS levels and select an EPS.

Getting Here

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select an EPS node and click the **Notebooks** detail window.

EPS Page

Overview

Use this page to manage the Enterprise Project Structure (EPS) and its projects. The EPS page displays schedules for any single project or group of projects you choose with detail windows, a Gantt view, and a grid view. Use the EPS page to quickly update project details and run important operations including summarizing, creating templates, and defining baselines.

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> **Note**
>
> Data on the EPS page is a mix of live data and summary data that is accurate as of the last time the projects in the view were summarized.

You can customize this presentation of project data, creating and saving multiple EPS views, or data layouts, to meet your needs. The convenient Views list enables you to quickly switch between views.

> **Note**
>
> If you do not have EPS/OBS access to an EPS element, but you do have access to a project in that EPS element or WBS belonging to a project in that EPS element, you will still be able to view the project on this page.

Screen Elements

Actions menu

Define Baselines: Opens the Define Baselines dialog box.

Import/Export Projects: Opens the Import/Export Projects dialog box.

Publish Projects: Creates a service to publish projects data for reporting and integration.

Summarize Projects: Creates a service to summarize project data for reporting and integration.

Auto Reorganize: Automatically moves items in the list to the appropriate list position or grouping band when they are changed.

Close All: Closes all open projects.

Release Exclusive Lock: Releases the exclusive lock on all exclusively locked open projects.

Global Search and Replace: Opens the Global Search and Replace dialog box.

Delete Published Data: Deletes published project data for the selected projects or EPS nodes.

Delete Summarized Data: Deletes summarized project data for the selected projects or EPS nodes.

Open menu

Project: Opens the currently selected project. Open projects display an open folder icon next to their name.

Project Template: Opens the currently selected template.

Open Exclusively: Opens the currently selected projects and places a lock on each project. Other users can still view the project, but cannot make updates to the project data.

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> **Note**
>
> You can only open one template at a time. When you open a template, all open projects will be closed automatically.

Expand All

Expands all grouping bands to show all data items.

Collapse All

Collapses all grouping bands to the top level.

Views menu

Manage Views...: Opens the Manage Views dialog box.

Import/Export Views: Opens the Import Export Views dialog box.

Select a view name to open it.

Grid View

Enables you to view and configure data in a grid format. You can customize which columns are available in the grid.

Gantt View

Enables you to view data as a graphical representation of sequence and duration.

Filters menu

Manage Filters: Opens the manage filters dialog box.

Full Screen

Expands the current work area so it fills the entire display.

Show Hint Help (Alt+F1)

Shows a description of the column when you hover over the column heading.

Print

Opens the Print Options dialog box.

Customize View

Opens the Customize View dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

EPS work area

The main work area for viewing project data in your choice of the following customizable formats:

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- Grid View Format of the EPS Page
- Gantt View Format of the EPS Page

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Show/Hide Tabs

Enables you to configure which tabs are shown and hidden.

EPS detail windows:

EPS Budget Log Detail Window of the EPS Page

EPS Funding Detail Window of the EPS Page

EPS General Detail Window of the EPS Page

EPS Notebooks Detail Window of the EPS Page

EPS UDF Detail Window of the EPS Page

Project detail windows:

Budget Log Detail Window of the EPS Page

Codes Detail Window of the EPS Page

Funding Detail Window of the EPS Page

General Detail Window of the EPS Page

Issues Detail Window of the EPS Page

Notebooks Detail Window of the EPS Page

Risks Detail Window of the EPS Page

UDF Detail Window of the EPS Page

EPS Panels

Audit Panel

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.

EPS UDF Detail Window of the EPS Page

Overview

Use this detail window to see all the UDFs and their values assigned to the selected EPS node. You can also create or remove a UDF assignment. You can assign manual Project UDFs with a Summary Calculation set to none to an EPS node. You cannot assign Formula UDFs to an EPS node.

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> **Note**
>
> You can only assign cost UDFs to activities here if you have the *Edit EPS Costs/ Financials* privilege assigned for this project.

Screen Elements

Assign... button

Opens the Select UDF dialog box.

Group By list

Groups the data according to your selection.

Customize View

Opens the Customize View dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

> **Note**
>
> Only the default fields that appear as columns in the detail window are described below.

User Defined Field field

The name of the user defined field.

Data Type field

The data type of the user defined field.

Value field

The value of the user defined field.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select an EPS node and click the **UDF** detail window.

Errors Section of the Leveling Report Log

Overview

Use this section to view errors in the selected project. All fields are read-only.

Screen Elements

Activities that have invalid relationship loops field:

The number of activities that have invalid relationship loops.

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Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, click the **Actions** menu and select **Run Leveler...** (Shift+F9).
3. In the **Level Resources** dialog box, click the **Options** tab.
4. On the **Options** tab, select the **Display leveling log upon completion** and click **Level**.
5. In the **Leveling Report Log**, expand the **Statistics Section** section.

Errors Section of the Schedule Project Log Dialog Box of the Activities Page

Overview

Use this section to view errors for various projects.

Screen Elements

Activities that have invalid relationship loops table

The information about the activities that have invalid relationship loops in a table format.

Project ID: The unique identifying code for the project associated with the activity.

Project Name: The name of the project associated with the activity.

Activity ID: The unique identifier of the activity.

Activity Name: The name of the activity.

Start: The current start date of the activity.

Finish: The current finish date of the activity.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, and click **Schedule...** (F9).
3. In the **Schedule** dialog box:
   a. Configure the options and select the **Display scheduling log upon completion** option.
   b. Click **Schedule Now**.

Exceptions Section of the Leveling Report Log

Overview

Use this section to view the number of critical activities, activities with unsatisfied constraints, activities with unsatisfied relationships, and activities with external dates.

Screen Elements

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Critical Activities field

The number of critical activities in the selected project.

Activities with unsatisfied constraints field

The number of activities with constraints that have not been addressed.

Activities with unsatisfied relationships field

The number of activities with relationships that have not been addressed.

Activities with external dates field

The number of activities with external dates.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click the **Actions** menu and select **Leveler**.
   b. Select **Display leveling log upon completion** and click **Level Now**.
   c. In the **Leveling Report Log**, expand the **Exceptions** section.

Exceptions Section of the Schedule Project Log Dialog Box of the Activities Page

Overview

Use this section to view the number of critical activities, activities with unsatisfied constraints, activities with unsatisfied relationships, and activities with external dates.

Screen Elements

Critical Activities field

The number of critical activities in the selected project.

Activities with unsatisfied constraints field

The number of activities with constraints that have not been addressed.

Activities with unsatisfied relationships field

The number of activities with relationships that have not been addressed.

Activities with external dates field

The number of activities with external dates.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, and click **Schedule...** (F9).
3. In the **Schedule** dialog box:

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a. Configure the options and select the **Display scheduling log upon completion** option.

b. Click **Schedule Now**.

Expense Categories Page

Overview

Use this page to add and configure expense categories.

Screen Elements

Add (Ins) button

Creates a new category for managing different types of entries.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Category field

The name of the expense category. You can use expense categories to organize and track various expense types within an organization.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

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The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Expense Categories**.

Expense Details Page of the Activity Form Page

Overview

Use this page to edit the general, unit, and cost details for the selected expense of the current activity.

Screen Elements

Expense Item field

The name for the expense that is unique for the activity.

The same name can be used for expenses associated with other activities.

Activity field

The name of the activity.

Expense Category field

The classification code or name for the expense category.

Expense categories are useful for organizing and tracking various expense types within an organization.

Vendor field

The name of the vendor providing the product or service associated with the expense.

Accrual Type list

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The accrual type for the project expense.

Start of Activity: Indicates the entire expense costs are accrued at the start date of the activity.

End of Activity: Indicates entire expense costs are accrued at the finish date of the activity.

Uniform Over Activity: Indicates the expense costs are accrued uniformly over the duration of the activity.

Document Number field

The number of the invoice, purchase order, requisition, or other document related to the expense item.

Cost Account field

The cost account associated with the expense for the activity.

Auto Compute Actuals option

Determines whether to calculate the expense actual and remaining units based on the budgeted or planned cost and the activity's percent complete.

Planned Units field

The planned number of units for the selected expense.

Actual Units field

The actual units of the expense item used to complete the activity.

Remaining Units field

The remaining units of work to be performed by the resource on the activity.

Calculated as **Planned Units** minus **Actual Units**.

Unit of Measure field

The unit of measure used for the project expense.

Planned Cost field

The expected total cost of the expense item.

Calculated as **Planned Units** multiplied by **Price per Unit**.

Actual Cost field

The project expense for the activity.

Calculated as **Actual Units** multiplied by **Price/Unit**.

Remaining Cost field

The remaining total cost for the activity, including labor resources, nonlabor resources, and project expenses.

Before actual expenses are made, the remaining cost should be the same as the 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.

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Calculated as **Remaining Labor Costs** plus **Remaining Nonlabor Costs** plus **Remaining Expense Costs**.

Price/Unit field

The planned price per unit for the activity expense.

This number is multiplied by the planned number of units to compute the planned cost.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand any portlet containing activities.
4. In the portlet, click an activity.
5. On the **Activity Form** page, expand the **Expenses** section and click an expense item.

Expense UDFs Page

Overview

Use this page to add and configure user defined fields for expenses.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently. The data will no longer be available to views, filters, calculations, reports, and waterlines.

User Defined Field field

The name of the user defined field. This column is always visible on this page.

Data Type list

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The name of the type of data that corresponds to each user-defined field. The data type you select determines the type of data you can specify in a field. The following data types are available:

Text: Allows you to use text or a combination of text and numbers.

Start Date: Allows you to enter Start Date information only.

Finish Date: Allows you to enter Finish Date information only.

Cost: Allows you to enter currency values.

Number: Allows you to use numerals with two decimal places.

Integer: Allows you to use numeric data, but not a number related to money.

Indicator: Allows you to use an indicator field that you can use to icons in columns.

This column is always visible on this page.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

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Tip

- Right-click any field to add or delete a UDF.
- When a user-defined field (UDF) is deleted, all its values are also deleted from all of their respective appearances throughout the application. This includes user interface views, activity views, calculated UDFs, reports, Activity Networks, filters, sorts, groupings, waterlines, and columns.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Expense UDFs**.

Expenses Detail Window of the Activities Page

Overview

Use this detail window to add, revise, or delete activity expenses.

Screen Elements

Add

Adds a new item to the Expenses list.

Customize View

Opens the Customize View dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Expenses detail window columns

Only the default fields that appear as columns in the **Expenses** detail window are described below.

Expense Item field

The name for the expense that is unique for the activity.

The same name can be used for expenses associated with other activities.

Expense Category field

The classification code or name for the expense category.

Expense categories are useful for organizing and tracking various expense types within an organization.

Planned Units field

The planned number of units for the selected expense.

Actual Units field

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The actual units of the expense item used to complete the activity.

Remaining Units field

The remaining units of the expense item used to complete the activity.

CBS field

The Primavera Unifier Cost Breakdown Sheet to which you want to link an activity, assignment or expense.

Accrual Type list

The accrual type for the project expense.

Start of Activity: Indicates the entire expense costs are accrued at the start date of the activity.

End of Activity: Indicates entire expense costs are accrued at the finish date of the activity.

Uniform Over Activity: Indicates the expense costs are accrued uniformly over the duration of the activity.

Actual Cost field

The project expense for the activity.

Calculated as **Actual Units** multiplied by **Price/Unit**.

At Completion Units field

The sum of the actual units and remaining units for the expense on the activity.

Auto Compute Actuals option

Determines whether to calculate the expense actual and remaining units based on the budgeted or planned cost and the activity's percent complete.

Cost Account field

The cost account associated with the project, resource, or expense for an activity.

Document Number field

The number of the invoice, purchase order, requisition, or other document related to the expense item.

Planned Cost field

The expected total cost of the expense item.

Calculated as **Planned Units** multiplied by **Price per Unit**.

Price/Unit field

The planned price per unit for the activity expense.

This number is multiplied by the planned number of units to compute the planned cost.

Remaining Cost field

The remaining total cost for the activity, including labor resources, nonlabor resources, and project expenses.

Before actual expenses are made, the remaining cost should be the same as the planned cost.

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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.

Calculated as **Remaining Labor Costs** plus **Remaining Nonlabor Costs** plus **Remaining Expense Costs**.

Unit of Measure field

The unit of measure used for the project expense.

Vendor field

The name of the vendor providing the product or service associated with the expense.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **Expenses** detail window.

Expenses Section of the Activity Form Page

Overview

Use this section to add, revise, and/or delete activity expenses.

Screen Elements

Add Activity Expenses link

Enables you to add expenses to the activity.

Expense Item field

The name for the expense that is unique for the activity.

The same name can be used for expenses associated with other activities.

Expense Category field

The classification code or name for the expense category.

Expense categories are useful for organizing and tracking various expense types within an organization.

Planned Cost field

The expected total cost of the expense item.

Calculated as **Planned Units** multiplied by **Price per Unit**.

Actual Cost field

The project expense for the activity.

Calculated as **Actual Units** multiplied by **Price/Unit**.

Remaining Cost field

The remaining total cost for the activity, including labor resources, nonlabor resources, and project expenses.

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Before actual expenses are made, the remaining cost should be the same as the 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.

Calculated as **Remaining Labor Costs** plus **Remaining Nonlabor Costs** plus **Remaining Expense Costs**.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand any portlet containing activities.
4. In the portlet, click an activity.
5. On the **Activity Form** page, expand the **Expenses** section.

Export Tab of the Import Export Enterprise Data Dialog Box

Overview

Use this dialog box to export enterprise data to a file.

Screen Elements

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Data Type field

The data type to be imported or exported.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

Export button

Exports the selected data to a file.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. Click **Import/Export Enterprise Data**.
3. Click the **Import** tab.

Export Tab of the Import Export Views Dialog Box of the EPS, Activity, and Assignment Pages

Overview

Use this dialog box to export EPS, Activity, and Assignment views to a file.

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> **Note**
>
> When you export a view, the columns, sorting, grouping, filters, bars, gantt, and activity network (for activity views), and usage spreadsheet (for assignment views) are exported. The width of columns, color and font of text, and data about the detail tabs (including the order, column width, and selected columns) are not exported with views.

Screen Elements

Export views to a file options

Determines whether to export classic or standard views.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Views

The list of views in the import file.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

Export button

Exports the selected data to a file.

Getting Here

1. On the **Navigation Menu**, expand **Projects** or **Resources**.
   - If you expanded **Projects**, click **Activities**, **EPS**, or **Assignments**.
   - If you expanded **Resources**, click **Assignments**.
2. Click the **Views** menu and select **Import/Export Views**.
3. Click the **Export** tab.

Export tab of the Import/Export Projects Dialog Box of the EPS Page

Overview

Use this tab to configure export type, project template, and project.

Screen Elements

Export Type list

Determines whether the project will be exported to a **Primavera XML**, **Microsoft Project XML**, **UN/CEFACT XML**, **IPMDAR Format**, **DOE - CPP**, or **Primavera XER** file.

Add Project button

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Enables you to add a project to the export projects table.

To enable this button, you must select Primavera XER, DOE - CPP, or Primavera XML on the **Export Type** list.

Export to ZIP option

Determines whether to compress the exported projects into a zip file.

To enable this option, you must select Primavera XML or Primavera XER in the Export Type list.

Add Baseline button

Enables you to specify the baseline to export with the selected project.

To enable this button, you must select DOE - CPP on the **Export Type** list and select a project in the project list.

Project field

The project selected to export.

To enable this field, you must select Microsoft Project XML, UN/CEFACT XML, or IPMDAR format on the **Export Type** list.

Template list

The template to use for exporting a project.

To enable this list, you must select a Microsoft Project format, UN/CEFACT XML, IPMDAR, or DOE - CPP format from the **Export Type** list.

Add Project button

Enables you to add a project to the export projects table.

To enable this button, you must select Primavera XER, DOE - CPP, or Primavera XML on the **Export Type** list.

Export Projects table area:

> **Note**
>
> This table area is only visible if you select **Primavera XER**, **Primavera XML**, or **DOE - CPP** on the Export Type list.

Project ID

Displays the Project ID of the project to be exported.

To see this field, you must select Primavera XML or Primavera XER on the **Export Type** list.

Project Name

Displays the name of the project to be exported.

To see this field, you must select Primavera XML or Primavera XER on the **Export Type** list.

Projects field

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The IDs and names of the projects to export.

To see this field, you must select DOE - CPP on the **Export Type** list.

Financial Period Calendar field

The name of the financial period calendar assigned to the project.

To see this field, you must select Primavera XML or Primavera XER on the **Export Type** list.

Scheduled Date field

The date and time that the project was most recently scheduled.

To enable this field, you must select DOE - CPP from the **Export Type** list.

Summarized Date field

The date and time the project was most recently summarized.

To enable this field, you must select DOE - CPP from the **Export Type** list.

Data Date field

The progress point, or "as-of date", for activities in the project. Project status is up-to-date as of the data date.

To enable this field, you must select DOE - CPP from the **Export Type** list.

Template field

The template to use for the export. To enable this field, you must select DOE - CPP from the **Export Type** list.

Baselines field

Determines which baselines are imported or exported. Click **Select** to open the Select Baselines dialog box, where you can select or clear specific baselines of the project.

> **Note**
>
> : An asterisk in this field denotes that a baseline previously selected for assignment according to the **Select Baselines** list, has been manually deselected in the Select Baselines dialog box.

On the Import tab, to enable this field, you must select Primavera XML from the **Import Type** list and select a file to import. On the Export tab, to enable this field you must select Primavera XML or DPE - CPP from the **Export Type** list.

Manage Templates button

Opens the appropriate Manage Templates dialog box if you selected one of the Microsoft Project options, UN/CEFACT, or IPMDAR on the **Export Type** list.

This button is not visible if you selected Primavera XML on the **Export Type** list.

Validate button

Provides counts of the data to be exported.

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To enable this button, you must select DOE - CPP from the **Export Type** list and select a project and a baseline to export.

Export button

Exports the project with your selected options.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click the **Actions** menu and select **Import/Export Projects**.
3. Click the **Export** tab.

Filter Tab of the Customize Risks Dialog Box

Overview

Use this tab to configure what risks will display in the risks portlet.

Screen Elements

Display Risks list

Determines how to display risks.

Show Risks where I have access rights option

Determines whether to display Risks where you have access rights.

Show Risks where I am the Project Owner option

Determines whether to display Risks where you are the Project Owner.

Show Risks where I am the Risk Owner option

Determines whether to display Risks where you are the Risk Owner.

Show Risks where I am assigned as a resource option

Determines whether to display Risks where you are an assigned as a resource.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Risks** portlet and click **Customize**.
4. In the Customize Risks dialog box, click the **Filter** tab.

Filtering tab of the Customize View Dialog Box

Overview

Use this tab to configure and apply one or more filters to constrain or reduce the quantity of data shown in the view.

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> **Note**
>
> The view you are in affects which settings are available.

Screen Elements

Edit Filters... button

Opens the Manage filters dialog box.

Match options

Determines if elements display based on all applied filters or any applied filters.

Search

Enables you to perform a search based on the value you enter in the search bar.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

Name field

The names of existing filters that are grouped by type:

Standard: Predefined filters that are already in the application.

Global: Filters that are available to all users.

Multiple User: Filters that are available to you and a group of other users.

User: Filters that you created.

Match any/all of the following rules list

Determines whether the filter should match any or all rules.

Filter rules section:

The rules of the selected filter showing the Field, Operator and Value. Modify the values for each field listed to customize the filter.

Getting Here

1. Click **Customize View**.
2. In the **Customize View** dialog box, click **Filtering**.

Filtering tab of the Manage Views Dialog Box of the Activities Page, EPS Page or Assignments Page

Overview

Use this tab to configure and apply one or more filters to constrain or reduce the quantity of data shown in the view.

Screen Elements

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Edit Filters... button

Opens the Manage filters dialog box.

Match options

Determines if elements display based on all applied filters or any applied filters.

Search

Enables you to perform a search based on the value you enter in the search bar.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

Name field

The names of existing filters that are grouped by type:

Standard: Predefined filters that are already in the application.

Global: Filters that are available to all users.

Multiple User: Filters that are available to you and a group of other users.

User: Filters that you created.

any/all of the following rules list

Determines whether the filter should match any or all rules.

Filter rules section:

The rules of the selected filter showing the Field, Operator and Value. Modify the values for each field listed to customize the filter.

Getting Here

1. Click **Navigation Menu**
2. On the **Navigation Menu**, either:
   - Expand **Projects** and click **Activities** or **EPS**.
   - Expand **Resources** and click **Assignments**.
3. Click the **Views** menu and select **Manage Views...**.
4. In the **Manage Views** dialog box, click **Filtering**.

Financial Period tab of the Financial Period Calendars Page

Overview

Use this tab to customize financial periods for the selected financial period calendar.

Screen Elements

Add (Ins)

Creates a new entry in the current table.

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Actions menu

Generate Financial Periods: Opens the Generate Financial Periods dialog box.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Name field

The name chosen for the financial period.

Start Date field

The date the financial period begins.

Finish Date field

The date the financial period ends.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Financial Periods**.
3. On the **Financial Periods** page, click **Financial Periods** tab.

Financial Periods Page

Overview

Use this page to add and configure customized financial period calendars. Assign financial period calendars to projects to provide more accurate reporting of actual units and costs. You can use the Store Period Performance dialog box on the Activities page to store period performance in a specified financial period.

Screen Elements

Add

Blank Financial Period Calendar: Creates a new calendar with no financial periods defined.

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Copy from existing Financial Period Calendar: Opens the Select Financial Period Calendar dialog box.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Financial Period Calendars section:

Context menu

Delete: Removes the selected item or association permanently.

Duplicate: Creates a new item as a copy of the selected item.

Set as Default Financial Period: Sets the selected calendar to be the default for new projects and projects imported without a financial period calendar.

Financial Period Calendar Name field

The name chosen for the financial period calendar.

Usage Count field

The number of projects assigned the corresponding Financial Period Calendar.

Financial Period tab

See Financial Period tab of the Financial Period Calendars Page

Used By tab

See Used By Tab of the Financial Period Calendars Page

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

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Tip

- A financial period calendar cannot be deleted if it is assigned to a project which has stored data for activities or resource assignments.
- A setting in the Display Format section of the Global tab of the My Preferences page determines whether a user can add Financial Period columns to their view and the earliest and latest financial period columns they can add. If a user adds Financial Period columns to their view, they should make sure that the view is using the appropriate financial period calendar for those columns. To set the financial period calendar for a view, select **Customize View**, select the Gantt tab, then choose the appropriate financial period calendar on the Financial Period list.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Financial Periods**.

Formula Detail Window of the Project UDFs Page

Overview

Use this detail window to define formulas for the selected project user defined field.

To use the elements in this window, select a UDF which has a **UDF Type** of **Formula**.

Screen Elements

Fields list

The field associated with the formula. When the field is displayed for a project, this formula or statement is used to automatically generate the field's value.

Insert Field button

Inserts the selected field into the formula.

Validate button

Validates the entered formula.

Formula buttons

Use this section to define a formula or if/then/else statement to calculate field values. You can define a formula or if/then/else statement only if the field has a Formula UDF type.

Formula Editor

Displays the formula you have created with the fields list and formula buttons.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project UDFs**.

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3. On the **Project UDFs** page, select a user-defined field and click the **Formula** detail window.

Funding Detail Window of the EPS Page

Overview

Use this detail window to assign, configure, or remove funding sources from a project.

Screen Elements

Assign... button.

Opens the Select Funding Source dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Delete: Deletes the selected item.

Funding Source field

The name of a funding source assigned to the current project or EPS.

Amount field

The value in units of currency of the funding item.

Fund Share field

The percentage of the total fund that is allocated to the current project or EPS.

> **Tip**
>
> If more than one project is selected, the detail window will not be visible.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, select a project and click the **Funding** detail window.

Funding Sources Page

Overview

Use this page to configure project funding sources and their hierarchy.

Screen Elements

Add menu

Add: Creates a category.

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Add Child: Creates a subcategory, subordinate to the selected category.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Expand All button

Enables you to see all of the items in the hierarchical list or grouped view.

Collapse All button

Enables you to hide subordinate items in the hierarchical list or grouped view.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Add Child: Creates a new item, subordinate to the selected item.

Delete: Removes the selected items permanently.

Cut: Cuts the selected item.

Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Move Right: Moves the selected item one level lower in the hierarchical arrangement.

Move Left: Moves the selected item one level higher in the hierarchical arrangement.

Expand: Enables you to expand and view all of the items in a hierarchical list.

Collapse: Enables you to collapse and hide subordinate items in a hierarchical list.

Funding Source field

Funding sources are the agencies, businesses, or groups that provide funding for a project.

Description field

This field displays a description that corresponds to the Funding Source name.

To see the following columns, click Analyze Data Usage.

Project Count field

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The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Tip

- If the funding source to be deleted is currently assigned to one or more EPS nodes or projects, then you can choose to merge assignments into a different funding source, or delete the selected funding source and any associated source.
- The project count includes assignments to projects, activities, and assignments.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Funding Sources**.

Gantt tab of the Manage Views Dialog Box of the Activities Page, EPS Page or Assignments Page

Overview

Use this tab to configure progress lines and timescale for the Gantt chart.

Screen Elements

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Show section

Data date line option

Determines whether to show the data date as a vertical line in the Gantt Chart.

Relationship lines option

Determines whether to show lines to represent the relationships between different activities.

Non-driving relationships option

Determines whether to show lines for relationships which do not drive the dates of successor activities. To see the **Non-driving relationships** option, select the **Relationship Lines** option.

Sight lines option

Determines whether to show lines for relationships which do not drive the dates of successor activities.

> **Note**
>
> The **Data date line**, **Relationship lines**, and **Sight Lines** options are available in the Gantt tab of the Manage Views dialog box in the Activities page. The **Non-driving relationships** option is available in the Gantt tab of the Manage Views dialog box in the Activities and EPS pages.

Non-work time shading option

Determines whether to shade non-work time in the project default calendar on the Gantt chart.

Timescale section

Timescale list

The Gantt chart time interval options. Select from one of the following intervals:

Week/Day: The Gantt View is divided into weeks which are then divided into days.

Month/Week: The Gantt View is divided into months which are then divided into weeks.

Quarter/Month: The Gantt View is divided into quarters which are then divided into months.

Year/Month: The Gantt View is divided into years which are then divided into months.

Year/Quarter: The Gantt View is divided into years which are then divided into quarters.

Financial Period: The Gantt chart is divided into years which are then divided into financial periods.

Financial Period Calendar list

The financial period calendar you want to use when showing Financial Period as the timescale in the Gantt and the Resource and Role Assignment dialog box. To see this field, select Financial Period on the Timescale list.

Getting Here

1. Click **Navigation Menu**
2. On the **Navigation Menu**, either:

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- Expand **Projects** and click **Activities** or **EPS**.
- Expand **Resources** and click **Assignments**.

3. Click the **Views** menu and select **Manage Views...**.
4. In the **Manage Views** dialog box, click **Gantt**.

Gantt View Format of the Activities Page

Overview

Use the Gantt View to view the dates, progress, and relationships of activities in a project. You can also drag activities and milestones to apply constraints to them.

Screen Elements

Relationship Lines

Enable you to view the relationship between different activities. The point at which the relationship line touches each Gantt bar, whether the beginning or end, determines the type of relationship between the activities.

Right clicking on the timescale in the Gantt View will display:

Timescale list

The Gantt chart time interval options. Select from one of the following intervals:

Week/Day: The Gantt View is divided into weeks which are then divided into days.

Month/Week: The Gantt View is divided into months which are then divided into weeks.

Quarter/Month: The Gantt View is divided into quarters which are then divided into months.

Year/Month: The Gantt View is divided into years which are then divided into months.

Year/Quarter: The Gantt View is divided into years which are then divided into quarters.

Financial Period: The Gantt chart is divided into years which are then divided into financial periods.

Zoom to fit: Adjusts the current view's height and width or timescale to fit as much of the data as possible into the current work area.

> **Note**
>
> If you select to show the Financial Periods timescale, you can hover over a financial period in the timescale to see the start and finish dates of the financial period.

Hovering over an activity bar will display:

Activity Name field

The name of the activity.

The activity name does not have to be unique.

Activity ID field

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The unique identifier of the activity.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Start Date field

The current start date of the activity. For started activities, this is the actual start date. For not started activities, this is the planned start date until the project is scheduled. When scheduled, the start date field is set to the remaining early start date.

Finish Date field

The current finish date for the activity. For not started activities, this is the planned finish date. For in-progress activities, this is the remaining early finish date. For completed activities, this is the actual finish date.

Drag lines

Enables you to drag the start or finish of a bar in the Gantt to change the start or finish date of an in progress or not started activity. You can also drag the Remaining Early Start date of In Progress activities to a later date or to an earlier date as far back as to the Actual Start date.

Hovering directly to the left or right of an activity bar when relationship lines are visible in the Gantt will display:

Create Relationship

Enables you to create a new relationship in the Gantt.

Show Legend

Enables you to view a description of the currently defined bars available on the Gantt chart and whether relationship lines are currently selected to show. To hide the legend, click **Hide Legend**

Gantt Settings

Enables you to show or hide elements of the Gantt.

Data Date Show or hide the vertical line representing the Data Date in the Gantt. If multiple projects are open, the line is drawn on the earliest data date for all open projects.

Relationships Show or hide relationships between activities in the Gantt.

Sight Lines Show or hide vertical sight lines in the Gantt.

Progress Spotlight Show or hide the Progress Spotlight in the Gantt.

Timescale Select a timescale for the Gantt.

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Tip

- If financial periods do not exist for part of the duration of your project, the Gantt chart does not show data for the parts of your project whose dates fall outside the existing financial periods.
- If financial periods do not exist for the whole of the duration of your project, the Gantt chart does not show any data. Change the Gantt timescale for your view in the Manage Views dialog box.
- You cannot zoom the financial period Gantt timescale using Zoom to Fit, nor by dragging the timescale.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, click **Gantt View**.

Gantt View Format of the Assignments Page of the Projects Section

Overview

Use the Gantt chart format to view assignment duration, dates, and progress.

Screen Elements

Right-clicking on the timescale will display:

Timescale list

The Gantt chart time interval options. Select from one of the following intervals:

Week/Day: The Gantt View is divided into weeks which are then divided into days.

Month/Week: The Gantt View is divided into months which are then divided into weeks.

Quarter/Month: The Gantt View is divided into quarters which are then divided into months.

Year/Month: The Gantt View is divided into years which are then divided into months.

Year/Quarter: The Gantt View is divided into years which are then divided into quarters.

Financial Period: The Gantt chart is divided into years which are then divided into financial periods.

Zoom to fit: Adjusts the current view's height and width or timescale to fit as much of the data as possible into the current work area.

Note

If you select to show the Financial Periods timescale, you can hover over a financial period in the timescale to see the start and finish dates of the financial period.

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Hovering over an assignment bar will display:

Resource Name field

The name of the resource.

Bar Type field

The type of bar in the Gantt.

Current Bar: Spans the early remaining/actual start to the early remaining/actual finish for each activity, and indicates how the schedule is progressing according to the original plan.

Late Bar: Shows the late start to the late finish of an activity.

Planned Bar: Shows the forecasted status of planned activities, and is used for simulating the outcome of the project schedule as part of project planning.

Start Date field

The start date for the assignment on the activity. For a not started assignment, this is the activity's Planned Start date. For a started assignment, this is the Actual Start date.

Finish Date field

The finish date for the assignment. For not started activities, this is the Planned Finish date. For in progress activities, this is the Remaining Finish date. For completed activities, this is the Actual Finish date.

▲ Show Legend

Enables you to view a description of the currently defined bars available on the Gantt chart. To hide the legend, click ▼ **Hide Legend**

Gantt Settings

Enables you to show or hide elements of the Gantt.

Sight Lines Show or hide vertical sight lines in the Gantt.

Timescale Select a timescale for the Gantt.

Tip

- If financial periods do not exist for part of the duration of your project, the Gantt chart does not show data for the parts of your project whose dates fall outside the existing financial periods.
- If financial periods do not exist for the whole of the duration of your project, the Gantt chart does not show any data. Change the Gantt timescale for your view in the Manage Views dialog box, or refresh your view if you are using the Overallocated Resources view.
- You cannot zoom the financial period Gantt timescale using Zoom to Fit, nor by dragging the timescale.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Assignments**.

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2. Click **Gantt View**.

Gantt View Format of the Assignments Page of the Resources Section

Overview

Use the Gantt chart format to view assignment duration, dates, and progress.

Screen Elements

Right-clicking on the timescale will display:

Timescale list

The Gantt chart time interval options. Select from one of the following intervals:

Week/Day: The Gantt View is divided into weeks which are then divided into days.

Month/Week: The Gantt View is divided into months which are then divided into weeks.

Quarter/Month: The Gantt View is divided into quarters which are then divided into months.

Year/Month: The Gantt View is divided into years which are then divided into months.

Year/Quarter: The Gantt View is divided into years which are then divided into quarters.

Financial Period: The Gantt chart is divided into years which are then divided into financial periods.

Zoom to fit: Adjusts the current view's height and width or timescale to fit as much of the data as possible into the current work area.

> **Note**
>
> If you select to show the Financial Periods timescale, you can hover over a financial period in the timescale to see the start and finish dates of the financial period.

Hovering over an assignment bar will display:

Resource Name field

The name of the resource.

Bar Types field

The type of bar shown in an EPS view Gantt chart.

Current Bar: Spans the early remaining/actual start to the early remaining/actual finish for each activity, and indicates how the schedule is progressing according to the original plan.

Project Baseline Bar: Shows the project baseline start and finish dates of an activity, and indicates how the schedule is progressing according to the original plan.

Forecast bar: Shows the forecast start to the forecast finish dates, and indicates how the schedule is progressing according to the original forecast dates.

Start Date field

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The current start date of the project. For a not started project, this is the project's planned start date. For a project that has started or is complete, this is the project's actual start date. For projects with no activities, the start date is equal to the anticipated start date if one is defined; if no anticipated start is defined, then the start date is equal to the project's planned start date.

Finish Date field

The current finish date of the project. For not started and in-progress projects, this is the latest early finish date from all activities in the project. For completed projects, this is the latest actual finish date derived from all activities. For projects with no activities, the Finish Date is equal to the Anticipated Finish date if one is defined. For projects with no activities and no Anticipated Finish date, the Finish Date field is blank.

▲ Show Legend

Enables you to view a description of the currently defined bars available on the Gantt chart. To hide the legend, click ▼ **Hide Legend**

Gantt Settings

Enables you to show or hide elements of the Gantt.

Sight Lines Show or hide vertical sight lines in the Gantt.

Timescale › Select a timescale for the Gantt.

> **Tip**
>
> - If financial periods do not exist for part of the duration of your project, the Gantt chart does not show data for the parts of your project whose dates fall outside the existing financial periods.
> - If financial periods do not exist for the whole of the duration of your project, the Gantt chart does not show any data. Change the Gantt timescale for your view in the Manage Views dialog box, or refresh your view if you are using the Overallocated Resources view.
> - You cannot zoom the financial period Gantt timescale using Zoom to Fit, nor by dragging the timescale.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. Click **Gantt View**.

Gantt View Format of the EPS Page

Overview

Use the Gantt chart format to view project duration, dates, and progress in an EPS node.

Screen Elements

Right-clicking on the timescale will display:

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Timescale list

The Gantt chart time interval options. Select from one of the following intervals:

Week/Day: The Gantt View is divided into weeks which are then divided into days.

Month/Week: The Gantt View is divided into months which are then divided into weeks.

Quarter/Month: The Gantt View is divided into quarters which are then divided into months.

Year/Month: The Gantt View is divided into years which are then divided into months.

Year/Quarter: The Gantt View is divided into years which are then divided into quarters.

Financial Period: The Gantt chart is divided into years which are then divided into financial periods.

Zoom to fit: Adjusts the current view's height and width or timescale to fit as much of the data as possible into the current work area.

> **Note**
>
> If you select to show the Financial Periods timescale, you can hover over a financial period in the timescale to see the start and finish dates of the financial period.

Hovering over a project bar will display:

Name field

The name of the project.

Bar Types field

The type of bar shown in an EPS view Gantt chart.

Current Bar: Spans the early remaining/actual start to the early remaining/actual finish for each activity, and indicates how the schedule is progressing according to the original plan.

Project Baseline Bar: Shows the project baseline start and finish dates of an activity, and indicates how the schedule is progressing according to the original plan.

Forecast bar: Shows the forecast start to the forecast finish dates, and indicates how the schedule is progressing according to the original forecast dates.

Start Date field

The current start date of the project. For a not started project, this is the project's planned start date. For a project that has started or is complete, this is the project's actual start date. For projects with no activities, the start date is equal to the anticipated start date if one is defined; if no anticipated start is defined, then the start date is equal to the project's planned start date.

Finish Date field

The current finish date of the project. For not started and in-progress projects, this is the latest early finish date from all activities in the project. For completed projects, this is the latest actual finish date derived from all activities. For projects with no activities, the Finish Date is equal to the Anticipated Finish date if one is defined. For projects with no activities and no Anticipated Finish date, the Finish Date field is blank.

▲ Show Legend

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Enables you to view a description of the currently defined bars available on the Gantt chart. To hide the legend, click **Hide Legend**

Gantt Settings

Enables you to show or hide elements of the Gantt.

Sight Lines Show or hide vertical sight lines in the Gantt.

Timescale Select a timescale for the Gantt.

Tip

- If financial periods do not exist for part of the duration of your project, the Gantt chart does not show data for the parts of your project whose dates fall outside the existing financial periods.
- If financial periods do not exist for the whole of the duration of your project, the Gantt chart does not show any data. Change the Gantt timescale for your view in the Manage Views dialog box.
- You cannot zoom the financial period Gantt timescale using Zoom to Fit, nor by dragging the timescale.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click **Gantt View**.

Gateway Page

Overview

Use this page to specify general default options.

Screen Elements

Gateway Parameters:

API URL field

The Primavera Gateway URL that will allow you to integrate other products with P6 and P6 Professional in the format: *<https: or http>//<hostName>:<portNumber>/gatewayapi/restapi/v1/<service>*

This field is also used when integrating with a Oracle Primavera Cloud workspace assigned to a P6 connection.

Username field

The name of the Gateway user with the administrative privileges.

Password field

The password of the Gateway user who has administrative privileges.

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Test Connection button

Tests that the address specified in the **API Url** field can be accessed using the **Username** and **Password** specified.

P6 Deployment field

Enter a name for the P6 deployment to be integrated with Primavera Gateway.

Integration Parameters:

Add button

Adds a new integration parameters line to the table.

Refresh button

Refreshes the list of selected deployments and synchronizations from Gateway.

Action Type list

Determines what action to take:

Import: Allows the import of the data specified in the **Source/Destination Deployment**, **Synchronization**, and **Action Name** columns.

Export: Allows the export of the data specified in the **Source/Destination Deployment**, **Synchronization**, and **Action Name** columns..

Source/Destination Deployment field

Determines the source or destination deployment to connect to.

Synchronization list

The synchronizations available based on the source or destination deployment selected.

Action Name field

The name that will appear on the Exchange Data menu.

Delete

Deletes the selected data items or table rows.

Getting Here

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Gateway**.

General Detail Window of the Activities Page

Overview

Use this detail window to configure general information about the activity.

Screen Elements

ID/Code field

The unique identifier of the activity or WBS.

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Project ID field

The unique identifying code for the project associated with the activity.

Name field

The name of the activity or WBS.

WBS field

The name of the WBS element associated with the activity.

Activity Type list

Determines how duration and schedule dates are calculated for an activity.

Task Dependent: Activities are scheduled using the activity's calendar rather than the calendars of the assigned resources. Choose task dependent when you want to control the duration of the activity yourself (that is, no resources are assigned), or when one or more resources assigned to the same activity can work according to the same calendar. For example, you might have an activity to cure concrete; you know how long the task takes and the addition of resources won't complete the task any earlier. You would designate this activity as task dependent.

Resource Dependent: Activities are scheduled using the calendars of the assigned resources. This type is used when several resources are assigned to the activity, but they might work separately. Choose resource dependent when you want to schedule each resource according to his/her own time schedule, or resource calendar, not the activity calendar. The assigned resource availability determines the start and finish dates of the activity. Typically, you use this type when multiple resources assigned to the same activity can work independently, or when availability can affect the activity's duration. For example, an activity that requires an Inspector might be delayed if that resource is assigned to multiple projects or is on vacation.

Level of Effort: Activities have a duration that is determined by its dependent activities and are typically administration type. Choose level of effort to indicate that the activity's duration depends on its predecessor and/or successor activities. A level of effort activity is usually one that is ongoing, such as clerical work, Change Management, or project management tasks. For example, site cleanup could be considered a level of effort activity; it occurs repeatedly and is dependent on the completion of a phase.

Start or Finish Milestone: Milestone activities are zero-duration and are used to mark significant project events. Choose start milestone or finish milestone to indicate that the activity marks the beginning or end of a major stage in the project. A primary resource or an activity owner, and expenses can be assigned to a milestone. In an office building addition project, examples of milestones might include Project Definition Complete, Structure Complete, or End Bidding Process.

WBS Summary: Activities that are used to aggregate date, duration, and percent complete values for a group of activities that share a common WBS code level. Choose WBS Summary to indicate that the activity is a summary-level WBS activity. A WBS Summary activity represents a group of activities that share a common WBS level. The summary-level WBS activity enables roll-ups of dates for the activity group. The duration of a WBS Summary activity extends from the start of the earliest activity in a group to the finish of the latest activity. WBS codes control which activities are part of a WBS Summary activity; P6 incorporates any activities that share a component of the WBS Summary activity's WBS code into the WBS Summary activity. For example, all activities whose WBS codes begin with A (A.1, A.1.1, A.1.2, etc.) can be part of one WBS Summary activity whose WBS code is A. At a lower level, all activities whose WBS codes start with A.1 (A.1.1, A.1.2, etc.) can be part of a WBS Summary activity whose WBS code is A.1.

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Duration Type field

Determines how remaining duration, units, and units/time are calculated when you update an activity that has resources assigned. The activity's duration type should correspond to the dominant factor, that is, the least flexible factor in the project: schedule, costs/work effort, or resource availability.

Fixed Units/Time: The resource units per time are constant when the activity duration or units are changed. Use this duration type when an activity has fixed resources with fixed productivity output per time period.

Fixed Duration & Units/Time: The activity duration is constant as the units or resource units per time are changed. Use this duration type when the activity must be completed within a fixed time period regardless of the resources assigned.

Fixed Units: The activity units are constant when the duration or resource units per time are changed. Use this duration type when the total amount of work is fixed, and increasing the resources can decrease the activity duration.

Fixed Duration & Units: The duration and units remain constant as the units/time is changed. Use this duration type when the activity must be completed within a fixed time period and the total amount of work is fixed.

Percent Complete Type list

Determines whether activity percent complete is calculated based on:

Physical: The activity's percent complete will be entered by the user for this activity.

Duration: The activity's percent complete will be calculated from the actual and remaining duration.

Units: The activity's percent complete will be calculated from the actual and remaining units.

Location field

The geographical location.

Activity Owner field

The user responsible for the activity.

Calendar field

The calendar assigned to the activity.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **General** detail window.

General Detail Window of the EPS Page

Overview

Use this detail window to add or modify information about the selected project.

Screen Elements

Details section:

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Project ID field

The unique identifying code for the project.

Project Name field

The name of the project.

Responsible Manager field

The organization breakdown structure (OBS) assigned to the project or EPS.

Project Owner field

The resource designated as responsible for the project.

The project owner designation provides a user with viewing access for the project.

Financial Period Calendar field

The financial period calendar assigned to the project.

Project Status list

The current state of the project or WBS element. For activities, this field reflects the current state of its parent WBS or project. The status type determines how project, WBS, activity, and resource assignment data are handled by applications within P6 EPPM.

The status you assign to a project automatically applies to all its WBS elements and their activities. By default, when you create and save a new WBS, it automatically inherits the **Project Status** value of its parent WBS or project; however, subject to certain logical constraints, you can change the individual status of a WBS. For example, within an *Active* project you can designate WBS elements that are *Active*, *Inactive*, and *Planned*. The following status values can appear in this field:

Active: This is the default setting for new projects. Use this status to reflect actual authorized WBS or project work at your organization. When you designate a project as *Active*, P6 Team Member Web timesheet users can view all activities included in its active WBS elements. Depending on their timesheet privileges, users may also be able to assign themselves to and perform work on activities that are included in an active WBS element.

Inactive: Use this status to designate a WBS or project that is on hold, terminated, or no longer active. Select the **Resources can view activities from an inactive project** option on the **Team Member** page of the **Project Preferences** dialog box to allow P6 Team Member Web timesheet users to view, but not edit, activities that are included in an inactive WBS element or project.

Planned: Use this status to designate a project or WBS that is in its planning phase. If a WBS element's status is *Planned*, P6 Team Member Web timesheet users cannot view any of its activities. This prevents P6 Team Member Web timesheet users from assigning themselves to and performing work on unauthorized activities not yet officially designated *Active*.

What If: This status can only be designated at the project level. Use this status to designate a project is only being considered or is undergoing analysis before establishing a more defined project schedule. When a project's status is *What If*, P6 Team Member Web timesheet users cannot view any of its activities. This prevents P6 Team Member Web timesheet users from assigning themselves to and performing work on unauthorized activities not yet officially designated *Active*.

Reflection projects created in P6 Professional appear in P6 as What If projects.

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Template: This status appears in this field only for template projects or for a WBS element that belongs to a template project. This status is set by P6; you cannot directly set this value.

Location field

The geographical location.

Checked Out By field

The name of the user who checked out the project.

If the project is not checked out, this field is blank.

Date Checked Out field

The date and time the user checked out the project. If the project is not checked out, this field is blank.

Planned Dates section:

Anticipated Start field

The expected start date of the project used during the planning phase. This date is manually entered and is not affected by scheduling.

If there are no children elements, the anticipated start is the start date listed for the project in the table.

Anticipated Finish field

The expected finish date of the project used during the planning phase. This date is manually entered and is not affected by scheduling.

If there are no children elements, the anticipated finish is the finish date listed for the project in the table.

Project Planned Start field

The expected start date for the project.

Must Finish By field

The optional date constraint you can specify for the project end date.

Actual Dates section:

Actual Start field

If the work has started, the date work on the project began. For an EPS, the actual start is the earliest actual start among all projects within it.

Actual Finish field

The date on which the project is complete.

This field is empty until all activities in the project have an actual finish date.

Scheduled Finish field

The calculated latest early finish date, which is based on the schedule most recently generated for the project.

Data Date field

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The progress point, or "as-of date", for activities in the project. Project status is up-to-date as of the data date. You can set the data date when you schedule the project or apply actuals, or you can set it manually. Set it manually if resources manually update activity progress and you do not plan to reschedule the project or apply actuals.

Description section:

Description field

The description of the selected project.

> **Tip**
>
> If more than one project is selected, the detail window will not be visible.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select a project and click the **General** detail window.

General Detail Window of the Issues Page

Overview

Use this detail window to add or modify information about the selected issue.

Screen Elements

Issue Name field

The name of the project issue.

In P6 Professional, issues which are automatically generated by the threshold monitor are named after the threshold parameter that triggered the project issue.

Responsible Manager field

The organizational breakdown structure (OBS) assigned to the issue.

If the field is editable and you have edit privileges, you can select a different responsible manager.

Identified Date field

The date the issue was identified.

Associated Project field

The project associated with the issue.

Owner field

The resource who is responsible for the issue.

Resolution Date field

The date the selected issue was resolved.

Applies To field

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The activity, WBS element, or project associated with the current issue.

Status field

The current status of the issue.

Identified By field

The user name of the person who identified the issue.

Priority field

The level of importance assigned to the issue.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Issues**.
2. Select an issue and click the **General** detail window.

General Detail Window of the Resources Tab of the Administration Page

Overview

Use this detail window to modify basic information about a selected resource.

Screen Elements

Details section

Resource ID field

The unique identifier for the resource.

Resource Name field

The name of the resource.

Office Phone field

The office phone number for the resource.

Active option

Determines whether the resource is currently active. A selected option indicates the resource is active.

Non-active resources might have left the organization, but are not deleted from the system since they might have actual hours.

Office Phone field

The office phone number for the resource.

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Resource Type list

The resource type. Valid values are:

Labor: Indicates that the selected resource performs labor, measured in units of time.

Nonlabor: Indicates that the selected resource does not perform labor, measured in units of time. Equipment is a nonlabor resource.

Material: Indicates that the resource has a unit of measure other than time. You can select a unit of measure for the material resource.

Employee ID field

The resource identifier within the organization, typically the employee number or social security number.

Other Phone field

The alternate phone numbers for the resource.

Parent Resource field

A resource categorized at a higher level than the current resource, in a resource hierarchy.

The parent resource is generally the larger department or organization for which you work.

For example, a salesperson might be assigned to an element of the resource hierarchy called Region 1 Sales.

Unit of Measure field

The unit of measure used for the material resource.

Title field

The job title for the resource.

For example, a resource may have the title Senior Engineer.

Email field

The email address for the resource.

Location field

The geographical location.

Notes section

Work area

The area where you can enter a note.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab, click the **General** detail window.

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General Page

Overview

Use this page to specify general default options.

Screen Elements

Starting Day of Week

First day of week for calendars list

Use the arrow to choose a day. The start day of the week affects how all days in a week are displayed in profiles, spreadsheets, and other layouts in which a weekly timescale can be displayed. For example, if Wednesday is selected as the starting day of the week, the week is displayed as WTFSSMT.

> **Note**
>
> When using View Calendar or going to Calendar views in Enterprise Data, the **First day of week for calendars** setting is ignored.

Activity Duration

Default duration for new activities field

The default duration for new activities in all projects. Having a default duration simplifies the process of adding new activities.

Codes

Code separator character field

The character that separates hierarchy levels in roles, resource codes, project codes, cost accounts, issue codes, activity codes, and risk categories; it is also the default separator for WBS codes in all new projects.

P6 Professional Applications

Online Help URL field

The help URL that will allow users to access help for P6 Professional. If this field is left blank, the Online Help option will not be available and Local help will always launch when the F1 key or Help shortcut are used.

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.

Using the hosted version ensures that you always have the most current help content.

Always launch the Online Help for the F1 shortcut key and context sensitive help option

Switch on this option if your users have access to the internet and need to be able to see the most up to date version of Help. If this option is switched off, accessing Help via the F1 key and Help shortcuts will always show local help. This option is off by default.

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Run in Secure Global Desktop environment option

Switch on this option if you want P6 Professional users to run the application in Secure Global Desktop.

> **Note**
>
> If this option is selected, P6 Professional users will not be able to see database details and system information on the **System** tab of the **About** page.

Enable offline mode option

Switch on this option if your users need to be able to use offline mode. If this option is switched off, you cannot change assign the *Enable Work Offline* global security profile privilege.

Industry Selection

Industry to use for terminology and default calculation settings in the P6 Professional module list

Use the arrow to choose the type of industry in which you use this application. The industry you choose causes P6 Professional 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 Tech, 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.

> **Note**
>
> Until an industry is selected P6 Professional users will see a message each time they log in which explains that this option has not been set.

Cost Spread

Spread cost based on options

Determines how costs are spread in resource analysis, capacity planning, team usage, and assignments pages as well as the usage chart in the resource and role assignment pickers. Other affected areas of P6 EPPM are publishing, summarizing, live assignment spreads, integration with Primavera Unifier, reports, and Primavera Analytics. If you have P6 Professional connected to your P6 EPPM database, the resource spreadsheets and histograms in Resource Analysis, Resource Assignments, and Team Usage views are affected.

Linear Spread: Determines that costs are spread evenly across the time period, regardless of any changes in resource or role rates.

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Units Spread: Determines that cost spreads are calculated to account for periodic changes in resource or role rates.

> **Note**
>
> - If you select to change from Linear Spread to Units Spread, you must run Recalculate Assignment Costs for all projects.
> - If your projects are integrated with Primavera Unifier, you must use linear spread.

What's New Dialog

Display What's New Dialog option

Determines whether the dialog describing the new features in P6 EPPM is shown to users when they log into P6 for the first time after an update.

Password Policy

Enable option

Determines whether to enable the password policy.

Use the Password Policy to authorize a password that is 8-20 characters long and that contains at least one letter and one number.

Identify Baseline Activities

Identify baseline activities using options

Determines whether to match activities in the project with their corresponding activities in the baseline using the **Activity ID/Code** or the internal **GUID (Globally Unique ID**) of the activity.

Date Filters

Finish date filters use start of Current Date, Week, and Month option

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.

Oracle Guided Learning

Display Oracle Guided Learning content option

Enables Oracle Guided Learning content in P6 EPPM. Oracle Guided Learning provides in-app training via interactive, step-by-step guides.

P6 Web OGL App ID field

The Application ID for the P6 Oracle Guided Learning instance.

TM Web OGL App ID field

The Application ID for the P6 Team Member Web Oracle Guided Learning instance.

OGL Environment Type list

Cloud only: Determines whether Oracle Guided Learning is connected to the Stage or Production environment of your P6 installation.

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Getting Here

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **General**.

General Section of the Activity Form Page

Overview

Use this section to view dates and duration and to communicate with the project manager about the activity. If you are the primary resource for the activity, you can use the General section to edit the start, finish, and expected finish dates.

Screen Elements

Edit link

Enables you to edit activity information that is presented as read-only in the General section.

Activity ID field

The unique identifier of the activity.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Activity Name field

The name of the activity.

The activity name does not have to be unique.

WBS field

The name of the WBS element.

Calendar field

The name of the calendar selected for the resource.

Primary Resource option

Determines whether the corresponding resource is the activity's primary resource.

Typically, the primary resource is the person responsible for the overall work on the activity and for updating activity status.

Activity Type field

Determines how duration and schedule dates are calculated for an activity.

Task Dependent: Activities are scheduled using the activity's calendar rather than the calendars of the assigned resources. Choose task dependent when you want to control the duration of the activity yourself (that is, no resources are assigned), or when one or more resources assigned to the same activity can work according to the same calendar. For example, you might have an activity to cure concrete; you know how long the task takes and

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the addition of resources won't complete the task any earlier. You would designate this activity as task dependent.

Resource Dependent: Activities are scheduled using the calendars of the assigned resources. This type is used when several resources are assigned to the activity, but they might work separately. Choose resource dependent when you want to schedule each resource according to his/her own time schedule, or resource calendar, not the activity calendar. The assigned resource availability determines the start and finish dates of the activity. Typically, you use this type when multiple resources assigned to the same activity can work independently, or when availability can affect the activity's duration. For example, an activity that requires an Inspector might be delayed if that resource is assigned to multiple projects or is on vacation.

Level of Effort: Activities have a duration that is determined by its dependent activities and are typically administration type. Choose level of effort to indicate that the activity's duration depends on its predecessor and/or successor activities. A level of effort activity is usually one that is ongoing, such as clerical work, Change Management, or project management tasks. For example, site cleanup could be considered a level of effort activity; it occurs repeatedly and is dependent on the completion of a phase.

Start or Finish Milestone: Milestone activities are zero-duration and are used to mark significant project events. Choose start milestone or finish milestone to indicate that the activity marks the beginning or end of a major stage in the project. A primary resource or an activity owner, and expenses can be assigned to a milestone. In an office building addition project, examples of milestones might include Project Definition Complete, Structure Complete, or End Bidding Process.

WBS Summary: Activities that are used to aggregate date, duration, and percent complete values for a group of activities that share a common WBS code level. Choose WBS Summary to indicate that the activity is a summary-level WBS activity. A WBS Summary activity represents a group of activities that share a common WBS level. The summary-level WBS activity enables roll-ups of dates for the activity group. The duration of a WBS Summary activity extends from the start of the earliest activity in a group to the finish of the latest activity. WBS codes control which activities are part of a WBS Summary activity; P6 incorporates any activities that share a component of the WBS Summary activity's WBS code into the WBS Summary activity. For example, all activities whose WBS codes begin with A (A.1, A.1.1, A.1.2, etc.) can be part of one WBS Summary activity whose WBS code is A. At a lower level, all activities whose WBS codes start with A.1 (A.1.1, A.1.2, etc.) can be part of a WBS Summary activity whose WBS code is A.1.

Duration Type field

Determines how remaining duration, units, and units/time are calculated when you update an activity that has resources assigned. The activity's duration type should correspond to the dominant factor, that is, the least flexible factor in the project: schedule, costs/work effort, or resource availability.

Fixed Units/Time: The resource units per time are constant when the activity duration or units are changed. Use this duration type when an activity has fixed resources with fixed productivity output per time period.

Fixed Duration & Units/Time: The activity duration is constant as the units or resource units per time are changed. Use this duration type when the activity must be completed within a fixed time period regardless of the resources assigned.

Fixed Units: The activity units are constant when the duration or resource units per time are changed. Use this duration type when the total amount of work is fixed, and increasing the resources can decrease the activity duration.

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Fixed Duration & Units: The duration and units remain constant as the units/time is changed. Use this duration type when the activity must be completed within a fixed time period and the total amount of work is fixed.

Duration type is read-only on this page.

Percent Complete Type field

Determines the way in which the application calculates the percent complete for the activity.

The type can be *Units*, *Duration*, *Physical, or Scope*. If the Percent Complete Type is *Units*, percent complete is calculated from the actual and remaining units. If the Percent Complete Type is *Duration*, the percent complete is calculated from the actual and remaining duration. If the Percent Complete Type is *Physical*, the user will enter the percent complete for the activity. If the Percent Complete Type is *Scope*, the percent complete is calculated by Oracle Primavera Cloud and cannot be modified in P6.

Auto Compute Actuals option

Determines whether to calculate the expense actual and remaining units based on the budgeted or planned cost and the activity's percent complete.

Started option

Determines whether the activity has started.

Finished option

Determines whether the activity has been completed.

Remaining Duration field

The total working time from the activity remaining start date to the remaining finish date.

The remaining working time is calculated using the activity's calendar. Before the activity is started, the remaining duration is the same as the planned duration. After the activity is completed the remaining duration is zero.

Total Duration field

The activity's actual duration plus its remaining duration.

Percent Complete field

The percent of the activity that has been completed.

The calculation is based on the formula for the selected Percent Complete Type. The Percent Complete Type can be *Units*, *Duration*, *Physical, or Scope*.

If the selected activity's percent complete type is *Duration*, the percent complete is calculated as (**Planned Duration** minus **Remaining Duration**) divided by **Planned Duration**.

If the activity's percent complete type is *Units*, the percent complete is calculated as (**Actual Labor Units** plus **Actual Nonlabor Units**) divided by (**Actual Labor Units** plus **Actual Nonlabor Units** plus **Remaining Labor Units** plus **Remaining Nonlabor Units**).

If the activity's percent complete type is *Physical*, either the user records the percent complete manually or the field is set to calculate using steps. To calculate using steps, the **Calculate Activity % Complete from activity steps** option must be set in Project Preferences.

If the activity's percent complete type is *Scope*, the percent complete originates from Oracle Primavera Cloud and cannot be modified in P6.

Getting Here

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1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand any portlet containing activities.
4. In the portlet, click an activity.
5. On the **Activity Form** page, expand the **General** section.

General Section of the Content Tab of the Customize Dashboard Page

Overview

Use this section to configure basic dashboard properties such as title, filter, and portlet rows.

Screen Elements

Dashboard Title field

The unique title for the dashboard.

Dashboard Filter field

Determines which information will display on the dashboard.

Restricts users from changing dashboard filter option

Determines whether to allow users to change the dashboard filter.

User Filter field

The filter a user selects for the dashboard. This filter overrides the specified dashboard filter.

This field is unavailable if the dashboard owner selects the **Restrict users from changing dashboard filter** option.

Maximum number of rows displayed in dashboard portlets field

The maximum number of rows you want to display in the dashboard portlets.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, click **Customize**.
4. On the **Dashboard Details** page, click the **Content** tab.
5. On the **Content** tab, expand the **General** section.

General Section of the Global Tab of the My Preferences Page

Overview

Use this section to modify general preferences.

Screen Elements

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Detail Settings section

Maximum number of rows displayed in each section field

For pages with standard lists of data (not tables), the number of rows that display together before the list is divided.

Generally, the lower the number, the better the performance because the user interface is displaying fewer rows of data.

Maximum number of rows displayed in trees and pick lists field

This field controls the number of elements that display in hierarchical lists, such as the EPS/project hierarchy in the **Open Projects** dialog box.

If the number of items available to display exceeds the maximum you specify, a message appears to inform you that you are viewing only a partial list.

Responsible Manager section

When moving or pasting a project

Select from one of the following options to determine the responsible manager to assign to a moved or pasted project.

Retain the responsible managers that were assigned to the moved, copied, or cut data: Select to retain the responsible managers assigned to the original data you copied, or to the data before it was moved.

Assign the OBS node of the new parent node to be the responsible manager for all moved or pasted data: Select to assign the responsible manager of the destination EPS node to all the data you move or paste.

Earned Value Settings section

Calculate performance and earned value information by

Select from one of the following options to calculate performance and earned value information. Calculate Performance and Earned Value Information lets you choose whether to display earned value information, performance indicators, and indices based on cost or labor units. For example, when you display earned value information on the **Portfolios Performance Status** tab, you will see either Costs or Labor Units data, depending on how you set this preference.

Cost: Select to display earned value information, performance indicators, and indices based on cost.

Labor Units: Select to display earned value information, performance indicators, and indices based on labor units.

Display actual and earned value using financial period data option

Display actual and earned value using financial period data lets you choose to view information based on past period actuals data that has been stored for custom financial periods. This option applies to the histogram and spreadsheet displays in the Portfolios Gantt Chart, Projects Team Usage view, and Resources Usage view.

When you choose this option, stored financial period values for actuals are distributed evenly from the start to the finish date defined for a financial period and earned value calculations are based on these stored period quantities.

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If you do not choose this option, actuals data is spread evenly from the actual start to the data date or actual finish date of the activity or assignment.

> **Note**
>
> If you choose this option but period performance has not been stored, total reported actuals display in the timescale period representing the data date. For more information, contact your P6 administrator or Project Management Office.

If projects are summarized by financial period (which is controlled in Application Settings in P6), 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 all unit and cost values in financial period intervals.

Dissolve Activity Settings section

Retain lag

Select this option if you would prefer that lag is retained when you dissolve activities.

If you select to retain lag while dissolving activities, the lag from the predecessor relationship with the dissolved activity is added to the lag from the relationship with the successor relationship and applied to the new relationship created between the new predecessor and successor activities.

Out-of-Sequence section

Warn about out-of-sequence activities

Select this option to receive a warning when a change you make to the status or relationships of an activity could put it, or other activities, out-of-sequence.

This warning applies only to changes you make directly to activities or their relationships. The warning will not show for activities that are pushed out-of-sequence by Update Progress, Apply Actuals or any other automated procedure in P6.

Getting Here

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Global** tab.
3. On the **Global** tab, select **General**.

General Tab of the Add Project Dialog Box of the EPS Page

Overview

Use this tab to define the unique qualities of a new project. You can start with an empty project and add new activities or base your new project on an existing template or project.

Screen Elements

Project ID field

The unique identifying code for the project.

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Project Name field

The name of the project.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

EPS field

The node in the EPS hierarchy where this project belongs.

Click **Select** to select an EPS element from the dialog box.

Responsible Manager field

The organizational breakdown structure (OBS) assigned to the project.

A responsible manager is required for each project and each level of the EPS.

Project Planned Start field

The expected start date for the project.

Must Finish By field

The optional date constraint you can specify for the project end date.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select an EPS element where you want to add the new project, then click **Context** and select **Add Project**.
3. Click the **General** tab.

General tab of the Add Project Template Dialog Box of the EPS Page

Overview

Use this tab to define the properties of a new project template. You can start with a clean template and add new activities or base your new template on an existing template or project.

Screen Elements

Template ID field

The unique alphanumeric short name you assign to your new project template.

The name can have up to 40 characters.

Template Name field

The long name of your project template.

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The name can have up to 100 characters.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

EPS field

The node in the EPS hierarchy where this project belongs.

Click ••• **Select** to select an EPS element from the dialog box.

Responsible Manager field

The organizational breakdown structure (OBS) assigned to the project.

A responsible manager is required for each project and each level of the EPS.

Project Planned Start field

The expected start date for the project.

Must Finish By field

The optional date constraint you can specify for the project end date.

Getting Here

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select an EPS element where you want to add the new project, then click ⚙ **Context** and select **Add Project Template**.
3. Click the **General** tab.

General tab of the Customize View Dialog Box of the Team Usage Page or the Analysis page

Overview

Use this tab to configure general settings in the view.

> ⓘ **Note**
>
> The view you are in affects which settings are available.

Screen Elements

Display list

The cost viewing options: Units or Cost. The capability to view costs is dependent on your security privileges. If you do not have access to costs data and you select the Costs option, no data appears.

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By default, actual units and costs are spread evenly across the time period from the Actual Start to the Data Date, or Actual Finish if there is one. A Global Preference setting lets you choose to view actuals values based on data stored for custom financial periods (past period actuals). When you choose this option, actual units and costs are spread evenly across the dates defined for each financial period. When this option is turned on, under/over allocated values are also calculated based on the stored period data for actual units. Additionally, the histogram legend indicates that Period Actual Units or Costs are being displayed.

Timescale list

The Gantt chart time interval options. Select from one of the following intervals:

Week/Day: The Gantt View is divided into weeks which are then divided into days.

Month/Week: The Gantt View is divided into months which are then divided into weeks.

Quarter/Month: The Gantt View is divided into quarters which are then divided into months.

Year/Month: The Gantt View is divided into years which are then divided into months.

Year/Quarter: The Gantt View is divided into years which are then divided into quarters.

Financial Period: The Gantt chart is divided into years which are then divided into financial periods.

Show usage for options

Determines whether to view resource or role data for the Open projects or for All projects. If you select to show usage for all projects, P6 shows usage data for all projects for resources or roles assigned in the projects you have open. These options are available in the Team Usage page.

Filter By section:

The rules of the selected filter showing the **Field**, **Operator** and **Value**. Modify the values to customize the filter. These options are available in the Analysis page.

Include assignments in restricted projects option

Adds a row for Other Assignments to the view. The Other Assignments row provides totals for the units and costs assigned to the selected resource in projects you do not have permission to access. Selecting this option gives you no information about the other projects you do not have permission to access, except the total number of units and costs assigned to the selected resource across all other projects. In the Team Usage page, this option is included with the Show usage for options.

Display options

Determines whether to show the entire published date range or a user specified date range in the Start and Finish of the timescale displayed in the spreadsheet and chart.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Team Usage**.
2. Click **Customize View**.
3. In the **Customize View** dialog box, click **General**.

Or:

1. On the **Navigation Menu**, expand **Resources** and click **Analysis**.

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2. Click **Customize View**.
3. In the **Customize View** dialog box, click **General**.

General Tab of the Document Details Page or Dialog Box (with content repository)

Overview

This tab displays configurable options for general document information of the selected document.

Screen Elements

Title field

The identifying name of the document as you want it to appear.

Access Level field

The list of who can access the document.

Project: If you have access to the project, you will have access to this document.

Private: Only the user who created the document will have access.

Security Policy list

The security policy for the selected document or folder:

Personal: Can be viewed, modified, or deleted only by the user who added it to the project.

Read-Only: Can be viewed by any project team member, but team members cannot modify or delete it.

Shared: Can be viewed, modified, or deleted by any project team member.

This list is not available when you access document details from the **My Documents** portlet.

Template Document option

Determines whether the document is to be used as a template.

Author field

The resource who authored or created the document.

Version field

The version number of the document. Version 1 is the original version of the document.

If the version number is a link, you can click the link to view that version of the document.

Last Modified By field

The name of the user who last modified the document.

Modified Date field

The date and time the document was last modified.

Format field

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The application format that the selected document was created in or checked in as, after being updated.

Size field

The document size in KB.

Review Status field

The current review status of the document.

The review statuses are *Blank*, *In Review*, *Approved*, *Rejected*, and *Terminated*. If the document is not under review, this field is blank.

This field is not available when you access document details from the **My Documents** portlet.

Owner field

The resource responsible for the document.

If you have the appropriate privileges, you can browse to assign a resource to this field. This field is not available when you access document details from the **My Documents** portlet.

Document Category list

The list of classifications that can be used to organize various documents.

This list is not available when you access document details from the **My Documents** portlet.

Reference Number field

The reference or catalog number of a document.

The reference number is defined by the user.

This field is not available when you access document details from the **My Documents** portlet.

> **Tip**
>
> The document you select and where you access the **General** tab might change which screen elements are visible.

Getting Here

From the Documents page:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab, select a document and click the **General** tab.

From the Dashboards page:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Documents** portlet and click the **Private Documents** tab.
4. On the **Private Documents** tab, select a document and click **Edit Details**.

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5. In the **Document Details** dialog box, click the **General** tab.

General Tab of the Documents Details Page or Dialog Box (without content repository)

Overview

This section displays configurable options for general document information of the selected document.

Screen Elements

Title field

The name of the document.

Public Location field

The publicly-accessible file location of the selected document. All project participants can view this file.

Private Location field

The private file location of the selected document. Typically, the private location is found on the user's personal computer rather than a location that anyone could access.

Open button

Enables you to launch the file (if it is recognized by the system) or open the file location (if you have permissions to view the location).

Deliverable option

Determines whether the work product or document is a project deliverable.

Status list

The current review status of the document. If the document is not under review, this field is blank.

Author field

The resource who authored or created the document.

Version field

The version number of the document. Version 1 is the original version of the document.

If the version number is a link, you can click the link to view that version of the document.

Last Modified By field

The name of the user who last modified the document.

Revision Date field

The date of the last update of the document.

Owner field

The resource responsible for the document.

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If you have the appropriate privileges, you can browse to assign a resource to this field. This field is not available when you access document details from the **My Documents** portlet.

Document Category list

The classification label used to organize documents.

Reference Number field

The reference or catalog number of a document.

The reference number is defined by the user.

This field is not available when you access document details from the **My Documents** portlet.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page:
   a. Expand a project and select a document from the left pane.
   b. Click the **General** tab.

General Tab of the Eventing Page

Overview

Use this page to configure eventing parameters and directory services to allow business objects and special operations to trigger events (on premises only).

Screen Elements

Eventing section

Eventing option

Determines whether to send events for P6, P6 EPPM Web Services, and P6 Integration API.

Interval

The length of time that the Event Notification System uses to determine how often it sends events to the message queue. Specifying a smaller time increases the frequency that the Event Notification System reports events to the message queue.

Max Queue Size

The amount of memory allocated to the queue for events. Once exceeded, events will publish immediately.

Show Costs option

Determines whether to enable the display of cost fields in event notifications.

JMS Destination Security option

Determines whether enable security.

JMS Connection Factory

The JNDI name of the JMS Connection Factory

JMS Connection Username

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The username to use when sending events to the specified JMS destination.

JMS Connection Name

The JNDI name of the queue or topic where events publish.

JMS Connection Password

The password to use when sending events to the specified JMS destination.

Test Connection button

Tests the connection to the JMS destination using the **Username** and **Password** specified.

Directory Services section

Provider URL

The URL of the JNDI provider used for eventing.

Security Principle

The WebLogic administrative user connected to the JNDI provider for eventing.

Initial Context Factory

The class name of the initial context factory for the JNDI connection for eventing.

Security Credentials

The password for the WebLogic administrative user connected to the JNDI provider for eventing.

Lookup Name

The JNDI queue name used when testing the directory connection for eventing.

Security Level list

The security level used to authenticate to the directory service for eventing. The available options are **SIMPLE**, **STRONG**, or **NONE**.

Test Connection button

Tests the connection to the directory service using the **Username** and **Password** specified.

Getting Here

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Eventing**.
3. Click the **General** tab.

General Tab of the IPMDAR Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use the General tab of the Add/Modify Template dialog box to specify general data to be exported to an IPMDAR file.

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Screen Elements

Contract Details tab:

Security Marking field

The security marking including the security classification.

Distribution Statement field

The distribution statement that identifies restrictions on the document's availability for distribution, release, and disclosure.

Reporting Period End Date field

The the end date of the reporting period.

Contractor Name field

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 field

The type of the ID Code for the contractor.

Contractor ID Code field

The ID Code used to identify the reporting contractor.

Contractor Address - Street field

The street address for the reporting contractor.

Contractor Address - City field

The city for the reporting contractor.

Contractor Address - State field

The state for the reporting contractor.

Contractor Address - Country field

The country for the reporting contractor.

Contractor Address - Zip Code field

The zip code or postal code for the reporting contractor.

POC and Contact Details tab:

Point of Contact Name field

The name of the person designated as the point of contact for the project.

Point of Contact Title field

The title of the person designated as the point of contact for the project.

Point of Contact Telephone Number field

The telephone number of the person designated as the point of contact for the project.

Point of Contact Email field

The email address of the person designated as the point of contact for the project.

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Contract Name field

The contract name.

Contract Number field

The contract number.

Contract Type field

The contract type.

Contract Task/Effort Name field

The name of the task or effort for the contract.

Program Name field

The name of the program.

Program Phase field

The phase of the program.

EVMS Accepted field

Indicates whether the contractor's EVMS has been accepted.

EVMS Accepted Date field

The date the contractor's EVMS was accepted.

Source Software tab:

Data Source Software field

The name of the software used to manage the source data.

Data Software Version field

The version of the software used to manage the source data.

Data Software Company Name field

The name of the company who produces the software used to manage the source data.

Data Software Comments field

Comments about the software used to manage the source data.

Export Source Software field

The name of the software used to export the data set.

Export Software Version field

The version of the software used to export the data set.

Export Software Company Name field

The name of the company that produces the software used to export the data set.

Export Software Comments field

Comments about the software used to export the data set.

Getting Here

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1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Export** tab.
4. On the **Export** tab:
   a. In the **Export Type** list, select **IPMDAR Format**.
   b. In the **Project** field, click **Browse** and select a project.
   c. Click **Manage Templates**.
5. In the **Manage IPMDAR Templates for Project** dialog box:
   - Click **Add** to create a new template.
   - Or select **Context** and select **Edit** to modify an existing template.

In the **IPMDAR Template** dialog box, click the **General** tab.

General Tab of the MSP Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use this tab to configure basic information for the template.

Screen Elements

Template Name field

The name for the import or export template.

This field is required and can contain up to 40 characters.

Currency list

Determines the currency used in cost fields.

Import Microsoft Project summary tasks as WBS summary activities option

Determines whether to import a summary task from Microsoft Project as a P6 WBS summary task in addition to the WBS hierarchical element.

Planned/budgeted baseline values list

Determines which of the ten Microsoft Project baselines the application will use for planned or budgeted values.

Selecting 0 indicates the current project baseline.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Import** or **Export** tab.
   a. On the **Import** tab:

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- In the **Import Type** list, select **Microsoft Project XML**.
- On the **Import** tab, click ••• **Browse** in the **File** field and select a Microsoft Project XML file to import.
- Click **Manage Templates**.

b. Or on the **Export** tab:

- In the **Export Type** list, select a Microsoft Project XML file type to export.
- Click **Manage Templates**.

4. In the **Manage Templates** dialog box, click a template.
5. In the **Modify Template** dialog box, click the **General** tab.

General Tab of the Project Preferences Dialog Box of the EPS Page

Overview

Use this tab to view or configure basic project information and default settings for new activities and assignments in the selected project. If an EPS node is selected, the data shown here represents the default settings for the fields.

Screen Elements

New Activities section

Duration Type list

Determines how remaining duration, units, and units/time are calculated when you update an activity that has resources assigned. The activity's duration type should correspond to the dominant factor, that is, the least flexible factor in the project: schedule, costs/work effort, or resource availability.

Fixed Units/Time: The resource units per time are constant when the activity duration or units are changed. Use this duration type when an activity has fixed resources with fixed productivity output per time period.

Fixed Duration & Units/Time: The activity duration is constant as the units or resource units per time are changed. Use this duration type when the activity must be completed within a fixed time period regardless of the resources assigned.

Fixed Units: The activity units are constant when the duration or resource units per time are changed. Use this duration type when the total amount of work is fixed, and increasing the resources can decrease the activity duration.

Fixed Duration & Units: The duration and units remain constant as the units/time are changed. Use this duration type when the activity must be completed within a fixed time period and the total amount of work is fixed.

Percent Complete Type list

Determines the way in which the application calculates the percent complete for the activity.

This default activity percent complete type will be applied to all new activities added to a project. If you change this setting for an existing project that has activities, the percent complete type of those existing activities will not be changed.

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Activity Type list

Determines how duration and schedule dates are calculated for an activity.

Task Dependent: Activities are scheduled using the activity's calendar rather than the calendars of the assigned resources. Choose task dependent when you want to control the duration of the activity yourself (that is, no resources are assigned), or when one or more resources assigned to the same activity can work according to the same calendar. For example, you might have an activity to cure concrete; you know how long the task takes and the addition of resources won't complete the task any earlier. You would designate this activity as task dependent.

Resource Dependent: Activities are scheduled using the calendars of the assigned resources. This type is used when several resources are assigned to the activity, but they might work separately. Choose resource dependent when you want to schedule each resource according to his/her own time schedule, or resource calendar, not the activity calendar. The assigned resource availability determines the start and finish dates of the activity. Typically, you use this type when multiple resources assigned to the same activity can work independently, or when availability can affect the activity's duration. For example, an activity that requires an Inspector might be delayed if that resource is assigned to multiple projects or is on vacation.

Level of Effort: Activities have a duration that is determined by its dependent activities and are typically administration type. Choose level of effort to indicate that the activity's duration depends on its predecessor and/or successor activities. A level of effort activity is usually one that is ongoing, such as clerical work, Change Management, or project management tasks. For example, site cleanup could be considered a level of effort activity; it occurs repeatedly and is dependent on the completion of a phase.

Start or Finish Milestone: Milestone activities are zero-duration and are used to mark significant project events. Choose start milestone or finish milestone to indicate that the activity marks the beginning or end of a major stage in the project. A primary resource or an activity owner, and expenses can be assigned to a milestone. In an office building addition project, examples of milestones might include Project Definition Complete, Structure Complete, or End Bidding Process.

WBS Summary: Activities that are used to aggregate date, duration, and percent complete values for a group of activities that share a common WBS code level. Choose WBS Summary to indicate that the activity is a summary-level WBS activity. A WBS Summary activity represents a group of activities that share a common WBS level. The summary-level WBS activity enables roll-ups of dates for the activity group. The duration of a WBS Summary activity extends from the start of the earliest activity in a group to the finish of the latest activity. WBS codes control which activities are part of a WBS Summary activity; P6 incorporates any activities that share a component of the WBS Summary activity's WBS code into the WBS Summary activity. For example, all activities whose WBS codes begin with A (A.1, A.1.1, A.1.2, etc.) can be part of one WBS Summary activity whose WBS code is A. At a lower level, all activities whose WBS codes start with A.1 (A.1.1, A.1.2, etc.) can be part of a WBS Summary activity whose WBS code is A.1.

Calendar field

The default calendar for new activities.

Cost Account field

The cost account associated with expenses for new activities.

Price/Unit field

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The default price/unit used to calculate the cost for activities that have labor/non-labor units but no assigned resources and for activities that have assigned resources or roles that do not have a specified price/unit.

To change the price/unit, type a new amount followed by a forward slash (/) and time unit designation, for example, $20/h.

New Activities - Auto Numbering section

Activity ID Prefix field

The series of initial letters, numeric digits, or special characters you want P6 to use to auto-number all the activities in a given project. By default, this field can contain 1 to 20 characters.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Activity ID Suffix field

The numeric digits you want P6 to use to auto-number all the activities in a given project. The value must be a number between 1 and 999,999.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Increment field

The number you want P6 to add to the previous Activity ID in order to auto-number all the new activities in a given project. This field value must be between 1 and 99,999.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

New Assignments section

Rate Type list

The rate type that corresponds to a specific price/unit value defined for a resource or role. A resource or role can have up to five rate types and corresponding price/unit values.

The default rate type setting determines which of a resource's or role's price/unit values is initially applied to new assignments within a project. The rate type on the assignment can be edited to change the price/unit.

If the default Rate Type setting for a project that has existing assignments is changed, the rate type of those existing assignments will not be changed.

Drive activity dates by default option

Determines whether resources drive activity dates by default.

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Resources can be assigned to the same activity more than once option

Determines whether resources can work on the same activity multiple times.

General section

WBS Code Separator field

The character(s), such as a period, used to separate code fields. You may use one or two characters.

The separator is also the WBS code separator for new projects by default.

Fiscal year begins on the first day of list

Determines on which month the fiscal year begins.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select a project or EPS node, click the **Context** menu and select **Set Project Preferences**.
3. Click the **General** tab.

General Tab of the UN/CEFACT Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use the General tab of the Add/Modify Template dialog box to specify general data to be exported to a UN/CEFACT file.

Screen Elements

Template Name field

The name for the import or export template.

This field is required and can contain up to 40 characters.

Contract Details tab:

Contractor Name field

The name of the contractor working on the project. This may be your organizations's name or the name of another organization.

ID field

The contractor's DUNS, DUNS+4 or CAGE code.

Business Type list

The business type.

Security Type list

The security code.

Schedule Type list

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The schedule type code.

Effective Start date field

The start date of the XML file.

Effective End Date field

The end date of the XML file.

Postal Address tab:

Project Location field

The location of the project.

Street Address field

The street address of the project location.

City field

The city of the project location.

State field

The state of the project location.

Country field

The country of the project location.

Postal Code field

The postal code of the project location.

Reporting Hierarchical Structure tab:

Export WBS option

Mark this checkbox to export the WBS with the project.

Export OBS field

The structure to export as the Organizational Breakdown Structure for the project. This can be either the OBS or an Activity Code which represents the OBS.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Export** tab.
   a. Or on the **Export** tab:
      - In the **Export Type** list, select **UN/CEFACT XML Format 6**.
      - In the **Project** field, click **Browse** and select a project.
      - Click **Manage Templates**.
4. In the **Manage Templates** dialog box, click a template.
5. In the **UN/CEFACT Template** dialog box, click the **General** tab.

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Generate Financial Period Dialog Box

Overview

Use this dialog box to automatically create a batch of new financial periods.

Screen Elements

Last Period Finish Date

The latest finish date of all the financial periods.

Batch Start Date field

The date the batch begins.

Batch Finish Date field

The date the batch ends.

Period Cycle options

Choose from one of the following to set as the period cycle:

Weeks: Select the period cycle by weeks.

Months: Select the period cycle by months.

Year: Select the period cycle by years.

Every field

Choose the frequency of selected period cycle.

Tip

- Although the application will alert you in each case, be aware of the following constraints when creating or configuring financial periods:
- You cannot introduce gaps in a series of financial periods. Any new periods you create must start or end flush with any existing entries. For example, if October 7-13 and October 14-20 are existing financial periods, you can create a new one that either ends on October 6 or starts on October 21.
- You cannot overlap financial periods. In order to serve their purpose, financial periods must represent unique slices of time.
- You can create financial periods with a duration of fewer than seven days; however, if a financial period calendar contains financial periods with a duration of less than one week, that calendar is not available in timescales in P6. You can use P6 Professional if you need to view data by financial periods spanning increments of fewer than seven days.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page expand **Global** and click **Financial Periods**.

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3. On the **Financial Periods** page, click the **Financial Periods** tab.
4. On the **Financial Periods** tab, click **Actions** and click **Generate Financial Periods**.

Generate Timesheet Periods Dialog Box

Overview

Use this dialog box to automatically create new timesheet periods at the same time.

Screen Elements

Last Period Finish Date

The latest finish date of all the timesheet periods.

Batch Start Date field

The date the batch begins.

Batch Finish Date field

The date the batch ends.

Period Cycle list

Every Week: Creates timesheet periods which cover a week each.

Every Two Weeks: Creates timesheet periods which cover every two weeks.

Every Four Weeks: Creates timesheet periods which cover every four weeks.

Every Month: Creates timesheet periods which cover every month.

Add button

Adds the timesheet periods for the selected date range.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Timesheet Periods**.
3. Click the **Actions** menu and click **Generate Timesheet Periods**.

Global Calendars Page

Overview

Use this page to view or configure global calendar information and options.

Screen Elements

Add (Ins) button

Opens the Select Calendar to Copy dialog box.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

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Full Screen

Expands the current work area so it fills the entire display.

Print

Opens the Print Options dialog box to enable you to print the list of calendar names.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Refresh

Refreshes the current screen with any new, updated, or removed data.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Duplicate: Creates a new item as a copy of the selected item.

Set as Default Calendar: Sets the current calendar as the default calendar.

Calendar Name

Displays a list of all available calendars to view. This column is always visible on this page.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

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Summary tab

See Summary Tab of the Global Calendars Page.

Calendar tab

See Calendar Tab of the Global Calendars Page.

Standard Work Week tab

See Standard Work Week Tab of the My Calendar dialog box, Global Calendars Page, Project Calendars Page, or Resource Calendars Page.

Used By tab

See Used By Tab of the Global Calendars Page.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Tip

- The project count includes assignments to projects, baselines, activities, and resources.
- You cannot delete the global default calendar.
- If you delete a calendar that is currently set as the project default calendar, or as the default calendar for a resource, or as the assigned calendar for an activity, you will be prompted to choose a replacement calendar for those assignments. Replacing the calendar for projects, resources, or activity assignments can cause the dates of those assignments to change.
- You need the **Add/Edit/Delete Global Calendars** or **Add/Edit/Delete Resource Calendars** security privileges to delete a calendar.
- When you are analyzing enterprise data usage, the Summary, Calendar, Standard Work Week, and Used By tabs are hidden. To bring the tabs back into view and hide the columns specific to analyzing enterprise data, select **Refresh**.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Global Calendars**.

Global Data tab of the Primavera XML or Primavera XER Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use this tab to select an import action when the same data exists in the import file and project being updated. Expand each grouping band to see the data types within.

Screen Elements

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Name field

The type of global or project data for import.

Import Action list

Determines what action to take when importing:

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 for this data type.

Keep: Imports the secure code using the same import action assigned to the parent grouping node. This action is available for secure codes only when importing from a Primavera XML file.

> **Tip**
>
> To understand how the import of secure codes is handled, see the *P6 EPPMImporting and Exporting Guide*.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click the **Actions** menu and select **Manage Import Templates** or **Import/Export Projects**.
3. In the **Import/ExportProjects** dialog box:
   a. Click the **Import** tab.
   b. Click the **Import Type** list and select **Primavera XER** or **Primavera XML.**
   c. Click the **File** field and select a file to import.
   d. Click the **Manage Templates** button.
4. In the **Manage Primavera Templates** or **Manager Primavera XER and XML Templates** dialog box, click the name of a template.
5. In the **Primavera Template** or **Primavera XER and XML Template** dialog box, click the **Basic** tab.
6. Click the **Global Data** tab.

Global Scheduled Services Page

Overview

Use this page to configure P6 to automatically publish any of the following types of global data to use in reporting.

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- **Enterprise Data**: Enterprise level business objects containing calculated and denormalized fields, including cost accounts, funding sources, resource teams, role teams, timesheet dates, and User Defined Fields.
  - **Project**: This includes the EPS, Project Codes, user assignments of project codes, periodic budgets for projects and WBS elements, budget change logs for projects and WBS elements, and project descriptions. The affected tables are as follows (the PMDB table is listed first and the associated Px follows in parentheses): pfolio (Pfoliox), pcattype (Projectcodehierarchy), pcatval (Pcatvalx), pcatuser (Pcatuserx), wbsbudg (wbsbudgx), budgchng (budgchngx), and WbsNote (wbsmemox)
  - **Activity**: This includes Activity Code Types and Activity Code Values. The affected tables are as follows (the PMDB table is listed first and the associated Px follows in parentheses): actvtype (Activitycodehierarchy), actvcode (Actvcodex).
  - **Resource**: This includes resource portfolios, role portfolios, resource code types and values, role code types and values, resource curve definitions and assignments, and timesheet data. The affected tables are as follows (the PMDB table is listed first and the associated Px follows in parentheses): rfolio (Rfoliox), rcattype (Resourcecodehierarchy), rcatval (Rcatvalx), rsrccurv (Rsrccurvx), rsrcrcat (Rsrcrcatx), rsrchour (Timeshtx), and Timesht (Timeshtx).
  - **Calendar**: This includes global, project, and resource calendars. The affected tables are as follows (the PMDB table is listed first and the associated Px follows in parentheses): calendar (Calendar).
  - **Enterprise Data Dictionary**: This includes cost accounts, currency information, project funding information, reports, user defined codes, and the data stored in user defined code values. The affected tables are as follows (the PMDB table is listed first and the associated Px follows in parentheses): account (Costaccounthierarchy), currtype (Currtypex), udfcode (Udfcodex), and UserDefinedFieldValue (udfvaluex).
- **Enterprise Summary Data**: EPS-level spread data for currently published projects in a given EPS.
- **Resource Management Data**: The resource hierarchy, resources, resource rates, resource limits, role rates, resource role assignments, and resource security.
- **Security Data**: Users, the OBS, security profiles and security for the P6 Extended Schema.
- **Audit Data**: Information gathered during table and project auditing.

> **Note**
>
> Audit data for blob fields is not published with the global scheduled service.

Screen Elements

Run Service button

Schedules the selected service to run immediately.

View Log button

Enables you to view the log for the most recent run of the selected service.

Refresh

Refreshes the current screen with any new, updated, or removed data.

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Move Up button

Moves the selected item closer to the top of the list.

Move Down button

Moves the selected item closer to the bottom of the list.

Full Screen

Expands the current work area so it fills the entire display.

Search

Enables you to perform a search based on the value you enter in the search bar.

Name field

The title of the scheduled service.

Enabled option

Determines whether a service can be scheduled.

Status field

The status of the service.

Statuses include:

Pending: When the service was just created or if the service is waiting in queue to be run.

Running: When the service is running on the service machine.

Failed: When the service cannot complete, an error occurs, or data could not be committed.

Complete: When the service completes successfully.

Last Run field

The last time the service ran.

Next Run field

The next time the service is scheduled to run.

Service Settings detail window

See: Service Settings Detail Window.

Service Summary detail window

See: Service Summary Detail Window

Tip

You must have the Administer Global Scheduled Services privilege to modify settings on the Global Scheduled Services page. If you have the appropriate security privileges, you can assign a user this privilege on the User Administration Global Security Profiles page available from the Administration tab.

Getting Here

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1. On the ☰ **Navigation Menu**, expand **Administration** and click **Scheduled Services**.
2. On the **Scheduled Services** page, click **Global**.

Global Search & Replace Wizard of the EPS Page

Overview

Use Global Search & Replace to replace data in multiple activities, WBS elements, and projects.

Screen Elements

Search

Enables you to perform a search based on the value you enter in the search bar.

Make Global button

Moves the selected User template to the Global Templates list.

Context

Add: Creates a new item and opens the Select Project step of the Global Search & Replace Wizard.

Edit: Opens the Select Project step of the Global Search & Replace Wizard for the selected template.

Delete: Removes the selected item permanently.

Templates list

The list of existing templates. **Global Templates** can be accessed by all users, **User Templates** are exclusively yours.

Apply button

Applies the selected template and opens the Review Changes page of the Global Search & Replace dialog box.

Select Project step

See: Select Project Step of the Global Search and Replace Wizard of the EPS Page

Define Search And Replace Criteria step

See: Define Search and Replace Criteria step of the Global Search and Replace Wizard of the EPS Page

Apply Criteria step

See: Apply Criteria step of the Global Search and Replace Wizard of the EPS Page

Getting Here

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the EPS page, click the **Actions** menu and select **Global Search & Replace**.

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Global Security Profiles Page

Overview

Use this page to configure global security profiles by assigning privileges in the detail window. The options you configure on the privileges detail window apply to the selected profile.

Screen Elements

Add button

Creates a new global or project security profile.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Delete: Removes the selected item or association permanently.

Set As Default: Sets the selected security profile as the default profile for new users.

Duplicate: Creates a new item as a copy of the selected item.

Default Profile indicator

Default profile indicator is to assign this security profile to new users.

Profile Name field

The name of the security profile.

Description field

The full description for the profile.

Assigned Privileges list

The privileges assigned to the profile.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Download Privilege List

Enables you to download an Excel file listing all security profiles and the privileges assigned to each.

Privileges detail window

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Privileges Detail Window of the Global Security Profiles Page

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Global Security Profiles**.

Global Tab of the MSP Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use this tab to configure global data import options.

Screen Elements

Name field

The type of global or project data for import.

Import Action list

Determines what action to take when importing:

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 for this data type.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/Export Projects** dialog box, click the **Import** tab.
   a. In the **Import Type** list, select **Microsoft Project XML**.
   b. In the **File** field, click **Browse** and select a Microsoft Project XML file to import.
   c. In the **Action** list, select **Update Existing**.
   d. In the **Import To** field, click **Browse** and select a project to update.
   e. Click **Manage Templates**.
4. In the **Manage MSP Templates** dialog box, click a template.
5. In the **MSP Template** dialog box, click the **Global** tab.

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Global Tab of the My Preferences Page

Overview

Use this tab to customize data display formats for all sections of the application.

Screen Elements

General section

See: General Section of the Global Tab of the My Preferences Page

Display Format section

See: Display Format Section of Global Tab of the My Preferences Page

Resources section

See: Resources Section of the Global Tab of the My Preferences Page

Email Notifications section

See: Email Notifications Section of the Global Tab of the My Preferences Page

Project Score section

See: Project Score Section of Global Tab of the My Preferences Page

Performance Thresholds section

See: Performance Thresholds Section of the Global Tab of the My Preferences Page

Getting Here

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Global** tab.

Grid View Format of the Activities Page

Overview

Use the Grid View to view activity data grouped by project and WBS for the currently open set of projects. Customize columns to focus only on the data of importance to you.

Screen Elements

Context menu

Add Activity: Adds a new activity at the selected point in the list.

Add Child WBS: Adds a WBS level as a child of the selected WBS or project.

Add Sibling WBS: Adds a WBS as a sibling of the selected WBS.

Add WBS from Template: Opens the Select WBS dialog box.

Delete: Deletes the selected activity or WBS.

Dissolve: Removes the selected activity from the schedule and links all its predecessors to all its successors.

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View Calendar: Enables you to view a read-only version of the assigned calendar.

Email Activity Details: Sends an email message containing the details of the selected activity and a link to the activity in P6. You must have an email address associated with your user name in P6 EPPM to send email messages.

Link Activities: Creates a relationship between the selected activities in the order they were selected. The default relationship is Finish to Start for resource dependent, task dependent, and level of effort activities, Start to Start for start milestones, and Finish to Finish for finish milestones. The link is visible on the Gantt chart.

Unlink Activities: Removes the relationship between the selected activities.

Cut: Cuts the selected activity or WBS node.

Copy: Copies the selected activity or WBS node.

Paste: Pastes the selected activity or WBS node.

Assign ▶

Resources... (Ctrl+Alt+R): Opens the Assign Resource dialog box.

Roles... (Ctrl+Alt+O): Opens the Assign Role dialog box.

Predecessors...: Opens the Assign Relationships panel and expands the Assign Predecessors section.

Successors...: Opens the Assign Relationships panel and expands the Assign Successors section.

Codes... (Ctrl+Alt+D): Opens the Assign Codes panel.

Fill Down: Copies the data from the first cell selected to all other selected cells in the same column. Use CTRL or SHIFT to select multiple cells.

Expand: Expands the selected WBS and all child WBS elements.

Expand All: Expands all WBS elements in the selected project.

Collapse: Collapses the selected WBS and all child levels of the selected WBS.

Collapse All: Collapses all WBS elements in the selected project.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Move Right: Moves the selected item one level lower in the hierarchical arrangement.

Move Left: Moves the selected item one level higher in the hierarchical arrangement.

Grid View columns:

Open Column Menu

Ascending: Click to sort the current view by the contents of the selected column in ascending order.

Descending: Click to sort the current view by the contents of the selected column in descending order.

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Group by Column: Click to group the current view by the selected column.

Hide Column: Click to remove the column from the current view. You cannot hide pinned columns.

Fit to Content: Click to adjust the column width to the current contents of the column.

Find and Replace: Click to find and replace text in the column. This action is only available for columns containing text.

Pin Column: Click to add or remove the column to the pinned columns list for the current view.

Rename Column: Click to rename the column in the current view.

Open Column Selector button

Opens a list enabling you to add and remove columns in the grid.

The default fields that appear as columns in the Grid View are described below.

Project indicator

A visual indicator of the type of project. Possible indicators include:

A project. Its status may be *planned*, *active*, or *inactive*.

An open project.

A locked project (that is, a project another user has opened exclusively).

A proposed or *what-if* project.

A checked out project.

A project template.

An open project template.

WBS indicator

A visual indicator of the WBS type. Possible indicators include:

A WBS. Each instance indicates the work is further divided hierarchically into discrete packages.

Activity indicator

A visual indicator of the activity type within the WBS or project. Possible indicators include:

An activity.

A milestone.

ID/Code field

The unique identifier of the activity or WBS.

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Name field

The name of the activity or WBS.

Start field

The current start date of the activity. For started activities, this is the actual start date. For not started activities, this is the planned start date until the project is scheduled. When scheduled, the start date field is set to the remaining early start date.

Finish field

The current finish date for the activity. For not started activities, this is the planned finish date. For in-progress activities, this is the remaining early finish date. For completed activities, this is the actual finish date.

Remaining Duration field

The total working time from the activity remaining start date to the remaining finish date.

The remaining working time is calculated using the activity's calendar. Before the activity is started, the remaining duration is the same as the planned duration. After the activity is completed the remaining duration is zero.

Activity % Complete field

The percent of the activity that has been completed.

The calculation is based on the formula for the selected Percent Complete Type. The Percent Complete Type can be *Units*, *Duration*, *Physical, or Scope*.

If the selected activity's percent complete type is *Duration*, the percent complete is calculated as (**Planned Duration** minus **Remaining Duration**) divided by **Planned Duration**.

If the activity's percent complete type is *Units*, the percent complete is calculated as (**Actual Labor Units** plus **Actual Nonlabor Units**) divided by (**Actual Labor Units** plus **Actual Nonlabor Units** plus **Remaining Labor Units** plus **Remaining Nonlabor Units**).

If the activity's percent complete type is *Physical*, either the user records the percent complete manually or the field is set to calculate using steps. To calculate using steps, the **Calculate Activity % Complete from activity steps** option must be set in Project Preferences.

If the activity's percent complete type is *Scope*, the percent complete originates from Oracle Primavera Cloud and cannot be modified in P6.

Primary Resource field

The person primarily responsible for performing or overseeing work related to a specific activity.

The first resource you assign to an activity is automatically identified as the activity's primary resource.

> **Tip**
>
> Right-click a table cell for quick access to a shortcut menu of actions you can perform within a particular row or column.

Getting Here

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1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Click **Grid View**.

Grid View Format of the Assignments Page of the Projects Section

Overview

Use the Assignments Grid to display assignment data in a table format.

Screen Elements

Context menu

Assign Resource: Opens the Select a Resource dialog box.

Fill Down: Copies the data from the first cell selected to all other selected cells in the same column. Use CTRL or SHIFT to select multiple cells.

Delete: Enables you to delete the selected assignment.

View Calendar: Enables you to view a read-only version of the assigned calendar.

Resource Assignments Table columns

Open Column Menu

Ascending: Click to sort the current view by the contents of the selected column in ascending order.

Descending: Click to sort the current view by the contents of the selected column in descending order.

Group by Column: Click to group the current view by the selected column.

Hide Column: Click to remove the column from the current view. You cannot hide pinned columns.

Fit to Content: Click to adjust the column width to the current contents of the column.

Find and Replace: Click to find and replace text in the column. This action is only available for columns containing text.

Pin Column: Click to add or remove the column to the pinned columns list for the current view.

Rename Column: Click to rename the column in the current view.

Open Column Selector button

Opens a list enabling you to add and remove columns in the grid.

The default fields that appear as columns in Resource Assignments table are described below.

Activity ID field

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The unique identifying code for the activity assigned to the resource or role.

Activity Name field

The name of the activity assigned to the resource or role.

Resource Name field

The name of the resource assigned to the activity.

Role Name field

The name of the role assigned to the activity.

Start field

The start date for the assignment on the activity. For a not started assignment, this is the activity's **Planned Start** date. For a started assignment, this is the **Actual Start** date.

Finish field

The finish date for the assignment. For not started activities, this is the **Planned Finish** date. For in progress activities, this is the **Remaining Finish** date. For completed activities, this is the **Actual Finish** date.

Remaining Units/Time field

The units per time required for the resource assignment to complete the activity.

Planned Units field

The planned units of work for the resource assignment on the activity.

Actual Units field

The sum of the actual non-overtime and the overtime units worked by the resource on the activity.

Calculated as **Actual Regular Units** plus **Actual Overtime Units**.

Values for **Actual Regular Units** and **Actual Overtime Units** are obtained from either timesheets when project actuals are applied, or directly from the updated fields in the interface.

Remaining Units field

The remaining units of work to be performed by the resource on the activity.

Calculated as **Planned Units** minus **Actual Units**.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Assignments**.
2. Click **Grid View**.

Grid View Format of the Assignments Page of the Resources Section

Overview

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Use the Assignments Grid to display assignment data in a table format. Filter, group, sort, and customize the columns.

Screen Elements

Context menu

Assign Resource: Opens the Select a Resource dialog box.

Assign Resource by Role: Opens the Select a Resource dialog box.

Fill Down: Copies the data from the first cell selected to all other selected cells in the same column. Use CTRL or SHIFT to select multiple cells.

Delete: Enables you to delete the selected assignment.

View Calendar: Enables you to view a read-only version of the assigned calendar.

Resource Assignments Table columns

Open Column Menu

Ascending: Click to sort the current view by the contents of the selected column in ascending order.

Descending: Click to sort the current view by the contents of the selected column in descending order.

Group by Column: Click to group the current view by the selected column.

Hide Column: Click to remove the column from the current view. You cannot hide pinned columns.

Fit to Content: Click to adjust the column width to the current contents of the column.

Find and Replace: Click to find and replace text in the column. This action is only available for columns containing text.

Pin Column: Click to add or remove the column to the pinned columns list for the current view.

Rename Column: Click to rename the column in the current view.

Open Column Selector button

Opens a list enabling you to add and remove columns in the grid.

The default fields that appear as columns in Resource Assignments table are described below.

Activity ID field

The unique identifying code for the activity assigned to the resource or role.

Activity Name field

The name of the activity assigned to the resource or role.

Resource ID field

The unique identifier for the resource.

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Resource Name field

The name of the resource assigned to the activity.

Planned Units field

The planned units of work for the resource assignment on the activity.

Actual Units field

The sum of the actual non-overtime and the overtime units worked by the resource on the activity.

Calculated as **Actual Regular Units** plus **Actual Overtime Units**.

Values for **Actual Regular Units** and **Actual Overtime Units** are obtained from either timesheets when project actuals are applied, or directly from the updated fields in the interface.

Remaining Units field

The remaining units of work to be performed by the resource on the activity.

Calculated as **Planned Units** minus **Actual Units**.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. Click **Grid View**.

Grid View Format of the EPS Page

Overview

Use the EPS Grid to display project and EPS data for your entire organization in a familiar spreadsheet format. Filter, group, sort, and customize the columns.

Screen Elements

Context menu

Add Project (Ins): Adds a new project in the selected EPS node.

Add Project Template: Adds a new template in the selected EPS node.

Open Template: Opens the selected project template. To see this menu item, select a project template.

Open Template to Activities: Opens the selected project template and navigates to the Activities page. To see this menu item, select a project template.

Add Sibling EPS: Adds an EPS as a sibling of the selected EPS. To see this menu item, select an EPS.

Add Child EPS: Adds an EPS as a child of the selected EPS. To see this menu item, select an EPS.

Open Project: Opens the selected project. To see this menu item, select a project or EPS.

Open Project to Activities: Opens the selected project and navigates to the Activities page. To see this menu item, select a project or EPS.

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Close: Closes the selected project.

Close All: Closes all open Projects.

Copy: Copies the selected project or EPS node.

Cut: Cuts the selected project or EPS node.

Paste: Pastes the selected project or EPS node

Delete: Deletes the selected project or EPS node.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement. To see this menu item, select an EPS.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement. To see this menu item, select an EPS.

Move Right: Moves the selected item one level lower in the hierarchical arrangement. To see this menu item, select an EPS.

Move Left: Moves the selected item one level higher in the hierarchical arrangement. To see this menu item, select an EPS.

Fill Down: Copies the data from the first cell selected to all other selected cells in the same column. Use CTRL or SHIFT to select multiple cells. To see this menu item, select a project or project template.

Assign Codes: Opens the Assign Codes Panel. To see this menu item, select a project or project template.

Delete Code Assignments: Opens the Assign Codes Panel. To see this menu item, select a project or project template.

View Audit Data: Opens the Audit panel. To see this menu item, select at least one EPS element, EPS grouping node, or project.

Set Project Preferences: Opens the Project Preferences dialog box.

View Calendar: Enables you to view a read-only version of the assigned calendar. To see this menu item, select a project or project template.

Expand: Expands the selected EPS node. To see this menu item, select an EPS.

Collapse: Collapses the selected EPS node. To see this menu item, select an EPS.

EPS Table columns

Open Column Menu

Ascending: Click to sort the current view by the contents of the selected column in ascending order.

Descending: Click to sort the current view by the contents of the selected column in descending order.

Group by Column: Click to group the current view by the selected column.

Hide Column: Click to remove the column from the current view. You cannot hide pinned columns.

Fit to Content: Click to adjust the column width to the current contents of the column.

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Find and Replace: Click to find and replace text in the column. This action is only available for columns containing text.

Pin Column: Click to add or remove the column to the pinned columns list for the current view.

Rename Column: Click to rename the column in the current view.

Open Column Selector button

Opens a list enabling you to add and remove columns in the grid.

The default fields that appear as columns in the EPS table are described below.

EPS indicator

A visual indicator of the EPS type. Possible indicators include:

An EPS. Each instance indicates the work is further divided hierarchically into discrete packages.

Project indicator

A visual indicator of the type of project. Possible indicators include:

A project. Its status may be *planned*, *active*, or *inactive*.

An open project.

A locked project (that is, a project another user has opened exclusively).

A proposed or *what-if* project.

A checked out project.

A project template.

An open project template.

ID field

The unique identifier of the project or EPS. Click the ID to open the project directly to the Activities page.

Name field

The name of the project. Click the Name to open the project directly to the Activities page.

Actual Expense Cost field

The actual cost for all project expenses associated with the project within the EPS.

Actual Labor Cost field

The actual cost for all labor resources assigned to the projects within the EPS.

Actual Material Cost field

The actual units for all material resources assigned to the project within the EPS.

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Actual Nonlabor Cost field

The actual cost for all nonlabor resources assigned to the project within the EPS.

Actual This Period Labor Cost field

The labor costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Labor Cost** minus the sum of the stored **Actual This Period Labor Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Labor Cost** is the same as **Actual Labor Cost**.

Actual This Period Material Cost field

The material costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Material Cost** minus the sum of the stored **Actual This Period Material Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Material Cost** is the same as **Actual Material Cost**.

Actual This Period Nonlabor Cost field

The nonlabor costs incurred during this financial period.

If period performance is stored, the calculation is **Actual Nonlabor Cost** minus the sum of the stored **Actual This Period Nonlabor Cost** fields for all previous periods.

If the period performance is not stored, **Actual This Period Nonlabor Cost** is the same as **Actual Nonlabor Cost**.

Actual Total Cost field

The actual total cost incurred on the project as of the project data date.

Calculated as **Actual Labor Costs** plus **Actual Nonlabor Costs** plus **Actual Material Costs** plus **Actual Expense Costs**.

At Completion Expense Cost field

The sum of the actual plus remaining cost for all project expenses associated with the cost account.

Calculated as **Actual Expense Cost** plus **Remaining Expense Cost**.

At Completion Labor Cost field

The sum of the actual plus remaining costs for all labor resources assigned to the activities in the project.

If the activities are not started, this equals the planned labor costs. Once the activities are complete, this equals the actual labor costs.

Calculated as **Actual Labor Cost** plus **Remaining Labor Cost**.

At Completion Material Cost field

The material cost at completion. It is the sum of the actual plus remaining costs for all material resources assigned to all activities in the project.

It is the same as the planned material costs if the activities are not started, and the actual material costs once the activities are completed.

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Calculated as **Actual Material Cost** plus **Remaining Material Cost**.

At Completion Nonlabor Cost field

The nonlabor cost at completion. It is the sum of the actual plus remaining costs for all nonlabor resources assigned to the activities in the project.

It is the same as the planned nonlabor costs if the activities are not started, and the actual nonlabor costs once the activities are completed.

Calculated as **Actual Nonlabor Cost** plus **Remaining Nonlabor Cost**.

At Completion Total Cost field

The estimated cost at completion for the activities in the project.

Calculated as the **Actual Total Cost** plus the **ETC** (estimate-to-complete) cost. The method for computing ETC depends on the Earned Value technique selected for the activity's WBS.

BL Project Expense Cost field

The planned cost for all expenses associated with the project in the project baseline.

BL Project Labor Cost field

The cost for all labor resources assigned to the project in the project baseline.

BL Project Material Cost field

The planned cost for all material resources assigned to the project in the project baseline.

> **Tip**
>
> Right-click a table cell for quick access to a shortcut menu of actions you can perform within a particular row or column.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click **Grid View**.

Grid View Format of the Planning Page of the Resources Section

Overview

Use the Planning Grid to display high level resource and role assignment data in a table format.

Screen Elements

Context menu

Expand All: Enables you to see all of the items in the hierarchical list. To see this option, hover over a grouping band.

Collapse All: Enables you to hide subordinate items in the hierarchical list. To see this option, hover over a grouping band.

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Split Resource Assignments: Enables you to some of the assign the total units allocated for the selected resource assignment to another resource or role. To see this option, hover over an assignment row.

Cut: Enables you to cut an assignment. To see this option, hover over an assignment row.

Copy: Enables you to copy an assignment. To see this option, hover over an assignment row.

Paste: Enables you to paste a cut or copied assignment. To see this option, hover over an assignment row.

Delete: Deletes the selected resource or role assignment. To see this option, hover over an assignment row.

Planning Table columns

% Allocation field

The percentage of the resource or role's Maximum Units/Time that is allocated to the selected project level assignment.

When you change the **% Allocation** field, P6 assigns the specified percentage of the resource or role's maximum units per time to the selected project. This does not consider their existing allocations and can therefore cause them to become overallocated. Changing the resource or role's allocation recalculates the total units for the assignment and the corresponding spread of allocated units in the spreadsheet.

Committed option

Determines whether the resource is committed to the project. If a resource is committed to a project, their availability for high level resource planning for other projects is adjusted accordingly.

Finish Date field

The finish date for the assignment. If the Life of Project option is selected, this date is the same as the Forecast Finish Date. If the Life of Project option is cleared, you can select a finish date for the planning assignment.

Forecast Finish Date field

The planned finish date of a project or WBS based on a what-if scenario designed to simulate project performance and outcomes and to plan resource allocation.

Life of Project option

Determines that the assignment is for the entire duration of the project. When the Life of Project option is selected for an assignment, you cannot directly edit its start and finish dates. Use Synchronize Resource Dates on the Actions menu to set the the start of the assignment to the Project Forecast Start and the finish of the assignment to the Forecast Finish Date.

Name field

The name of the resource. This column is always visible on this page.

Project Forecast Start field

The planned start date of the project based on a what-if scenario designed to simulate project performance and outcomes.

Resource ID field

The unique identifier for the resource. This column is always visible on this page.

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Resource Type field

The type of resource/role assignment.

Valid values are:

Labor: Indicates that the selected resource performs labor, which is measured in units of time.

Nonlabor: Indicates that the selected resource does not perform labor, but its work is measured in units of time.

Material: Indicates that the selected resource does not perform labor, and its work is measured in units you specify.

Role ID field

The unique identifier of the associated role.

Role Name field

The name of the role assigned to the resource.

Search Criteria field

Indicates whether the assignment has any associated search criteria with a **Yes** or **No** link.

When search criteria have been specified, this field shows a **Yes** link that provides access to the stored resource request search criteria used to search for a qualified resource.

When you assign a resource using the *Request Resources* feature with your custom resource search criteria, the search criteria you specify is saved. A **Yes** link appears in the **Search Criteria** column beside the assignment, indicating search criteria is specified. This saved search criteria can be useful later if you ever need to modify the resource assignment and want to reuse the same criteria.

A **No** link appears when the assignment was made directly without any search criteria; however, you can click the **No** link to specify search criteria for the resource or role assignment.

Start Date field

The start date for the assignment. If the Life or Project option is selected, this date is the same as the Project Forecast Start. If the Life of Project option is cleared, you can select a start date for the planning assignment.

Status field

The current status of the assignment, used to classify assignments. Valid values are **None**, **Draft**, **Filled**, and **Submitted**.

Total Units field

The resource or role units allocated to the project. You can enter a number of units as hours, days, weeks, months, or years.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Planning**.
2. Click **Grid View**.

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Grid View Format of the Status Updates Page

Overview

Use the grid view of the Status Updates page to see the updates your team members made to their assigned activities. You can print this page or export it as an Excel file.

Screen Elements

Switch to Card View link

Opens the card view of the Status Updates page.

Full Screen

Expands the current work area so it fills the entire display.

Customize View

Opens the Customize View dialog box.

Print

Opens the Print Options dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Status Updates grid

Provides information about the status update. You can view the following fields in the grid:

Action Required By: The name of the user whose action is required on the activity.

Approved By: The name of the user who approved the status.

Changed Field: The name of the field that has been changed during the status update.

Held Date: The date the status update was put on hold.

ID/Code: The ID of the project and the activity.

Last Approved By: The name of the user who most recently approved the update.

Last Approved Date: The date the status update was most recently approved.

Name: The name of the activity.

New Value: The new value of the changed field.

Old Value: The old value of the changed field.

Pending For: The duration since the status update was most recently submitted or resubmitted. This duration is calculated using the project calendar.

Rejected By: The name of the user who most recently rejected the status update.

Rejected Date: The date the status update was rejected.

Resubmitted By: The name of the user who most recently resubmitted the status update.

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Resubmitted Date: The date the status update was resubmitted.

Review Type: The people responsible for reviewing activity updates.

Reviewers Assigned: The names of the reviewers assigned to the activity.

Status: The status of the activity or assignment.

Step Name: The name of steps assigned to the activity.

Submitted Date: The date the status update was submitted.

Submitted User: The name of the user who submitted the update.

Type: The type of element, whether activity or an assignment.

WBS Name: The name of the WBS for the activity.

WBS Code: The WBS code for the activity.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

> **Tip**
>
> To view the Status Updates page in a card format, click **Switch to Card** View.

Getting Here

To view status updates for all open projects:

1. On the **Navigation Menu**, expand **Approvals** and click **Status Updates**.
2. On the **Status Updates** page, click **Switch to Grid View**.

Grouping tab of the Customize View Dialog Box

Overview

Use this tab to group data into categories that share a common attribute, such as code value.

> **Note**
>
> The view you are in affects which settings are available.

Screen Elements

Configure button

Displays the Configure panel.

Theme button

Displays the Theme panel.

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Configure panel

Group By section

Context

Add Above: Adds a new item above the selected item.

Add Below: Adds a new item below the selected item.

Delete: Removes the selected item permanently.

Group by list

Determines the fields for grouping the view.

Sort Order list

Determines whether columns are sorted in ascending or descending order, or by hierarchy.

Grouping Interval control

Determines the grouping interval for the field.

For hierarchical fields, select a level of the hierarchy as the lowest level of the grouping, or mark the All option to show the entire hierarchy.

For date fields, select an interval from the list. Available options are Day, Week, Week of the Year, Month, Quarter, Financial Period, Year.

Band Options section

Show field title option

Determines whether to show the title of the field in the table or grid.

Show field rollups option

Determines whether to display summarized values, such as the dates of the table or Gantt chart.

Clear the option to prevent this information from displaying.

Hide if empty option

Determines whether to hide grouping bands that do not contain any data.

Display text in band using options

Determines whether grouping band labels show the **ID/Code**, **Name/Description**, or **ID/Code and Name/Description** of the data contained in the band.

Theme panel

Style list

Determines the visual appearance of the view. Options include: Vertical bands, Vertical lines, Horizontal bands, or none.

Colors list

Determines the colors to use for the lines or bars in the view.

Preview area

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Provides a preview of how the selected options will look.

Getting Here

1. Click **Customize View**.
2. In the **Customize View** dialog box, click **Grouping**.

Grouping tab of the Manage Views Dialog Box of the Activities Page, EPS Page, or Assignments Page

Overview

Use this tab to group data into categories that share a common attribute, such as code value.

Screen Elements

Configure button

Displays the Configure panel.

Theme button

Displays the Theme panel.

Configure panel

Group By section

Group by list

Determines the fields for grouping the view.

Sort Order list

Determines whether columns are sorted in ascending or descending order, or by hierarchy.

Grouping Interval control

Determines the grouping interval for the field.

For hierarchical fields, select a level of the hierarchy as the lowest level of the grouping, or mark the All option to show the entire hierarchy.

For date fields, select an interval from the list. Available options are Day, Week, Week of the Year, Month, Quarter, Financial Period, Year.

Band Options section

Show field title option

Determines whether to show the title of the field in the table or grid.

Show field rollups option

Determines whether to display summarized values, such as the dates of the table or Gantt chart.

Clear the option to prevent this information from displaying.

Hide if empty option

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Determines whether to hide grouping bands that do not contain any data.

Collapse to single level option

Determines whether to groups data items by their immediate parent regardless of the parent's position in the hierarchy. This option is available when the view is grouped by a hierarchical data item, and the Grouping Interval control is configured to group the view to level 1.

Display text in band using options

Determines whether grouping band labels show the **ID/Code**, **Name/Description**, or **ID/Code and Name/Description** of the data contained in the band.

Theme panel

Style list

Determines the visual appearance of the view. Options include: Vertical bands, Vertical lines, Horizontal bands, or none.

Colors list

Determines the colors to use for the lines or bars in the view.

Preview area

Provides a preview of how the selected options will look.

Getting Here

1. Click **Navigation Menu**
2. On the **Navigation Menu**, either:
   - Expand **Projects** and click **Activities** or **EPS**.
   - Expand **Resources** and click **Assignments**.
3. Click the **Views** menu and select **Manage Views...**.
4. In the **Manage Views** dialog box, click **Grouping**.

Hard Constraints - Constraints That Prevent Activities Being Moved Section of the Schedule Check Report Dialog Box

Overview

Use this section to view activities with hard constraints. Hard constraints override logical relationships and thereby prevent activities from being scheduled according to the logic. Hard constraints should only be used when they reflect real dates. Examples of hard constraints are Mandatory Start and Mandatory Finish. If possible, replace hard constraints with logical relationships.

Only a subset of all the activities in the open projects are checked. WBS summary activities, activities with an actual finish date, and Level of Effort activities are removed from the subset to create a list of activities that are checked for Hard Constraints. Start constraints are ignored if they are on activities that have an actual start. The Actual percentage is calculated as the number of activities found that match the check divided by the total number of subset activities checked.

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Screen Elements

Project ID field

The unique identifying code of the project containing the activity which failed the check. Click this link to view the project.

Activity ID field

The unique identifying code for the activity which failed the check. Click this link to view the activity.

Activity Name field

The name of the listed activity. Click this link to view the activity.

Constraint Type field

The type of constraint on the activity.

A hard constraint type prevents activities from being moved. In P6, 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, 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.

Constraint Date field

The date for which the activity's constraint applies. Depending on the constraint type, this date could be a start or finish.

For example, for 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 is empty.

Position field

The constraint position: primary or secondary.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
   a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

History Detail Window of the Report Schedules Tab

Overview

Use this dialog box to view details about the jobs for the currently selected report including the date and time each job was run and its status.

> **Note**
>
> The run history is only captured for scheduled reports or on-demand reports delivered by email.

Screen Elements

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Clear History button

Deletes the historical report run records for the selected schedule.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Run Date field

The date and time the report ran.

User field

The identifier for the user who created the scheduled job.

Status field

The delivery result of a report run from the schedule or run on-demand.

For on-demand reports, history is only shown for reports sent to email recipients.

Statuses include:

Completed: The scheduled report run is successful.

Failed: The scheduled report run encountered an error and the report did not run.

Getting Here

1. On the **Navigation Menu**, select **Reports**.
2. On the **Reports** page:
   a. Click the **Reports** tab.
   b. Select a report, and then click the **Schedule** detail window.
   c. In the **Schedule** detail window, click **Context** and then click **View History**.

Or

1. Click the **Schedules** tab.
2. Select a report and then click the **History** detail window.

History Tab of the Document Details Page or Dialog Box (with content repository)

Overview

Use this tab to view an audit trail of all actions that have been performed on a selected document. You can see all document activities, the user who performed the activity, and when the activity occurred.

Screen Elements

Date field

The date and time the document was last modified.

User field

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The name of the user who performed the action.

Action field

The activity performed on the selected document.

Examples include **Created Document** and **Review Terminated**.

Version field

The version number of the document. Version 1 is the original version of the document.

If the version number is a link, you can click the link to view that version of the document.

Getting Here

From the Documents page:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab, select a document and click the **History** tab.

From the Dashboards page:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand **My Documents** and select the **Private Documents** tab.
4. On the **Private Documents** tab, select a document and click **Edit Details**.
5. In the **Document Details** dialog box, click the **History** tab.

ID Lengths Page

Overview

Use this page to specify the maximum number of characters for IDs and codes.

Screen Elements

Project ID field

The maximum number of characters that a project ID may have.

WBS Code field

The maximum number of characters that a WBS code may have.

Resource ID field

The maximum number of characters that a resource ID may have.

Activity ID field

The maximum number of characters that an activity ID may have.

Cost Account ID field

The maximum number of characters that a cost account ID may have.

Role ID field

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The maximum number of characters that a role ID may have.

Getting Here

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **ID Lengths**.

Impacts Detail Window of the Risk Scoring Matrices Page

Overview

Use this detail window to assign impacts to the selected risk scoring matrix.

Screen Elements

Type field

The type of impact threshold assigned to the risk scoring matrix.

Impact threshold types include schedule, cost, and user-defined. You must define a cost and schedule impact for a risk scoring matrix. User-defined impacts are optional.

Name field

The name of the selected cost (by percentage or value), schedule (by percentage or value), or user-defined impact.

Severity fields

The ranges and values assigned to the chosen thresholds.

The number of severity fields is determined by the number of levels chosen for the impact thresholds.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Scoring Matrices**.
3. On the **Risk Scoring Matrices** page, click the **Impacts** detail window.

Import Calendar Events Tab of the My Calendar dialog box

Overview

Use this tab to select a file containing nonwork exception time to import into My Calendar.

> **Note**
>
> A calendar entry will only be imported if it is longer than your standard work day or if it is an all day or multiple day entry.

Screen Elements

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File field

The name of the specific nonwork time from an .ics file to be imported into a personal calendar.

Name field

The name of the nonwork time set in the calendar.

Start Date field

The date of the nonwork time begins for the imported event.

End Date field

The date the nonwork time ends for the imported event.

Import button

Imports a file with your selected options.

Getting Here

1. Click the **User** menu and select **My Calendar**.
2. In the **My Calendar** dialog box, select the **Import Calendar Events** tab.

Import Export Enterprise Data Dialog Box

Overview

Use this dialog box to import and export enterprise data.

Screen Elements

Import tab

See: Import Tab of the Import Export Enterprise Data Dialog Box

Export tab

See: Export Tab of the Import Export Enterprise Data Dialog Box

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. Click **Import/Export Enterprise Data**.

Import Export Views Dialog Box of the EPS, Activity, and Assignment Pages

Overview

Use this dialog box to import and export EPS, Activity, and Assignment views.

Screen Elements

Import tab

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See: Import Tab of the Import Export Views Dialog Box of the EPS, Activity, and Assignment Pages

Export tab

See: Export Tab of the Import Export Views Dialog Box of the EPS, Activity, and Assignment Pages

Getting Here

1. On the **Navigation Menu**, expand **Projects** or **Resources**.
   - If you expanded **Projects**, click **Activities**, **EPS**, or **Assignments**.
   - If you expanded **Resources**, click **Assignments**.
2. Click the **Views** menu and select **Import/Export Views**.

Import Tab of the Import Export Enterprise Data Dialog Box

Overview

Use this dialog box to import enterprise data.

Screen Elements

File field

The file to be imported.

Data Type field

The data type to be imported or exported.

> **Note**
>
> Only the worksheets in the import file are represented in the data type field.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

Import button

Imports a file with your selected options.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. Click **Import/Export Enterprise Data**.
3. Click the **Import** tab.

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Import Tab of the Import Export Views Dialog Box of the EPS, Activity, and Assignment Pages

Overview

Use this dialog box to import EPS, Activity, and Assignment views from a file.

Screen Elements

File field

The file to be imported.

Views

The list of views in the import file.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

Import button

Imports a file with your selected options.

Getting Here

1. On the **Navigation Menu**, expand **Projects** or **Resources**.
   - If you expanded **Projects**, click **Activities**, **EPS**, or **Assignments.**
   - If you expanded **Resources**, click **Assignments**.
2. Click the **Views** menu and select **Import/Export Views**.
3. Click the **Import** tab.

Import tab of the Import/Export Projects Dialog Box of the EPS Page

Overview

Use this tab to import information to a central database.

Screen Elements

Import Type list

Determines whether the **Primavera XER**, **Primavera XML**, or **Microsoft Project XML** import type is used.

Currencies Import In list

Determines whether to use the base currency rate in your database, or the currency rate in the XML file for importing financial data.

Base rate: Financial data will be imported as units of the base currency in your database.

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XML rate: Financial data will be imported as units of the view currency present in the XML file and converted according to the exchange rates present in the XML file and in your database.

To see this list, the currency ID and name present in the XML file must match a currency ID and name in your database and the exchange rate for that currency in the XML file must be different from the exchange rate for that currency in your database.

File field

The file to be imported.

Template list

The template to use for importing projects.

Action list

To enable this list, you must select **Microsoft Project XML** from the **Import Type** list.

Determines what action to take when importing:

Create New: Creates a new project for the imported data.

Update Existing: Updates an existing project with the imported data.

Import Projects table area:

> **Note**
>
> To enable this table area you must select **Primavera XER** or **Primavera XML** on the Import Type list and select a file to be imported.

Project ID

Displays the Project ID of the project in the import file.

Project Name

Displays the name of the project in the import file.

Import Action

To enable this list, you must select **Primavera XER** or **Primavera XML** from the **Import Type** list and select an import file in the **File** field.

Determines what action to take when importing the project from the import file:

Add Into Existing Project: Imports the entire project from the import file as a new WBS under the selected Project or EPS node. This option is available only for importing Primavera XER files.

Create New: Imports the project from the import file as a new project.

Replace Existing: Deletes the existing project in the database and replaces it with the project imported from the import file. This option is available only for importing Primavera XER files.

Update Existing: Updates an existing project with data from the import file.

Ignore: Retains data in the existing project and does not import the updated data.

Import To

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Determines where the project is imported.

If you selected **Add Into Existing Project** for the import action, you can select a project or a WBS node within a project. If you selected **Replace Existing** or **Update Existing** for the import action, you can select a project. If you selected **Create New** for the import action, you can select an EPS node.

Financial Period Calendar field

The name of the financial period calendar to assign to the project. If you choose to import the project using the **Create New** import action, after selecting an EPS node in the Import To field, you can select the financial period calendar to assign to the project.

Baselines

Determines which baselines are imported or exported.

Manage Templates button

Opens the **Manage Primavera Templates** or **Manage MSP Templates** pane.

Import button

Imports a file with your selected options.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. Click the **Import** tab.

Import/Export Projects Dialog Box of the EPS Page

Overview

Use this dialog box to import and export information to and from this database using external files and then share this information with other P6 and P6 Professional users, and other project management tools (such as Microsoft Project). You can import and export using Oracle Primavera XML or XER formats, which enables you to share project information between Project Management databases. You can also use external files to archive your projects or create a backup of your database.

Screen Elements

Import tab

See: Import tab of the Import/Export Projects Dialog Box of the EPS Page

Export tab

See: Export tab of the Import/Export Projects Dialog Box of the EPS Page

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.

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Index Performance Portlet of the Dashboards Page

Overview

Use this portlet to view Schedule Performance Index (SPI), Cost Performance Index (CPI), and To Complete Performance Index (TCPI) calculations. SPI indicates whether you are meeting earned and planned values within your schedule; CPI indicates whether you have spent money over the budget to date; TCPI enables you to determine the level of performance needed to achieve the cost or time objectives. Status indicators help you gauge whether these index values are within an acceptable range or whether you will need to take corrective action, based on thresholds you define.

Screen Elements

Legend

Key to performance threshold indicators. Use these visual indicators to quickly scan values based on thresholds you define:

Critical: Indicates that a WBS, project, or portfolio requires significant corrective action.

Warning: Indicates that a WBS, project, or portfolio needs attention and is performing below expectations.

Acceptable: Indicates that a WBS, project, or portfolio is performing within an expected range.

Exceptional: Indicates that a WBS, project, or portfolio is exceeding expectations.

Projects list

The available projects. Selecting a project allows the user to view the index performance for each project and WBS within the project.

Schedule Performance Index field

A measure of the work accomplished as a percentage of the work scheduled.

Schedule Performance Index (SPI) indicates whether you are meeting earned and planned values within your schedule. You can set performance thresholds for SPI calculated values to determine whether you need to take corrective action.

Calculated as **Earned Value of Cost** or **Quantity** divided by **Planned Value of Cost** or **Quantity**.

The variance percentage is calculated as **Earned Value** divided by **Planned Value**.

Cost Performance Index (CPI) field

A measure of the value of work accomplished as a percentage of the actual costs of a project.

Cost Performance Index (CPI) indicates whether you have spent money over the budget to date.

On the My Preferences page, you can set performance thresholds for CPI calculated values to determine whether you need to take corrective action.

Calculated as **Earned Value Cost** divided by **Actual Cost**. A value less than 1 indicates that the actual cost has exceeded the planned value.

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To Complete Performance Index field

A measure of the value of the project work that is remaining.

To Complete Performance Index (TCPI) is essentially a ratio of the *remaining work* to the *remaining funds*. It helps determine the level of performance that must be achieved on the remaining work to meet recognized business goals, such as the Budget at Completion (BAC) or the Estimate at Completion (EAC).

You can set performance thresholds for calculated TCPI values to display visual indicators that help you determine whether you need to take corrective action.

Calculated as (**BAC** minus **Earned Value**) divided by (**EAC** minus **Actual Units** or **Cost**). Where BAC equals **Base Equipment Cost** plus **Base Expense Cost** plus **Base Work Cost** plus **Base Material Cost**; EAC equals (**Actual Equipment Cost** plus **Actual Expense Cost** plus **Actual Work Cost** plus **Actual Material Cost**) plus (**Remaining Equipment Cost** plus **Remaining Expense Cost** plus **Remaining Work Cost** plus **Remaining Material Cost**); Actual Cost equals **Actual Equipment Cost** plus **Actual Expense Cost** plus **Actual Work Cost** plus **Actual Material Cost**.

Tip

- The **Index Performance** portlet calculates and displays data in cost or labor units based on the option selected on the **Global** tab in **My Preferences**.
- You can click a project name in the portlet to display the **Index details** page or the associated project; the page displayed depends on your module access.
- On the Dashboards page, if a dashboard's **Filter by** option is set to a portfolio or project code, the portlet lists each project included in the portfolio or project code filter and displays each project's index performance data.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Index Performance** portlet.

Indicators Detail Window of the Project UDFs Page

Overview

Use this detail window to define graphical indicators to appear with the currently selected project user-defined field. The parameters you define are based on the relationship between your UDF value and other values or fields.

Screen Elements

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently. The data will no longer be available to views, filters, calculations, reports, and waterlines.

Parameter field

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The comparison operator expressing the relationship between the project UDF value and the value, range, or field you specify. When you select a parameter of **is within range of** or **is not within range of**, the value or field you enter in the **Value** column represents the low values in the range, and the **High Value** column represents the high values in the range.

Low Value Type options

Determines whether the project UDF value should be compared with a value you specify or a field value you choose from the list.

Value field

The manually-specified value or field-supplied value used for the logical comparison to define this indicator. When you select a comparison parameter of **is within range of** or **is not within range of**, the value or field in this column represents the low value in the range.

High Value Type options

Determines whether the project UDF value should be compared with a range defined by a high value you specify or determined by a field value for comparison parameters of only **is within range of** or **is not within range of**.

High Value field

The manually-specified value or field-supplied value representing the high value of the optional range used in the comparison parameter for each indicator.

Indicator field

The graphical image or icon used to symbolically represent a specific project UDF value relative to another value, range, or relationship you define.

Bubble Color field

The color used in portfolio view bubble charts to represent this project UDF value or range relative to others.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project UDFs**.
3. On the **Project UDFs** page, select a user-defined field and click the **Indicators** detail window.

Integration and Allow Lists Page

Overview

Use this page to specify the maximum number of characters for IDs and codes.

Screen Elements

Project ID field

The maximum number of characters that a project ID may have.

WBS Code field

The maximum number of characters that a WBS code may have.

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Resource ID field

The maximum number of characters that a resource ID may have.

Activity ID field

The maximum number of characters that an activity ID may have.

Cost Account ID field

The maximum number of characters that a cost account ID may have.

Role ID field

The maximum number of characters that a role ID may have.

Getting Here

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **ID Lengths**.

Integrations Tab of the Project Preferences Dialog Box of the EPS Page

Overview

Use this page to configure integrations with applications via Primavera Gateway, for example Primavera Unifier. If an EPS node is selected, the data shown here represents the default settings for the fields.

Screen Elements

Gateway area

Application field

Determines the application which the integration links with P6.

Deployment field

Determines the deployment from Primavera Gateway used by the integration.

Actions list

Lists the actions associated with the deployment.

Unifier area

Schedule Sheet Integration section

Link project to a Primavera Unifier project option

Determine whether to link the P6 project to a Primavera Unifier project.

Project Name field

The Unifier project to which you want to link this P6 project.

Schedule Sheet field

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The Unifier schedule sheet to which you want to link this project.

Data Mapping field

The data mapping document.

Delete activities no longer in the P6 Schedule from Primavera Unifier option

Determine whether to remove activities in the Primavera Unifier project if they have been deleted from the P6 Schedule.

Only send activities with CBS codes assigned option

Determine whether to filter the activities which are sent to Unifier to only those with a CBS code assigned.

Summary Sheet Integration section

Schedule Type list

Select the type of data to integrate with Primavera Unifier.

If you choose **Duration**, units will be sent from P6 and costs will be calculated in Primavera Unifier based on the duration of the project and WBSes.

If you choose **Resource**, units will be sent from P6 and costs will be calculated in Primavera Unifier based on Resource unit loading.

If you choose **Cost**, costs and units will be sent from P6 to Unifier. Primavera Unifier will not calculate costs.

Synchronize WBS Hierarchy option

Determine whether to send WBS level data to Primavera Unifier. If you do not select this option, only project level summary data is sent to Primavera Unifier.

Syncrhonize WBS Hierarchy list

If you select the **Synchronize WBS Hierarchy** option, choose how much of the WBS hierarchy to synchronize with Primavera Unifier.

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.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select a project or EPS node, click the **Context** menu and select **Set Project Preferences**.
3. Click the **Integrations** tab.

Invalid Progress Dates - Activities with Actual Dates After the Data Date Section of the Schedule Check Report Dialog Box

Overview

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Use this section to view activities that have actual dates after the data date.

Only a subset of the activities in the open projects are checked. WBS summary activities, Level of Effort activities, and activities with actual finish dates before the data date are removed from the subset to create the list of activities checked for actual start or finish dates occurring after the data date. The Actual percentage is calculated as the number of activities found that match the check divided by the number of subset activities checked.

Screen Elements

Project ID field

The unique identifying code of the project containing the activity which failed the check. Click this link to view the project.

Activity ID field

The unique identifying code for the activity which failed the check. Click this link to view the activity.

Activity Name field

The name of the listed activity. Click this link to view the activity.

Data Date field

The progress point, or "as-of date", for activities in the project. Project status is up-to-date as of the data date. You can set the data date when you schedule the project or apply actuals, or you can set it manually. Set it manually if resources manually update activity progress and you do not plan to reschedule the project or apply actuals.

Actual Start Date field

The date the activity started.

Actual Finish field

The date on which the activity was completed.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
    a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Invalid Progress Dates - Incomplete Activities Before the Data Date Section of the Schedule Check Report Dialog Box

Overview

Use this section to view incomplete activities that are scheduled before the data date.

Only a subset of the activities in the open projects are checked. WBS summary activities, Level of Effort activities, and activities with actual finish dates before the data date are removed from the subset to create the list of activities checked for planned dates that occur before the data date. The Actual percentage is calculated as the number of activities found that match the check divided by the number of subset activities checked.

Screen Elements

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Project ID field

The unique identifying code of the project containing the activity which failed the check. Click this link to view the project.

Activity ID field

The unique identifying code for the activity which failed the check. Click this link to view the activity.

Activity Name field

The name of the listed activity. Click this link to view the activity.

Data Date field

The progress point, or "as-of date", for activities in the project. Project status is up-to-date as of the data date. You can set the data date when you schedule the project or apply actuals, or you can set it manually. Set it manually if resources manually update activity progress and you do not plan to reschedule the project or apply actuals.

Start Date field

The current start date of the activity. For started activities, this is the actual start date. For not started activities, this is the planned start date until the project is scheduled. When scheduled, the start date field is set to the remaining early start date.

Finish Date field

The current finish date for the activity. For not started activities, this is the planned finish date. For in-progress activities, this is the remaining early finish date. For completed activities, this is the actual finish date.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
    a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Issue Codes Page

Overview

Use this page to add and configure issue codes and code values for projects.

Screen Elements

Add menu

Add Code: Enables you to add a new code.

Add Code Value: Enables you to add a new value to an existing code. This option is only available if you have selected a code in the list.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Expand All button

Enables you to see all of the items in the hierarchical list or grouped view.

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Collapse All button

Enables you to hide subordinate items in the hierarchical list or grouped view.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context

Add Code: Creates a new code to help you organize data.

Add Code Value: Creates an issue code value for the selected issue code.

Delete: Deletes the selected data items or table rows permanently.

Cut: Cuts the selected item.

Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

Fill Down: Copies the data from the first cell selected to all other selected cells in the same column. Use CTRL or SHIFT to select multiple cells.

Name field

The name of the code.

For example, you can create an issue code titled *Severity*, and subsequently create issue code values: *High*, *Medium*, and *Low*. You can assign each of these code values to issues across multiple projects, enabling you to categorize each issue according to how severe it is. Similarly, you can create codes to categorize issues by responsibility, subproject, or any other classification you require to organize issues. Assigning issue codes enables you to quickly search for and view issues according to specific criteria.

Description field

A description of the code or the code value.

Secure option

Determines whether the code is a secure code.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

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The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download link

Enables you to download the currently displayed data as a Microsoft Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all columns are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Issues** and click **Issue Codes**.

Issue UDFs Page

Overview

Use this page to add and configure user defined fields for issues.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

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Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently. The data will no longer be available to views, filters, calculations, reports, and waterlines.

User Defined Field field

The name of the user defined field. This column is always visible on this page.

Data Type list

The name of the type of data that corresponds to each user-defined field. The data type you select determines the type of data you can specify in a field. The following data types are available:

Text: Allows you to use text or a combination of text and numbers.

Start Date: Allows you to enter Start Date information only.

Finish Date: Allows you to enter Finish Date information only.

Cost: Allows you to enter currency values.

Number: Allows you to use numerals with two decimal places.

Integer: Allows you to use numeric data, but not a number related to money.

Indicator: Allows you to use an indicator field that you can use to icons in columns.

This column is always visible on this page.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

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The most recent time that a project or baseline using the corresponding data item was scheduled.

Download link

Enables you to download the currently displayed data as a Microsoft Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all columns are downloaded.

> **Tip**
>
> - Right-click any field to add or delete a UDF.
> - When a user-defined field (UDF) is deleted, all its values are also deleted from all of their respective appearances throughout the application. This includes user interface views, activity views, calculated UDFs, reports, Activity Networks, filters, sorts, groupings, waterlines, and columns.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand Issues and click **Issue UDFs**.

Issues Detail Window of the Activities Page

Overview

Use this detail window to list and manage issues associated with the selected activity.

Screen Elements

Add button

Adds an item to the table.

Customize View

Opens the Customize View dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Issues grid area:

Applies To field

The activity, WBS element, or project associated with the current issue.

Associated Project field

The project associated with the issue.

Description field

A detailed summary for the item.

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The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Identified By field

The user name of the person who identified the issue.

Identified Date field

The date the issue was identified.

Issue Name field

The name of the project issue.

In P6 Professional, issues which are automatically generated by the threshold monitor are named after the threshold parameter that triggered the project issue.

Owner field

The resource who is responsible for the issue.

Priority list

The level of importance assigned to the issue.

Resolution Date field

The date the selected issue was resolved.

Responsible Manager field

The organizational breakdown structure (OBS) assigned to the issue.

If the field is editable and you have edit privileges, you can select a different responsible manager.

Status field

The current status of the project issue.

Tip

- If you have more than one activity or a grouping band selected, the detail window will not be visible.
- If you have a project template open, the icons in the detail window will be disabled.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **Issues** detail window.

Issues Detail Window of the EPS Page

Overview

Use this detail window to list and manage issues associated with the selected project.

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Screen Elements

Add button

Adds an item to the table.

Customize View

Opens the Customize View dialog box.

Issues table area:

Context menu

Delete: Deletes the selected item.

Issue Name field

The name of the project issue.

In P6 Professional, issues which are automatically generated by the threshold monitor are named after the threshold parameter that triggered the project issue.

Priority list

Determines the priority of the activity when performing resource leveling.

Status field

The current status of the issue.

Owner field

The resource who is responsible for the issue.

Responsible Manager field

The organizational breakdown structure (OBS) assigned to the issue.

If the field is editable and you have edit privileges, you can select a different responsible manager.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Tip

- If you have a project template open, the icons in the detail window will be disabled.
- If more than one project is selected, the detail window will not be visible.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select a project and click the **Issues** detail window.

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Issues Page

Overview

Use this page to view a list of all the issues for the currently open projects or portfolios. This page helps you manage issues in the following ways:

- View issue status and priority
- Send email about issues to multiple recipients who have configured their *My Preferences* settings to automatically receive issue notifications

Screen Elements

Add button

Adds an item to the table. If you have more than one project open, clicking **Add** opens the Select Project dialog box to enable you to specify which project the issue is related to.

Full Screen

Expands the current work area so it fills the entire display.

Customize View

Opens the Customize View dialog box.

Print

Prints the Grid View.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Issue table

Context menu

Add Issue: Adds an issue and associates the new issue with the selected project. This option is only available when you group your view by Project.

Collapse All: Collapses the selected grouping band.

Delete: Deletes the selected issue.

Email Issue Details: Opens the Send Email dialog box with details of the issue pre-filled in the Subject and body of the email. You can specify recipients of the email and add, delete, or edit text in the Subject and body of the email before sending.

Expand All: Expands the selected grouping band.

Applies To field

The activity, WBS element, or project associated with the current issue.

Associated Project field

The project associated with the issue.

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Identified Date field

The date the issue was identified.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Identified By field

The user name of the person who identified the issue.

Issue Count field

The number of issues in the group.

This field always shows a value of 1 at the issue level.

Issue Name field

The name of the project issue.

In P6 Professional, issues which are automatically generated by the threshold monitor are named after the threshold parameter that triggered the project issue.

Owner field

The resource who is responsible for the issue.

Priority field

The level of importance assigned to the issue.

Resolution Date field

The date the selected issue was resolved.

Responsible Manager field

The organizational breakdown structure (OBS) assigned to the issue.

If the field is editable and you have edit privileges, you can select a different responsible manager.

Status field

The current status of the issue.

> **Note**
>
> In addition to the columns listed above, you can also display columns for Issue Codes and User Defined Fields in the issue table.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

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Show/Hide Tabs

Enables you to configure which tabs are shown and hidden.

Issue detail windows:

General Detail Window of the Issues Page

Codes Detail Window of the Issues Page

Related Documents Detail Window of the Issues Page

Related Issues Detail Window of the Issues Page

UDF Detail Window of the Issues Page

Tip

- When sorting by a specific issue column in the List format, an up-facing triangle indicates the column is sorted in ascending order, and a down-facing triangle indicates the column is sorted in descending order.
- To add, edit, or delete an issue, you must have the required security privilege.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Issues**.

Lags - Relationships with a Positive Lag Duration Section of the Schedule Check Report Dialog Box

Overview

Use this section to identify relationships with positive lags. Lags are a scheduled delay between activities. It is important to identify lags in the schedule as they can manipulate float and constrain a schedule. You can replace a lag with a task to avoid the problems that lags can create.

Only a subset of all the internal and external links in the open projects are checked. Any links between activities that both have actual finish dates are removed from the subset to create the list of links checked for positive lag. The Actual percentage is calculated as the number of links found that match the check divided by the total number of subset links checked.

Screen Elements

Predecessor Project ID field

The identifying code for the project containing the predecessor activity that failed the check. Click this link to view the predecessor project.

Predecessor Activity ID field

The identifying code for the predecessor activity that failed the check. Click this link to view the predecessor activity.

Predecessor Activity Description field

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The brief description of the predecessor activity. Click this link to view the predecessor activity.

Relationship Type field

The type of relationship between two activities.

Valid values are:

Finish to Start: The successor activity cannot start until its predecessor finishes.

Finish to Finish: The successor activity cannot finish until its predecessor finishes.

Start to Start: The successor activity cannot start until its predecessor starts.

Start to Finish: The successor activity cannot finish until its predecessor starts.

Lag Duration (hours) field

The time in hours between the start or finish of the activity and the start or finish of the predecessor successor.

Successor Project ID field

The identifying code of the project that contains the successor activity. Click this link to view the successor project.

Successor Activity ID field

The identifying code of the successor activity. Click this link to view the successor activity.

Successor Activity Description field

The brief description of the successor activity. Click this link to view the successor activity.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
    a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Large Durations - Activities That Have a Remaining Duration Greater Than 352 Hours Section of the Schedule Check Report Dialog Box

Overview

Use this section to view activities with duration greater than the value you listed in the Large Durations field in the Check Schedule dialog box. Activities with a large duration are difficult to manage. You can break these activities down into smaller activities which provide a better insight into cost and schedule.

Only a subset of the activities in the open projects are checked. WBS summary activities, activities with an actual finish date, milestones, and Level of Effort activities are removed from the subset to create the list of activities checked for large remaining duration. The Actual percentage is calculated as the number of activities found that match the check divided by the number of subset activities checked.

Screen Elements

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Project ID field

The unique identifying code of the project containing the activity which failed the check. Click this link to view the project.

Activity ID field

The unique identifying code for the activity which failed the check. Click this link to view the activity.

Activity Name field

The name of the listed activity. Click this link to view the activity.

Remaining Duration (hours) field

The time left to complete an activity in hour format.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
    a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Large Float - Activities with a Total Float Greater Than 352 Hours Section of the Schedule Check Report Dialog Box

Overview

Use this section to view activities with a float greater than the number of hours you specify in the Large Float field in the Check Schedule dialog box. Activities with a large float might be missing a suitable predecessor or successor. A high percentage of large floats can indicate an unstable network that is not logic driven.

Only a subset of the activities in the open projects are checked. WBS summary activities, activities with an actual finish date, and Level of Effort activities are removed from the subset to create the list of activities checked for total float greater than the specified value. The Actual percentage is calculated as the number of activities found that match the check divided by the total number of subset activities checked.

Screen Elements

Project ID field

The unique identifying code of the project containing the activity which failed the check. Click this link to view the project.

Activity ID field

The unique identifying code for the activity which failed the check. Click this link to view the activity.

Activity Name field

The name of the listed activity. Click this link to view the activity.

Total Float (hours) field

The total number of hours an activity can be delayed before risking a delay to the project finish date.

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A float of zero hours indicates that the activity cannot be delayed at all and a negative float indicates that the project is already behind schedule. In a complex schedule, negative total float on some activities might not cause a delay to the project finish date.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
    a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Late Activities - Activities Scheduled to Finish Later Than the Project Baseline Section of the Schedule Check Report Dialog Box

Overview

Use this section to view activities that are scheduled to finish later than the project baseline. This indicates how well the project is performing against the currently selected baseline.

Only a subset of the activities in the open projects are checked. WBS summary activities, activities with an actual finish date, milestones, and Level of Effort activities are removed from the subset to create the list of activities checked for a Baseline Finish Variance of less than 0. The Actual percentage is calculated as the number of activities found that match the check divided by the total number of subset activities checked.

Screen Elements

Project ID field

The unique identifying code of the project containing the activity which failed the check. Click this link to view the project.

Activity ID field

The unique identifying code for the activity which failed the check. Click this link to view the activity.

Activity Name field

The name of the listed activity. Click this link to view the activity.

Finish Variance (hours) field

The number of hours the task has been delayed.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
    a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Layout Tab of the Customize Dashboard Page

Overview

Use this tab to arrange the size and position of portlets on a dashboard.

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Screen Elements

Dashboard Portlets work area

A customizable arrangement of the selected portlets simulating their actual size and position on the dashboard.

Narrow option

The application displays the selected portlet as a narrow box.

Wide option

The application displays the selected portlet as a wide box.

Moves the selected portlet left in the layout

Moves the selected portlet up in the layout

Moves the selected portlet right in the layout

Moves the selected portlet down in the layout

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the selected dashboard, click **Customize**.
4. On the Dashboard Details page, click the **Layout** tab.

Level Resources Dialog Box of the Activities Page

Overview

Use this dialog box to start the automated process of leveling project resources. Resource leveling ensures that resource demand does not exceed resource availability by changing the start of certain activities. During leveling, the resource requirements of all scheduled activities are compared to the maximum quantity available at the time of leveling. An activity is delayed if too few resources are available at any time during the activity's duration.

Screen Elements

Consider assignments in other projects with priority equal or higher than option

Determines whether the leveling process should include assignments in other projects during the leveling process. If you select this option, also specify the minimum (lowest ranking) numeric priority level. Other projects includes all closed projects in addition to the open ones normally leveled.

For example, if resources are assigned across multiple projects, you can determine whether to consider the resource assignments in other projects when leveling. A leveling priority number is assigned to each project with 1 being the highest or first priority, followed by 2, then 3, and so on with each successively higher number having a lower ranking. If you specify a priority value of 4, then levels 1, 2, 3, and 4 are included in the leveling process.

When including resource usage in closed projects the leveler assumes that the resource can be used 24 hours per day for all 7 days of a week across the entire activity duration. The

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resource's calendar is not used. This may potentially yield unexpected results when calendars in closed projects are different from those in the open projects being leveled.

Preserve scheduled early and late dates option

Determines whether early and late dates are preserved as scheduled or adjusted during the leveling process.

If you mark this option, the project's current early dates are retained before leveling. When you preserve these dates, P6 only forward-levels the schedule, which means that the early dates of activities from the start to the finish of the project are considered.

If you clear this option, the application also performs backward leveling. The application reverses the leveling process, beginning at the project's late finish and working towards the beginning of the project. If insufficient resources are available to schedule an activity on its late dates, the activity is advanced to an earlier date. When the schedule is leveled forward and backward (by clearing the option) the project's early and late start/finish dates are updated.

Level resources only within activity total float option

Determines whether 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).

Preserve minimum activity float field

The minimum amount of total float time expressed in hours that you want to maintain for each activity during leveling.

This setting limits the amount of float an activity can use when being delayed in order to level the schedule.

For example if the float for an activity is 5 days and you set the value of this field to 2 days (or 16 hours assuming 1 day equals 8 hours) the activity cannot be moved more than 3 days.

You can specify any unit of time, for example `2w` or `3d`, and P6 will convert it into hours for you.

Maximum percent to over allocate resources field

The maximum percentage by which resource availability can be increased.

You can make adjustments to this field value each time you level resources. For example, if an important resource assignment does not fit within the available float using your first over allocation limit, you can try again using a higher limit.

Recalculate assignment costs when leveling option

Determines whether to recalculate the costs of assignments when leveling.

Display leveling log upon completion option

Determines whether to display the leveling log when leveling is complete.

Resources tab

See Resources Tab of the Level Resources Dialog Box of the Activities Page

Prioritization tab

See Prioritization Tab of the Level Resources Dialog Box of the Activities Page

Level Now button

Compares the resource requirements of all scheduled activities to the maximum quantity available at the time of leveling.

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Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Click the **Actions** menu and select **Leveler**.

Leveling Report Log

Overview

When you level open projects, you have the option of generating this log in a new window. Use it to view details about the projects you just leveled.

Screen Elements

Scheduling Settings section

See Scheduling Settings Section of the Leveling Report Log.

Leveling Settings section

See Leveling Settings Section of the Leveling Report Log.

Statistics section

See Statistics Section of the Leveling Report Log.

Errors section

See Errors Section of the Leveling Report Log.

Warnings section

See Warnings Section of the Leveling Report Log.

Leveling Warnings section

See Leveling Warnings Section of the Leveling Report Log.

Scheduling Results section

See Scheduling Results Section of the Leveling Report Log.

Leveling Results section

See Leveling Results Section of the Leveling Report Log.

Exceptions section

See Exceptions Section of the Leveling Report Log.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, click the **Actions** menu and select **Run Leveler...** (Shift+F9).
3. In the **Level Resources** dialog box, click the **Options** tab.
4. On the **Options** tab, select the **Display leveling log upon completion** and click **Level**.

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Leveling Results Section of the Leveling Report Log

Overview

Use this section to view the results of leveling for the selected project. All fields are read-only.

Screen Elements

Activities that cannot be Leveled field

The list of activities that the application cannot level.

Activities delayed by Leveling table

The ID and name of activities that have been delayed. Also shows the project ID and name of the project to which the activity belongs.

Project ID field

The unique identifying code for the project associated with the activity.

Project Name field

The name of the project associated with the activity.

Activity ID field

The unique identifier of the activity.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Activity Name field

The name of the activity.

The activity name does not have to be unique.

Activities indirectly delayed by Leveling field

The activities indirectly delayed by leveling.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, click the **Actions** menu and select **Run Leveler...** (Shift+F9).
3. In the **Level Resources** dialog box, click the **Options** tab.
4. On the **Options** tab, select the **Display leveling log upon completion** and click **Level**.
5. In the **Leveling Report Log**, expand the **Leveling Results** section.

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Leveling Settings Section of the Leveling Report Log

Overview

Use this section to view the configuration of various leveling settings. All fields are read-only.

Screen Elements

Preserve scheduled early and late dates option

Determines whether early and late dates are preserved as scheduled or adjusted during the leveling process.

If you mark this option, the project's current early dates are retained before leveling. When you preserve these dates, the module only forward-levels the schedule, which means that the early dates of activities from the start to the finish of the project are scheduled.

If you clear this option, the application also performs backward leveling. Backward leveling schedules activities to occur as late as possible without delaying the project finish. The application reverses the leveling process, beginning at the project's late finish and working towards the beginning of the project. If insufficient resources are available to schedule an activity on its late dates, the activity is advanced to an earlier date. When the schedule is leveled forward and backward (by clearing the option) the project's early and late start/finish dates are updated.

Level resources only within activity total float option

Determines whether 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).

Minimum preserved float field

The minimum amount of float maintained for each activity during leveling.

Maximum percent to over allocate resources field

The maximum percentage by which resource availability can be increased.

You can make adjustments to this field value each time you level resources. For example, if an important resource assignment does not fit within the available float using your first over allocation limit, you can try again using a higher limit.

Consider assignments in closed projects option

Determines whether the assignments contained in closed projects will be considered when leveling.

Consider closed projects with Priority equal/higher than field

Determines which closed projects, based on their priority level, will be considered when leveling.

Level all resources option

Determines whether to level all the resources within the project.

Priorities section

The priorities assigned to the leveler.

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Leveling priorities are assigned in the **Leveling Priorities** table of the **Level Resource** dialog box.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, click the **Actions** menu and select **Run Leveler...** (Shift+F9).
3. In the **Level Resources** dialog box, click the **Options** tab.
4. On the **Options** tab, select the **Display leveling log upon completion** and click **Level**.
5. In the **Leveling Report Log**, expand the **Leveling Settings** section.

Leveling Warnings Section of the Leveling Report Log

Overview

Use this section to view the leveling warnings for various projects.

Screen Elements

Non-driving resource assignments moved off activity dates due to leveling field

A list of non-driving activity assignments where a date change occurred after the project was leveled.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, click the **Actions** menu and select **Run Leveler...** (Shift+F9).
3. In the **Level Resources** dialog box, click the **Options** tab.
4. On the **Options** tab, select the **Display leveling log upon completion** and click **Level**.
5. In the **Leveling Report Log**, expand the **Leveling Warnings** section.

Levels Detail Window of the Risk Thresholds Page

Overview

Use this detail window to view level configurations for the selected risk threshold.

Screen Elements

Sort Descending / Sort Ascending button

Sorts threshold by name.

Code field

The short name for the threshold level.

Name field

The name of the threshold level.

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Range field

The user-defined range for each threshold level where the breadth of the range specifies the amount of risk associated with the assigned level.

You can enter text or numeric data in this field depending on the threshold type.

Probability: The value is a percentage.

Tolerance: The value is a number.

Cost Impact by value: The value is the cost.

Schedule Impact by value: The value is a duration.

Cost Impact by percentage: The value is a percentage.

Schedule Impact by percentage: The value is a percentage.

User-defined Impact: The value is text.

Color field

The color representing the threshold in the score field or probability and impact diagram (PID).

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Thresholds**.
3. On the **Risk Thresholds** page, click the **Levels** detail window.

Links to Closed Projects - Activities with links to closed projects Section of the Schedule Check Report Dialog Box

Overview

Use this section to view the activities that have predecessors or successors in projects that were not open when the Check Schedule job was initiated.

Screen Elements

Predecessor Project ID field

The identifying code for the project containing the predecessor activity that failed the check. An asterisk indicates this project was not open when the Check Schedule job was initiated. Click this link to view the predecessor project if it is currently open.

Predecessor Activity ID field

The identifying code for the predecessor activity that failed the check. Click this link to view the predecessor activity.

Predecessor Activity Description field

The brief description of the predecessor activity. Click this link to view the predecessor activity.

Relationship Type field

The type of relationship between two activities.

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Valid values are:

Finish to Start: The successor activity cannot start until its predecessor finishes.

Finish to Finish: The successor activity cannot finish until its predecessor finishes.

Start to Start: The successor activity cannot start until its predecessor starts.

Start to Finish: The successor activity cannot finish until its predecessor starts.

Lag Duration (hours) field

The time in hours between the start or finish of the activity and the start or finish of the predecessor successor.

Successor Project ID field

The identifying code of the project that contains the successor activity. An asterisk indicates this project was not open when the Check Schedule job was initiated. Click this link to view the successor project if it is currently open.

Successor Activity ID field

The identifying code of the successor activity. Click this link to view the successor activity.

Successor Activity Description field

The brief description of the successor activity. Click this link to view the successor activity.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
    a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Links to Closed Projects - Activities with Links to Closed Projects Section of the Schedule Check Report Dialog Box

Overview

Use this section to view data for activities that have links to closed projects.

Screen Elements

Predecessor Project ID field

The identifying code for the project containing the predecessor activity that failed the check.

Predecessor Activity ID field

The identifying code for the predecessor activity that failed the check.

Predecessor Activity Description field

The brief description of the predecessor activity.

Relationship Type field

The type of relationship between two activities.

Valid values are:

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Finish to Start: The successor activity cannot start until its predecessor finishes.

Finish to Finish: The successor activity cannot finish until its predecessor finishes.

Start to Start: The successor activity cannot start until its predecessor starts.

- **Start to Finish**: The successor activity cannot finish until its predecessor starts.

Lag Duration (hours) field

The time in hours between the start or finish of the activity and the start or finish of the predecessor successor.

Successor Project ID field

The identifying code of the project that contains the successor activity.

Successor Activity ID field

The identifying code of the successor activity.

Successor Activity Description field

The brief description of the successor activity.

> **Tip**
>
> Asterisks (*) are used in the report to show which activities are contained in closed projects.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
   a. Click the **Actions** menu and select **Check Schedule**.
   b. In the **Check Schedule** dialog box, configure the options and click **Check Schedule**.
   c. In the **Schedule Check Report** dialog box, expand the **Links to Closed Projects - Activities with links to closed projects** section.

Locations Page

Overview

Use this page to add and configure locations. You can later assign locations to projects, activities, and resources and report on locations in Primavera Analytics.

Screen Elements

Add (Ins) button

Opens the Add Locations dialog box.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Actions menu

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Import from Excel: Enables you to import location data from a Microsoft Excel file.

Create Import Template: Enables you to create an import template as a Microsoft Excel file.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Context

Add: Opens the Add Locations dialog box.

Edit: Enables you to edit the selected item.

Delete: Removes the selected item or association permanently.

Name field

The name of the location, for example "Head Office."

Street field

The address, typically made up of the building name or number and street name.

Street 2 field

Use this field if you need to add more address information at a level between street and city.

City field

The city name.

State/Province field

The state or province.

Postal Code field

The zip or postal code.

Country field

The country name.

Latitude field

The geographical coordinate for the latitude of the location.

Enter the coordinate manually or complete the address fields and click **Locate** to let P6 find it.

Longitude field

The geographical coordinate for the longitude of the location.

Enter the coordinate manually or complete the address fields and click **Locate** to let P6 find it.

To see the following columns, click Analyze Data Usage.

Project Count field

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The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Tip

- Always create an import template before populating the Excel file with data.
- Do not use the **Download** link to create your data in an Excel spreadsheet.
- The project count includes assignments to projects and activities.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Locations**.

Long Lags - Relationships with a Lag Duration Greater Than 352 Hours Section of the Schedule Check Report Dialog Box

Overview

Use this section to identify relationships with lags longer than than the number of hours you specify in the Long Lags field of the Check Schedule dialog box. Lags, especially long lags, can manipulate float and constrain a schedule.

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Only a subset of all the internal and external links in the open projects are checked. Any links between activities that both have actual finish dates are removed from the subset to create the list of links checked for long lag. The Actual percentage is calculated as the number of links found that match the check divided by the total number of subset links checked.

Screen Elements

Predecessor Project ID field

The identifying code for the project containing the predecessor activity that failed the check. Click this link to view the predecessor project.

Predecessor Activity ID field

The identifying code for the predecessor activity that failed the check. Click this link to view the predecessor activity.

Predecessor Activity Description field

The brief description of the predecessor activity. Click this link to view the predecessor activity.

Relationship Type field

The type of relationship between two activities.

Valid values are:

Finish to Start: The successor activity cannot start until its predecessor finishes.

Finish to Finish: The successor activity cannot finish until its predecessor finishes.

Start to Start: The successor activity cannot start until its predecessor starts.

Start to Finish: The successor activity cannot finish until its predecessor starts.

Lag Duration (hours) field

The time in hours between the start or finish of the activity and the start or finish of the predecessor successor.

Successor Project ID field

The identifying code of the project that contains the successor activity. Click this link to view the successor project.

Successor Activity ID field

The identifying code of the successor activity. Click this link to view the successor activity.

Successor Activity Description field

The brief description of the successor activity. Click this link to view the successor activity.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
    a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Manage Dashboards Page

Overview

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Use this page to view all dashboards available in your user interface view and those that are currently displayed on the Dashboards page.

> **Note**
>
> This page displays the global and multi-user dashboards available to you as defined in your view settings, along with your private, user dashboards. If you have the appropriate rights, you can modify the list of available dashboards that display on this page.

Screen Elements

Create Dashboard link

Enables you to create a new dashboard based on another dashboard or the default dashboard settings.

Search field

The text or numeric value you want to use to search for portfolio views by name.

This is an incremental search field. As you type, the list of entries is refreshed and matching portfolio view names automatically expand in the list. To reset the list, clear the **Search** field.

For example, enter `budget` or just `bu` to find all views with the word "Budget" in their names.

Title field

The name of the dashboard.

You can click the hyperlink to open the **Customize Dashboard** page.

Filter field

The portfolio, project, or project code filter defined for the dashboard.

Available To field

Indicates the user access for each dashboard.

Global: All users can view the dashboard.

User: Only you can access the dashboard.

Multiple Users: A select group of users, including you, have access to the dashboard.

Created By field

The login name of the person who created the dashboard.

Date Created

The date and time the dashboard was created.

 **Move Down**

Moves the selected item one level lower in the hierarchical arrangement.

**Move Up**

Moves the selected item one level higher in the hierarchical arrangement.

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Delete link

Removes the selected item.

Getting Here

In the context selector, select **Dashboard** and then click **Manage Dashboards**.

Manage Filters Dialog Box of the Activities Page, Assignments, EPS Page, or Card View of the Status Updates Page

Overview

Use this dialog box or tab to configure and apply one or more filters to the current view to constrain or reduce the quantity of data shown on the page.

Screen Elements

Match options

Determines if elements display based on all applied filters or any applied filters.

Search

Enables you to perform a search based on the value you enter in the search bar.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

Name field

The names of existing filters that are grouped by type:

Standard: Predefined filters that are already in the application.

Global: Filters that are available to all users.

Multiple User: Filters that are available to you and a group of other users.

User: Filters that you created.

Filter definition section

Match any/all of the following rules list

Determines whether the filter should match any or all rules.

Add a filter condition... button

Adds a filter condition to the filter definition area. This item is available if there are no filter conditions.

Context menu

Add Above: Adds a new item to the list above the selected item.

Add Below: Adds a new item to the list below the selected item.

Add Filter Group Above: Adds a filter group above the selected item. This option is not available on the Status Updates page.

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Add Filter Group Below: Adds a filter group below the selected item. This option is not available on the Status Updates page.

Delete: Deletes the selected item. If the filter is a multiple user filter and you are not the owner, this menu item will remove it from your list of filters, but the filter will still exist for other users assigned to it.

Move Left: Moves the selected item out of the current filter group.

Move Right: Moves the selected item into an existing filter group.

Move Into New Group: Creates a filter group below the selected item and moves the selected item into the new filter group. This option is not available on the Status Updates page.

Filter rules section:

The rules of the selected filter showing the Field, Operator and Value. Modify the values for each field listed to customize the filter.

Add another filter condition... button

Adds an additional filter condition to the filter definition area. This item is available if there are already filter conditions.

Getting Here

1. On the **Navigation Menu**, expand **Projects** or **Resources**.
   - If you expanded **Projects**, click **Activities**, **EPS** or **Assignments.**
   - If you expanded **Resources**, click **Assignments**.
2. Click **Filters** and select **Manager Filters...**.

Manage Portfolio Views Page

Overview

This page lists all portfolio views available to you. Use this page to create, modify, and delete portfolio views.

Screen Elements

Create View link

Creates a new portfolio view.

Search field

The text or numeric value you want to use to search for portfolio views by name.

This is an incremental search field. As you type, the list of entries is refreshed and matching portfolio view names automatically expand in the list. To reset the list, clear the **Search** field.

For example, enter `budget` or just `bu` to find all views with the word "Budget" in their names.

Title field

The name of the portfolio view. The title can contain up to 255 characters, and it does not have to be unique.

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A visual indicator appears before the title to help you identify the type of view and determine whether it is available to just you or shared globally by all users. For example, you might see the user histogram icon for a personal histogram called *Spending for My Projects*, and the global histogram icon for a shared histogram called *Spending for All Projects*.

Available to field

Indicates user access for the view.

Global: All users with module access to global portfolio views can use the view.

User: Access to the view is restricted to the current user.

Delete link

Deletes the current portfolio view.

Getting Here

In the context selector, select **Portfolios**, then click **Manage Portfolio Views**.

Manage Portfolios or Create Portfolios Dialog Box

Overview

Use this dialog box to review the list of projects inside each portfolio and to create, modify, and delete portfolios. The Manage Portfolios dialog box 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.

> **Note**
>
> In the Create Portfolio dialog box, you can view information about all portfolios, but you can only modify the new portfolio.

Screen Elements

Search field

Activates the search based on your search criteria.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Cut: Cuts the selected item.

Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

Expand: Enables you to expand and view all of the items in a hierarchical list.

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Collapse: Enables you to collapse and hide subordinate items in a hierarchical list.

Portfolios list

The available portfolios.

Portfolio indicator

A visual indicator of the type of portfolio. Possible indicators include:

 A user or multiple user portfolio made up of projects you select manually.

 A user or multiple user portfolio made up of projects selected by filter criteria.

 A global portfolio made up of projects manually selected by the portfolio manager.

 A global portfolio made up of projects selected by filter criteria.

Name field

The name of the portfolio.

Project Selection Tab

Manual area

Available Projects

The list of all available projects.

Selected Projects

The list of projects that you have selected from the Available Projects list.

By Filter area

Match any/all of the following rules list

Determines whether the filter should match any or all rules.

Add a filter condition... button

Adds a filter condition to the filter definition area. This item is available if there are no filter conditions.

Context menu

Add Above: Adds a new item to the list above the selected item.

Add Below: Adds a new item to the list below the selected item.

Delete: Deletes the selected item.

Filter rules section:

The rules of the selected filter showing the Field, Operator and Value. Modify the values for each field listed to customize the filter.

Add another filter condition... button

Adds an additional filter condition to the filter definition area. This item is available if there are already filter conditions.

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Access tab

> **Note**
>
> To see this tab, select a Multiple User portfolio from the Portfolios list.

Available users list

The list of all available users.

Selected users list

The users you selected from the Available Users list.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Getting Here

From the Context selector:

1. In the context selector, select **Portfolios**, then click **Manage Portfolios**.

From the Capacity Planning page:

1. In the context selector, select **Portfolios**.
2. In the context selector:
   - Click **Open Portfolio** to select a group of projects by portfolio type, EPS node, or project code.
   - Or choose a portfolio in the Most Recently Used list.
3. On the **Navigation Menu**, expand **Portfolios** and click **Capacity Planning**.
4. On the Capacity Planning page, click **Create Portfolio...**.

Manage Primavera Templates Dialog Box, Manage Primavera XER and XML Templates Dialog Box, Manage MSP Templates Dialog Box, Manage UN/CEFACT Templates Dialog Box, Manage IPMDAR Templates Dialog Box, or Manage CPP Templates Dialog Box of the EPS Page

Overview

Use this dialog box to manage templates for importing and exporting projects. You can configure a template by clicking the template name in the list.

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Screen Elements

Add button

Adds an item to the table.

Import Template button

Imports a template to the list. To see this button, select the DOE - CPP export format.

Refresh

Refreshes the current screen with any new, updated, or removed data. To see this button, select the DOE - CPP export format.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Name field

The name for the import or export template.

Updated by field

The username of the person who most recently updated the template. This field is only available in the Manage Primavera XER and XML Templates dialog box.

Updated Date field

The date and time the template was most recently updated. This field is only available in the Manage Primavera XER and XML Templates dialog box.

> **Note**
>
> - To modify a template, click the template name to open the template customization panel.
> - To rename a template, double click the name cell and edit the existing name or type a new name.

Context menu

Edit: Enables you to modify the template.

Add: Adds a new template with a default name.

Delete: Deletes the template.

Duplicate: Duplicates the template.

Export: Exports the template.

Back button

Returns to the **Import/Export Projects** dialog box.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.

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2. Click the **Actions** menu and select **Import/Export Projects** or **Manage Import Templates**.
3. If you selected **Import/Export Projects**:
   - Click the **Import** or **Export** tab.
   - On the **Import** tab, in the **Import Type** list select **Primavera XML** or **Primavera XER**, in the **File** field, select a file, then click **Manage Templates**.
   - On the **Export** tab, in the **Export Type** list select **UN/CEFACT XML Format 6**, **IPMDAR Format**, **DOE - CPP**, or any of the Microsoft Project formats, select a file if necessary, then click **Manage Templates**.

Manage User Sessions Page or My Sessions Page

Overview

Use this page to monitor real-time user session information to improve security, detect potential malicious activity, troubleshoot performance issues, and to reset sessions for users who have been locked out of any application connected to the database.

You can switch between views that show details of the currently logged in users sessions, all users' recent sessions in P6, P6 Team Member Web, P6 for Android, P6 for iOS or P6 Professional, and your own session.

A user may be locked out and unable to initiate a session if they have attempted to log in while a session is already running, or if they have repeatedly entered login information incorrectly.

> **Note**
>
> - If you reset a user's session while they are using P6, P6 Team Member Web, P6 for Android, P6 for iOS or P6 Professional, their session will be ended and they will need to log back in again. Users of P6 Professional might not be aware that their session has ended for up to five minutes. Data changes they make after their session is ended will be lost. Therefore, it is important to let users know you will be resetting their session before hand wherever possible.
> - The number of failed attempts users are permitted before they are locked out of the P6 is set in the P6 Administrator application.
> - Accounts that are locked out, but not reset, will become available after a length of time defined in the P6 Administrator application.

Screen Elements

Actions menu

Reset User: Resets the selected users' sessions. If users are locked out, they are able to initiate a session after users have been reset. To see this menu, you must be logged in as a user assigned the Admin Superuser global security profile.

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> **Caution**
>
> **Caution** Oracle recommends that users only be reset if they are locked out. Once a user session has been reset, the user will be returned to the login screen.

Views menu

Current user activity: Lists all active user sessions and all locked out user accounts. This may include several entries for a user if they are logged into multiple applications, from multiple browsers, or from multiple computers.

Recent user activity: Lists information about the most recent session per application for each user during the defined time period. If a user has not logged in during the defined time period, the Last Active Time column for that user is empty. The time period for this view depends on the Interval to store user login information (in days) setting on the Audit tab of the Application Settings page.

My activity: Lists information about your current session.

To see this menu, you must be logged in as a user assigned the Admin Superuser global security profile.

Full Screen

Expands the current work area so it fills the entire display.

Print

Opens the Print Options dialog box.

Refresh

Refreshes the current screen with any new, updated, or removed data.

Customize View

Opens the Customize View dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected. To see this option, you must be logged in as a user assigned the Admin Superuser global security profile.

> **Note**
>
> : Only the default fields that appear as columns on the page are described below.

Login Name field

The login name for the user.

Failed Login Attempts field

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The number of failed login attempts for the user.

This field is only valid for on-premises deployments using Native authentication mode. To see this field, select the **Current user activity** view. To see this option, you must be logged in as a user assigned the Admin Superuser global security profile.

Application Name field

Determines the application used for the session.

Hard Drive Code field

The identifying code for the machine on which a user is logged in. This code is stored as a browser cookie on the user's machine and is unique to the computer, user and browser.

Last Active Time field

The date and time that the user was last active in the application.

Tip

- A user account that is locked out is highlighted in red and denoted by an asterisk.
- You must be logged in as a user assigned the Admin Superuser global security profile to access the Manage User Sessions page. All users can access the My Sessions page.
- The User Sessions page displays users who are currently logged in, users who left the application but did not log out, and users whose failed login count exceeds the acceptable threshold.

Getting Here

1. Click the **User** menu and select **User Sessions** or **My Session**.

Manage Views Dialog Box of the Activities Page, EPS Page or Assignments Page

Overview

Use this dialog box to configure the appearance and properties of your views and to manage global, user, and multiple user views.

Screen Elements

Search field

Activates the search based on your search criteria.

Context menu

Set Active: Opens the selected view and closes the Manage Views dialog box.

Add: Adds a new view in the selected group.

Expand: Expands the selected group of views.

Collapse: Collapses the selected group of views.

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Delete: Deletes the selected view. If the view is a multiple user view and you are not the owner, this menu item will remove it from your list of views, but the view will still exist for other users assigned to it.

Cut: Cuts the selected view.

Copy: Copies the selected view.

Paste: Pastes a cut or copied view into the selected group or below the selected view in the list.

Name field

The name of the view.

Reset button

Resets the view to the last saved state. To see this button you must make a change to the view.

Apply button

Applies the changes to the view and closes the **Manage Views** dialog box without saving the changes to the view. To see this button you must make a change to the view.

Edit View area:

Columns tab

See: Columns tab of the Manage Views Dialog Box of the Activities Page, EPS Page or Assignments Page

Filtering tab

See: Filtering tab of the Manage Views Dialog Box of the Activities Page, EPS Page or Assignments Page

Grouping tab

See: Grouping tab of the Manage Views Dialog Box of the Activities Page, EPS Page, or Assignments Page

Sorting tab

See: Sorting tab of the Manage Views Dialog Box of the Activities Page, EPS Page or Assignments Page

Bars tab

See: Bars tab of the Manage Views Dialog Box of the Activities Page, EPS Page or Assignments Page.

Gantt tab

See: Gantt tab of the Manage Views Dialog Box of the Activities Page, EPS Page or Assignments Page

Spreadsheet tab:

See: Spreadsheet tab of the Customize View Dialog Box of the Assignments Page

Activity Network tab

See: Activity Network tab of the Customize View Dialog Box of the Activities Page

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Access tab:

See: Access tab of the Manage Views Dialog Box of the Activities Page, EPS Page or Assignments Page

Getting Here

1. Click **Navigation Menu**
2. On the **Navigation Menu**, either:
   - Expand **Projects** and click **Activities** or **EPS**.
   - Expand **Resources** and click **Assignments**.
3. Click the **Views** menu and select **Manage Views...**.

Module Access Detail Window of the Users Page

Overview

Use this detail window to assign module access for the selected user. Users cannot log into P6 without one of the following module access options selected: Projects, Portfolios, Resources, Contributor, or Enterprise Reporting. If the user only has a P6 Professional, Primavera Analytics, Team Member Interfaces, P6 Integration API, or P6 EPPM Web Services license, they will be prompted that they don't have a valid license.

Screen Elements

Module field

The name of each module. Modules represent components or distinct role-based functions of the P6 EPPM suite.

Access option

Determines whether to grant access to each corresponding module.

Contributor option

Determines limited user access to P6, such as the Dashboards and Projects sections (Activities page). For user interface views, only the options on the Activity Editing tab apply to contributors. Access to P6 functionality is additionally determined by a user's OBS access and relationship to the project, that is, whether the user is assigned as a resource to activities or designated as an activity owner. You must clear all other module access options in order to select Contributor module access; conversely, you must clear Contributor module access in order to select any other module access option.

Enterprise Reports option

Determines user access to the Reports section in P6. By selecting this module access option, the P6 EPPM user will be able to run reports.

Security for reports is enforced when the report is run. See the *P6 EPPM Oracle Analytics Publisher Configuration Guide* for more information on security.

Integration API option

Determines user access to log into the PMDB database through P6 Integration API via Java.

P6 Analytics option

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Determines user access only to the Star database through Oracle Business Intelligence. By selecting this module access option, a Star user is created for the P6 EPPM user as long as the user name matches Oracle database user name requirements. For example, if the P6 EPPM user name begins with anything other than a letter, a Star user cannot be created. Once a Star user is created, the user will be able to access the Oracle Business Intelligence Dashboards application.

P6 Professional option

Determines user access to P6 Professional.

Portfolios option

Determines user access to the following functionality in P6: the Portfolios section, Project Performance portlets, the Portfolio View portlet in the Dashboards section, document management functionality (if the Content Repository is configured), and workflow functionality (if the integration with Oracle BPM is configured).

Projects option

Determines user access to the following functionality in P6: the Projects section, Project Performance portlets in the Dashboards section, document management functionality (if the Content Repository is configured), and workflow functionality (if the integration with Oracle BPM is configured).

Resources option

Determines user access to the following functionality in P6: the Resources section, Resources portlets in the Dashboards section, document management functionality (if the Content Repository is configured), and workflow functionality (if the integration with Oracle BPM is configured).

Team Member option

Determines user access to the P6 for Android and P6 for iOS mobile apps and P6 Team Member interfaces: P6 Team Member Web and Email Statusing Service. All modules provide access rights to Email Statusing Service, P6 for Android, and P6 for iOS on iPhone, but only the Team Member Interfaces module access option provides access rights to P6 Team Member Web and P6 for iOS on iPad.

Timesheet option

Determines user access to Timesheets in P6 Team Member.

Visualizer option

Determines user access to Visualizer.

Web Services option

Determines user access to P6 EPPM Web Services, which uses open standards, including XML, SOAP, and WSDL, to seamlessly integrate P6 EPPM functionality into other applications. Using P6 EPPM Web Services, organizations can share P6 EPPM data between applications independent of operating system or programming language.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page, click the **Module Access** detail window.

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My Activities Portlet of the Dashboards Page

Overview

Use this portlet to view activities to which you are either assigned as a resource or designated as the activity owner. The portlet displays activities based on assignment dates and your current portlet customization settings. You can click an activity to open it.

Screen Elements

Activity Name field

The name of the activity.

The activity name does not have to be unique.

Start Date field

The current start date of the activity. For started activities, this is the actual start date. For not started activities, this is the planned start date until the project is scheduled. When scheduled, the start date field is set to the remaining early start date.

Finish Date field

The current finish date for the activity. For not started activities, this is the planned finish date. For in-progress activities, this is the remaining early finish date. For completed activities, this is the actual finish date.

Remaining Units field

The units remaining to complete the assignment.

Calculated as **Remaining Duration** multiplied by **Remaining Units per Time**.

Primary Resource option

Determines whether the corresponding resource is the activity's primary resource.

Typically, the primary resource is the person responsible for the overall work on the activity and for updating activity status.

Tip

The "No information is available" message appears in the **My Activities** portlet if you:

- have no activities scheduled during the range of days specified on the **Content** tab of the **Dashboard Details** page.
- are not assigned as a resource or owner to any activities in, or do not have the appropriate access rights to, the projects included in the portfolio, project, or project code filter specified in the dashboard's **Filter by** field.

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> **Note**
>
> If the dashboard containing the portlet is your private dashboard, or a multi-user or global dashboard you created, you can change the **Filter by** option at any time; if the dashboard is a multi-user or global dashboard created by another user, your ability to change the **Filter by** option is controlled by dashboard settings.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Activities** portlet.

My Calendar Dialog Box

Overview

Use the My Calendar dialog box to view and manage your own personal resource calendar. For example, you can:

- Rename your calendar or change your base calendar.
- Edit your standard work week or day, including designating special non work days.
- Create or import exceptions to show when you are unavailable.

Screen Elements

Calendar Name field

The name of the calendar.

Summary tab:

See: Summary Tab of the My Calendar dialog box, Project Calendars page, or Resource Calendars Page

Calendar tab

See: Calendar Tab of the My Calendar dialog box, Project Calendars Page, or Resource Calendars Page.

Standard Work Week tab

See: Standard Work Week Tab of the My Calendar dialog box, Global Calendars Page, Project Calendars Page, or Resource Calendars Page.

Import Calendar Events tab:

See: Import Calendar Events Tab of the My Calendar dialog box

Getting Here

1. Click the **User** menu and select **My Calendar**.

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> **Note**
>
> The My Calendar link will only appear on the User menu when your user access account has an Associated Resource and that resource has a personal resource calendar.

My Calendar Portlet of the Dashboards Page

Overview

Use this portlet to see a week's worth of activities that pertain to your projects. The My Calendar portlet displays all activities that you are either assigned to as a resource or designated as the activity owner. Display the current week or click past or future dates to see the list of activities and milestones for the selected week. The selected week is highlighted in blue.

Screen Elements

Calendar

The different months and activities associated with each month.

The arrows to the left display the previous month and the arrows to the right display next month. The selected week is highlighted in blue.

Activities list

The list of activities for specified month above.Activities can be displayed and hidden by the arrows.

> **Tip**
>
> Click a project or activity to view more detailed project or activity data. You can edit details only if you have the required access rights.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Calendar** portlet.

My Documents Portlet (with content repository)

Overview

Use this portlet to view all your documents.

Screen Elements

Recent Documents tab

See Recent Documents Tab of the My Documents Portlet (with content repository).

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Private Documents tab

See Private Documents Tab of the My Documents Portlet (with content repository).

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. Expand the **My Documents** portlet.

My Issues Portlet of the Dashboards Page

Overview

Use this portlet to view information about issues with which you are associated . The information that appears depends on the display format and customize options you select.

Screen Elements

Add button

Opens the Select Project dialog box.

Expand All button

Expands all the projects in the table to display issues.

Collapse All button

Collapses all the projects in the table.

Customize View

Opens the Customize View dialog box.

Print

Prints the Grid View.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Email Issue Details: Opens the Send Email dialog box.

Issue Table columns

Only the default fields that appear as columns in the issue columns are described below.

Issue Name field

The name of the project issue.

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In P6 Professional, issues which are automatically generated by the threshold monitor are named after the threshold parameter that triggered the project issue.

Priority field

The level of importance assigned to the issue.

Owner field

The resource who is responsible for the issue.

Resolution Date field

The date the selected issue was resolved.

Status field

The current status of the issue.

> **Tip**
>
> Maximize the issues portlet if you need to customize the view.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Issues** portlet.

My Preferences Page

Overview

Use this page to customize options that influence all sections of the application.

Screen Elements

Remote Client IP Address field

The IP address of the machine from which you are logged into P6.

Version field

The version of the software you are working in.

Database Name field

The name of the database you are working in.

Global tab

See: Global Tab of the My Preferences Page.

View tab

See: View Tab of the My Preferences Page.

Personal Information tab

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See: Personal Information Tab of the My Preferences Page.

Password tab

See: Password Tab of the My Preferences Page.

Restore to Defaults link

Restores all options to default settings.

Getting Here

Click the **User** menu and select **My Preferences**.

My Projects Portlet of the Dashboards Page

Overview

Use this portlet to view projects you are the owner of, have OBS access to, or are assigned to as a resource or as an activity owner. The portlet displays the project start and finish dates, current percent complete, date last summarized, and the project owner. You can click a project name link to open the project.

Screen Elements

Name field

The name of the project.

The icon next to the project name indicates your association with the project, the type of project, and its check-out status.

Start Date field

The current start date of the project. For a not started project, this is the project's planned start date. For a project that has started or is complete, this is the project's actual start date. For projects with no activities, the start date is equal to the anticipated start date if one is defined; if no anticipated start is defined, then the start date is equal to the project's planned start date.

Finish Date field

The current finish date of the project. For not started and in-progress projects, this is the latest early finish date from all activities in the project. For completed projects, this is the latest actual finish date derived from all activities. For projects with no activities, the Finish Date is equal to the Anticipated Finish date if one is defined. For projects with no activities and no Anticipated Finish date, the Finish Date field is blank.

Percent Complete field

The project duration percent complete.

Calculated as (**Planned Duration** minus **Remaining Duration**) divided by **Planned Duration**. This field is blank for projects that have not been summarized.

Last Summarized field

The date the project was last summarized. This is useful for assessing whether summary data for the project is current.

This field is blank for projects that have not been summarized.

Project Owner field

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The resource designated as responsible for the project.

The project owner designation provides a user with viewing access for the project.

Tip

- The "No information is available" message appears in this portlet if you are not associated with any projects, if no projects meet your portfolio, project, or project code filtering criteria, or if you have cleared all of the My Projects display options on the **Dashboard Details** page.
- Click a project name to view more details about the project; the page that displays when you open the project is determined by your user interface view settings. Depending on the settings defined in your view, you might be able to change your view preferences.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Projects** portlet.

My Reviews Tab of the Document Reviews Portlet of the Dashboards Page

Overview

Use this tab to display a list of all document reviews that you have created along with their initiation date and due date.

Screen Elements

My Reviews Tab toolbar

See My Reviews Toolbar.

Name field

The name of the review.

Initiator field

The name of the user who initiated the review.

Date Initiated field

The date the review began.

If the review has not started, this field is blank.

Due Date field

The date by which all reviewers need to complete the review. If no due date is specified for the review, then this field appears blank.

Status field

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The current status of the document.

> **Tip**
>
> If you have not created any document reviews, the "No information is available" message displays.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Document Reviews** portlet and click the **My Reviews** tab.

My Risks Portlet of the Dashboards Page

Overview

Using your portfolio, project, or project code filter criteria specified for the current dashboard, the **My Risks** portlet displays information about your associated risks. You can customize the portlet to specify the columns of information you want to display, as well as the types of risks you want to appear.

Screen Elements

Customize link

See Customize Risks Dialog Box.

Name field

The name of the risk.

General category

ID field

The unique identifier for the risk.

Name field

The name for a particular type of risk classification.

Owner field

The resource who has ownership of the risk.

Identified By field

The name of the resource who identified the risk.

Type list

Determines whether a risk is a threat or an opportunity.

A threat will have a negative impact on your project, while an opportunity can have a perceived benefit to the project.

Status field

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The current state of the risk.

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. 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.

Description field

The description of the risk.

Cause field

The description of the cause of the risk.

Effect field

The resulting effect of the presence of the risk.

Notes field

The notes or comments captured for the associated risk.

User Defined category

User Defined fields

The fields defined by your P6 administrator that are not standard in the application but are necessary to capture additional data.

> **Tip**
>
> The "No information is available" message appears when your project and risk filtering criteria excludes risks that are associated with you, or there are no risks associated with you.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Risks** portlet.

My Sessions Page

Overview

Use this page to see information about your current and recent login sessions.

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Users assigned the Admin Superuser global security profile can use this page see information about login sessions for all users and to reset sessions for users whose account has been locked out of P6. A user can be locked out of P6 and therefore unable to initiate a session if they have attempted to log in while an existing session is already running, or if they have entered login information incorrectly several times.

Screen Elements

Full Screen

Expands the current work area so it fills the entire display.

Print

Opens the Print Options dialog box.

Refresh

Refreshes the current screen with any new, updated, or removed data.

Customize View

Opens the Customize View dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Login Name field

The login name for the user.

Application Name field

Determines the application used for the session.

Hard Drive Code field

The identifying code for the machine on which a user is logged in. This code is stored as a browser cookie on the user's machine and is unique to the computer, user and browser.

Last Active Duration field

The duration (in days) since the last time the user was active in the application.

Calculated as the difference between the Last Active Time and the current date and time. A value of zero means the user most recently logged in today.

Last Active Time field

The date and time that the user was last active in the application.

Login Time field

The date and time that the user last logged into the application.

Logout Time field

The date and time that the user last logged out from the application.

Personal Name field

The personal name for the user. This name might be a nickname, full name, reference to a role or department, or include any information recognized by your organization to identify the user.

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Remote Client IP field

The IP address of the machine from which the user logged into P6.

If the session is for P6, P6 Team Member Web, P6 for Android, or P6 for iOS, the Remote Client IP shows the IP address of the application server for that application. If the session is for P6 Professional, the Remote Client IP shows the user's machine ID.

Session State field

The state of the session, showing whether it is expired or current.

1. Click the **User** menu and select **My Session**.

Negative Float - Activities with a Total Float Less Than 0 Section of the Schedule Check Report Dialog Box

Overview

Use this section to view activities with negative float. Negative float can occur when a constraint or actual date creates a schedule that is shorter than the duration calculated to complete the activities on the critical path. Activities with negative float are critical.

Only a subset of the activities in the open projects are checked. WBS summary activities, activities with an actual finish date, and Level of Effort activities are removed from the subset to create the list of activities checked for negative float. The Actual percentage is calculated as the number of activities found that match the check divided by the total number of subset activities checked.

Screen Elements

Project ID field

The unique identifying code of the project containing the activity which failed the check. Click this link to view the project.

Activity ID field

The unique identifying code for the activity which failed the check. Click this link to view the activity.

Activity Name field

The name of the listed activity. Click this link to view the activity.

Total Float (hours) field

The total number of hours an activity can be delayed before risking a delay to the project finish date.

A float of zero hours indicates that the activity cannot be delayed at all and a negative float indicates that the project is already behind schedule. In a complex schedule, negative total float on some activities might not cause a delay to the project finish date.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
    a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

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Negative Lags - Relationships With a Lag Duration of Less Than 0 Section of the Schedule Check Report Dialog Box

Overview

Use this section to identify relationships with negative lags. Negative lags can affect critical path and distort total float. When activity durations change, activities with negative lag can be scheduled unrealistically. Negative lags can be used to schedule overlapping activities. For example, when digging a trench, workers can start laying pipe in the completed sections of the trench while the rest of the trench is still in progress. To avoid the distortion that negative lag can cause, you might consider using positive lag on a Start to Start relationship rather than a negative lag on a Finish to Start relationship.

Only a subset of all the internal and external links in the open projects are checked. Any links between activities that both have actual finish dates are removed from the subset to create the list of links checked for negative lag. The Actual percentage is calculated as the number of links found that match the check divided by the total number of subset links checked.

Screen Elements

Predecessor Project ID field

The identifying code for the project containing the predecessor activity that failed the check. Click this link to view the predecessor project.

Predecessor Activity ID field

The identifying code for the predecessor activity that failed the check. Click this link to view the predecessor activity.

Predecessor Activity Description field

The brief description of the predecessor activity. Click this link to view the predecessor activity.

Relationship Type field

The type of relationship between two activities.

Valid values are:

Finish to Start: The successor activity cannot start until its predecessor finishes.

Finish to Finish: The successor activity cannot finish until its predecessor finishes.

Start to Start: The successor activity cannot start until its predecessor starts.

Start to Finish: The successor activity cannot finish until its predecessor starts.

Lag Duration (hours) field

The time in hours between the start or finish of the activity and the start or finish of the predecessor successor.

Successor Project ID field

The identifying code of the project that contains the successor activity. Click this link to view the successor project.

Successor Activity ID field

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The identifying code of the successor activity. Click this link to view the successor activity.

Successor Activity Description field

The brief description of the successor activity. Click this link to view the successor activity.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
   a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Notebook Section of the Activity Form Page

Overview

Use this section to view notebook topics associated with the activity, along with descriptive text.

Screen Elements

Assign Notebook Topic link

Opens a dialog box to search for and select a notebook topic to assign.

Topic Name field

The name of the notebook topic.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand any portlet containing activities.
4. In the portlet, click an activity.
5. On the **Activity Form** page, expand the **Notebook** section.

Notebook Topics Page

Overview

Use this page to add and configure notebook topics.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Analyze Data Usage button

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Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Opens the Delete Notebook Topics dialog box.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Topic Name field

The name of the notebook topic.

EPS option

Determines whether the selected notebook topic is available for assignment to an EPS node.

Project option

Determines whether the selected notebook topic is available for assignment to a project.

WBS option

Determines whether the selected notebook topic is available for assignment to a WBS.

Activity option

Determines whether the selected notebook topic is available for assignment to an activity.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

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The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

> **Tip**
>
> The project count includes assignments to projects, WBS elements, and activities.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Notebook Topics**.

Notebooks Detail Window of the Activities Page

Overview

Use this detail window to assign a notebook topic to an activity; view, add, or assign a notebook topic; or remove a topic assignment.

Screen Elements

Assign... button

Opens the **Select Notebook Topic** dialog box.

Context menu

Delete: Deletes the selected item.

Topic field

The name of the associated notebook topic.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Getting Here

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1. On the ☰ **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **Notebooks** detail window.

Notebooks Detail Window of the EPS Page

Overview

Use this detail window to configure notebook topics and descriptions for the selected project.

Screen Elements

Assign... button

Opens the **Select Notebook Topic** dialog box.

⚙ **Context** menu

Delete: Deletes the selected item.

Topic field

The name of the associated notebook topic.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

> **Tip**
>
> If more than one project is selected, the detail window will not be visible.

Getting Here

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select a project and click the **Notebooks** detail window.

Notebooks Tab of the MSP Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use this tab of the to select the notebook topics you want to use to exchange data 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.

Screen Elements

Project notes list

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The Microsoft Project notebook topic to exchange data with a project notebook.

WBS notes list

The Microsoft Project notebook topic to exchange data with a P6 WBS notebook.

Activity notes list

The Microsoft Project notebook topic selected to exchange data with an activity notebook.

Export all notebook topics to Microsoft Project notes option

Determines whether 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 previously-selected notebook topics.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Import** or **Export** tab.
   a. On the **Import** tab:
      - In the **Import Type** list, select **Microsoft Project XML**.
      - On the **Import** tab, click **Browse** in the **File** field and select a Microsoft Project XML file to import.
      - Click **Manage Templates**.
   b. Or on the **Export** tab:
      - In the **Export Type** list, select a Microsoft Project XML file type to export.
      - Click **Manage Templates**.
4. In the **Manage Templates** dialog box, click a template.
5. In the **Modify Template** dialog box, click the **Notebooks** tab.

Notifications Page

Overview

Use this page to configure notifications for timesheets, status updates and issues.

Screen Elements

Team Member Notifications

Timesheet reviewers option

Enables all users configured as a timesheet approval manager or delegated to approve timesheets to receive en email once a day listing all timesheets pending their approval.

Timesheet users option

Enables all timesheet users to receive an email listing all their timesheets which have been approved and rejected since the last time the service ran. Users who have not had a timesheet approved or rejected since the last service run time will not receive an email.

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Status update reviewers option

Enables all users configured as a status update reviewer to receive en email once a day listing all status updates pending their review.

Status update users option

Enables all users to receive an email listing all their status updates which have been approved and rejected since the last time the service ran. Users who have not had a status update approved or rejected since the last service run time will not receive an email.

Service Start Time list

The time of day the service will poll the database for pending timesheets and status updates and send the email notification.

Issue Notifications

Enable issue notifications option

Enables automated notifications when Issues are added or modified.

Send notifications from alternate email address option

Enables using am alternate email address for issue notification emails. Leave this option clear to use the email address of the user who sends notifications, if their email address is configured.

Alternate Email Address field

The email address from which notifications about issues will be sent when the *Send notifications from alternate email address* option is selected or if the user's email address is not configured.

Getting Here

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Notifications**.

OBS Page

Overview

Use this page to configure the organizational breakdown structure (OBS) for your enterprise.

Screen Elements

Add button

Creates a new OBS element.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

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Print

Prints the Grid View.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Delete: Removes the selected item or association permanently.

Cut: Cuts the selected item.

Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

Expand: Enables you to expand and view all of the items in a hierarchical list.

Collapse: Enables you to collapse and hide subordinate items in a hierarchical list.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Move Right: Moves the selected item one level lower in the hierarchical arrangement.

Move Left: Moves the selected item one level higher in the hierarchical arrangement.

OBS Name field

The unique name for the OBS element. OBS elements represent responsible managers arranged in a hierarchy.

Description field

The description that corresponds with the OBS name.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

EPS Count field

The number of EPS nodes currently using the corresponding data item. To see a list of the EPS nodes using the corresponding data item, click the link. The list you see is restricted to those EPS nodes to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

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Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Responsibility detail window

See Responsibility Detail Window of the OBS Page.

Users detail window

See Users Detail Window of the OBS Page.

> **Tip**
>
> The project count includes assignments to projects and WBS elements.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **OBS**.

Open Portfolio Dialog Box

Overview

Use the Open Portfolio dialog box to open a group of projects by EPS, project code, or portfolio. After opening a group of projects, the application will continue to open that same portfolio whenever you click **Portfolios.**

Screen Elements

Organize By list

Organizes the view by **EPS,Portfolios** or **Project Codes**.

Search

Enables you to perform a search based on the value you enter in the search bar.

Getting Here

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1. In the context selector, select **Portfolios**, then click **Open Portfolio**.

Open Projects Dialog Box

Overview

Use this dialog box to open projects or templates. You can search, identify, and select any number of projects to open. If you specify a portfolio, EPS node, or project code to open, every project you have access to in this group will open.

This dialog box is also used to open project templates.

Screen Elements

Organize By list

Organizes the view by **EPS,Portfolios** or **Project Codes**.

Projects button

Displays the list of all projects.

Templates button

Displays the list of all templates.

Available Projects

The list of all available projects.

Selected Projects

The list of projects that you have selected from the Available Projects list.

Select Items (Ctrl+Shift+Right Arrow)

Adds the selected item or items from the available list to the selected list.

Deselect Items (Ctrl+Shift+Left Arrow)

Removes the selected item or items from the selected list.

Open Exclusively option

Places an exclusive lock on all projects in the **Selected Projects** list. Other users can still view projects opened exclusively, but cannot make updates to the project data.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

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Tip

- To limit the number of projects that display in the dialog box, enter the value you want in the **Maximum number of rows displayed in trees and pick lists** field on the **Global** tab of **My Preferences**.
- The locked symbol on a project indicates it is opened exclusively. Click the project name in the **Available Projects** list to view the name of the user who has the project opened exclusively.

Getting Here

1. In the context selector, select **Projects**, then click **Open Projects**.

Open Requests for Resources Portlet of the Dashboards Page

Overview

Use this portlet to view roles that require staffing. Only requests for roles on a selected role team are displayed.

Screen Elements

Name field

The names of the unstaffed roles for the current role team organized and filtered according to your portlet preferences. Each project or role name is a link that displays the activities for the role and enables you to access the resource staffing features.

Unstaffed Units field

The total units that require resource assignments for each role.

Units for all roles are totaled at the level by which you organize.

Staffed Units field

The total units currently assigned to individual resources for each role.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Open Requests for Resources** portlet.

Options tab of the Add Schedule Dialog Box, Schedule Detail Dialog Box, or Run Report Dialog Box of the Reports Page

Overview

Set the options on this tab to determine how your scheduled report output will be generated, formatted, and delivered.

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Screen Elements

Schedule Name field

The name for the report schedule. A single report can have multiple schedule names.

Report Name field

The title for the report defined in your P6 reporting software.

Template list

The template you want to use to apply style to the report data.

Output Format list

The file formats that you can use for file output.

Delivery Type field

The way users will access or take delivery of this report. On-demand reports can be delivered by email as attachments or downloaded as files. You can only deliver scheduled reports by email.

Email Options icon

Launches the **Send Email** dialog box used to enter all email recipients for the selected report.

Notification options

Determine the types of email status notifications the user who scheduled the report should receive when the scheduled report attempts to run.

Report Completed: Determines whether email is sent if the report is delivered without errors.

Report Complete with warnings: Determines whether email is sent if the report is delivered, but has errors.

Report Failed: Determines whether email is sent if the report failed to run.

Report Parameters table

If a report has field parameters predefined in your P6 reporting software, they will appear here in P6. You must specify report parameter values in order to generate valid output.

> **Note**
>
> To avoid system performance issues, be as specific as possible when entering values for reports. Narrow down your choices to include only what is absolutely necessary.

Field Name field

The key field used by P6 to construct valid data for each specific instance of report output.

Value field

The parameter value for the field displayed in the **Field Name** column.

The data entered in a text field must be accurate, or the report will fail to run.

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Tip

- In the Report Parameters table, when you click **Browse** to select a **PROJECT ID**, a familiar **Select Projects** dialog box appears where you can group, search, and select projects by EPS, portfolio, or project code.
- In the Report Parameters table, when you click **Browse** to select a **RESOURCE ID**, a familiar **Select Resource** dialog box appears where you can filter, search, and select resources by type, primary role, resource code, or team.

Getting Here

1. On the **Navigation Menu**, select **Reports**.
2. On the **Reports** page:
   a. Click the **Reports** tab.
   b. Select a report, and then click the **Schedule** detail window.
3. In the **Schedule** detail window, click **Add** (Ins).
4. In the **Report Setting** dialog box, click the **Options** tab.

Overhead Codes Page

Overview

Use this page to add, configure, and export overhead codes.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

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Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Name field

The name of the code.

Description field

A description of the code or the code value.

To see the following columns, click Analyze Data Usage.

Timesheet Period Count field

The number of timesheet periods currently using the corresponding data item. To see a list of the timesheet periods using the corresponding data item, click the link.

Resource Count field

The number of resources currently using the corresponding data item. To see a list of the resources using the corresponding data item, click the link.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Timesheet Period Update Date field

The most recent time that a timesheet row using the corresponding data item was updated.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Overhead Codes**.

P6 EPPM and P6 Professional tab of the Consent Notice Page

Overview

Use this page to configure and audit consent notices for P6 and P6 Professional.

Screen Elements

Consent Message section

Preview button

Shows a preview of the consent notice as users will see it.

Consent Message field

The consent message that will be shown to users.

Status of user acceptance section

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Forget all users acceptance button

Sets the consent status of all users to Not Responded. All users will be asked to accept consent again.

Enable Consent Notice list

Determines which actions will cause the consent notice to be displayed to users.

Print

Prints the current page, table, chart, or item.

Search

Enables you to perform a search based on the value you enter in the search bar.

Enabled or **Disabled** indicator

Shows whether the specified action will cause the consent notice to be displayed to users.

Context menu

Email User for Consent Rejection: Sends an email to the selected users about their consent status.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Consent Notice**.
3. On the **Consent Notice** page, click **P6 EPPM and P6 Professional**.

Parameters tab of the Add Schedule Dialog Box, Schedule Details Dialog Box or Run Report Dialog Box of the Reports Page

Overview

Set values for the report parameters on this tab.

Screen Elements

Report Parameters table

Field Name field

The key field used by P6 to construct valid data for each specific instance of report output.

Value field

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The parameter value for the field displayed in the **Field Name** column.

The data entered in a text field must be accurate, or the report will fail to run.

> **Tip**
>
> - In the Report Parameters table, when you click **Select** to select a **PROJECT ID**, the **Select Projects** dialog box appears where you can group, search, and select projects by EPS, portfolio, or project code.
> - In the Report Parameters table, when you click **Select** to select a **RESOURCE ID**, the **Select Resource** dialog box appears where you can filter, search, and select resources by type, primary role, resource code, or team.

Getting Here

1. On the **Navigation Menu**, select **Reports**.
2. On the **Reports** page:
   a. Click the **Reports** tab.
   b. Select a report, and then click the **Schedule** detail window.
   c. In the **Schedule** detail window, click **+ Add Schedule...**.
   d. In the **Add Schedule** dialog box, click the **Parameters** tab.

Or

1. Click the **Reports** tab.
2. Click **Run...**.
3. In the **Run Report** dialog box, click the **Parameters** tab.

Or

1. Click the **Schedules** tab.
2. Select a report, and then click **Context**.
3. Click **View Details**.
4. In the **Add Schedule** dialog box, click the **Parameters** tab.

Password Tab of the My Preferences Page

Overview

Use this tab to change your own password.

Screen Elements

Current Password field

Enter the current password for the selected user.

New Password field

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When the **Password Policy** is enabled, the password must be between 8 and 20 characters and contain at least one number and one letter. The policy is enabled by default.

When the **Password Policy** is disabled, the password must be between 1 and 20 characters. The application does not allow blank passwords.

Confirm New Password field

To confirm the change, enter the new password.

When the **Password Policy** is enabled, the password must be between 8 and 20 characters and contain at least one number and one letter. The policy is enabled by default.

When the **Password Policy** is disabled, the password must be between 1 and 20 characters. The application does not allow blank passwords.

> **Tip**
>
> You cannot change passwords if you are running P6 EPPM in LDAP or SSO authentication mode.

Getting Here

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Password** tab.

Performance Thresholds Section of the Global Tab of the My Preferences Page

Overview

Use this section to specify parameters for Performance, Earned Value, and Index values that appear in dashboard Project Performance portlets and on the Portfolios Performance Status tab.

Screen Elements

Performance section

Use the options in this section to define what is considered **Exceptional**, **Warning**, or **Critical** when assessing schedule performance for a project, WBS, or EPS. The values you specify determine which indicators apply to the Schedule to date, Labor units to date, Schedule at completion, and Labor units at completion metrics.

★ **Exceptional**: For schedule values, the minimum number of days that the project, WBS, or EPS must be ahead of schedule to be considered exceptional. For labor units, the minimum percentage under 100 that the labor units variance must be less than to display the exceptional indicator. For example, if you set the exceptional threshold at 10% and the actual labor units variance is 85%, then that item would be considered exceptional.

⚠ **Warning**: For a schedule value, the minimum number of days that the project, WBS, or EPS must be behind schedule to display the warning indicator. For labor units, the minimum percentage over 100 that the labor units variance must be greater than to display the warning indicator.

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Critical: For a schedule value, the minimum number of days that the project, WBS, or EPS must be behind schedule to display the critical indicator. For labor units, the minimum percentage over 100 that the labor units variance must be greater than to display the critical indicator.

Some examples of threshold percentage calculations are as follows:

Schedule to date equals (**Earned Value Labor Units** minus **Planned Value Labor Units**) divided by **Planned Value Labor Units**

Labor units to date equals (**Earned Value Labor Units** minus **Actual Labor Units**) divided by **Earned Value Labor Units**

Schedule at completion equals (**Budget At Completion** multiplied by **Schedule Variance Index**) divided by **Budget At Completion**

Labor units at completion equals (**Budget At Completion Labor Units** minus **Estimate At Completion Labor Units**) divided by **Budget At Completion Labor Units**

Earned Value section

Use the options in this section to define what is considered **Exceptional**, **Warning**, and **Critical** when assessing earned value performance for a project, WBS, or EPS. The values you specify determine which indicators apply to the Schedule to date, Labor units to date, Schedule at completion, and Labor units at completion metrics.

Exceptional: The minimum percentage under 100 that the schedule or labor units variance must be less than to display the exceptional indicator. For example, if you set the exceptional threshold at 10% and the actual earned value variance is 85%, then that item would be considered exceptional.

Warning: The minimum percentage over 100 that the schedule or labor units variance must be greater than to display the warning indicator.

Critical: The minimum percentage over 100 that the schedule or labor units variance must be greater than to display the critical indicator.

Some examples of threshold percentage calculations are as follows:

Schedule to date equals (**Earned Value Labor Units** minus **Planned Value Labor Units**) divided by **Planned Value Labor Units**

Labor units to date equals (**Earned Value Labor Units** minus **Actual Labor Units**) divided by **Earned Value Labor Units**

Schedule at completion equals (**Budget At Completion** multiplied by **Schedule Variance Index**) divided by **Budget At Completion**

Labor units at completion equals (**Budget At Completion Labor Units** multiplied by **Cost Variance Index**) divided by **Budget At Completion Labor Units**

Index section

Use the options in this section to define what is **Exceptional**, **Warning**, and **Critical** when assessing index performance. The values you specify determine which indicators apply to the Cost Performance Index (CPI), Schedule Performance Index (SPI), and To Complete Performance Index (TCPI).

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Exceptional: The minimum percentage under 100 that the index variance must be greater than to display the exceptional indicator. For example, if you set the exceptional threshold at 10% and the actual index variance is 85%, then that item would be considered exceptional.

Warning: The minimum percentage over 100 that the index variance must be less than to display the warning indicator.

Critical: The minimum percentage over 100 that the index variance must be less than to display the critical indicator.

Some examples of percentage calculations are as follows:

CPI equals **Earned Value** divided by **Actual Units**

SPI equals **Earned Value** divided by **Planned Value**

TCPI equals (**Budget At Completion** minus **Earned Value**) divided by (**Estimate At Completion** minus **Actual Units**)

Getting Here

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Global** tab.
3. On the **Global** tab, select **Performance Thresholds**.

Personal Information Section of the Content Tab of the Customize Dashboard Page

Overview

Use this section to enable and configure portlets in the dashboard that display information pertaining directly to the projects on which you are working.

Screen Elements

My Projects option

Determines whether the **My Projects** portlet displays on the dashboard.

If you are assigned Contributor module access, the projects you are assigned will always display, regardless of the **Show Project where I** options you choose.

Show Projects where I: options

Determines which projects display on the dashboard.

have access rights: Projects to which you have access rights will display.

am assigned as a resource: Projects to which you are assigned as a resource and have access rights will display.

am the Project Owner: Projects of which you are the project owner will display, regardless of your access rights to the projects.

My Activities option

Determines whether the My Activities portlet displays on the dashboard.

Show activities field

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Determines for how many upcoming days the portlet will display scheduled activities.

My Risks option

Determines whether the **My Risks** portlet displays on the dashboard.

Customize link

Opens a dialog box with configurable options for customizing risks. See Customize Risks Dialog Box.

My Issues option

Determines whether the **My Issues** portlet displays on the dashboard.

Customize link

Opens a dialog box with configurable options for customizing issues.

Communication Center option

Determines whether the **Communication Center** portlet displays on the dashboard.

Display: options

Determines if all teams or only the teams based on the dashboard filter are displayed in the **Communication Center** portlet.

Show team members who: options

Determines what team members the application displays in the **Communication Center** portlet.

My Documents option

Determines whether the **My Documents** portlet displays on the dashboard.

My Calendar option

Determines whether the **My Calendar** portlet displays on the dashboard.

Show activities option

Determines whether project activities are shown in the portlet.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, click **Customize**.
4. On the **Dashboard Details** page, click the **Content** tab.
5. On the **Content** tab, expand the **Personal Information** section.

Planning Page of the Resources Section

Overview

Use the Planning page to establish resource demand on a proposed project without the need to perform time-consuming resource-loading on a detailed project plan. Specify, review, or

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modify project-level and WBS-level allocation data for individual resources and roles across the project lifecycle.

> **Note**
>
> The default filter for this page is Portfolio. If no data appears on the page, you may need to change the filter.

Screen Elements

Assign... menu

Resource: Enables you to assign a resource to a selected project or WBS.

Role: Enables you to assign a role to a selected resource, project, or WBS.

Search For a Resource to Assign: Enables you to search for a resource to assign to a selected project.

Project: Enables you to assign a project to the selected resource or role.

Actions menu

Hide if Empty: Select this option to hide empty rows from the view.

Show Other Assignments: When you have filtered your view to a single resource, role, resource team, role team, or resource code, use this action to see all assignments in the project while maintaining the grouping of your view by the original data item.

Show Only Unassigned Role Requests: enables you to filter the view to show only role assignments that are not yet staffed.

Synchronize Resource Dates: enables you to synchronize the start and finish dates of planning assignments with project dates. To synchronize resource dates, group your view by project. You can choose whether to synchronize:

- The dates of all assignments that have the Life of Project option selected with the scheduled start and finish dates of the project.

The dates of all planning assignments with the project's Forecast Start and Forecast Finish dates. If there is a difference between the Project Forecast Start and the Forecast Start Date, that difference is added to the start and finish date of all assignments.

Grid View

Enables you to view and configure data in a grid format. You can customize which columns are available in the grid.

Spreadsheet View

Enables you to view data as a spreadsheet.

Filter By

Opens the Filter By dialog box. Use this dialog box to filter and select the data you want to display on the Resource Planning spreadsheet.

Full Screen

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Expands the current work area so it fills the entire display.

Print

Opens the Print Options dialog box.

Customize View

Opens the Customize View dialog box.

Refresh

Refreshes the current screen with any new, updated, or removed data.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Planning work area

The main work area for planning assignments to projects in your choice of the following customizable formats:

- Grid View Format of the Planning Page of the Resources Section
- Spreadsheet View Format of the Planning Page of the Resources Section

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

> **Tip**
>
> At the portfolio, project code, and project levels, the Total Units column and timescale interval columns display a summary total of allocated units for all resources and roles. For example, if you choose a project when filtering the spreadsheet by projects, allocated units of all resources belonging to a given project roll up and show summary totals in the Total Units column and timescale interval columns in the spreadsheet for the project's row.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Planning**.

Portfolio Analysis Page

Overview

Use this page to analyze portfolio data, conduct side-by-side comparisons of two project groups, and apply waterline analysis techniques to assist with executive-level critical decision making. The Portfolio Analysis page is divided into two halves. Information related to one project group appears on one side and information specific to a second project group appears on the other side.

For each project group you can display the latest summarized data. You can also select a portfolio view to determine the layout of project data.

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> **Note**
>
> Some values on this page are calculated from published or summarized data. The publisher and summarizer services always use the project baseline for earned value calculations, regardless of the *Baseline to be used for earned value calculations* setting in each project's preferences. Therefore earned value data viewed on this page might differ from the same data viewed in areas of the software using live data. For further information see: Summarized, Published, and Live Data Usage in P6*Summarized, Published, and Live Data Usage in P6*

Screen Element

Compare options

Determines whether the two selected project groups are displayed vertically or horizontally on the page.

Portfolio Analysis toolbar

See Portfolio Analysis Toolbar.

Portfolio Analysis Settings bar

See Portfolio Analysis Settings Area

Work Area

Displays the data or chart you selected in the View field on the settings bar.

Getting Here

1. On the **Navigation Menu**, expand **Portfolios** and select **Portfolio Analysis**.

Portfolio Performance Status Page

Overview

Use this page to display summarized schedule and cost or labor unit data based on the performance metric you select. To date and forecast data are provided at the high-level group, project, and WBS levels, depending on the portfolio that is currently open. Arranged by EPS, portfolio, or project code, each entry in the list represents a project, code, EPS element, or portfolio and includes an identifying icon, name, and summary performance data including a visual indicator for each cell value.

> **Note**
>
> Some values on this page are calculated from published or summarized data. The publisher and summarizer services always use the project baseline for earned value calculations, regardless of the *Baseline to be used for earned value calculations* setting in each project's preferences. Therefore earned value data viewed on this page might differ from the same data viewed in areas of the software using live data. For further information see: Summarized, Published, and Live Data Usage in P6*Summarized, Published, and Live Data Usage in P6*

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Screen Elements

Return link

Navigates back to the previous page.

Schedule link

Displays status based on performance relative to the schedule.

Earned Value link

Displays status based on performance relative to earned value metrics.

Index link

Displays status based on performance relative to CPI, SPI, and TCPI.

Performance Status legend

Displays the series of visual indicators and their short descriptions. By default, there are four (4) indicators representing customizable metrics to help you quickly assess status and identify areas that require attention.

Critical

Warning

Acceptable

Exceptional

Schedule:

To Date: Schedule field

Determines project performance by calculating the variance between the baseline schedule and the actual schedule to date.

This variance helps address the basic question, "How did we do so far?" It provides concise answers such as *4 days early*, *No Progress*, *on schedule*, or *12 days late*.

This value is expressed in units of time accompanied by a convenient visual indicator mapped to performance thresholds you can define. The value can be derived based on costs or labor units and will often yield different results.

Calculated as (**Baseline Duration** multiplied by **Performance % Complete**) minus (**Baseline Duration** multiplied by **Schedule % Complete**). Where **Performance % Complete** equals **Earned Value** divided by **Budget at Completion** and **Schedule % Complete** equals **Planned Value** divided by **Budget at Completion**.

To Date: Labor Units field

Determines project performance by calculating the variance between the actual and the scheduled labor units. This value is accompanied by a convenient visual indicator mapped to performance thresholds you can define.

Calculated as **Earned Value Labor Units** minus **Actual Labor Units**.

To Date: Cost field

Determines project performance by calculating the variance between earned value and actual cost.

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Calculated as **Earned Value Cost** minus **Actual Cost**.

Forecast at Completion: Schedule field

The estimated schedule variance at completion.

Calculated as **Remaining Finish Date** minus **Baseline Finish Date**.

Forecast at Completion: Labor Units field

The estimated labor units at completion.

Calculated as **Budget at Completion Labor Units** minus **Estimate at Completion Labor Units**.

Forecast at Completion: Cost field

The estimated cost at completion.

Calculated as **Budget at Completion** minus **Estimate at Completion**.

Earned Value:

To Date: Schedule field

Determines project performance by calculating the variance between actual and scheduled labor units or cost.

This variance helps address the basic question, "How did we do so far?" It provides concise answers such as *4 days early*, *No Progress*, *on schedule*, or *12 days late*.

For costs, calculated as **Earned Value Cost** minus **Planned Value Cost**.

For labor units, calculated as **Earned Value Labor Units** minus **Planned Value Labor Units**.

To Date: Labor Units field

Determines project performance by calculating the variance between the actual and the scheduled labor units. This value is accompanied by a convenient visual indicator mapped to performance thresholds you can define.

Calculated as **Earned Value Labor Units** minus **Actual Labor Units**.

To Date: Cost field

Determines project performance by calculating the variance between earned value and actual cost.

Calculated as **Earned Value Cost** minus **Actual Cost**.

Forecast at Completion: Schedule field

The estimated schedule variance at completion.

For costs, calculated as **Budget at Completion** multiplied by **Schedule Variance Index (SVI)**. Where **SVI** equals **Schedule Variance** divided by **Planned Value Cost**.

For labor units, calculated as **Baseline (BL) Labor Units** multiplied by **Schedule Variance Index (SVI) Labor Units**. Where **SVI** equals **Schedule Variance** divided by **Planned Value Labor Units**.

Forecast at Completion: Labor Units field

The estimated labor units at completion.

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Calculated as **Baseline (BL) Labor Units** multiplied by **Cost Variance Index (CVI) Labor Units**. Where **CVI** equals **Cost Variance** divided by **Earned Value Labor Units**.

Forecast at Completion: Cost field

The estimated cost at completion.

Calculated as **Budget at Completion** multiplied by **Cost Variance Index (CVI)**. Where **CVI** equals **Cost Variance** divided by **Earned Value Cost**.

Index:

Schedule Performance Index field

A measure of the work accomplished as a percentage of the work scheduled.

Schedule Performance Index (SPI) indicates whether you are meeting earned and planned values within your schedule. You can set performance thresholds for SPI calculated values to determine whether you need to take corrective action.

Calculated as **Earned Value of Cost** or **Quantity** divided by **Planned Value of Cost** or **Quantity**.

The variance percentage is calculated as **Earned Value** divided by **Planned Value**.

Cost Performance Index field

A measure of the value of work accomplished as a percentage of the actual costs.

Cost Performance Index (CPI) indicates whether you have spent money over the budget to date.

On the My Preferences page, you can set performance thresholds for CPI calculated values to determine whether you need to take corrective action.

Calculated as **Earned Value Cost** divided by **Actual Cost**. A value less than 1 indicates that the actual cost has exceeded the planned value.

To Complete Performance Index field

A measure of the value of the project work that is remaining.

To Complete Performance Index (TCPI) is essentially a ratio of the *remaining work* to the *remaining funds*. It helps determine the level of performance that must be achieved on the remaining work to meet recognized business goals, such as the Budget at Completion (BAC) or the Estimate at Completion (EAC).

You can set performance thresholds for calculated TCPI values to display visual indicators that help you determine whether you need to take corrective action.

Calculated as (**BAC** minus **Earned Value**) divided by (**EAC** minus **Actual Units** or **Cost**). Where BAC equals **Base Equipment Cost** plus **Base Expense Cost** plus **Base Work Cost** plus **Base Material Cost**; EAC equals (**Actual Equipment Cost** plus **Actual Expense Cost** plus **Actual Work Cost** plus **Actual Material Cost**) plus (**Remaining Equipment Cost** plus **Remaining Expense Cost** plus **Remaining Work Cost** plus **Remaining Material Cost**); Actual Cost equals **Actual Equipment Cost** plus **Actual Expense Cost** plus **Actual Work Cost** plus **Actual Material Cost**.

Page: n of N

The page number and total page count for the Performance Summary.

[Next >>] link

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Advances to the next page.

[<< Previous] link

Returns to the previous page.

> **Tip**
>
> - This page calculates and displays data in cost or labor units based on the option selected on the **Global** tab in **My Preferences**.
> - When a name appears as a hyperlink, you can open it by clicking the link. Click **Return** to go back. For example, you can click a project in a portfolio to view status for each WBS, and then click a parent WBS to view the status of any child WBS elements.
> - When you have expanded a project, project code, or WBS, a **View** link will appear in the **Activities** column of the performance status table. Click **View** to open the **Activities for WBS** dialog box where you can check the status of the individual activities. Click an activity link to open the **Resource Assignments for Activity** dialog box where you can check the progress of each assignment and even contact the resources by email.

Getting Here

1. In the context selector, select **Portfolios**.
2. In the context selector:
   - Click **Open Portfolio** to select a group of projects by portfolio type, EPS node, or project code.
   - Or choose a portfolio in the Most Recently Used list.
3. On the **Navigation Menu**, expand **Portfolios** and click **Performance Status**.

Portfolio View Portlet of the Dashboards Page

Overview

Use this portlet to analyze project data for an entire portfolio in a chart or scorecard format. You can customize the exact data fields you want to display and the type of chart or scorecard you want to view. When displaying a scorecard, you can also add and delete projects, export data, and even edit certain project data. As you analyze data for a project group, you might identify issues with a particular project or require more detailed project information. In this case, click **Open Project.**

Screen Elements

Title field

The name of the portfolio view. The title can contain up to 255 characters, and it does not have to be unique.

A visual indicator appears before the title to help you identify the type of view and determine whether it is available to just you or shared globally by all users. For example, you might see

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the user histogram icon for a personal histogram called *Spending for My Projects*, and the global histogram icon for a shared histogram called *Spending for All Projects*.

Screen Elements for Charts

The following screen elements apply only to bubble, histogram, and pie chart portfolio views (not scorecards).

Portfolio Chart

Displays a bubble chart, histogram chart, or pie chart, depending on your selection.

Portfolio Scorecard

Enables you to view the actual source data used to generate the chart.

Customize link

Opens a dialog box for modifying how the information is presented in the chart.

Screen Elements for Scorecards

The following screen elements apply only to scorecard portfolio views.

> **Note**
>
> You must maximize the portlet to view all the available options.

Save link

Saves any changes made to project data within the current portfolio.

Cancel link

Cancels any pending changes made to project data within the current portfolio.

Add link

Creates a new *What If* project within the current portfolio.

> **Note**
>
> The first time you click this link in the portlet, the Add Project dialog box appears prompting you to select the default Responsible Manager for all newly created projects.

Delete link

Deletes the currently selected project from the database.

Expand link

Shows the contents of each group. To show the contents of individual groups, click **Expand** beside the group title.

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Collapse link

Hides the contents of each group. To hide the contents of individual groups, click **Collapse** beside the group title.

Export Spreadsheet link

Exports the scorecard data to a spreadsheet file.

Customize link

Enables you to set the applicable options for the portfolio view including choosing columns for the scorecard and setting grouping options.

Scorecard table

The scorecard presents its data in a table or spreadsheet format. You can customize the fields displayed as columns.

Total summary row

Dates, sums, and other totals calculated from all the data in the scorecard.

Open Project icon

Opens the selected project in the Projects section. The default destination page (EPS, Activities, etc.) is determined by your user interface view settings and My Preferences page view settings.

Tip

- When viewing a scorecard in the portlet, if you add or delete a project or edit project data, you must save your changes before navigating to another page. If you do not, any projects you add or delete, and any data you edit, will not be saved to the database.
- When you customize a dashboard, you can add up to 50 Portfolio View portlets. You can add any existing portfolio views (global or user views) to a private dashboard; however, you can add only existing global views to a global or multi-user dashboard. Any new portfolio views you add to a private dashboard are added as user views; any new portfolio views you add to a global or multi-user dashboard are added as global views. You can modify a portfolio view from the Portfolios page to change whether it is a user or a global view.
- Information displayed in the Portfolio View portlet is based on summarized data, so it is current as of the last date the summarizer was run for a project. You can easily determine the date the summarizer was last run if you are displaying a scorecard view. To determine the date, add the column Last Summarized Date, which is available under the Summary section of the Available Columns list when you customize the portlet.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Portfolio View** portlet.

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Portfolio View Save As Dialog Box

Overview

Use this dialog box to save the current portfolio view as a new portfolio view.

Screen Elements

Title field

The name of the portfolio view. The title can contain up to 255 characters, and it does not have to be unique.

A visual indicator appears before the title to help you identify the type of view and determine whether it is available to just you or shared globally by all users. For example, you might see the user histogram icon for a personal histogram called *Spending for My Projects*, and the global histogram icon for a shared histogram called *Spending for All Projects*.

Save the portfolio view as a options

Determines how to save the portfolio.

This portfolio view is available to options

The value indicating who can access the portfolio view.

Current User: Enables you to access the portfolio view.

All Users: Enables all users to access the portfolio view.

Another User: Enables only the users you specify to access the portfolio view.

Getting Here

1. On the **Navigation Menu**, expand **Portfolios** and select **Portfolio Analysis**.
2. On the **Portfolio Analysis** page, click **Save As**.

Portfolio Views Section of the Content Tab of the Customize Dashboard Page

Overview

Use this section to enable and configure portlets in the dashboard that show customized portfolio data in a chart, scorecard, or histogram view.

Screen Elements

Add link

Adds a new portlet ready for customization.

Portfolio View option

Determines whether to display a portfolio view on a dashboard to help analyze data for a particular project group or project..

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Remove link

Deletes the portfolio view.

Common Fields section

The following fields apply to most chart types:

Title field

The name of the portfolio view. The title can contain up to 255 characters, and it does not have to be unique.

A visual indicator appears before the title to help you identify the type of view and determine whether it is available to just you or shared globally by all users. For example, you might see the user histogram icon for a personal histogram called *Spending for My Projects*, and the global histogram icon for a shared histogram called *Spending for All Projects*. This is also the name that appears in the title bar of the portlet.

Type

The type of chart to be displayed.

If you change the type to **Scorecard**, the information that displays on the page changes so you can input scorecard details.

X-Axis

The data field represented in the X-axis of the chart.

This field is not displayed for a pie chart.

Y-Axis

The data field represented in the Y-axis of the chart.

This field is not displayed for a Pie chart.

Group By list

The data field used to group projects in the chart. Grouping gathers, or groups, together all of the projects that contain the same value for the selected data field.

This field is not displayed for a Histogram.

Color Theme

The type of colors included in the chart: pastel or primary.

Show 3-D option

Determines whether to display the chart in 3-D.

Show horizontal gridlines option

Displays horizontal gridlines in the chart. This field is not displayed for a Pie chart.

Show vertical gridlines

Displays vertical gridlines in the chart. This field is not displayed for a Pie chart.

Show all values on axis, not just assigned values

Displays all values on the X axis and Y axis, even if there is no assigned value. For example, if you choose to display Project Status on the X axis, the X axis displays all types of Project

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Status (Active, Inactive, What-If), even if no projects are assigned to a status type. This option only applies when you choose to display project code or project status on the X or Y axis. This option is not displayed for a Pie chart.

Bubble Chart Fields section

The following field applies only to the Bubble chart:

Bubble Size list

Determines the size of bubbles that display in a Bubble chart.

Pie Chart Fields section

The following fields apply only to the Pie chart:

Data list

The data field represented in a Pie chart.

Show pie data label

For each section of the Pie chart, displays the value for the customize option you select in the Data field. For example, if the data you choose to display in the Pie chart is Actual Cost, the chart displays the Actual Cost value next to each section of the Pie chart.

Show group by label option

For each section of the Pie chart, displays the value for the customize option you select in the Group By field. For example, if you choose to group the chart by Project, the chart displays the Project Name next to each section of the Pie chart.

Show percentage

Displays the percentage of each slice of the Pie chart.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, click **Customize**.
4. On the **Dashboard Details** page, click the **Content** tab.
5. On the **Content** tab, expand the **Portfolio View** section.

Predecessors Section of the Relationships Section of the Activity Form Page

Overview

Use this section to view predecessor relationships.

Screen Elements

Project ID field

The unique identifier of the project containing the successor activity.

Activity ID field

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The unique identifying code for the successor activity.

Activity Name field

The name of the selected activity's successor.

Relationship Type list

The relationship between two activities. Select from the following types:

Finish to Start: A relationship in which the start of a successor activity depends on the completion of its predecessor activity. This is the default activity relationship.

Finish to Finish: A relationship in which the finish of a successor activity depends on the finish of its predecessor activity.

Start to Start: A relationship between activities in which the start of a successor activity depends on the start of its predecessor.

Start to Finish: A relationship between activities in which a successor activity cannot complete until its predecessor activity starts.

Lag field

The amount of time the predecessor activity was delayed, affecting the ability of its successor activity to start or finish. Lag can be positive (indicating a delay) or negative (indicating that the successor can begin a set time before the predecessor completes).

This value is specified by the project manager and is used by the project scheduler when scheduling activities.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand any portlet containing activities.
4. In the portlet, click an activity.
5. On the **Activity Form** page, expand the **Relationships** section

Prices Detail Window of the Roles Tab of the Administration Page

Overview

Use this detail window to define the price/unit for up to five available rate types for each role.

Screen Elements

Price/Unit fields

The non-overtime rate for the role, which is used to compute costs for any activities to which the role is assigned.

You can define up to five rate types for a role. Your organization can define text titles for each rate type as part of enterprise data.

Getting Here

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1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Roles**.
3. On the **Roles** tab, click the **Prices** detail window.

Print Options Dialog Box

Overview

Use this dialog box to configure the appearance and options for printing the view. These settings are saved with the view.

Screen Elements

Overview area

Provides a high level preview of how the selected options will look, including an estimate of the number of pages.

Preview area

Provides a preview of how the selected options will look. Hover over the preview to show editing options:

Edit Header : Enables you to edit the header of the output.

Edit Content : Enables you to edit the content of the output.

Edit Footer : Enables you to edit the footer of the output.

Preview toolbar

Zoom Out: Zooms to show less detail but more of the page.

Zoom In: Zooms to show more detail but less of the page.

Zoom to Default: Resets the zoom level to the default.

Zoom to Fit: Zooms to fit an entire page of output in the preview area.

Continuous: Toggles between showing a single page and showing multiple pages in a continuous list.

Settings area

Restore Defaults button

Restores all fields in the Settings area to their default values.

Print button

Sends the output to your default printer.

Paper Size list

The size of the paper to be used for the output.

Orientation options

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**Landscape**: Determines that the output will be printed on wide pages.

**Portrait**: Determines that the output will be printed on long pages.

Top field

The size of the top margin of the output.

Left field

The size of the left margin of the output.

Right field

The size of the right margin of the output.

Bottom field

The size of the bottom margin of the output.

Show watermark option

Select whether to show a watermark on output. If you select to show a watermark, enter the text to be used for the watermark into the text box.

Pages options

All: Determines that all pages of the output will be printed.

Number to **number**: Determines that only the pages starting at the first number and finishing at the second number will be printed.

Scaling options

Auto: Determines that standard scaling will be used for the output.

Fit to number pages wide: Determines that the output will be scaled to fit the specified number of pages width.

Page Layout options

Determines the order pages will be printed if the output spreads across multiple pages.

**Over then down**: Prints the top row of the output pages first, then moves to the next row.

**Down then over**: Prints the first column of the output pages first, then moves to the next columns.

Page break on group option

Determines that the output will move to a new page after printing the last line of a group of data. This option is ignored when the view is grouped to all levels of a hierarchy.

Repeat column headers option

Determines that column headings will print at the top of every page containing columns when the output spans multiple pages.

Show row numbers option

Determines that row numbers will be printed to the left of the first column of data.

Edit view:

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Edit View of the Print Options Dialog Box

Getting Here

1. Click **Print**.

Prioritization Tab of the Level Resources Dialog Box of the Activities Page

Overview

Use this tab to configure leveling priorities.

Screen Elements

Context menu

Add Above: Adds a new item to the list above the selected item.

Add Below: Adds a new item to the list below the selected item.

Delete: Deletes the selected item.

Leveling Priorities table

The priorities associated with the resources and the sort order for each.

Your priorities are used to handle scheduling conflicts that might occur during leveling, and determine which project or activity is leveled first. The table displays the field to use for prioritization, and the order in which the item specified in the priority is leveled. If leveling priorities conflict, P6 uses the Activity ID to resolve the conflict.

Field Name field

The fields considered to be leveling priorities.

Sort Order list

Determines whether the application sorts values in ascending or descending order.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Click the **Actions** menu and select **Leveler**.
3. In the **Level Resources** dialog box, click the **Prioritization** tab.

Private Documents Tab of the My Documents Portlet (with content repository)

Overview

Use this tab to view your private documents, including documents that have been added using P6 Professional.

Screen Elements

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Documents Portlet toolbar

See My Documents Portlet Toolbar.

Title field

The name of the document.

Version field

The version number of the document. Version 1 is the original version of the document.

If the version number is a link, you can click the link to view that version of the document.

Creation Date field

The date and time the selected document was created.

Modified Date field

The date and time the document was last modified.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. Expand the **My Documents** portlet and click the **Private Documents** tab.

Private Documents Tab of the My Documents Portlet of the Dashboards Page (with content repository)

Overview

Use this tab to view all private documents that you have added.

Screen elements

Private Documents Tab toolbar

See Private Documents Toolbar.

Title field

The names of the user, the folders, and the associated documents.

Version field

The version number of the document. Version 1 is the original version of the document.

If the version number is a link, you can click the link to view that version of the document.

Creation Date field

The date and time the selected document was created.

Modified Date field

The date and time the document was last modified.

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> **Tip**
>
> **Add Document** enables you to create a new private document only.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Documents** portlet and click the **Private Documents** tab.

Privileges Detail Window of the Global Security Profiles Page

Overview

Use this detail window to assign global security privileges to the selected global security profile.

Screen Elements

Administration Category

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.

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 EPPM user data. To search the LDAP directory when provisioning, users must also have the Provision Users from LDAP global privilege.

Add/Edit/Delete User Interface Views option

Determines whether the profile will enable users to create, modify, and remove user interface views configurations, which control the functionality users can access in P6.

Edit Application Settings option

Determines whether the profile will enable users to modify application settings, which set global preferences for P6 EPPM.

Provision Users from LDAP option

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.

View Published Audit Data option

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Determines whether the profile will enable users to view published table auditing data.

Codes Category

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.

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.

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 Global Issue Codes option

Determines whether the profile will enable users to create global issue codes and code values data. This privilege also selects the 'Edit Global Issue Codes' global privilege.

Edit Global Issue Codes option

Determines whether the profile will enable users to modify global issue codes data. This privilege also enables users to create, modify, and remove global issue code values.

Delete Global Issue Codes option

Determines whether the profile will enable users to remove global issue codes and code values data. This privilege also selects the 'Add Global Issue Codes' and 'Edit Global Issue Codes' global privileges.

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.

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.

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.

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.

Edit Resource Codes option

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.

Delete Resource Codes option

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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 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.

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.

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.

Add/Delete Secure Codes option

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, resource codes, role codes, 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, resource codes, role codes, issue codes, and code values data.

Global Data Category

Add/Edit/Delete Categories and Overhead Codes option

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Determines whether the profile will enable users to create, modify, and remove categories and overhead codes data, which can be applied to all projects. Overhead codes are only available to P6 Team Member Web users.

Add/Edit/Delete Cost Accounts option

Determines whether the profile will enable users to create, modify, and remove cost accounts data.

Add/Edit/Delete Currencies option

Determines whether the profile will enable users to create, modify, and remove currencies data.

Add/Edit/Delete Locations option

Determines whether the profile will enable users to create, modify, and remove locations data.

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 Funding Sources option

Determines whether the profile will enable users to create, modify, and remove funding source data.

Add/Edit/Delete Global Calendars option

Determines whether the profile will enable users to create, modify, and remove global calendars data.

Add/Edit/Delete Global Portfolios option

Determines whether the profile will enable users to create, modify, and remove global portfolio configurations in Manage Portfolios Views.

Add/Edit/Delete Risk Categories, Matrices, and Thresholds option

Determines whether the profile will enable users to create, modify, and remove risk categories, risk scoring matrices, and risk thresholds data.

Add/Edit/Delete Timesheet Period Dates option

Determines whether the profile will enable users to create, modify, and remove individual or batched timesheet periods.

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 Stored Images option

Determines whether the profile will enable users to create, modify, and remove stored images in P6 EPPM and P6 Professional.

Resources Category

Add Resources option

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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.

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 resources, but clear the Active option for the resource on the Resources tab on the Resources Administration page.

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 Resource Curves option

Determines whether the profile will enable users to create, modify, and remove resource distribution curves definitions.

Add/Edit/Delete Roles option

Determines whether the profile will enable users to create, modify, and remove roles data.

Add/Edit/Delete Global Resource and Role Teams option

Determines whether the profile will enable users to create, modify, and remove global Resource Teams and Role Teams. A Resource/Role Team is a collection of resources/roles.

Add/Edit/Delete Rate Types and Units of Measure option

Determines whether the profile will enable users to create, modify, and remove resource rate types and units of measure 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

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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.

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.

Approve Resource Timesheets option

Determines whether the profile will enable users to approve or reject submitted timesheets as a Resource Manager.

Templates Category

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 Issue Forms option

Determines whether the profile will enable users to create, modify, and remove issue forms.

Add/Edit/Delete Microsoft and Primavera XML Templates option

Determines whether the profile will enable users to create, edit, duplicate, delete, import, and export templates that are used to import and export data to and from Microsoft Project, Primavera XML, and Primavera XER formats.

Add/Edit/Delete Project Templates option

Determines whether the profile will enable users to create, modify, and remove project templates. To create project templates, users must also have the 'Add Projects' project privilege assigned to their profile. To modify templates, you must have the same project privileges that are required to modify projects. To delete project templates, users must also have the 'Delete Projects' project privilege assigned to their profile.

Tools Category

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.

Administer Global Scheduled Services option

Determines whether users have the privilege to modify settings on the Global Scheduled Services dialog box. You can modify the following publishing services if you have this privilege: Publish Security, Publish Enterprise Data, Publish Enterprise Summaries, Publish Resource Management, Publish Audit Data. With this privilege, you can enable the service, choose how often the service will run, and at what time the service will run.

Administer Project Scheduled Services option

Determines whether the profile will enable users to set up the Apply Actuals, Export, Import, Level, Project Checker, Publish, Schedule, Summarize, and Send to Schedule Sheet scheduled services to run at specific time intervals.

Edit Global Change Definitions option

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Determines whether the profile will enable users to create, modify, and remove Global Change specifications available to all users in P6 Professional.

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 XLSX option

Determines whether the profile will enable users to import projects, resources, and roles from XLSX files into P6 Professional and P6. P6 Professional users must also be a Project Superuser to update a project from XLSX format. P6 users do not need to be a Project Superuser, but do require the Add/Edit Activities Except Relationships privilege.

Import XML option

Determines whether the profile will enable users to import projects from P6, 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.

Enable Work Offline option

Determines whether the profile will enable users to work offline in P6 Professional configured to a database with a P6 Pro Cloud Connect alias. To work offline, the database alias must have the Enable Client-side Cache option selected. To see this privilege, select the Enable offline mode option in the General pane of Application Settings.

Views and Reports Category

Add/Edit/Delete Global Activity and Assignment Layouts, Views and Filters option

Determines whether the profile will enable users to create, modify, and remove global activity and resource assignment layouts, views, and filters.

Add/Edit/Delete Global Dashboards option

Determines whether the profile will enable users to create, modify, and remove global dashboards.

Add/Edit/Delete Global Project, WBS and Portfolio Layouts, Views and Filters option

Determines whether the profile will enable users to create, modify, and remove global project, WBS, and portfolio layouts, views, and filters. This privilege is required to save view changes made to the Portfolio Analysis page.

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.

Edit Projects from Scorecards option

Determines whether the profile will enable users to create, modify, and remove projects from scorecards in the Portfolio View portlet and the Portfolio Analysis page. This privilege is

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required to save data changes made to the Portfolio Analysis page. The following project privileges are also required for scorecards: 'Edit Project Details Except Costs/Financials' to edit project data, 'View Project Costs/Financials' to view project cost data, 'Edit WBS Costs/Financials' to edit project cost data, 'Create Project' to add a project, and 'Delete Project' to delete a project.

Add/Edit/Delete Global Visualizer Layouts option

Determines whether the profile will enable users to create, modify, and remove global layouts in Visualizer.

Add/Edit/Delete Global Visualizer Filters option

Determines whether the profile will enable users to create, modify, and remove global filters in Visualizer.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Global Security Profiles**.
3. On the **Global Security Profiles** page, click the **Privileges** detail window.

Privileges Detail Window of the Project Security Profiles Page

Overview

Use this page to configure project security profiles and define assigned privileges. Define specific privileges for the profile using the detail windows. The options you configure on each detail window apply to the selected profile.

Overview

Use this detail window to assign project security privileges to the selected project security profile.

Screen Elements

Activities Category

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. Users assigned a profile with this privilege can also designate another user as an activity owner and be assigned as a status reviewer for reviewing status updates from P6 Team Member interface users. Users assigned Team Member work distribution filters must have this privilege assigned. 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.

Add/Edit/Delete Activity Relationships option

Determines whether the profile will enable users to create, modify, and remove activity relationships assigned to projects.

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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.

Add/Edit/Delete Expenses option

Determines whether the profile will enable users to create, modify, and remove expenses assigned to projects.

Delete Discussion Comments option

Determines whether the profile will enable users to delete discussion comments assigned to activities.

Codes Category

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.

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.

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.

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.

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.

Delete EPS Activity Codes option

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.

EPS and Projects Category

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.

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Add Projects option

Determines whether the profile will enable users to create, copy, and paste projects within the EPS node. To create project templates, users must also have the 'Add/Edit/Delete Project Templates' global privilege assigned to their profile.

Delete Projects option

Determines whether the profile will enable users to delete, cut, and paste projects within the EPS node. To delete project templates, users must also have the 'Add/Edit/Delete Project Templates' global privilege assigned to their profile.

Edit Project Details Except Costs/Financials option

Determines whether the profile will enable users to set Project Preferences and to edit project-level data. This privilege also enables users to assign or remove a risk scoring matrix to a project in the Risk Scoring Matrices page in Enterprise Data.

Certain Project Preferences, such as editing Publication Priority, require additional privileges. To assign a project baseline, users must also have the 'Assign Project Baselines' project privilege assigned to their profile. To edit cost UDFs, users must also have the 'Edit WBS Costs/Financials' project privilege assigned to their profile.

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.

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.

Delete Project Data with Timesheet Actuals option

Determines whether the profile will enable users to delete activities and resource assignments for projects that have timesheet actuals. This includes cutting an activity with timesheet actuals and pasting the activity to another project. To delete project data at all different levels (activity, WBS, project, and EPS), users must also have the appropriate privileges assigned to their profile. For example, to delete activities with timesheet actuals, users must also have the 'Delete Activities' project privilege assigned to their profile. To delete activities and WBS nodes with timesheet actuals, users must additionally have the 'Add/Edit/Delete WBS Except Costs/Financials' project privilege assigned to their profile.

Delete Published Project Data option

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Determines whether the profile will enable users to delete published project and baseline data using the Delete Published Data action on the EPS and activities pages, using scheduled services, web services, and delete published baseline data in the Define Baselines dialog box.

Export Project Data option

Determines whether the profile will enable users to export project data and download data to Excel using the Download link below grids. This privilege also conveys the ability to copy and paste data out of the project or EPS node.

Project Data Category

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

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.

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Related Applications Category

Administer Project External Applications option

Determines whether the profile will enable users to modify entries in the External Applications feature in P6 Professional.

Exchange Project Data with Primavera Unifier option

Determines whether the profile will enable users to exchange project data with a linked Primavera Unifier project.

Exchange Project Data with Oracle Primavera Cloud option

Determines whether the profile will enable users to exchange project data with a linked Oracle Primavera Cloud project.

Exchange Project Data with Gateway option

Determines whether the profile will enable users to exchange project data with a project linked via Primavera Gateway.

Resource Assignments Category

Add/Edit Activity Resource Requests option

Determines whether the profile will enable users to create and modify resource requests for activities.

Add/Edit/Delete Resource Assignments for Resource Planning option

Determines whether the profile will enable users to add, edit, or delete resource assignments on the Planning Page of the Resources Section.

Add/Edit/Delete Role Assignments for Resource Planning option

Determines whether the profile will enable users to add, edit, or delete role assignments on the Planning Page of the Resources Section.

Edit Committed Flag for Resource Planning option

Determines whether profile will enable the users to edit the committed flag on the Planning Page of the Resources Section.

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.

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 Professional. The 'Add/Edit Activities Except Relationships' and 'View Project Costs/Financials' project privileges are also required for this functionality.

Tools Category

Apply Actuals option

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Determines whether the profile will enable users to apply actuals to activities in projects.

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 using P6 Professional, and whether users can open projects exclusively. Opening a project exclusively places a lock on the project allowing only the user who opened the project to make changes to the project. Other users can view project data, but cannot make updates until the exclusive lock is released.

Level Resources option

Determines whether the profile will enable users to level resources in projects. This privilege also selects the 'Schedule Project' project privilege.

Schedule Projects option

Determines whether the profile will enable users to schedule projects.

Monitor Project Thresholds option

Determines whether the profile will enable users to run the threshold monitor for projects in P6 Professional.

Store Period Performance option

Determines whether the profile will enable users to track actual this period values for actual units and costs in projects. The 'Add/Edit Activities Except Relationships' project privilege is also required for this functionality.

Summarize Projects option

Determines whether the profile will enable users to summarize data for all projects in the EPS.

Edit Publication Priority option

Determines whether the profile will enable users to edit the Publication Priority for the project. This privilege should be granted only to administrators to optimize the flow of projects through the service queue.

Run Baseline Update option

Determines whether the profile will enable users to update baselines assigned to projects with new project information using the Update Baseline tool.

Run Global Change option

Determines whether the profile will enable users to run Global Change specifications to update activity detail information in P6 Professional.

Allow Integration with Primavera Unifier option

Determines whether the profile will enable users to link projects to Primavera Unifier projects and schedule sheets.

Perform Global Search & Replace option

Determines whether the profile will enable users to use Global Search & Replace to update project, WBS, and activity information in P6.

Views and Reports Category

Add/Edit Project Level Layouts option

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Determines whether the profile will enable users to create, modify, and remove project level layouts in the Activities, Assignments, or WBS windows in P6 Professional.

Edit Project Reports option

Determines whether the profile will enable users to modify reports, modify report batches, and export reports for projects in P6 Professional.

Publish Project Website option

Determines whether the profile will enable users to publish a Web site for projects in P6 Professional.

Add/Edit/Delete Project Visualizer Layouts option

Determines whether the profile will enable users to create, modify, and remove project layouts in Visualizer.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Project Security Profiles**.
3. On the **Project Security Profiles** page, click the **Privileges** detail window.

Probability and Impact Diagram Detail Window of the Risk Scoring Matrices Page

Overview

Use this detail window to view a graphical representation of probability, impact, and tolerance thresholds defined for a selected risk scoring matrix.

Screen Elements

Display Score Rating As list

The risk scoring matrix score is available in a numeric or a text format.

Numeric: Displays the numeric score ratings of the severity fields.

Text: Displays the text score ratings of the severity fields.

Probability field

The values defined for the probability threshold.

Severity fields

The ranges and values assigned to the chosen thresholds.

The number of severity fields is determined by the number of levels chosen for the impact thresholds.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Scoring Matrices**.

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3. On the **Risk Scoring Matrices** page, click the **Probability and Impact Diagram** detail window.

Probability and Impact Diagram Detail Window of the Risks Page

Overview

Use this detail window to view a graphical representation of probability and impact for a selected risk scoring matrix.

Screen Elements

Display Score Rating As list

Determines whether the risk scoring matrix is shown in a numeric or a text format.

Probability field

The values defined for the probability threshold.

Severity fields

The ranges and values assigned to the chosen thresholds.

The number of severity fields is determined by the number of levels chosen for the impact thresholds.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Risks**.
2. On the **Risks** page, click the **Probability and Impact Diagram** detail window.

Probability Detail Window of the Risk Scoring Matrices Page

Overview

Use this detail window to view the probability threshold assigned to the selected risk scoring matrix.

Screen Elements

Code field

The short name for the threshold level.

Name field

The name for each value defined for the probability threshold assigned to the risk scoring matrix.

Range field

The threshold range values defined for the probability assigned to the risk scoring matrix.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Scoring Matrices**.

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3. On the **Risk Scoring Matrices** page, click the **Probability** detail window.

Project Access Detail Window of the Users Page

Overview

Use this detail window to assign user access permissions to projects under different responsible managers.

Screen Elements

Assign OBS button

Opens the Select Responsible Manager dialog box and enables you to select an OBS to assign to the selected user.

Context menu

Delete: Removes the selected item or association permanently.

Responsible Manager field

The list of OBS elements assigned to the selected user.

Project Security Profile field

Determines the project access granted to the user.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page, click the **Project Access** detail window.

Project Calendars Page

Overview

Use this page to configure project calendars, define the standard work week, and view the activities using a given calendar.

Screen Elements

Add (Ins) button

Opens the Select Calendar to Copy dialog box.

Open Project... button

Opens the Open Projects dialog box to enable you to view, add, delete, and modify codes specific to those projects.

Expand All button

Enables you to see all of the items in the hierarchical list or grouped view.

Collapse All button

Enables you to hide subordinate items in the hierarchical list or grouped view.

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Print

Opens the Print Options dialog box to enable you to print the list of calendar names.

Full Screen

Expands the current work area so it fills the entire display.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Calendar Name

Displays a list of all available calendars to view.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Duplicate: Creates a new item as a copy of the selected item.

Promote to Global Calendar: Moves the selected calendar to the global calendar. Assignments to the calendar will remain.

Show/Hide Tabs

Enables you to configure which tabs are shown and hidden.

Summary tab

See Summary Tab of the My Calendar dialog box, Project Calendars page, or Resource Calendars Page.

Calendar tab

See Calendar Tab of the My Calendar dialog box, Project Calendars Page, or Resource Calendars Page.

Standard Work Week tab

See Standard Work Week Tab of the My Calendar dialog box, Global Calendars Page, Project Calendars Page, or Resource Calendars Page.

Used By tab

See Used By Tab of the Project Calendars Page.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

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Tip

- You cannot delete the global or project default calendar.
- If you delete a calendar that is currently set as the project default calendar, or as the default calendar for a resource, or as the assigned calendar for an activity, you will be prompted to choose a replacement calendar for those assignments. Replacing the calendar for projects, resources, or activity assignments can cause the dates of those assignments to change.
- You need the **Add/Edit/Delete Global Calendars** or **Add/Edit/Delete Resource Calendars** security privileges to delete a calendar.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project Calendars**.

Project Checker Report Dialog Box of the Activities Page

Overview

Use the Project Checker to evaluate the project data in relation to unique key constraints, foreign key constraints, and P6 EPPM business rules. The report checks for problems with unique key constraints, foreign key constraints, and violations of the P6 EPPM business rules.

Screen Elements

Project selection

The list of projects to check.

Options

Determines the checks to be run. Select one of the following:

All: Runs checks against unique key constraints, foreign key constraints, and business rules.

Unique key checks only: Runs checks against the selected projects in each table of the database, to determine whether any unique key constraints have been violated.

Foreign key checks only: Runs checks against the selected projects in each table of the database, to determine whether any foreign key constraints have been violated.

Business rule checks only: Runs checks against the selected projects to help adherence to good practice and to determine whether any business rules have been violated.

Limit Report Rows option

Enables you to specify the maximum number of rows to return for each of the checks included in the report.

Maximum Rows field

Determines the number of rows to return for each of the checks included in the report if the Limit Report Rows option is selected.

Getting Here

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1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Click the **Actions** menu and select **Project Checker**.

Project Codes Detail Window of the Activities Page

Overview

Use this detail window to view codes assigned to projects.

> **Note**
>
> The data in this detail window is read only. You can modify these code assignments, in the Codes Detail Window of the EPS Page.

Screen Elements

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Codes detail window columns

Name field

The name of the code.

Value field

The alphanumeric or descriptive value of the code.

Description field

The description provided for the code or code value when it was created.

Type field

The type of the code. This field describes the scope of the code: Global, EPS, or Project.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, select a project grouping band and click the **Codes** detail window.

Project Codes Page

Overview

Use this page to add and configure project codes and code values.

Screen Elements

Add menu

Add Code: Creates a new code.

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Add Code Value: Creates a code value for the selected code.

Add Child Code Value: Creates a child code value for the selected code value.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Expand All button

Enables you to see all of the items in the hierarchical list or grouped view.

Collapse All button

Enables you to hide subordinate items in the hierarchical list or grouped view.

Full Screen

Expands the current work area so it fills the entire display.

Customize View

Opens the Customize View dialog box.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add Code: Creates a new code to help you organize data.

Add Code Value: Creates a code value for the selected code.

Add Child Code Value: Creates a subordinate code value for a selected code value.

Delete: Deletes the selected data items or table rows permanently.

Cut: Cuts the selected item.

Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Move Right: Moves the selected item one level lower in the hierarchical arrangement.

Move Left: Moves the selected item one level higher in the hierarchical arrangement.

Expand: Enables you to expand and view all of the items in a hierarchical list.

Collapse: Enables you to collapse and hide subordinate items in a hierarchical list.

Name field

The name of the code. This column is always visible on this page.

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Description field

A description of the code or the code value.

Maximum Length field

The maximum number of characters used for a code value name.

Weight field

The weight of the project code.

P6 calculates project score based on the weights associated with project codes and project code values assigned to a project. To use project scoring features, you must create weighted project codes and code values and assign them to the projects you want to rank.

Weight Percent field

The project code weight divided by the total of all project code weights.

Maximum Code Value Weight field

The maximum allowed weight value for a specific project code type.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

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1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project Codes**.

Project Data tab of the Primavera XML or Primavera XER Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use this tab to select an import action when the same data exists in the import file and project being updated.

Many data items are both created and assigned when you import, typically when they have a one-to-many relationship (for example, risks, project calendars, activity codes). So if you import a new calendar, not only is the calendar object created, but the process of importing will also assign the calendar to whichever objects in the import file are using it. However, some data items are only created on import because their definition includes the information about the data item to which they belong (for example, scheduling options, WBS nodes, and activity relationships). Other data items are only assigned on import, meaning that the item must exist in the database for the import process to assign it to another item (for example, baseline assignments, high level planning assignments).

Select Remove from P6 to delete those values in the database that are not contained in the file you are importing.

Screen Elements

Name field

The type of global or project data for import.

Import Action list

Determines what action to take when importing:

Insert New: Retains the data in the existing project and adds new data even when a matching record exists. The availability of this option depends on the import format, application, and data type. See the P6 EPPM Importing and Exporting Guide for the supported P6 and P6 Professional data types.

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 for this data type.

Assign: Assigns the codes and code values during import. This action is available for codes only when importing from a Primavera XML file and for unsecured codes only when importing from an XER file.

Ignore: This action is available for codes only. This action does not assign the codes and code values during import. This applies only to the assignment of codes and code values, not to whether the codes and code values are imported. If you chose to Insert New, Keep Existing, or

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Update Existing for the code type on the Global Data tab, the code and its values will be imported, even if you choose Ignore here.

Remove from P6 option

Determines whether to remove the selected item from the database if a matching item is not found in the import file. This option is available if the import file is in XML format. This option is not available for secure codes.

Tip

- To understand how the import of secure codes is handled, see the *P6 EPPMImporting and Exporting Guide*.
- Project Record Data covers data that is specific to a project, for example notebooks, budget logs, spending plans, and project UDFs. In most cases, multiple instances of these items are not permitted. For example, you cannot have two spending plans assigned to a project. However, it is possible to have multiple budget logs assigned to one project, therefore if you select Insert New as the import action for the Project Data Record duplicate records can be created for budget logs.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click the **Actions** menu and select **Manage Import Templates** or **Import/Export Projects**.
3. In the **Import/ExportProjects** dialog box:
   a. Click the **Import** tab.
   b. Click the **Import Type** list and select **Primavera XER** or **Primavera XML.**
   c. Click the **File** field and select a file to import.
   d. Click the **Manage Templates** button.
4. In the **Manage Primavera Templates** or **Manager Primavera XER and XML Templates** dialog box, click the name of a template.
5. In the **Primavera Template** or **Primavera XER and XML Template** dialog box, click the **Basic** tab.
6. Click the **Project Data** tab.

Project Data Tab of the Update Baselines Dialog Box of the Activities Page or EPS Page

Overview

Use this tab to determine which project data items should be updated or added in the baseline.

Screen Elements

Project Details option

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Determines whether to update project data in the baseline.

The following data 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.

Project UDFs option

Determines whether to update project UDFs in the baseline.

Project risks, issues and thresholds option

Determines whether to update risks, issues, and thresholds in the baseline.

If you choose to update issues but not activities, the new issues are added without activity assignments.

Risk UDFs option

Determines whether to update risk UDFs in the baseline.

Issue UDFs option

Determines whether to update issue UDFs in the baseline.

Work products and documents option

Determines whether to update data related to work products and documents in the baseline, except documents from the Content Repository.

If you choose to update work products and documents but not activities, the new work products and documents are added without activity assignments.

Work products and documents UDFs option

Determines whether to update work product and document UDFs in the baseline.

WBS UDFs option

Determines whether to update WBS UDFs in the baseline.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. On the **Activities** or **EPS** page, click the **Actions** menu and select **Define Baselines**.
3. In the **Define Baselines** dialog box, select a baseline and click **Update**
4. Select the **Project Data** tab.

Project Gantt Chart Portlet of the Dashboards Page

Overview

Use this portlet to quickly view the status of projects and review its milestones.

The table lists projects that meet the portfolio, project code value, or project filter criteria specified in the **Filter by** field in the dashboard. In the table, you can expand the project rows to display a list of each project's start and finish milestone activities. You can filter the milestones that display in the portlet by selecting an activity code filter.

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The Gantt chart displays a bar for each project, which represents the span between the **Project Planned Start** and **Scheduled Finish** dates of the project. Each project bar indicates current progress, and remaining effort. When you expand a project row in the table to display the project milestone activities, the Gantt chart shows milestone icons for each start and finish milestone activity in the project, and baseline milestones for each start and finish milestone in the baseline if one has been applied to the project.

Screen Elements

Columns field

Enables you to select the data fields you want to display as columns in the current table.

Print

Prints the Grid View.

Filters menu

Select Filter: Opens the select code value dialog box. Select an Activity Code by which to filter.

Clear Filter: Removes the currently set filter and display all milestones.

Expand All button

Enables you to see all of the items in the hierarchical list or grouped view.

Collapse All button

Enables you to hide subordinate items in the hierarchical list or grouped view.

ID field

The unique identifier of the project and associated milestones.

This field is fixed and cannot be modified using the customize columns icon.

Name field

The name of the project and associated milestones.

Start field

The start date of the project and its associated milestones.

Scheduled Finish field

The calculated latest early finish date, which is based on the schedule most recently generated for the project.

BL Start field

The current earliest start date of all activities in the project baseline.

BL Finish field

The current latest finish date of all activities in the project baseline.

Project Gantt Chart area

The Current Bar is drawn using the Project Planned Start and Scheduled Finish date fields. Milestones appear as diamonds. The Baseline Bar is drawn underneath the Current Bar using the BL Start and BL Finish dates of the project.

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> **Tip**
>
> Position your mouse pointer over a milestone to view its name and dates.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Project Gantt Chart** portlet.

Project Health Portlet of the Dashboards Page

Overview

Use this portlet to quickly see how well a portfolio or individual project is performing. Status indicators (shown below) identify areas where you might need to focus attention or implement corrective action.

Screen Elements

Exceptional

Indicates that a project or portfolio is exceeding expectations.

Acceptable

Indicates that a project or portfolio is performing as expected.

Warning

Indicates that the project or portfolio needs attention and is near critical.

Critical

Indicates that the project or portfolio requires significant corrective action.

> **Tip**
>
> Status indicators are based on performance thresholds you set on the **Global** tab in **My Preferences**. You can set performance thresholds to correspond to each of the status indicators.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Project Health** portlet.

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Project Notebooks Portlet of the Dashboards Page

Overview

Use this portlet to view all notebooks assigned to the selected project. In a dashboard, the Project Notebooks portlet displays all of the notebooks assigned to the projects that meet the dashboard's selected filter criteria.

Notebooks are used to store and share notes relating to a project. When you add notes for a given notebook topic, you can enter text and use HTML editing features such as formatting text and lists, inserting pictures, adding hyperlinks and Email links, and inserting tables.

Screen Elements

Notebook Topic field

The name of the notebook topic.

Click the name of a notebook topic to edit the description using the work area and Text Editor Toolbar.

Description field

The notes for the notebook topic.

For example, you might copy an email message, a web link, a table of observations, and a series of text notes into a notebook topic called *Budget Recommendations* to capture the ongoing cost impacts of a recurring project.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Project Notebooks** portlet.

Project or WBS UDF Detail Window of the Activities Page

Overview

Use this detail window to see all the UDFs and their values assigned to the selected WBS node or Project. If you have selected a WBS node, you can also create or remove a UDF assignment.

> **Note**
>
> You can only assign cost UDFs to activities here if you have the *Edit WBS Costs/ Financials* privilege assigned for this project.

Screen Elements

Assign... button

Opens the Select UDF dialog box. To see this button, select a WBS node.

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Group By list

Groups the data according to your selection.

Search

Enables you to perform a search based on the value you enter in the search bar.

User Defined Field field

The name of the user defined field.

Data Type field

The data type of the user defined field.

Value field

The value of the user defined field.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select a WBS node or Project grouping band and click the **UDF** detail window.

Project Performance Section of the Content Tab of the Customize Dashboard Page

Overview

Use this section to enable and configure portlets in the dashboard that display performance and performance related information.

Screen Elements

Schedule Performance option

Determines whether to display both current and forecast schedule summary performance information, in either costs or labor units.

To Date Values: Determines whether to display the values to date for schedule and labor units.

Forecast at Completion: Determines whether to display the forecast time increments at project completion.

Earned Value Performance option

Determines whether to display both current and forecast earned value schedule variance and labor unit variance calculations.

To Date Values: Determines whether to display the values to date for schedule and labor units.

Forecast at Completion: Determines whether to display the forecast for schedule and labor units at project completion.

Index Performance option

Determines which columns to display in the **Index Performance** portlet.

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Schedule Performance Index: Determines whether to display the Schedule Performance Index. A measure of the work accomplished as a percentage of the work scheduled, SPI indicates whether you are meeting earned and planned values within your schedule.

Cost Performance Index: Determines whether to display the Cost Performance Index. A measure of the value of work accomplished as a percentage of the actual costs, CPI indicates whether you have spent money over the budget to date.

To Complete Performance Index: Determines whether to display To Complete Performance Index. A measure of the value of the project work that is remaining, TCPI enables the project manager to determine the level of performance needed to achieve the cost or time objectives.

Project Statistics option

Determines whether to display the **Project Statistics** portlet. The **Project Statistics** portlet enables you to analyze project information in row and column format for a particular project or project group.

Customize link: Enables you to customize the data columns you want to view and to group and sort data.

Project Health option

Determines whether to display the **Project Health** portlet. The **Project Health** portlet enables you to quickly see how well a project or group of projects are performing.

Project Notebooks option

Determines whether to display the **Project Notebooks** portlet. The **Project Notebooks** portlet displays all of the notebook items assigned to the projects that meet the dashboard's selected filter criteria.

Project Gantt Chart option

Determines whether to display the **Project Gantt Chart** portlet. The **Project Gantt Chart** portlet enables you to quickly view the status of projects and review each project's milestones.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, click **Customize**.
4. On the **Dashboard Details** page, click the **Content** tab.
5. On the **Content** tab, expand the **Project Performance** section.

Project Preferences Dialog Box or Default Project Preferences for EPS Dialog Box of the EPS Page

Overview

Use this dialog box to configure project data and settings for the currently open and selected project, its activities, and related items. Select an EPS node to configure the project data and settings for all projects below that node, subject to any filters applied to the view.

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You can also use this dialog box to set project preferences to be applied to new projects created in the selected EPS node or to change the default project preferences for an EPS node to that of its parent EPS node.

> **Note**
>
> When you copy or cut and paste a project, the pasted project will retain the preferences of the cut or copied project; it will not inherit the preferences of the EPS node into which it is pasted.

Screen Elements

General tab

See: General Tab of the Project Preferences Dialog Box of the EPS Page

Analytics & Services tab

See: Analytics and Services Tab of the Project Preferences Dialog Box of the EPS Page

Calculations tab

See: Calculations Tab of the Project Preferences Dialog Box of the EPS Page

Integrations tab

See: Integrations Tab of the Project Preferences Dialog Box of the EPS Page

Team Member tab

See: Team Member Tab of the Project Preferences Dialog Box of the EPS Page

Default button

Changes all settings for the currently selected EPS node to the default settings for the application. Any settings changed from their previous values will be highlighted so that you can choose to Save or Cancel the changes to the selected EPS node's default project preferences. This option is only available in the Default Project Preferences for EPS dialog box.

Inherit EPS Project Preferences button

Changes all settings for the currently selected EPS node to the settings of its parent EPS node. Any settings changed from their previous values will be highlighted so that you can choose to Save or Cancel the changes to the selected EPS node's default project preferences. This option is only available in the Default Project Preferences for EPS dialog box.

Save button

Saves the changes you made to the currently selected EPS node's default project preferences. Projects created in the selected EPS node in the future, will use the saved settings.

Apply button

Project Preferences dialog box: Applies the changes you made to the selected project's preferences.

Default Project Preferences for EPS dialog box: Applies the changes you made to the project preferences of all visible projects and EPS nodes in the selected EPS node and all their children. If

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Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select a project or EPS node, click the **Context** menu and select **Set Project Preferences**.

Project Preferences of EPS Dialog Box of the EPS Page

Overview

Use this dialog box to make a change to any project preference settings for all child projects of the selected EPS node. Projects that are filtered out of the view will not be modified. Only settings you change here will be modified for child projects. Settings you do not change will not be modified.

The data shown here represents the default settings for P6. Your changes to these settings are not saved for EPS nodes.

Screen Elements

Analytics & Services tab

See: Analytics and Services Tab of the Project Preferences Dialog Box of the EPS Page

Calculations tab

See: Calculations Tab of the Project Preferences Dialog Box of the EPS Page

General tab

See: General Tab of the Project Preferences Dialog Box of the EPS Page

Integrations tab

See: Integrations Tab of the Project Preferences Dialog Box of the EPS Page

Team Member tab

See: Team Member Tab of the Project Preferences Dialog Box of the EPS Page

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select an EPS node, click the **Context** menu and select **Set Project Preferences**.

Project Scheduled Services Page

Overview

Use this page to schedule, verify status, modify, and delete routine recurring project management jobs, called services. The services run in the order in which they appear.

Screen Elements

Add

Apply Actuals: Adds an Apply Actuals scheduled service to the list.

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Export Primavera XER: Adds an Export Primavera XER scheduled service to the list.

Export Primavera XML: Adds an Export Primavera XML scheduled service to the list.

Import Primavera XER: (On-premises only) Adds an Import Primavera XER scheduled service to the list. This option is not available if your administrator has selected to store scheduled export files in the database.

Import Primavera XML: (On-premises only) Adds an Import Primavera XML scheduled service to the list (on-premises). This option is not available if your administrator has selected to store scheduled export files in the database.

Level: Adds a Level scheduled service to the list.

Project Checker: Adds a Project Checker scheduled service to the list.

Publish: Adds a Publish scheduled service to the list.

Schedule: Adds a Schedule scheduled service to the list.

Summarize: Adds a Summarize scheduled service to the list.

Send to Schedule Sheet: Adds a Send to Schedule Sheet scheduled service to the list.

Run Service button

Schedules the selected service to run immediately.

View Log button

Enables you to view the log for the most recent run of the selected service.

Refresh

Refreshes the current screen with any new, updated, or removed data.

Move Up button

Moves the selected item closer to the top of the list.

Move Down button

Moves the selected item closer to the bottom of the list.

> **Note**
>
> If services have similar or the same scheduled times, their position in the list will determine the order in which they are run.

Refresh

Refreshes the current screen with any new, updated, or removed data.

Print

Prints the Grid View.

Full Screen

Expands the current work area so it fills the entire display.

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Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Run Service: Schedules the selected service to run immediately.

View Log: Enables you to view the log for the most recent run of the selected service.

Delete: Deletes the selected item

Move Up: Moves the selected item closer to the top of the list.

Move Down: Moves the selected item closer to the bottom of the list.

Name field

The title of the scheduled service.

Service field

The type of service.

Enabled option

Determines whether a service can be scheduled.

Status field

The status of the service.

Statuses include:

Delegated: When the summarize service is running and waiting for child records to complete summarizing.

Pending: When the service was just created or if the service is waiting in queue to be run.

Running: When the service is running on the service machine.

Failed: When the service cannot complete, an error occurs, or data could not be committed. View the log file to determine the cause of the errors.

Completed: When the service completes successfully.

Download File: When the service completes successfully and results in a file to be downloaded. Click the link to download the file.

Download Zip: When the service completes successfully and results in a zipped file to be downloaded. Click the link to download the zipped file.

Completed with Errors: When the service completes, but one or more errors occurred. For example, Completed with Errors is returned if only one project in a group could not be summarized. View the log file to determine the cause of the errors.

Last Run field

The last time the service ran.

Next Run field

The next time the service is scheduled to run.

Owner field

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The creator of the service.

Show/Hide Tabs

Enables you to configure which tabs are shown and hidden.

Service Settings detail window

See: Service Settings Detail Window.

Project Settings detail window

See: Project Settings Detail Window

Service Summary detail window

See: Service Summary Detail Window

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Scheduled Services**.
2. On the **Scheduled Services** page, click **Project**.

Project Score Section of Global Tab of the My Preferences Page

Overview

Use this section to configure how the project score is calculated.

Screen Elements

Calculate Project Score based on selected Project Codes option

Determines whether to calculate project scores based on project codes.

High is greater than or equal to field

The high value will be greater than or equal to the value entered in this field.

Medium is greater than or equal to field

The medium value will be greater than or equal to the value entered in this field.

Low is greater than or equal to 0

Indicates that the low value must be greater than 0.

Select Project Codes section

You must select the **Calculate Project Score based on selected Project Codes** option to see this section.

Assign...

Opens the Select Project Code dialog box.

Print

Prints the Grid View.

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Search

Enables you to perform a search based on the value you enter in the search bar.

Project Code grid section

Context menu

Delete: Deletes the selected item.

Name field

The name of the code.

Weight Percent field

The project code weight divided by the total of all project code weights.

Weight field

The weight of the item in relation to other items. The weight value determines the importance of the item.

For example, an item with a weight of 1 has a lower measure of importance than an item with a weight of 10.

Maximum Code Value Weight field

The maximum allowed weight value for a specific project code type.

Getting Here

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **Global** tab.
3. On the **Global** tab, select **Project Score**.

Project Security Profiles Page

Overview

Use this page to configure project security profiles and define assigned privileges. Define specific privileges for the profile using the privileges detail window. The options you configure on the privileges detail window apply to the selected profile.

Screen Elements

Add button

Creates a new global or project security profile.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Search

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Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Duplicate: Creates a new item as a copy of the selected item.

Profile Name field

The name of the security profile.

Description field

The full description for the profile.

Assigned Privileges list

The privileges assigned to the profile.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Download Privilege List

Enables you to download an Excel file listing all security profiles and the privileges assigned to each.

Privileges detail window

Privileges Detail Window of the Project Security Profiles Page

> **Tip**
>
> Any users assigned to a deleted project security profile will automatically be reassigned to the current default project security profile.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Project Security Profiles**.

Project Settings Detail Window

Overview

Use this detail window configure the type, time, frequency, and projects for a service.

Screen Elements

The screen elements available depend on the service selected

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Import Services

Import Baselines option

Imports all baselines found in a Primavera XML import file.

This option is only available for Import Primavera XML services.

Import Action list

Enables you to select the action to take when importing projects and baselines. If you intend to import projects as new projects, select **Create New Project** and specify the destination level in the EPS hierarchy in **Import to**. If you intend to update existing projects with the imported data, select **Update Existing Project**. Baselines are always imported as new baselines.

Create a New Project if No Matching Project Exists option

Creates new projects and baselines in the database for projects and baselines imported from the file which do not already exist in the database. Projects in the file are matched to projects in the database on the basis of the globally unique ID for the project or the Project ID.

Import To field

Enables you to select the destination level in the EPS hierarchy for the projects and baselines being imported.

Select Template list

Enables you to select an import template to use for the import option.

All Other Services

Add button

Opens the Select Project dialog box.

Change Data Date menu

Determines how the data date will be set for projects running the scheduled service.

Use project's current Data Date + n days: Uses the project's current data date plus an additional number of days you specify. In calculating this new data date, P6 considers one day equal to 24 hours and uses a standard seven day calendar.

Use Service's run time: Uses the date and time the service runs as the new data date.

This field is only available for Apply Actuals, Level, and Schedule services.

Use leveling settings from field

Enables you to select a project from those assigned to the service, that will determine the resource leveling settings to apply to the service when it is run.

This field is only available for level services.

Use scheduling settings from field

Enables you to select another project which will determine the scheduling settings to apply to the service when it is run.

This field is only available for schedule services.

Context menu

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Delete: Deletes the selected item.

ID field

The unique identifier of the project or EPS.

Name field

The name of the project or EPS.

Current Data Date field

The data date for the project.

Enable Publication option

Determines whether the project is able to be published.

This option is only available for publish services.

Last Published On field

The most recent publication date for the project data. This field displays no value for projects that have never been published.

This option is only available for publish services.

Baselines

Determines which baselines are included when the service runs. Click *** **Select** to open the Select Baselines Dialog Box. This field is only available for export Primavera XML and publish services.

Tip

- When applying actuals, scheduling, and leveling, if a change would result in a new data date set before a project's planned start date, the service skips that project and logs an error.
- When applying actuals, if a change would result in a new data date set before the project's previous data date, the service will continue to run against the project and logs a warning.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Scheduled Services**.
2. On the **Scheduled Services** page, click **Project**.
3. Click the **Project Settings** detail window.

Project Statistics Portlet of the Dashboards Page

Overview

Use this portlet to analyze project information in row and column format for a particular project or project group. Depending on your information needs, you can customize the portlet to select the columns of information you want to appear, and specify the display format to analyze data in a way that is meaningful to you.

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The portlet displays the information you select down to the WBS level for all projects included in the current dashboard filter. For example, if you filter a dashboard by a portfolio, the Project Statistics portlet displays data for all projects included in that portfolio.

Screen Elements

Expand All button

Enables you to see the whole hierarchy of the selected item.

Collapse All button

Enables you to hide subordinate items in the hierarchical list or grouped view.

Customize View

Opens the Customize View dialog box.

Print

Prints the Grid View.

Search

Enables you to perform a search based on the value you enter in the search bar.

Project ID field

The unique identifying code for the project.

Project Name field

The name of the project.

Project Owner field

The resource designated as responsible for the project.

The project owner designation provides a user with viewing access for the project.

Start field

The current start date of the project. For a not started project, this is the project's planned start date. For a project that has started or is complete, this is the project's actual start date. For projects with no activities, the start date is equal to the anticipated start date if one is defined; if no anticipated start is defined, then the start date is equal to the project's planned start date.

Finish field

The current finish date of the project. For not started and in-progress projects, this is the latest early finish date from all activities in the project. For completed projects, this is the latest actual finish date derived from all activities. For projects with no activities, the Finish Date is equal to the Anticipated Finish date if one is defined. For projects with no activities and no Anticipated Finish date, the Finish Date field is blank.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

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Tip

- Information displayed in the Project Statistics portlet is based on summarized data, so it is current as of the last date the summarizer was run for a project. To determine this date, add the column Last Summarized Date, which is available under the Summary section of the Available Columns list when you customize the portlet. However, activity-level information is based on live data.
- To specify filter criteria for a dashboard, use the Filter by list at the top of the dashboard tab. For any dashboard you create, you can select to filter data by portfolio, project, or project code; for multi-user and global dashboards created by other users, your ability to change the filter is determined by the Restrict users from changing the dashboard filter setting on the Customize Dashboards page.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Project Statistics** portlet.

Project Tab of the CPP Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use the Project tab to view and edit the mappings of CPP fields related to the project.

Screen Elements

Template Name field

The name for the import or export template.

This field is required and can contain up to 40 characters.

Project Details section

PARSID field

The Project Assessment and Reporting System identifier for the project. This should be an integer between one and four digits.

CPP Status Date field

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 field

The revision of the project.

$Schema field

The JSON schema for the project. You cannot change the value of this field.

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Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Export** tab.
   a. Or on the **Export** tab:
      - In the **Export Type** list, select **DOE - CPP**.
      - In the **Project** field, click **Browse** and select a project.
      - Click **Manage Templates**.
4. In the **Manage Templates** dialog box, click a template.
5. In the **CPP Template** dialog box, click the **Project** tab.

Project Tab of the Documents Page (with content repository)

Overview

Use this tab to view a list of projects and their associated documents.

Screen Elements

Refresh Documents

Refreshes the current screen with any new, updated, or removed data.

Add Document

Enables you to select a document from your computer or a device attached to your computer to add to the selected project.

Add Options menu

Add Document: Enables you to select a document to add.

Add from content repository: Enables you to search, browse by folder, and select a document from the repository.

Copy from existing template: Enables you to search and select a template to copy as the basis for your new document.

Create new template: Enables you to browse and select a document template to store for future use.

Add Folder: Enables you to add a document folder to the repository and set its security policy.

View Options

- **Open**: Opens the document in the default application associated with the document type.
- **View**: Displays the selected document in a separate window.

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- **Download**: Allows you to download the document to your computer. You must select a path where the downloaded document will be saved.

Make Private

Changes the document accessibility, allowing access only to the owner of the document.

Access Level

Select from one of the following options in which to grant access of the project:

Make Private:Click to make the selected project or document private.

Assign to Project: Click to assign the selected document to a project.

Delete

Permanently deletes the selected items.

Check out

Enables you to put a lock on a content repository document while you work on it remotely. The document cannot be modified by other users until you check it in.

Check Out Options

Check out : Opens a dialog box to enable you to enter a location for where you want the document to be checked out to. Use the browse icon to search for a location. Use the **Open Document** option to determine whether to open the document or just check it out.

Check in : Opens a dialog box to enable you to select a document to be checked in. Use the browse icon to search for a document.

Undo Check Out: Enables you to view the Title, and Version of a checked out document, and undo the checkout.

If you undo a check out, any changes made to the selected document will be lost.

Start Review

Enables you to specify the reviewers, type of review, and due date for a review.

Add to recent documents

Adds the selected document to the recent documents list.

Cut

Cuts the selected item.

Move Options

Cut: Cuts the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

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Email Document Details

Enables you to configure and send an email about a document.

Search

Enables you to perform a search based on the value you enter in the search bar.

Document Details section

See Document Details Section of the Documents Page (with content repository).

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.

Project Tab of the IPMDAR Template Dialog Box of the Import/Export Project Dialog Box

Overview

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.

Screen Elements

Project Custom Fields tab:

> **Note**
>
> The US Department of Defense validation accepts a maximum of ten custom fields in total. This limit applies to the number of codes plus the number of user defined fields assigned on this page.

Codes area

Group By list

Enables you to group items in the table. Grouping gathers, or groups, together all of the data that contain the same value for the selected data field.

Search

Enables you to perform a search based on the value you enter in the search bar.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

Custom Field Name field

The name of a custom field selected for export.

Custom Field Description field

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The description of a custom field selected for export.

Custom Field Value field

The value of a custom field selected for export.

UDF area

Group by list

The project or project code used to group the data retrieved from the selected filter.

Search

Enables you to perform a search based on the value you enter in the search bar.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

Custom Field Name field

The name of a custom field selected for export.

Custom Field Value field

The value of a custom field selected for export.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Export** tab.
4. On the **Export** tab:
   a. In the **Export Type** list, select **IPMDAR Format**.
   b. In the **Project** field, click **Browse** and select a project.
   c. Click **Manage Templates**.
5. In the **Manage IPMDAR Templates for Project** dialog box:
   - Click **Add** to create a new template.
   - Or select **Context** and select **Edit** to modify an existing template.
6. In the **IPMDAR Template** dialog box, click the **Project** tab.

Project Tab of the MSP Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use this tab to configure project data import options.

Screen Elements

Name field

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The type of global or project data for import.

Import Action list

Determines what action to take when importing:

Insert New: Retains the data in the existing project and adds new data even when a matching record exists.

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 for this data type.

Remove from P6 option

Determines whether to remove the selected item from the database if a matching item is not found in the import file.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/Export Projects** dialog box, click the **Import** tab.
   a. In the **Import Type** list, select **Microsoft Project XML**.
   b. In the **File** field, click **Browse** and select a Microsoft Project XML file to import.
   c. In the **Action** list, select **Update Existing**.
   d. In the **Import To** field, click **Browse** and select a project to update.
   e. Click **Manage Templates**.
4. In the **Manage MSP Templates** dialog box, click a template.
5. In the **MSP Template** dialog box, click the **Project** tab.

Project Tab of the UN/CEFACT Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use the Project tab of the Add/Modify Template dialog box to specify project data to be exported to a UN/CEFACT file.

Screen Elements

Template Name field

The name for the import or export template.

This field is required and can contain up to 40 characters.

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Project Information tab:

Contract ID field

The contract number.

Reporting Start Date field

The effective start date of the XML file.

Reporting End Date field

The effective end date of the XML file.

> **Note**
>
> The project contact is the person who is responsible for overseeing the project, for example the Project Manager.

First Name field

The first name of the project contact.

Last Name field

The last name of the project contact.

Job Title field

The project contact's job title.

Email field

The project contact's email address.

Country Code field

The project contact's country code.

Phone Number field

The project contact's phone number.

Ext field

The project contact's phone extension.

Project Notes tab:

Add Notes... button

Adds a note item to the list.

list

The type for the note field.

Content list

The project notebook topic to export as the selected note type the file.

Getting Here

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1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Export** tab.
   a. Or on the **Export** tab:
      - In the **Export Type** list, select **UN/CEFACT XML Format 6**.
      - In the **Project** field, click **Browse** and select a project.
      - Click **Manage Templates**.
4. In the **Manage Templates** dialog box, click a template.
5. In the **UN/CEFACT Template** dialog box, click the **Project** tab.

Project UDFs Page

Overview

Use this page to create and configure user defined fields for projects.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently. The item will be deleted permanently.

User Defined Field field

The name of the user defined field. This column is always visible on this page.

Data Type list

The name of the type of data that corresponds to each user-defined field. The data type you select determines the type of data you can specify in a field. The following data types are available:

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Text: Allows you to use text or a combination of text and numbers.

Start Date: Allows you to enter Start Date information only.

Finish Date: Allows you to enter Finish Date information only.

Cost: Allows you to enter currency values.

Number: Allows you to use numerals with two decimal places.

Integer: Allows you to use numeric data, but not a number related to money.

Indicator: Allows you to use an indicator field that you can use to icons in columns.

This column is always visible on this page.

UDF Type field

Indicates whether a formula is specified for the field.

A formula is any custom calculation created for the field to automatically determine field values.

Summary Calculation field

Determines how the data in a Project UDF is calculated at EPS level when the Show field rollups option is selected.

Indicator field

Indicates that at least one graphical indicator is defined for the project user defined field.

A graphical indicator is any icon selected to display based on criteria set for field values.

Display Data Value option

Determines whether the value of the calculated UDF displays in the column.

Display Indicator option

Determines whether the indicator of the calculated UDF displays in the column.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

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The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Formula detail window

See Formula Detail Window of the Project UDFs Page.

Indicators detail window

See Indicators Detail Window of the Project UDFs Page.

Summary Indicators detail window

See Summary Indicators Detail Window of the Project UDFs Page.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Tip

- Right-click any field to add or delete a UDF.
- When a user-defined field (UDF) is deleted, all its values are also deleted from all of their respective appearances throughout the application. This includes user interface views, activity views, calculated UDFs, reports, Activity Networks, filters, sorts, groupings, waterlines, and columns.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project UDFs**.

Projects Checked Have Links to the Following Closed Projects Section of the Schedule Check Report Dialog Box

Overview

Use this section to view any closed projects that have relationships to or from the projects being checked. The details of these relationships are displayed at the end of the report.

Screen Elements

Closed Project ID field

The identifying code of the closed project that is linked to the currently open project.

Closed Project Description field

The brief description of the closed project which is linked to the currently open project.

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Data Date field

The progress point, or "as-of date", for activities in the project. Project status is up-to-date as of the data date. You can set the data date when you schedule the project or apply actuals, or you can set it manually. Set it manually if resources manually update activity progress and you do not plan to reschedule the project or apply actuals.

Links to/from Closed Project field

The number of links between the closed project and the open projects that were checked.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
    a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Projects Checked Section of the Schedule Check Report Dialog Box

Overview

Use this section to view projects that were checked and included in the report.

Screen Elements

Project ID field

The unique identifying code for each project that the application checked. Click this link to view the project.

Project Description field

The brief description of the project. Click this link to view the project.

Data Date field

The progress point, or "as-of date", for activities in the project. Project status is up-to-date as of the data date. You can set the data date when you schedule the project or apply actuals, or you can set it manually. Set it manually if resources manually update activity progress and you do not plan to reschedule the project or apply actuals.

Total Activities field

The number of activities in the project.

Complete Activities field

The total number of activities in the project with an actual finish date.

Total Links field

The total number of links to or from activities in open projects. This number includes links that exist between activities in open projects and activities in closed projects.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
    a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

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Projects Detail Window of the Risk Scoring Matrices Page

Overview

Use this detail window to add or remove projects for the selected risk scoring matrix.

Screen Elements

Assign... button

Adds a project to the selected risk scoring matrix. A risk scoring matrix must be assigned to a project to perform qualitative analysis on project risks.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Delete: Removes the selected item or association permanently.

Project ID field

The unique identifier of the project associated with the risk.

Project Name field

The name of the project associated with the risk.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Scoring Matrices**.
3. On the **Risk Scoring Matrices** page, click the **Projects** detail window.

Rate Types Page

Overview

Use this page to create a title for each of the five available Price/Unit fields. You can customize the title of the rate to describe what the rate type represents. It will appear wherever the rate types are displayed in a list or column.

Screen Elements

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

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Default Title field

Displays the default title for the rate type used for the resource or role.

User Defined Title field

The descriptive title for the rate type.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

To access enterprise data:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Rate Types**.

Recalculate Assignment Costs Dialog Box of the Activities Page

Overview

Use this dialog box to update price per time values on activities. This ensures that project costs reflect any updates.

Screen Elements

Synchronize overtime factor while recalculating costs option

Determines whether the overtime factors will be synchronized when costs are recalculated.

Recalculate button

Recalculates assignment costs for all open projects and closes the Recalculate Assignment Costs dialog box.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Click **Actions** and select **Recalculate Assignment Costs**.

Recalculate Assignment Costs Log dialog box

Overview

Use this log to view details for a Recalculate Assignment Costs service.

Screen Elements

Started Recalculate Costs on field

The date and time the Recalculate Assignment Costs service began.

Synchronize Overtime Factor field

Determines whether the application synchronized overtime factors while it recalculated costs.

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This field displays a *Yes* or *No*. Yes displays if the **Synchronize overtime factor while recalculating costs** option is selected in the **Recalculated Assignment Costs** dialog box before costs are recalculated.

Recalculate Costs as user field

The user name of the user who originated the service.

Running Recalculate Costs for project field

The project on which you are running the Recalculate Assignment Costs service.

Completed Recalculate Costs for project field

The project for which the Recalculate Assignment Costs service is complete.

Finished Recalculate Costs field

The date and time the Recalculate Assignment Costs service finished.

> **Tip**
>
> To view the Recalculate Assignment Costs log, you must first recalculate the assignment costs for a project.

Getting Here

1. Click the **User** menu and select **View Service Status...**.
2. In the **Service Status** dialog box, select a Recalculate Assignment Costs job and click **View Log**.

Recent Documents Tab of the My Documents Portlet (with content repository)

Overview

Use this tab to view all of the recent documents that have been added to the project.

Screen Elements

Documents Portlet toolbar

See My Documents Portlet Toolbar.

Title field

The names of the project, the folders, and the associated documents.

Version field

The version number of the document. Version 1 is the original version of the document.

If the version number is a link, you can click the link to view that version of the document.

Project field

The name of the associated project.

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Access Time field

The date and time you last accessed the document.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. Expand the **My Documents** portlet and click the **Recent Documents** tab.

Recent Documents Tab of the My Documents Portlet of the Dashboards Page

Overview

Use this tab to view project documents on which you have performed some recent action. For example, all documents that you have created, viewed, downloaded, or checked out appear in this folder. The Recent Documents tab lists up to fifty documents, grouped by project. Click next to a project name to view documents associated with the project.

Screen Elements

Recent Documents toolbar

See Recent Documents Toolbar.

You can customize the following columns, using the **Customize Columns** button on the toolbar.

Title field

The name of the document.

Version field

The version number of the document. Version 1 is the original version of the document.

If the version number is a link, you can click the link to view that version of the document.

Project field

The name of the associated project.

Access Time field

The date and time you last accessed the document.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Documents** portlet and click the **Recent Documents** tab.

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Reject Document Review Dialog Box

Overview

Use this dialog box to reject a document and make comments.

Screen Elements

Name field

The name of the review.

Description field

The details of the review as defined in the **Start Review** dialog box.

If no description is specified for the review, then this field appears blank.

Initiator field

The name of the user who initiated the review.

Due Date field

The date by which all reviewers need to complete the review. If no due date is specified for the review, then this field appears blank.

Comments field

The comments about the document review.

You can type any comments or responses you have for the review.

Attachments field

The documents attached to the document. The browse button allows you to attach a single file to the review document.

Reject button

Click to reject the document review and send any comments and/or attachments included.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Document Reviews** portlet and click the **Action Required** tab.
4. On the **Action Required** tab, select an action and click the **Reject**.

Reject Status Updates Dialog box

Overview

Use the Reject Status Updates dialog box to reject a status update if you cannot override the values in the status update.

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Screen Elements

Owner or **Assignment** indicator

Shows whether the status update was submitted by the owner of the activity or a resource assigned to the activity.

Activity field

The ID and name of the activity whose status was updated.

Project field

The ID and name of the project.

WBS field

The ID and name of the WBS element.

Submitting Resource: The name of the resource who made the update.

Updated Resource: The name of the resource assigned to the activity.

Update Rejection grid

The grid where you can specify the reason for rejecting changes made in the update.

Field field: The name of the field which was updated.

Change field: The value assigned to the field in the update.

Reason for Rejection field: The reason provided by the rejecting reviewer.

Step Update Rejection grid

The grid where you can specify the reason for rejecting changes made to steps in the update.

Step field: The name of the step which was updated.

Field field: The name of the field which was updated.

Change field: The value assigned to the field in the update.

Reason for Rejection field: The reason provided by the rejecting reviewer.

Comments field

The overall comments made by the reviewer about the status update.

Notify team member by email option

Determine whether to send an email to the team member who made the status update to tell them that the update was rejected.

Getting Here

1. On the **Navigation Menu**, expand **Approvals** and click **Status Updates**.
2. Select a status update and and select **Reject**.

Related Documents Detail Window of the Issues Page

Overview

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Use this detail window to assign documents which are related to the issue.

Screen Elements

Assign... button

Opens the Select Document dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Delete: Deletes the selected item.

Name field

The name of the document.

Description field

A short description of the file.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Issues**.
2. Select an issue and click the **Related Documents** detail window.

Related Issues Detail Window of the Issues Page

Overview

Use this detail window to assign other issues which are related to this issue.

Screen Elements

Assign... button

Opens the Select Issue dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Delete: Deletes the selected item.

Issue Name field

The name of the item related to the issue.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

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> **Tip**
>
> You can only assign a related issue if both issues belong to the same project.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Issues**.
2. Select an issue and click the **Related Issues** detail window.

Related Items Tab of the Document Details Page (with content repository)

Overview

Use this tab to view all items that are related to the document by name and description. Related items can include activities, documents, WBSs, or issues.

Screen Elements

Relate Activities or WBS

Relates an activity or WBS element to the selected item.

Relate Issues

Enables you to select an issue from a list of issues in a common dialog box to relate to the currently selected document.

Relate Documents

Enables you to select a document from a list of documents displayed in a common dialog box to relate to the current project document.

Delete

Permanently deletes the selected items.

Name field

The name of the project, code, EPS node, or portfolio.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

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Tip

- The document you select and where you access it can change which tabs are visible.
- Documents assigned to activities are visible to team members using P6 Team Member.

Getting Here

From the Documents page:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab, select a document and click the **Related Items** tab.

From the Dashboards page:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the **Dashboard** tab, expand the **My Documents** portlet and click the **Private Documents** tab.
4. On the **Private Documents** tab, select a document and click **Edit Details**.
5. In the **Document Details** dialog box, click the **Related Items** tab.

Related Items Tab of the Document Details Page or Dialog Box (without content repository)

Overview

Use this section to view all items that are related to the document. Related items can include activities, documents, WBS, or issues.

Screen Elements

Relate Activities or WBS

Enables you to select an activity or a WBS to associate with the currently selected document.

Relate Issues

Enables you to select an issue from a list of issues in a common dialog box to relate to the currently selected document.

Relate Documents

Enables you to select a document from a list of documents displayed in a common dialog box to relate to the current project document.

Delete

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Removes the document from the list.

Name field

The name of the related item, including activities and WBSs, issues, and other related documents.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

> **Tip**
>
> Documents assigned to activities are visible to team members using P6 Team Member.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page:
   a. Expand a project and select a document from the left pane.
   b. Click the **Related Items** tab.

Relationship Types - The Majority of Relationships Should be Finish to Start Section of the Schedule Check Report Dialog Box

Overview

Use this section to view the percentage of each relationship type in the schedule. To ensure schedule stability, the majority of relationships should be Finish to Start.

Only a subset of all the internal and external links in the open projects are checked. Any links between activities that both have actual finish dates are removed from the subset to create the list of links checked for relationship type. The Actual percentage is calculated as the number of links found that match the check divided by the total number of subset links checked.

Screen Elements

Relationship Type field

The type of relationship between two activities.

Valid values are:

Finish to Start: The successor activity cannot start until its predecessor finishes.

Finish to Finish: The successor activity cannot finish until its predecessor finishes.

Start to Start: The successor activity cannot start until its predecessor starts.

Start to Finish: The successor activity cannot finish until its predecessor starts.

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Count field

The number of relationships of that type.

% field

The percentage of that type of relationship.

Calculated as the **number of relationships** of a certain type divided by **total relationships** checked.

Predecessor Project ID field

The identifying code for the project containing the predecessor activity that failed the check. Click this link to view the predecessor project.

Predecessor Activity ID field

The identifying code for the predecessor activity that failed the check. Click this link to view the predecessor activity.

Predecessor Activity Description field

The brief description of the predecessor activity. Click this link to view the predecessor activity.

Lag Duration (hours) field

The time in hours between the start or finish of the activity and the start or finish of the predecessor successor.

Successor Project ID field

The identifying code of the project that contains the successor activity. Click this link to view the successor project.

Successor Activity ID field

The identifying code of the successor activity. Click this link to view the successor activity.

Successor Activity Description field

The brief description of the successor activity. Click this link to view the successor activity.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
    a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Relationships - Activities Missing Predecessors or Successors Section of the Schedule Check Report Dialog Box

Overview

Use this section to identify activities missing a predecessor, successor, or both. This indicates how well or poorly the schedule is linked together.

Only a subset of all the activities in the open projects are checked. WBS summary activities and activities with an actual finish date are removed to create the list of activities that are checked for missing logic. In the logic check, activities with an actual start or that are Start Milestones pass the predecessor check even if they do not have a predecessor. Finish

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Milestone activities always pass the successor check even if they do not have a successor. Activities with external predecessors or successors pass the check. Any of the remaining activities that were found to not have a predecessor or successor are then reported in the check. The Actual percentage is calculated as the number of activities found that match the check divided by the number of subset activities checked.

Screen Elements

Project ID field

The unique identifying code of the project containing the activity which failed the check. Click this link to view the project.

Activity ID field

The unique identifying code for the activity which failed the check. Click this link to view the activity.

Activity Name field

The name of the listed activity. Click this link to view the activity.

State field

The items that the listed activity is missing, whether predecessor, successor, or both.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
    a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Relationships Detail Window of the Activities Page

Overview

Use this detail window to configure predecessor and successor relationships for the selected activity.

Screen Elements

Predecessors toolbar

Add

Opens the **Assign Relationships** panel.

Customize View

Opens the Customize View dialog box.

Go to Activity (Ctrl + Home)

Moves to the selected activity.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Predecessors area columns

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Only the default fields that appear as columns in the predecessors area columns are described below.

Activity ID field

The unique identifying code for the predecessor activity.

Activity Name field

The name of the selected activity's predecessor.

Comments field

Comments providing further information or explanation about the relationship.

Early Finish field

The earliest possible date the predecessor activity can finish. Early finish dates can change as the project progresses and changes are made to the project management plan.

This date is calculated based on network logic, schedule constraints, and resource availability.

Free Float field

The amount of time the activity can be delayed before delaying the start date of any successor activity.

Lag field

The amount of time the predecessor activity was delayed, affecting the ability of its successor activity to start or finish. Lag can be positive (indicating a delay) or negative (indicating that the successor can begin a set time before the predecessor completes).

This value is specified by the project manager and is used by the project scheduler when scheduling activities.

> **Note**
>
> Lag entered in a unit other than hours is converted to hours based on the predecessor activity's calendar.

Late Start field

The latest possible date the remaining work for the predecessor activity can begin without delaying the project finish date.

This date is calculated based on activity relationships, schedule constraints, and resource availability.

Relationship Type list

The relationship between two activities. Select from the following types:

Finish to Start: A relationship in which the start of a successor activity depends on the completion of its predecessor activity. This is the default activity relationship.

Finish to Finish: A relationship in which the finish of a successor activity depends on the finish of its predecessor activity.

Start to Start: A relationship between activities in which the start of a successor activity depends on the start of its predecessor.

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Start to Finish: A relationship between activities in which a successor activity cannot complete until its predecessor activity starts.

WBS Name field

The name of the WBS element which contains the predecessor or successor activity.

Successors toolbar

Add

Opens the **Assign Relationships** panel.

Customize View

Opens the Customize View dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Successors area columns

Only the default fields that appear as columns in the successors area columns are described below.

Activity ID field

The unique identifying code for the successor activity.

Activity Name field

The name of the selected activity's successor.

Comments field

Comments providing further information or explanation about the relationship.

Lag field

The amount of time the predecessor activity was delayed, affecting the ability of its successor activity to start or finish. Lag can be positive (indicating a delay) or negative (indicating that the successor can begin a set time before the predecessor completes).

This value is specified by the project manager and is used by the project scheduler when scheduling activities.

Relationship Type list

The relationship between two activities. Select from the following types:

Finish to Start: A relationship in which the start of a successor activity depends on the completion of its predecessor activity. This is the default activity relationship.

Finish to Finish: A relationship in which the finish of a successor activity depends on the finish of its predecessor activity.

Start to Start: A relationship between activities in which the start of a successor activity depends on the start of its predecessor.

Start to Finish: A relationship between activities in which a successor activity cannot complete until its predecessor activity starts.

WBS Name field

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The name of the WBS element which contains the predecessor or successor activity.

> **Tip**
>
> If you have more than one activity or a grouping band selected, the detail window will not be visible.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **Relationships** detail window.

Relationships Section of the Activity Form Page

Overview

Use this section to select the appropriate option to view a list of the activity's predecessors or successors, along with status, dates, and primary resource contact information.

Screen Elements

Predecessors section

See Predecessors Section of the Relationships Section of the Activity Form Page.

Successors section

See Successors Section of the Relationships Section of the Activity Form Page.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand any portlet containing activities.
4. In the portlet, click an activity.
5. On the **Activity Form** page, expand the **Relationships** section.

Rename Column Dialog Box of the Activities, EPS, or Assignments Pages

Overview

Use the Rename Column dialog box to customize the names of columns in a view.

Screen Elements

Default Column field

The default name for the column.

New Name field

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The new name to assign to the column in this view.

Default button

Restores the column name to the default setting.

> **Tip**
>
> - The application saves customized column names as part of the view. All users who have access to the view will see the customized column name.
> - When you customize a column name, you can save the customized name as part of the view. The Select Columns, Group, Sort, Filter and Activity Network Options dialog boxes will also show the customized column name while you have that view open. Other views will show the default column name. To see the default name of a customized column, right click the column heading and click **Rename Column**.

Getting Here

1. On the **Navigation Menu**, expand **Projects** or **Resources**.
   a. If you expanded **Projects**, click **EPS** or **Activities**.
   b. If you expanded **Resources**, click **Assignments**.
2. Right-click a column heading and select **Rename Column**.

Renumber Activity IDs Dialog Box of the Activities Page

Overview

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.

Screen Elements

Increment Activity ID based on selected activities option

Choose to increment activity IDs using the increment value you specify.

Auto-number option

Choose to renumber activity IDs using the criteria you specify.

Replace beginning characters option

Choose to replace the beginning characters of the selected activity IDs with the characters specified in the **Replace with** field. Type the number of beginning characters to be replaced in the **Number of characters** field.

Renumber selected activities in baselines option

Select this option to renumber the selected activity IDs in all applicable baselines for the project.

Getting Here

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1. On the ☰ **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity, click ⚙ **Context** and select **Renumber Activity IDs**.

Report Tab of the Check Schedule Dialog Box

Overview

Use this tab to view potential issues in a schedule. For example, the report might identify missing logic or a large number of constraints in the schedule.

Screen Elements

The report elements available depend on the parameters selected when the Check Schedule job was initiated. Click one of the links below for detailed screen definitions:

- Projects Checked Section of the Schedule Check Report Dialog Box
- Projects Checked Have Links to the Following Closed Projects Section of the Schedule Check Report Dialog Box
- Check Summary Section of the Schedule Check Report Dialog Box
- Relationships - Activities Missing Predecessors or Successors Section of the Schedule Check Report Dialog Box
- Dangling Start - Activities With Start Dates That Are Not Driven by Predecessors Section of the Schedule Check Report Dialog Box
- Dangling Finish - Activities With Finish Dates That Do Not Drive Successors Section of the Schedule Check Report Dialog Box
- Negative Lags - Relationships With a Lag Duration of Less Than 0 Section of the Schedule Check Report Dialog Box
- Lags - Relationships with a Positive Lag Duration Section of the Schedule Check Report Dialog Box
- Long Lags - Relationships with a Lag Duration Greater Than 352 Hours Section of the Schedule Check Report Dialog Box
- Relationship Types - The Majority of Relationships Should be Finish to Start Section of the Schedule Check Report Dialog Box
- Hard Constraints - Constraints That Prevent Activities Being Moved Section of the Schedule Check Report Dialog Box
- Soft Constraints - Constraints That Do Not Prevent Activities Being Moved Section of the Schedule Check Report Dialog Box
- Out-of-Sequence - Activities Which are Completed or In-Progress Before Their Predecessors Section of the Schedule Check Report Dialog Box
- Large Float - Activities with a Total Float Greater Than 352 Hours Section of the Schedule Check Report Dialog Box
- Negative Float - Activities with a Total Float Less Than 0 Section of the Schedule Check Report Dialog Box
- Large Durations - Activities That Have a Remaining Duration Greater Than 352 Hours Section of the Schedule Check Report Dialog Box
- Invalid Progress Dates - Incomplete Activities Before the Data Date Section of the Schedule Check Report Dialog Box

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- Invalid Progress Dates - Activities with Actual Dates After the Data Date Section of the Schedule Check Report Dialog Box
- Resource/Cost - Activities That Do Not Have an Expense or a Resource Assigned Section of the Schedule Check Report Dialog Box
- Late Activities - Activities Scheduled to Finish Later Than the Project Baseline Section of the Schedule Check Report Dialog Box
- BEI - Activities with No Project Baseline Finish Date Section of the Schedule Check Report Dialog Box
- Links to Closed Projects - Activities with Links to Closed Projects Section of the Schedule Check Report Dialog Box

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
   a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Reports Page

Overview

Use this page to manage, run, and schedule the reports available to you. The arrangement of reports, including folder names and structure, is determined in your P6 reporting software.

The Reports page can generally be used two ways based on your View list setting: choose Reports to select a single report at the top and schedule it at the bottom, or choose Schedules to select one of your own scheduled instances of a report at the top and only view a description at the bottom.

Screen Elements

Reports View

See Reports Tab of the Reports Page.

Schedules View

See Schedules Tab of the Reports Page.

Getting Here

On the **Navigation Menu**, select **Reports**.

> **Note**
>
> If Reports is not visible on the P6 navigation bar, confirm that your administrator has granted you the Enterprise Reports option in the Module Access field.

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Tip

- When you choose to run a report to be delivered as a file, if the report takes longer than 20 seconds to complete, it will be run as a job service and you will be notified when the report is complete.
- HTML reports supplied with P6 are tested to meet applicable accessibility standards. If you create your own reports you can use the instructions in your P6 reporting software Help to create accessible HTML reports.
- You can switch off the report accessibility warning on the Display Format tab of the Global page of My Preferences.

Reports Page

Overview

Use this page to define three sets of header, footers, and custom labels for P6 Professional reports and Visualizer diagrams.

Screen Elements

First Set section

Define a header, footer, or custom text label for reports or diagrams.

Second Set section

Define a second header, footer, or custom text label for reports or diagrams.

Third Set section

Define a third header, footer, or custom text label for reports or diagrams.

Header Label 1, 2, or 3 field

The custom text that will be inserted into any report or diagram containing a Header Label 1, Header Label 2, or Header Label 3 variable text cell, when printed or drawn. You can type new header text. The maximum number of characters is 255.

Footer Label 1, 2, or 3 field

The custom text that will be inserted into any report or diagram containing a Footer Label 1, Footer Label 2, or Footer Label 3 variable text cell, when printed or drawn. You can type new footer text. The maximum number of characters is 255.

Custom Label 1, 2, or 3 field

The custom text that will be inserted into any report or diagram containing a Custom Label 1, Custom Label 2, or Custom Label 3 variable text cell, when printed or drawn. You can type new custom text. The maximum number of characters is 255.

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> **Note**
>
> The labels can be used by choosing them as variables in Page Setup. Variables can be set in Visualizer on the Title Block tab of the Page Setup tab. Variables can be set in P6 Professional on the Header and Footer tabs of the Page Setup dialog box. These labels cannot be used in P6.

General section

Cache Timeout list

Determines the interval at which the cache for searching reports times out.

Enhanced Page Loading option

Determines whether to use enhanced loading in the Reports page. When this option is selected, reports are cached as you expand the report folder structure. When this option is not selected, reports are cached as soon as you open the Reports page.

Caching allows reports to be searched, so select this option if page loading performance is more important to you than searching. You can search the You can search the report name, default format, default template, available format, and available templates columns.

BI Publisher **Authentication** section

> **Note**
>
> If you change the settings in this section, the changes will take effect the next time the registry service runs. The frequency at which the registry service runs can be configured in P6 Administrator application, on the Registry Service page of the Services section of the P6 Configuration. The default setting is for the Registry service to run every 90 seconds.

Selected Configuration list

The configuration on the BI Publisher server to be linked to this instance of P6.

Admin Username field

The username of an Administrative user on the BI Publisher server.

Password field

The password for the administrative user of the BI Publisher server.

Getting Here

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Reports**.

Reports Tab of the Reports Page

Overview

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Use this page to manage, run, and schedule the reports available to you. The arrangement of reports, including folder names and structure, is determined in your P6 reporting software.

> **Note**
>
> Values in Reports are calculated from published or summarized data. The publisher and summarizer services always use the project baseline for earned value calculations, regardless of the *Baseline to be used for earned value calculations* setting in each project's preferences. Therefore earned value data viewed in reports might differ from the same data viewed in areas of the software using live data. For further information see: Summarized, Published, and Live Data Usage in P6*Summarized, Published, and Live Data Usage in P6*

Screen Elements

Run... button

Enables you to configure options for running the selected report on-demand.

Print

Prints the Grid View.

Search

Searches the view or dialog box for data matching the criteria entered into the box. You can search the report name, default format, default template, available format, and available templates columns.

> **Note**
>
> The Enhanced Page Loading application setting affects which reports can be searched.

Context

Run: Enables you to configure options for running the selected report on-demand.

Report Name field

The title for the report defined in your P6 reporting software.

Default Format field

The standard or proprietary file format automatically used to deliver each instance of the report. You can schedule another instance of a report where you change the actual format that is applied to another format listed in the **Available Formats** field.

For example, the default might be XML but you can decide to format the specific report instance as PDF or Microsoft Excel.

Default Template field

The common template automatically used to apply style to the raw data in the report.

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Available Formats field

The permitted file formats that can be used for file output when running reports.

The file types available for output in P6 are specified in your P6 reporting software. One or more of the following outputs types are available:

HTML (.htm): The standard hypertext markup language file format used for web pages.

MHTML (.mht): The variant of HTML used to combine related external files such as images or audio with markup code into a single file for ease and portability.

XML (.xml): Standard extensible markup language file format.

PDF (.pdf): The Adobe Portable Document Format.

RTF (.rtf): Rich text format suitable for use with common word processor applications.

Microsoft Excel (.xlsx): The spreadsheet data file format for Microsoft Excel.

Microsoft Excel 2000 (.xls): An older variant of the spreadsheet data file format for Microsoft Excel 2000.

Microsoft PowerPoint (.ppt): The presentation or slide show file format from Microsoft.

Available Templates field

The permitted templates that you can use to apply styles to the raw data in the report.

A report template is a set of style rules applied to a report in order to best format and present its data. You can design templates using your P6 reporting software and also determine which templates should be available for users to apply to their reports.

Reports Tab detail windows:

Schedules Detail Window of the Reports Page

Description Detail Window of the Reports Page

Tip

- Except for the **Report Name** field, you can click and drag the fields in this pane to reorder the sequence of appearance.
- For hierarchical data, you must expand the levels to print, export, or search data in the Reports tab.

Getting Here

1. On the **Navigation Menu**, select **Reports**.
2. Click the **Reports** tab.

Resource Access Detail Window of the Users Page

Overview

Use this detail window to assign user access permissions to resources.

Screen Elements

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Assign Resource button

Displays a dialog box enabling you to assign resource access to the selected user.

Context menu

Delete: Removes the selected item or association permanently.

Resource ID field

The unique identifier for the resource.

Resource Name field

The name of the resource.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.
3. On the **Users** page, click the **Resource Access** detail window.

Resource Calendars Page

Overview

Use this page to view or configure resource calendar information and options.

Screen Elements

Add (Ins) button

Opens the Select Calendar to Copy dialog box.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Print

Opens the Print Options dialog box to enable you to print the list of calendar names.

Full Screen

Expands the current work area so it fills the entire display.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Refresh

Refreshes the current screen with any new, updated, or removed data.

Context

Add: Creates a new entry in the current table.

Delete: Deletes the selected data items or table rows permanently.

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Duplicate: Enables you to create and configure a new resource calendar based on the selected resource calendar.

Promote to Global Calendar: Moves the selected calendar to the global calendar. Assignments to the calendar will remain.

Convert to Shared Calendar: Converts the current resource calendar into a shared calendar that several resources can edit if they have the required privileges.

Calendar Name

Displays a list of all available calendars to view. This column is always visible on this page.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Summary tab

See Summary Tab of the My Calendar dialog box, Project Calendars page, or Resource Calendars Page

Calendar tab

See Calendar Tab of the My Calendar dialog box, Project Calendars Page, or Resource Calendars Page.

Standard Work Week tab

See Standard Work Week Tab of the My Calendar dialog box, Global Calendars Page, Project Calendars Page, or Resource Calendars Page.

Used By tab

See Used By Tab of the Resource Calendars Page.

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Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Tip

- The project count includes resource assignments to activities and high level planning.
- You cannot delete the global or project default calendar.
- If you delete a calendar that is currently set as the project default calendar, or as the default calendar for a resource, or as the assigned calendar for an activity, you will be prompted to choose a replacement calendar for those assignments. Replacing the calendar for projects, resources, or activity assignments can cause the dates of those assignments to change.
- You need the **Add/Edit/Delete Global Calendars** or **Add/Edit/Delete Resource Calendars** security privileges to delete a calendar.
- When you are analyzing enterprise data usage, the Summary, Calendar, Standard Work Week, and Used By tabs are hidden. To bring the tabs back into view and hide the columns specific to analyzing enterprise data, select **Refresh**.

Getting Here

To access enterprise data:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource Calendars**.

Resource Codes Page

Overview

Use this page to add and configure resource codes and code values for projects.

Screen Elements

Add menu

Add Code: Creates a new code.

Add Code Value: Creates a code value for the selected code.

Add Child Code Value: Creates a child code value for the selected code value.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Expand All button

Enables you to see all of the items in the hierarchical list or grouped view.

Collapse All button

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Enables you to hide subordinate items in the hierarchical list or grouped view.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add Code: Creates a new code to help you organize data.

Add Code Value: Creates a code value for the selected code.

Add Child Code Value: Creates a subordinate code value for a selected code value.

Delete: Deletes the selected data items or table rows permanently.

Cut: Cuts the selected item.

Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

Fill Down: Copies the data from the first cell selected to all other selected cells in the same column. Use CTRL or SHIFT to select multiple cells.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Move Right: Moves the selected item one level lower in the hierarchical arrangement.

Move Left: Moves the selected item one level higher in the hierarchical arrangement.

Expand: Enables you to expand and view all of the items in a hierarchical list.

Collapse: Enables you to collapse and hide subordinate items in a hierarchical list.

Name field

The name of the code. This column is always visible on this page.

Description field

A description of the code or the code value.

Maximum Length field

The maximum number of characters used for a code value name.

Secure option

Determines whether the code is a secure code.

To see the following columns, click Analyze Data Usage.

Project Count field

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The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

> **Tip**
>
> The project count includes resource assignments to activities and high level planning.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource Codes**.

Resource Curves Page

Overview

Use this page to add and configure resource curves.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Analyze Data Usage button

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Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Duplicate: Creates a new item as a copy of the selected item.

Name field

The name of the resource curve. The name is composed of alpha-numeric characters or symbols and must be unique.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

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Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Resource Curves Curve Definition window

See Curve Definition Detail Window of the Resource Curves Page.

> **Tip**
>
> The project count includes resource assignments to activities and high level planning.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource Curves**.

Resource or Role Activities for Project Dialog Box of the Team Usage Page

Overview

Use this dialog box to view project activities that have unstaffed and staffed assignments for a particular search and assign resources to those activities.

Screen Elements

Display options

Determines whether to display only unstaffed activities, or staffed and unstaffed activities, for the selected role. To see these options you must have clicked the **Role** button in the Team Usage page.

Assign Resource button

Displays a dialog box with search options and a list of resources that includes only resources that belong to your access nodes, based on resource security, and current project resources. To see this button you must have clicked the **Role** button in the Team Usage page.

Publish Project button

Creates a service to publish project data for reporting and integration. To see this button you must have clicked the **Role** button in the Team Usage page.

Search

Enables you to perform a search based on the value you enter in the search bar.

Selected / Unselected option

Enables you to assign resources to the selected activities. To see these options you must have clicked the **Role** button in the Team Usage page.

Activity ID field

The unique identifying code for the activity assigned to the resource or role.

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Activity Name field

The name of the activity assigned to the resource or role.

Resource Name field

The name of the resource assigned to the activity. To see this field you must have clicked the **Role** button in the Team Usage page.

Resource Type field

The type of resource/role assignment.

Valid values are:

Labor: Indicates that the selected resource performs labor, which is measured in units of time.

Nonlabor: Indicates that the selected resource does not perform labor, but its work is measured in units of time.

Material: Indicates that the selected resource does not perform labor, and its work is measured in units you specify. To see this field you must have clicked the **Role** button in the Team Usage page.

Start field

The current start date of the activity. For started activities, this is the actual start date. For not started activities, this is the planned start date until the project is scheduled. When scheduled, the start date field is set to the remaining early start date.

Finish field

The current finish date for the activity. For not started activities, this is the planned finish date. For in-progress activities, this is the remaining early finish date. For completed activities, this is the actual finish date.

Remaining Units field

The units remaining to complete the assignment.

Calculated as **Remaining Duration** multiplied by **Remaining Units per Time**.

Remaining Units/Time field

The units per time required for the resource assignment to complete the activity. To see this field you must have clicked the **Role** button in the Team Usage page.

Units % Complete field

The percent complete of units for the resource assignment on the activity.

The percent complete is always in the range 0 to 100.

Calculated as **Actual Units** divided by **At Completion Units** multiplied by 100. To see this field you must have clicked the **Resource** button in the Team Usage page.

Send Email button

Enables you to send an email to the Resource. To see this button you must have clicked the **Resource** button in the Team Usage page.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Team Usage**.

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2. On the **Team Usage** pane:
    a. Click the **Resource** button or the **Role** button.
    b. In the **Show usage for** list select **All Projects**.
    c. Expand a resource or role and select a project.
    d. Click the project name link.

Resource Search Criteria Dialog Box or Open a Request for a Resource Dialog Box

Overview

Use the Resources Search dialog box to search for resources who meet specific requirements.

Screen Elements

Resource Staffing link

Displays the Resource Staffing dialog box without saving any changes. This link is available only in the Resource Search Criteria dialog box.

Select Template link

Opens the **Select Template Search** dialog box. This link is available only in the Resource Search Criteria dialog box.

Save as Template link

Saves the current search criteria as a template to use again. This link is available only in the Resource Search Criteria dialog box.

Start field

The start date of the activity.

If more than one activity is selected in the Resource Staffing dialog box, this field displays the earliest actual/early start of all the activities. This link is available only in the Resource Search Criteria dialog box.

Finish field

The finish date of the activity.

If more than one activity is selected in the Resource Staffing dialog box, this field displays the latest actual/early finish of all the activities. This link is available only in the Resource Search Criteria dialog box.

Total Requested Units field

The number of work units the resource is being asked to perform on the activity.

If more than one activity is selected in the Resource Staffing dialog box, this field displays the total remaining units of all the activities. This link is available only in the Resource Search Criteria dialog box.

Define Search Criteria area

The configurable fields to define the search criteria. Defining search criteria enables you to more accurately identify the type of resource required to staff the role.

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Show Results Matching options or list

Determines what criteria is used in your search.

All search criteria: Finds a resource based on all selections of search criteria that you select from or enter in the fields of the dialog box.

Any search criteria: Finds a resource based on random search criteria.

Role Status field

The name of the primary job title or skill for the resource.

Roles field

The name of the roles to use in a search.

Proficiency list

The skill level of the resource: Master, Expert, Skilled, Proficient, or Inexperienced.

Resources fields

The names of the resources used to search for a resource to staff the activity.

Resource Codes field

The names of the resource codes used to search for a resource to staff the activity.

If you select the **all applied** option, you can specify only one code value for each resource code you select.

Define Sort Criteria area

The configurable fields used to define the sort criteria. This link is available only in the Resource Search Criteria dialog box.

Sort results by availability option

Determines whether to sort the results by resource availability. This link is available only in the Resource Search Criteria dialog box.

Compute availability for date range options

Determines whether to search availability based on the activity start and finish or by a custom date that you enter.

If multiple activities are selected in the Resource Staffing dialog box the Activity Start to Finish option uses the earliest early start date and the latest early finish date of all assignments. This link is available only in the Resource Search Criteria dialog box.

Do not show overallocated resources option

Determines whether to show overallocated resources. This link is available only in the Resource Search Criteria dialog box.

Run Search button

Displays a list of available resources that meet the specified criteria. This link is available only in the Resource Search Criteria dialog box.

Getting Here

From the **Dashboards** page:

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1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Open Requests for Resources** portlet and select project or a role, depending on your customize options.
4. On the **Resource Staffing** page:
   a. Click the **Unstaffed and Staffed** option to show all activities.
   b. Select one or more activities and click **Search**.

From the **Assignments** page:

1. Click **Navigation Menu**.
2. On the **Navigation Menu:**
   - Expand **Projects** and click **Assignments**.
   - Or expand **Resources** and click **Assignments**.
   - Select an assignment.
3. Click the link in the **Search Criteria** column.

From the **Activities** page:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Click the **Assignments** detail tab.
3. Click the link in the **Search Criteria** column.

Resource Search Results Dialog Box

Overview

Use this dialog box to review results of your search and assign a resource from the list of resources that match your criteria.

Screen Elements

Resource Staffing link

Displays the Resource Staffing dialog box without saving any changes.

Assign Resource link

Assigns the selected resource to the current activity.

Search link

Displays the **Search** dialog box without saving any changes.

Start field

The start date of the activity.

If more than one activity is selected in the Resource Staffing dialog box, this field displays the earliest actual/early start of all the activities.

Finish field

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The finish date of the activity.

If more than one activity is selected in the Resource Staffing dialog box, this field displays the latest actual/early finish of all the activities.

Total Requested Units field

The number of work units the resource is being asked to perform on the activity.

If more than one activity is selected in the Resource Staffing dialog box, this field displays the total remaining units of all the activities.

Requested Units/Time field

The units/time of work that the resource is being asked to perform on the activity.

This field does not display if the activity has a resource curve assigned or when multiple activities are selected in the **Resource Staffing** dialog box.

Selected / Unselected option

Enables you to select or clear the selection of an item in a list.

Resource Name field

The available resources that match the search criteria.

Score field

The number of units the resource will have available after being assigned to the activity.

Calculated as **Available units of the resource across the expanded activity time frame** minus **Total Requested Units**.

If a resource is assigned to projects which have not been published recently, the score cannot be calculated.

Under/Overallocated area

The underallocated or overallocated units for the resource by month.

This data is calculated by summing the Actual Units and Remaining Early Units and then subtracting the Limit. Positive values show that the resource is overallocated. Negative values show that the resource is underallocated.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Open Requests for Resources** portlet and select a project or role name, depending on your customization options.
4. On the **Resource Staffing Details** page:
   a. Click the **Unstaffed and Staffed** option to show all activities.
   b. Select one or more activities and click **Search**.
5. On the **Resource Search Criteria** page, define search and sort criteria and click **Run Search**.

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Resource Staffing of Project page

Overview

Use this page to view roles that require staffing. Only requests for roles on a selected role team are displayed.

Screen Elements

Search link

Displays configurable options to search for resources.

At least one assignment must be selected.

Assign Resource link

Displays a dialog box to search for and select a resource to assign.

Display options

Determines whether to display only unstaffed activities, or staffed and unstaffed activities.

Selected / Unselected option

Enables you to select or clear the selection of an item in a list.

Activity Name field

The staffed or unstaffed activities for the selected project.

Resource Name field

The name of the resource assigned to the activity.

Resource Type field

The type of resource/role assignment.

Valid values are:

Labor: Indicates that the selected resource performs labor, which is measured in units of time.

Nonlabor: Indicates that the selected resource does not perform labor, but its work is measured in units of time.

Start field

The start date for the assignment on the activity. For a not started assignment, this is the activity's **Planned Start** date. For a started assignment, this is the **Actual Start** date.

Finish field

The finish date for the assignment. For not started activities, this is the **Planned Finish** date. For in progress activities, this is the **Remaining Finish** date. For completed activities, this is the **Actual Finish** date.

Remaining Units field

The units remaining to complete the assignment.

Calculated as **Remaining Duration** multiplied by **Remaining Units per Time**.

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Remaining Units/Time field

The units per time required for the resource assignment to complete the activity.

Search Criteria field

Indicates whether the assignment has any associated search criteria with a **Yes** or **No** link.

When search criteria have been specified, this field shows a **Yes** link that provides access to the stored resource request search criteria used to search for a qualified resource.

When you assign a resource using the *Request Resources* feature with your custom resource search criteria, the search criteria you specify is saved. A **Yes** link appears in the **Search Criteria** column beside the assignment, indicating search criteria is specified. This saved search criteria can be useful later if you ever need to modify the resource assignment and want to reuse the same criteria.

A **No** link appears when the assignment was made directly without any search criteria; however, you can click the **No** link to specify search criteria for the resource or role assignment.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard tab, expand the **Open Requests for Resources** portlet and select a project or role name, depending on your customization options.
4. On the **Resource Staffing Details** page:
   a. Click the **Unstaffed and Staffed** option to show all activities.
   b. Select one or more activities and click **Search**.
5. On the **Resource Search Criteria** page, define search and sort criteria and click **Run Search**.
6. On the Resource Search Result page, click **Resource Staffing**.

Resource Tab of the MSP Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use this tab to configure resource information associated with the template.

Screen Elements

Import under resource field

The name of the resource under which to place Microsoft Project resources that do not yet exist in P6.

All Resource Access is required to import Microsoft Project XML.

Choose the Microsoft Project field to import as the Resource ID options

Determines whether to import Microsoft Project Resource name or Resource Initials as the P6 Resource ID.

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If a resource already exists options

Determine the action to be taken:

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 a 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.

Add a new resource if a resource does not exist option

Determines whether 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.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Import** or **Export** tab.
   a. On the **Import** tab:
      - In the **Import Type** list, select **Microsoft Project XML**.
      - On the **Import** tab, click **Browse** in the **File** field and select a Microsoft Project XML file to import.
      - Click **Manage Templates**.
   b. Or on the **Export** tab:
      - In the **Export Type** list, select a Microsoft Project XML file type to export.
      - Click **Manage Templates**.
4. In the **Manage Templates** dialog box, click a template.
5. In the **Modify Template** dialog box, click the **Resource** tab.

Resource Teams Detail Window of the Resources Tab of the Administration Page

Overview

Use this detail window to assign a resource to a resource team, view all resource teams to which a resource is assigned, or remove a resource from a resource team.

Screen Elements

Assign... button

Opens the Select Resource Team dialog box.

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Context menu

Delete: Deletes the selected item.

Team Name field

The name of the team to which the resource is assigned.

Available To field

Indicates the user access for the team.

Global: All users with module access can view this team.

User: Only you have access to this team.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab, click the **Resource Teams** detail window.

Resource Teams Tab of the Administration Page

Overview

Use this tab to create, modify, or delete a resource team.

Screen Elements

Add

Adds a new team to the list.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Add: Adds a new team to the list.

Delete: Deletes the selected team.

Cut: Cuts the selected team.

Copy: Copies the selected team.

Paste: Pastes a previously cut or copied team.

Name field

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The name of the global or user resource team.

Resources field

The list of resources assigned to the resource team.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Collapse Dock

Collapses the dock.

Resources detail window

See Resources Detail Window of the Resource Teams Tab of the Administration Page.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Administration** page, click the **Resource Teams** tab.

Resource UDFs Page

Overview

Use this page to configure user defined fields for resources.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently. The data will no longer be available to views, filters, calculations, reports, and waterlines.

User Defined Field field

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The name of the user defined field. This column is always visible on this page.

Data Type list

The name of the type of data that corresponds to each user-defined field. The data type you select determines the type of data you can specify in a field. The following data types are available:

Text: Allows you to use text or a combination of text and numbers.

Start Date: Allows you to enter Start Date information only.

Finish Date: Allows you to enter Finish Date information only.

Cost: Allows you to enter currency values.

Number: Allows you to use numerals with two decimal places.

Integer: Allows you to use numeric data, but not a number related to money.

Indicator: Allows you to use an indicator field that you can use to icons in columns.

This column is always visible on this page.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

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Tip

- Right-click any field to add or delete a UDF.
- When a user-defined field (UDF) is deleted, all its values are also deleted from all of their respective appearances throughout the application. This includes user interface views, activity views, calculated UDFs, reports, Activity Networks, filters, sorts, groupings, waterlines, and columns.
- The project count includes resource assignments to activities and high level planning.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource UDFs**.

Resource View of the Analysis Page

Overview

Use this view to analyze resource allocation as a chart (total allocation across time) and as a spreadsheet (of resource allocation values by project). You can view totals for individual resources or for multiple resources grouped by resource code, resource team, or primary role.

Screen Elements

Dock Area

Group By list

Select from one of the following by which to group the available resources:

Resource Hierarchy: Groups resources by their organizational hierarchy.

Resource Code: Groups resources by the resource codes assigned to them.

Primary Role: Groups resources by their primary role.

Resource Team: Groups resources by their resource team.

Assignment Code: Groups resources by the assignment codes assigned to their assignments.

Search

Enables you to perform a search based on the value you enter in the search bar. Select **ID,Name**, **Code**, **Role**, or **Team** from the list. Code, role, and team will only appear on the list if you have selected the corresponding option on the **Group By** list.

Resource or Role List or Hierarchy

Display the resources or roles available to you.

If you have selected to **Group By** a hierarchy, the resources or roles are displayed in the hierarchy. If you have selected to Group By a code, the resources or roles are displayed according to the codes assigned.

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If you have provided search criteria, the list shows resources or roles which match your search criteria. If you have provided search criteria, the resources or role which match your search criteria are not shown in a hierarchy or by code, even if you have selected to group by a hierarchy or code.

> **Note**
>
> An exclamation point against a resource icon signifies that the resource is overallocated at some point in the next six months from today's date.

Collapse Dock

Collapses the dock.

Spreadsheet area

Display list

Enables you to select whether to show units or costs.

Full Screen

Expands the current work area so it fills the entire display.

Customize View

Opens the Customize View dialog box.

Go to date selector

Enables you to move the spreadsheet and histogram or chart to show a specific timeframe.

Spreadsheet area

Enables you to view the page as a spreadsheet. The spreadsheet displays project data in a timescaled row and column format.

To see earlier time periods, click **Show 10 More**. To see later timer periods, click **Show 10 More**.

Download link

Enables you to download the currently displayed data as a Microsoft Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all columns are downloaded.

Histogram and Chart Dock area

Collapse Dock

Collapses the **Histogram and Chart** dock.

Resource Usage or **Role Usage** detail window

The usage chart displays a graphical view of frequencies for the selected role or resource. To display a dialog box containing units or costs information, hover over a bar on the chart..

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> **Note**
>
> An option on the My Preferences page allows you to display stored financial period data in this chart. Otherwise this chart displays published data.

Display Chart list

Determines whether the chart will display a **Histogram**, **Stacked Histogram** or an **Area Chart**.

Group By list

Select one of the following options:

Projects: Displays data for all roles or resources that are assigned to activities for all projects in the project group.

Project Codes: Displays data for all defined roles or resources assigned to projects assigned to the code you specify.

Assignment Codes: Displays data for all defined roles or resources with activity assignments using the assignment code you specify.

Code list

Enables you to select a project code for filtering the histogram. This list is visible if you have selected **Project Code** on the **Group By** list.

> **Tip**
>
> A user preference determines whether data in histograms shows a linear spread or spreads data according to stored period units.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Analysis**.
2. On the **Analysis** page, click **Resource**.

Resource/Cost - Activities That Do Not Have an Expense or a Resource Assigned Section of the Schedule Check Report Dialog Box

Overview

Use this section to view activities that do not have an expense or resource assigned. Plans without resources or costs are not as meaningful particularly when you are tracking Earned Value.

Only a subset of the activities in the open projects are checked. WBS summary activities, milestones, and Level of Effort activities are removed from the subset to create the list of activities checked for no resources or expense assignments. The Actual percentage is

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calculated as the number of activities found that match the check divided by the total number of subset activities checked.

> **Note**
>
> There is no check for the number of units or the value of the expenses.

Screen Elements

Project ID field

The unique identifying code of the project containing the activity which failed the check. Click this link to view the project.

Activity ID field

The unique identifying code for the activity which failed the check. Click this link to view the activity.

Activity Name field

The name of the listed activity. Click this link to view the activity.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
   a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

Resources Detail Window of the Resource Teams Tab of the Administration Page

Overview

Use this detail window to assign or remove resources from a resource team.

Screen Elements

Assign...

Opens the Select Resource dialog box.

Context menu

Delete: Deletes the selected item.

Resource ID field

The unique identifier for the resource.

Resource Name field

The name of the resource assigned to the resource team.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.

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2. On the **Resources** page, click **Resource Teams**.
3. On the **Resource Teams** tab, click the **Resources** detail window.

Resources Detail Window of the Roles Tab of the Administration Page

Overview

Use this detail window to assign resources to a role, modify resource settings, or delete a resource from the role.

Screen Elements

Assign... button

Opens the Select Resource dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Delete: Deletes the selected item.

Resource field

The name of the resource assigned to the role.

Proficiency field

The skill level of the resource. If you do not have appropriate privilege, you cannot access this field.

Primary Role option

Determines whether this is the resource's main role; a role that does not have this option selected indicates that this is a secondary role for the resource. You can only assign one primary role per resource; a resource is not required to have a primary role.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Roles**.
3. On the **Roles** tab, click the **Resources** detail window.

Resources Section of the Activity Form Page

Overview

Use this section to view a list of resources assigned to an activity, report time worked on an activity, report estimates of remaining work for your activities, report estimates of remaining work for a non-labor or material resource, and to report completed assignments.

Screen Elements

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Customize link

Opens a dialog box to customize the columns viewed in the resources portlet.

Resource Name field

The name of the resource assigned to the activity. Click to open the Resource Details page.

Role Name field

The name of the role assigned to the activity.

Search Criteria field

Indicates whether the assignment has any associated search criteria with a **Yes** or **No** link.

When search criteria have been specified, this field shows a **Yes** link that provides access to the stored resource request search criteria used to search for a qualified resource.

When you assign a resource using the *Request Resources* feature with your custom resource search criteria, the search criteria you specify is saved. A **Yes** link appears in the **Search Criteria** column beside the assignment, indicating search criteria is specified. This saved search criteria can be useful later if you ever need to modify the resource assignment and want to reuse the same criteria.

A **No** link appears when the assignment was made directly without any search criteria; however, you can click the **No** link to specify search criteria for the resource or role assignment.

Planned Units field

The planned units of work for the resource assignment on the activity.

Actual Units field

The sum of the actual non-overtime and the overtime units worked by the resource on the activity.

Calculated as **Actual Regular Units** plus **Actual Overtime Units**.

Values for **Actual Regular Units** and **Actual Overtime Units** are obtained from either timesheets when project actuals are applied, or directly from the updated fields in the interface.

Remaining Units field

The remaining units of work to be performed by the resource on the activity.

Calculated as **Planned Units** minus **Actual Units**.

Planned Units/Time field

The planned units per time at which the resource is to perform work on the activity.

For example, a person assigned full time would perform 8 hours of work per day. A department of five people might perform at 5 days per day.

Remaining Units/Time field

The units per time required for the resource assignment to complete the activity.

Getting

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.

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3. On the dashboard tab, expand any portlet containing activities.
4. In the portlet, click an activity.
5. On the **Activity Form** page, expand the **Resources** section.

Resources Section of the Content Tab of the Customize Dashboard Page

Overview

Use this section to enable and configure portlets in the dashboard that display information you can use to analyze and view resource information.

Screen Elements

Open Requests for Resources option

Determines whether to display which roles require staffing at any time in your projects.

Display options

Determines which projects will display.

all projects: Displays resource requests for all projects. This setting overrides the Filter by setting at the top of the dashboard.

projects based on dashboard filter: Displays resource requests based on the Filter by field at the top of the dashboard. This option enables requests to be filtered by specific projects, portfolios, or project codes.

Organize list

Determines how the portlet data is organized.

Role by Project: Lists projects followed by unstaffed roles.

Project by Role: Lists all unstaffed roles and where relevant the projects in which the roles are requested.

Role by Project by Project Codes: Lists projects with specific project code values followed by unstaffed roles.

Role Team field

The role team to display in the portlet.

Project Code field

The project code for the projects that you want to display.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, click **Customize**.
4. On the **Dashboard Details** page, click the **Content** tab.
5. On the **Content** tab, expand the **Resources** section.

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Resources Section of the Global Tab of the My Preferences Page

Overview

Use this section to configure resource assignment and staffing options.

Screen Elements

Resource Assignments section

When adding or removing multiple resource assignments on activities options

When adding or removing multiple resource assignments, you can choose to preserve or recalculate units, duration, and units/time. Choose from the following options:

Preserve the Units, Duration, and Units/Time for existing assignments: Choose this option for units, durations, and units/time to remain constant when additional resources are assigned to any activity. Regardless of the duration type of an activity, this equation is always true:

Remaining Units = Remaining Duration x Remaining Units/Time

Recalculate the Units, Duration, and Units/Time for existing assignments based on the activity Duration Type: Choose this option to calculate a resource assignment's remaining values based on the activity's duration type, specified in an activity's General tab.

When assigning a resource to an existing activity assignment options

When selecting a resource to staff an existing role assignment or replacing a current resource assignment with a different resource, you can choose to always use the current units/time and overtime factor of the new resource or you can choose to be prompted every time so you can select the units/time and overtime factor you want to apply to the assignment. Choose from the following options:

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.

Always use current assignment's Units/Time and Overtime factor: The 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.

Ask me to select each time I assign: Every time you make an assignment, the application will ask whether it should use the units/time and overtime factor for the new resource or the current assignment

When a resource and role share an activity assignment options

When selecting a resource to staff an existing role assignment or specifying a role for an existing resource assignment, you can choose to always apply either the resource or role rate (Price/Unit) to the assignment or you can choose to be prompted every time so you can select which rate you want to apply. Use the following options:

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> **Note**
>
> The assignment **Rate Source** field indicates whether the resource or role rate is applied to an assignment. The Rate Source, along with the Rate Type, determines the price/unit value used to calculate costs for the assignment.

Always use resource's Price/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.

Always use role's Price/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.

Ask me to select each time I assign: Every time you make an assignment, the application will ask whether it should use the resource's or role' price/unit.

Display the role limit based on options

In P6 Professional and P6, you can define the maximum availability (limit) over time for each role in the Roles dictionary. In P6, role limits are displayed in charts, histograms, and spreadsheets that display role allocation data, such as the Capacity Planning chart and Role Usage histogram. Use the following options:

Custom role limit: Determines whether role limits are calculated based on customized role limits.

Primary role assignments: Determines whether role limits are calculated using aggregation of the limits defined for each resource that has the selected role as a primary role. This option respects your assigned resource security so that resources which are not relevant to you are not calculated into the role limit. This is the default option.

Exclude inactive resources: Determines whether to exclude the working capacity of inactive resources from the calculation of role limits.

Resource Staffing section

Automatically summarize project after assigning resources option

Determines whether to summarize a project after you assign resources. Choosing this option ensures that you see is the most up-to-date resource allocation data in areas of P6 showing summarized data.

When this feature is enabled, you can check the status of the summarizer job in the **View Service Status** dialog box.

Within the resource staffing feature, click on an activity name to show limited activity details, based on whether you select **Display Resource Assignments**, **Display Notebook**, and/or **Display Steps**.

An administrative setting is also required to implement this feature. For more information, contact your P6 administrator.

Number of available items to search for Roles, Resources, and Resource Codes field

The number of search criteria items allowed when searching for resources to staff activities.

Getting Here

1. Click the **User** menu and select **My Preferences**.

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2. On the **My Preferences** page, click the **Global** tab.
3. On the **Global** tab, select **Resources**.

Resources Tab of the Administration Page

Overview

Use this tab to add resources, including assigning the resource to a role and resource team, assigning resource codes, and defining price and unit values.

Screen Elements

Group By list

Enables you to group items in the table. Grouping gathers, or groups, together all of the data that contain the same value for the selected data field.

Add menu

Sibling Resource: Adds a resource at the same level of the hierarchy as the selected resource.

Child Resource: Adds a resource as a child of the selected resource.

Actions menu

Auto Reorganize: Automatically moves items in the list to the appropriate list position or grouping band when they are changed.

Import from Excel: Enables you to import resources from a Microsoft Excel file.

Create Import Template: Creates a Microsoft Excel file that you can use as a template for creating an import file for resources.

Analyze Data Usage: Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Customize View

Opens the Customize View dialog box.

Print

Prints the Grid View.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Resources Table

Context menu

Add Sibling Resource: Adds a resource at the same level of the hierarchy as the selected resource.

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Add Child Resource: Adds a resource as a child of the selected resource.

Delete: Deletes the selected resource.

Cut: Cuts the selected resource.

Copy: Copies the selected resource.

Paste: Pastes a previously cut or copied resource into the selected area in the hierarchy.

Fill Down: Copies the data from the first cell selected to all other selected cells in the same column. Use CTRL or SHIFT to select multiple cells.

Expand: Expands the selected branch of the resource hierarchy.

Collapse: Collapses the selected branch of the resource hierarchy.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Move Right: Moves the selected item one level lower in the hierarchical arrangement.

Move Left: Moves the selected item one level higher in the hierarchical arrangement.

Resource ID field

The unique identifier of the resource. This column is always visible on this page

Resource Name field

The name of the resource. This column is always visible on this page

Email field

The email address for the resource.

Office Phone field

The office phone number for the resource.

Resource Type list

The resource type. Valid values are:

Labor: Indicates that the selected resource performs labor, measured in units of time.

Nonlabor: Indicates that the selected resource does not perform labor, measured in units of time. Equipment is a nonlabor resource.

Material: Indicates that the resource has a unit of measure other than time. You can select a unit of measure for the material resource.

Unit of Measure field

The unit of measure used for the material resource.

Primary Role field

The name of the primary job title or skill for the resource.

Default Units/Time field

The default units/time for resource assignments in projects, which is shown as either a percentage or units/duration depending on your settings in **My Preferences**.

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If you change the default setting, existing resource assignments are not affected. The default setting only applies to new resource assignments.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Collapse Dock

Collapses the dock.

Show/Hide Tabs

Enables you to configure which tabs are shown and hidden.

Resource Tab detail windows:

General Detail Window of the Resources Tab of the Administration Page

Resource Teams Detail Window of the Resources Tab of the Administration Page

Roles Detail Window of the Resources Tab of the Administration Page

Codes Detail Window of the Resources Tab of the Administration Page

Units and Prices Detail Window of the Resources Tab of the Administration Page

Settings Detail Window of the Resources Tab of the Administration Page

UDF Detail Window of the Resources Tab of the Administration Page

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> **Tip**
>
> The project count includes resource assignments to activities and high level planning.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Administration** page, click the **Resources** tab.

Resources Tab of the Import Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use this tab to map incoming resources to resource roles and to specify a resource node under which to import all incoming resource data present in the XML file.

Screen Elements

Resources list

Determines how resources are imported.

Import under resource field

Determines where the resource is imported.

Table area:

ID field

Displays the resource name 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.

Name list

Displays the name of the resource.

Type list

Displays the type of resource.

New ID field

Displays the new resource ID.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click the **Actions** menu and select **Manage Import Templates** or **Import/Export Projects**.
3. In the **Import/ExportProjects** dialog box:
   a. Click the **Import** tab.

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b. Click the **Import Type** list and select **Primavera XML.**

c. Click the **File** field and select a file to import.

d. Click the **Manage Templates** button.

4. In the **Manage Primavera Templates** or **Manager Primavera XER and XML Templates** dialog box, click the name of a template.
5. In the **Primavera Template** or **Primavera XER and XML Template** dialog box, click the **Advanced** tab.
6. On the **Advanced** tab, click the **Resources** tab.

Resources Tab of the IPMDAR Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use the General tab of the Add/Modify Template dialog box to specify resource data to be exported to an IPMDAR file.

Screen Elements

Resource Fields tab:

Resource Comment field

The resource code or user defined field to export as resource comments.

Resource Custom Fields tab:

> **Note**
>
> The US Department of Defense validation accepts a maximum of ten custom fields in total. This limit applies to the number of codes plus the number of user defined fields assigned on this page.

Codes area

Group By list

Enables you to group items in the table. Grouping gathers, or groups, together all of the data that contain the same value for the selected data field.

Search

Enables you to perform a search based on the value you enter in the search bar.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

Custom Field Name field

The name of a custom field selected for export.

Custom Field Description field

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The description of a custom field selected for export.

UDF area

Group By list

Enables you to group items in the table. Grouping gathers, or groups, together all of the data that contain the same value for the selected data field.

Search

Enables you to perform a search based on the value you enter in the search bar.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

Custom Field Name field

The name of a custom field selected for export.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Export** tab.
4. On the **Export** tab:
   a. In the **Export Type** list, select **IPMDAR Format**.
   b. In the **Project** field, click **Browse** and select a project.
   c. Click **Manage Templates**.
5. In the **Manage IPMDAR Templates for Project** dialog box:
   - Click **Add** to create a new template.
   - Or select **Context** and select **Edit** to modify an existing template.
6. In the **IPMDAR Template** dialog box, click the **Resources** tab.

Resources Tab of the Level Resources Dialog Box of the Activities Page

Overview

Use this tab to specify which resources to level.

Screen Elements

All resources / Selected resources option

Determines whether all resources or only the resources you select are leveled.

Available

The list of resources available to level.

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Search

Enables you to perform a search based on the value you enter in the search bar.

Selected

The list of resources you selected from the available resources.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Click the **Actions** menu and select **Leveler**.
3. In the **Level Resources** dialog box, click the **Prioritization** tab.

Response Plans Detail Window of the Risks Page

Overview

Use the Response Plans detail window to add response plans and response plan action items to the risk.

Screen Elements

Active option

Indicates whether a response plan is currently active for the associated risk.

One response plan must always be active, and only one response plan can be active at a given time for a risk.

Name field

The unique identifying name of the risk response plan or response action item.

ID field

The unique identifier of the response plan or response action item.

Response Type list

The type of response actions implemented for threats or opportunities.

Threats

Accept: Accept the risk and take no action. Post-response impacts are set to the same values as pre-response no matter what the response type.

Avoid: Change the project so the risk is avoided. This will usually reduce the post-response plan probability to zero.

Reduce: Reduce the probability and/or impact of the risk.

Transfer: Transfer the risk to another party.

Opportunities

Enhance: Increase the probability and/or impact of the opportunity.

Exploit: Actively seek out the opportunity.

Facilitate: Help another party increase the likelihood of the opportunity occurring.

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Reject: Reject the opportunity and take no actions.

Owner field

The name of the resource responsible for the response plan action item.

Status field

The status of the response action item.

The response action item usually goes through a process from being proposed to sanctioned, and then if it is not rejected it is planned into the project.

Statuses include:

Proposed: The default status. The action has been proposed.

Sanctioned: The action has been proposed and sanctioned.

Rejected: The action has been proposed and then rejected. This action is not used to drive the post-response position and its cost is not included in the Total Cost.

In-Progress: The response action item has started and there is some work still remaining.

Complete: The response action item has been completed.

Start field

The earliest start date of all response plan action items.

The project start date is the default start date for the response action item.

If an activity is assigned to the response action item, the field is set to display the start date of the activity.

Finish field

The latest finish date of all response action items.

The scheduled finish date for the project is the default finish date for a response action item. If the scheduled finish date is not set for the project, the project must finish by date is used. If that date is not set, then the project start date is used.

If an activity is assigned to the response action item, this field is set to display the finish date for the activity.

Probability field

The probability of the risk occurring after the response action item has been completed.

Schedule field

The schedule impact of the risk after the response action item has been completed.

Cost field

The monetary impact of the risk after the response action item has been completed.

Score field

The risk score after the response action item has been completed.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Risks**.

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2. On the **Risks** page, click the **Response Plans** detail window.

Responsibility Detail Window of the OBS Page

Overview

Use this detail window to view the responsibilities assigned to each organizational breakdown structure (OBS).

Screen Elements

Project ID/WBS Code field

The project identifier or WBS code.

Project Name/WBS Name field

The project or WBS Name.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **OBS**.
3. On the **OBS** page, click the **Responsibility** detail window.

Risk Categories Page

Overview

Use this page to create, modify, or delete categories for risk classification.

Screen Elements

Add menu

Add: Creates a category.

Add Child: Creates a subcategory, subordinate to the selected category.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Expand All button

Enables you to see all of the items in the hierarchical list or grouped view.

Collapse All button

Enables you to hide subordinate items in the hierarchical list or grouped view.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

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Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Add Child: Creates a new item, subordinate to the selected item.

Delete: Removes the selected items permanently.

Cut: Cuts the selected item.

Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Move Right: Moves the selected item one level lower in the hierarchical arrangement.

Move Left: Moves the selected item one level higher in the hierarchical arrangement.

Expand: Enables you to expand and view all of the items in a hierarchical list.

Collapse: Enables you to collapse and hide subordinate items in a hierarchical list.

Name field

The name for a particular type of risk classification. This column is always visible on this page.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

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The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Categories**.

Risk Details Window of the Risks Page

Overview

Use this detail window to write a description and describe the causes and effects of the selected risk.

Screen Elements

Description area

The description of the risk.

Edit button

Opens the Risk Details editor dialog box to the Description tab.

Cause field

The cause of the risk.

Edit button

Opens the Risk Details editor dialog box to the Cause tab.

Effect field

The effect of the risk.

Edit button

Opens the Risk Details editor dialog box to the Effect tab.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Risks**.
2. On the **Risks** page, click the **Risk Details** detail window.

Risk Scoring Matrices Page

Overview

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Use this page to create, modify, and delete risk scoring matrices which are used to perform qualitative analysis on project risks. Project risk is assessed based on the values you assign to the thresholds defined in the risk scoring matrix.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Customize View

Opens the Customize View dialog box.

Expand All button

Enables you to see all of the items in the hierarchical list or grouped view.

Collapse All button

Enables you to hide subordinate items in the hierarchical list or grouped view.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

Expand: Enables you to expand and view all of the items in a hierarchical list.

Collapse: Enables you to collapse and hide subordinate items in a hierarchical list.

Name field

The name of the risk scoring matrix.

Description field

A description of the selected risk scoring matrix.

Probability Threshold field

The name of the probability threshold assigned to the risk scoring matrix.

The probability threshold defines the likelihood of the risk occurring.

Matrix Size field

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The dimensions of the risk scoring matrix, which are defined by the number of levels required for the probability threshold and the impact thresholds.

The visual representation of the risk scoring matrix is the probability and impact diagram (PID).

Cost Impact Threshold field

The names of the cost impact thresholds assigned to the risk scoring matrix.

Each risk scoring matrix must have a cost impact, which is the monetary impact if the risk occurs, and a schedule impact, which is the amount of time the risk will increase or decrease the project schedule. User-defined impacts are optional.

Schedule Impact Threshold field

The schedule impact threshold for the selected risk matrix.

User Impact Threshold field

The user impact threshold for the selected risk matrix.

Tolerance Threshold field

The name of the tolerance threshold that is assigned to the risk scoring matrix.

The tolerance threshold is the acceptability or manageability of a risk on a project.

Risk Scoring Method list

The type of calculation used to obtain an overall impact value, which is then used along with the probability to determine the score used to evaluate project risk. The overall impact value is calculated using one of the following three methods:

Highest Impact: The overall impact for a risk is set to the highest of all the impacts assigned to the risk.

Average Impact: The overall impact is determined by calculating the average of all impact values.

Average Individual Impact: The overall impact is determined by combining the value of each impact individually with the probability from the Probability and Impact Diagram. The total of all impact scores is then divided by the number of impacts.

Description field

The description of the scoring matrix.

Risk Scoring Matrices Page detail windows:

Projects Detail Window of the Risk Scoring Matrices Page.

Probability and Impact Diagram Detail Window of the Risk Scoring Matrices Page.

Probability Detail Window of the Risk Scoring Matrices Page.

Impacts Detail Window of the Risk Scoring Matrices Page.

Tolerance Detail Window of the Risk Scoring Matrices Page.

Show/Hide Tabs

Enables you to configure which tabs are shown and hidden.

Download link

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Enables you to download the currently displayed data as a Microsoft Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all columns are downloaded.

> **Tip**
>
> The tolerance threshold is defined on the **Risk Thresholds** page.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Scoring Matrices**.

Risk Thresholds Page

Overview

Use this page to add and configure risk thresholds.

Screen Elements

Group By List

Arranges similar values in a table or list into groups based on a selected field.

None: Organizes risk thresholds alphabetically without grouping them into categories.

Levels: Organizes risk thresholds into level categories.

Type: Organizes risk thresholds into type categories.

Add (Ins)

Creates a new entry in the current table.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Duplicate: Creates a new item as a copy of the selected item.

Name field

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The name of the risk threshold.

Type list

The type of risk threshold.

Cost Impact by percentage: The cost impact if the risk occurs, defined as a percentage of the project's planned cost. Using the percentage option allows you to assess risks without having to define absolute values.

Cost Impact by value: The cost impact if a risk occurs.

Probability: The likelihood of a risk occurring.

Schedule Impact by percentage: The amount of time the risk will increase or decrease the project schedule, defined as a percentage of time in the planned project. Using the percentage option allows you to assess risks without having to define absolute values.

Schedule Impact by value: The amount of time the risk will increase or decrease the project schedule.

Tolerance: The acceptability or manageability of a risk on a project.

User-defined Impact: An impact you create for your particular project or company. These impact values will be calculated in the risk score.

Levels list

The number of levels assigned to a threshold.

Download link

Enables you to download the currently displayed data as a Microsoft Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all columns are downloaded.

Risk Thresholds Page detail window:

Levels Detail Window of the Risk Thresholds Page.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Thresholds**.

Risk UDFs Page

Overview

Use this page to add and configure user defined fields for risks.

Screen Elements

Add (Ins)

Creates a new entry in the current table.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

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Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently. The data will no longer be available to views, filters, calculations, reports, and waterlines.

User Defined Field field

The name of the user defined field. This column is always visible on this page.

Data Type list

The name of the type of data that corresponds to each user-defined field. The data type you select determines the type of data you can specify in a field. The following data types are available:

Text: Allows you to use text or a combination of text and numbers.

Start Date: Allows you to enter Start Date information only.

Finish Date: Allows you to enter Finish Date information only.

Cost: Allows you to enter currency values.

Number: Allows you to use numerals with two decimal places.

Integer: Allows you to use numeric data, but not a number related to money.

Indicator: Allows you to use an indicator field that you can use to icons in columns.

This column is always visible on this page.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

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The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download link

Enables you to download the currently displayed data as a Microsoft Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all columns are downloaded.

Tip

- Right-click any field to add or delete a UDF.
- When a user-defined field (UDF) is deleted, all its values are also deleted from all of their respective appearances throughout the application. This includes user interface views, activity views, calculated UDFs, reports, Activity Networks, filters, sorts, groupings, waterlines, and columns.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk UDFs**.

Risks Detail Window of the Activities Page

Overview

Use this detail window to assign and configure risks.

Screen Elements

Add

Adds a new row to the list.

Assign... button

Opens the **Select Risk** dialog box.

Customize View

Opens the Customize View dialog box.

Context menu

Add: Adds a new item to the list.

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Delete: Deletes the selected item.

Risks detail window columns

Only the default fields that appear as columns in the **Risks** detail window are described below.

Name field

The name for a particular type of risk classification.

ID field

The unique identifier for the risk.

Name field

The name of the risk.

Owner field

The resource who has ownership of the risk.

Schedule Impact (net) field

The net impact on the schedule if the risk occurs.

Status field

The current state of the risk.

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. 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.

Status Indicator field

A graphical indicator showing the status of the risk.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **Risks** detail window.

Risks Detail Window of the EPS Page

Overview

Use this detail window to list, modify, and manage your project risks.

Screen Elements

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Add

Adds a new row to the list.

Customize View

Opens the Customize View dialog box.

Context menu

Add: Adds a new item to the list.

Delete: Deletes the selected item.

Risks area columns

Only the default fields that appear as columns in the list described below.

ID field

The unique identifier for the risk.

Name field

The name of the risk.

Type list

Determines whether a risk is a threat or an opportunity.

A threat will have a negative impact on your project, while an opportunity can have a perceived benefit to the project.

Status field

The current state of the risk.

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. 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.

Owner field

The resource who has ownership of the risk.

Name field

The name for a particular type of risk classification.

Project ID field

The unique identifier of the project associated with the risk.

Project Name field

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The name of the project associated with the risk.

Cost field

The monetary impact on the project if the risk occurs.

Probability field

The probability of the risk occurring.

Schedule field

The impact on the schedule if the risk occurs.

Score field

The risk calculation based on the values defined for probability, cost impact, schedule impact, and any additional user-defined impacts for the risk.

Score (Text) field

The text-based risk score based on the values defined for probability, cost impact, schedule impact, and any additional user-defined impacts for the risk.

Identified By field

The name of the resource who identified the risk.

Identified Date field

The date the risk was identified.

> **Tip**
>
> If more than one project is selected, the detail window will not be visible.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select a project and click the **Risks** detail window.

Risks Page

Overview

Use this page to add, modify, or delete project risks.

> **Note**
>
> If the Probability, Schedule, and Cost fields are disabled, a risk scoring matrix is not assigned to the current project. You can still enter risk data on this page; however, a risk scoring matrix must be assigned to a project to perform qualitative risk analysis.

Screen Elements

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Add button

Adds an item to the table.

Expand All

Enables you to see all of the items in a hierarchical list.

Collapse All

Enables you to hide subordinate items in a hierarchical list.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Customize View

Opens the Customize View dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Risk Table

ID field

The unique identifier for the risk.

Name field

The name for a particular type of risk classification.

Type list

Determines whether a risk is a threat or an opportunity.

A threat will have a negative impact on your project, while an opportunity can have a perceived benefit to the project.

Status field

The current state of the risk.

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. 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.

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Owner field

The resource who has ownership of the risk.

Probability field

The probability of the risk occurring.

Schedule field

The impact on the schedule if the risk occurs.

Cost field

The monetary impact on the project if the risk occurs.

Score field

The risk calculation based on the values defined for probability, cost impact, schedule impact, and any additional user-defined impacts for the risk.

Response Total Cost field

The total cost of the active response plan.

If a response plan is active, this field is disabled and displays the sum of the **Remaining Cost** plus **Actual Cost** fields for all response action items in the response plan. Rejected response action items are not included in the calculation.

risk table

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Collapse Dock

Collapses the dock.

Show/Hide Tabs

Enables you to configure which tabs are shown and hidden.

Previous Record button

Shows the previous record.

Previous Record button

Advances to the next record.

Risks Page detail windows:

Codes Detail Window of the Risks Page

Response Plans Detail Window of the Risks Page

Activities Detail Window of the Risks Page

Risk Details Window of the Risks Page

Probability and Impact Diagram Detail Window of the Risks Page

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UDF Detail Window of the Risks Page

Getting Here

1. On the ☰ **Navigation Menu**, expand **Projects** and click **Risks**.

Role Activities for Project Dialog Box of the Analysis Page

Overview

Use this dialog box to view project activities that have unstaffed and staffed assignments for a particular role and to search for and assign resources to those activities. The activity list is sorted alphabetically by name.

Screen Elements

Display options

Determines whether to display only unstaffed activities, or staffed and unstaffed activities, for the selected role.

Assign Resource button

Displays a dialog box with search options and a list of resources that includes only resources that belong to your access nodes, based on resource security, and current project resources.

Publish Project button

Creates a service to publish project data for reporting and integration.

🔍 **Search**

Enables you to perform a search based on the value you enter in the search bar.

Selected / Unselected option

Enables you to assign resources to the selected activities.

Activity ID field

The unique identifying code for the activity assigned to the resource or role.

Activity Name field

The staffed or unstaffed activities for the selected project.

Resource Name field

The name of the resource assigned to the activity.

Resource Type field

The type of resource/role assignment.

Valid values are:

Labor: Indicates that the selected resource performs labor, which is measured in units of time.

Nonlabor: Indicates that the selected resource does not perform labor, but its work is measured in units of time.

Material: Indicates that the selected resource does not perform labor, and its work is measured in units you specify.

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Start field

The current start date of the activity. For started activities, this is the actual start date. For not started activities, this is the planned start date until the project is scheduled. When scheduled, the start date field is set to the remaining early start date.

Finish field

The current finish date for the activity. For not started activities, this is the planned finish date. For in-progress activities, this is the remaining early finish date. For completed activities, this is the actual finish date.

Remaining Units field

The units remaining to complete the assignment.

Calculated as **Remaining Duration** multiplied by **Remaining Units per Time**.

Remaining Units/Time field

The units per time required for the resource assignment to complete the activity.

> **Tip**
>
> Staffed resource assignments that have actual units are not listed on the Resource Staffing page.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Analysis**.
2. On the **Analysis** page, click the **Role button**.
3. On the **Role** page:
   a. Select a role from the list.
   b. Expand the role in the spreadsheet area.
   c. Click a project name.

Role Codes Page

Overview

Use this page to add and configure role codes and code values for projects.

Screen Elements

Add menu

Add Code: Creates a new role code to help you organize roles.

Add Code Value: Creates a role code value for the selected role code.

Add Child Code Value: Creates a child role code value for the selected role code *value*.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

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Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add Code: Creates a new code to help you organize data.

Add Code Value: Creates a code value for the selected code.

Add Child Code Value: Creates a subordinate code value for a selected code value.

Delete: Deletes the selected data items or table rows permanently.

Cut: Cuts the selected item.

Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

Fill Down: Copies the data from the first cell selected to all other selected cells in the same column. Use CTRL or SHIFT to select multiple cells.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Move Right: Moves the selected item one level lower in the hierarchical arrangement.

Move Left: Moves the selected item one level higher in the hierarchical arrangement.

Expand: Enables you to expand and view all of the items in a hierarchical list.

Collapse: Enables you to collapse and hide subordinate items in a hierarchical list.

Name field

The name of the code. This column is always visible on this page.

Description field

A description of the code or the code value.

Maximum Length field

The maximum number of characters used for a code value name.

Secure option

Determines whether the code is a secure code.

To see the following columns, click Analyze Data Usage.

Project Count field

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The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

> **Tip**
>
> The project count includes assignments to roles assigned to resources, activities, and high level resource planning.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Roles** and click **Role Codes**.

Role Teams Detail Window of the Roles Tab of the Administration Page

Overview

Use this detail window to assign roles to role teams.

Screen Elements

Assign... button

Opens the Select a Role Team dialog box

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Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Delete: Deletes the selected item.

Name field

The name of the role team.

Available To field

Indicates the user access for the team.

Global: All users with module access can view this team.

User: Only you have access to this team.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Roles**.
3. On the **Roles** tab, click the **Role Teams** detail window.

Role Teams Tab of the Administration Page

Overview

Use this tab to create roles teams, assign roles to teams, and modify or delete existing role teams.

Screen Elements

Add button

Adds a new team to the list.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Cut: Cuts the selected team.

Copy: Copies the selected item.

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Paste: Pastes a previously cut or copied item into the selected position.

Name field

The name of the role team.

Roles field

The list of roles assigned to the selected role team.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Collapse Dock

Collapses the dock.

Roles detail window

See Roles Detail Window of the Role Teams Tab of the Administration Page.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Administration** page, click the **Role Teams** tab.

Role View of the Analysis Page

Overview

Use this view to analyze role or staffing information as a chart (staffed, unstaffed, and overallocated values over time) and as a spreadsheet (staffed and unstaffed values by project). You can view totals for an entire role grouping (a parent role, role team or role code) or for individual roles. Use the navigation hierarchy to select and organize the roles you want to view. You can organize the view by role hierarchy or role team.

Screen Elements

Dock Area

Group By list

Select from one of the following by which to group the available roles:

Role Hierarchy: Groups roles by their organizational hierarchy.

Role Team: Groups roles by their role team.

Role Code: Groups roles by their role code.

Assignment Code: Groups roles by the assignment codes assigned to them.

Search

Enables you to perform a search based on the value you enter in the search bar. Select **ID,Name**, **Code**, or **Team** from the list. You can only select to search teams if you have selected **Role Team** on the **Group By** list.

Resource or Role List or Hierarchy

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Display the resources or roles available to you.

If you have selected to **Group By** a hierarchy, the resources or roles are displayed in the hierarchy. If you have selected to Group By a code, the resources or roles are displayed according to the codes assigned.

If you have provided search criteria, the list shows resources or roles which match your search criteria. If you have provided search criteria, the resources or role which match your search criteria are not shown in a hierarchy or by code, even if you have selected to group by a hierarchy or code.

Collapse Dock

Collapses the dock.

Spreadsheet area

Display list

Enables you to select whether to show units or costs.

Full Screen

Expands the current work area so it fills the entire display.

Customize View

Opens the Customize View dialog box.

Go to date selector

Enables you to move the spreadsheet and histogram or chart to show a specific timeframe.

Spreadsheet area

Enables you to view the page as a spreadsheet. The spreadsheet displays project data in a timescaled row and column format.

To see earlier time periods, click **Show 10 More**. To see later timer periods, click **Show 10 More**.

Download link

Enables you to download the currently displayed data as a Microsoft Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all columns are downloaded.

Chart Dock area

Collapse Dock

Collapses the **Chart** dock.

Resource Usage or **Role Usage** detail window

The usage chart displays a graphical view of frequencies for the selected role or resource. To display a dialog box containing units or costs information, hover over a bar on the chart..

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> **Note**
>
> An option on the My Preferences page allows you to display stored financial period data in this chart. Otherwise this chart displays published data.

Display Chart list

Determines whether the chart will display a **Histogram**, **Stacked Histogram** or an **Area Chart**.

Group By list

Select one of the following options:

Projects: Displays data for all roles or resources that are assigned to activities for all projects in the project group.

Project Codes: Displays data for all defined roles or resources assigned to projects assigned to the code you specify.

Assignment Codes: Displays data for all defined roles or resources with activity assignments using the assignment code you specify.

Code list

Enables you to select a project code for filtering the histogram. This list is visible if you have selected **Project Code** on the **Group By** list.

> **Tip**
>
> A user preference determines whether data in histograms shows a linear spread or spreads data according to stored period units.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Analysis**.
2. On the **Analysis** page, click **Role**.

Roles Detail Window of the Resources Tab of the Administration Page

Overview

Use this detail window to view and assign roles to the selected resource.

Details

Assign... button

Opens the Assign Role dialog box.

Search

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Enables you to perform a search based on the value you enter in the search bar.

Context menu

Delete: Deletes the selected item.

Role ID field

The unique identifier of the associated role.

Role Name field

The name of the role assigned to the resource.

Proficiency field

The skill level of the resource. If you do not have appropriate privilege, you cannot access this field.

Primary Role option

Determines whether this is the resource's main role; a role that does not have this option selected indicates that this is a secondary role for the resource. You can only assign one primary role per resource; a resource is not required to have a primary role.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab, click the **Roles** detail window.

Roles Detail Window of the Role Teams Tab of the Administration Page

Overview

Use this detail window to assign or remove roles from role teams.

Screen Elements

Assign... button

Opens the Assign Role dialog box.

Context menu

Delete: Deletes the selected item.

Role ID field

The unique identifier of the associated role.

Role Name field

The name of the role assigned to the role team.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.

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2. On the **Resources** page, click **Role Teams**.
3. On the **Role Teams** tab, click the **Roles** detail window.

Roles Tab of the Administration Page

Overview

Use this tab to add, modify, and delete roles.

Screen Elements

Group By list

Enables you to group items in the table. Grouping gathers, or groups, together all of the data that contain the same value for the selected data field.

Add menu

Sibling Role: Adds a role at the same level of the hierarchy as the selected role.

Child Role: Adds a role as a child of the selected role.

Actions menu

Auto Reorganize: Automatically moves items in the list to the appropriate list position or grouping band when they are changed.

Analyze Data Usage: Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Customize View

Opens the Customize View dialog box.

Print

Prints the Grid View.

Search

Enables you to perform a search based on the value you enter in the search bar.

Context

Add Sibling Role: Adds a role at the same level of the hierarchy as the selected role.

Add Child Role: Adds a role as a child of the selected role.

Delete: Deletes the selected item.

Cut: Cuts the selected item.

Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

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Fill Down: Copies the data from the first cell selected to all other selected cells in the same column. Use CTRL or SHIFT to select multiple cells.

Expand: Enables you to expand and view all of the items in a hierarchical list.

Collapse: Enables you to collapse and hide subordinate items in a hierarchical list.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Move Right: Moves the selected item one level lower in the hierarchical arrangement.

Move Left: Moves the selected item one level higher in the hierarchical arrangement.

ID field

The unique identifier for the role. This column is always visible on this page.

Name field

The name of the role. This column is always visible on this page.

Description field

The responsibilities for the role.

Calculate Cost from Units option

Determines whether by default any new assignments for this role will have its costs recalculated whenever any quantity changes occur.

Resources field

The list of resources assigned to the role.

Role Teams field

The list of role teams assigned to the role.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

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The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Collapse Dock

Collapses the dock.

Show/Hide Tabs

Enables you to configure which tabs are shown and hidden.

Roles Tab detail windows:

Resources Detail Window of the Roles Tab of the Administration Page

Prices Detail Window of the Roles Tab of the Administration Page

Role Teams Detail Window of the Roles Tab of the Administration Page

Codes Detail Window of the Roles Tab of the Administration Page

Units and Prices Detail Window of the Roles Tab of the Administration Page

> **Tip**
>
> The project count includes assignments to resources, activities, and high level resource planning.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Roles**.

Run Report Dialog Box of the Reports Page

Overview

Use this dialog box to determine how your on-demand report output will be generated, formatted, and delivered.

Screen Elements

Options tab

See: Options tab of the Add Schedule Dialog Box, Schedule Detail Dialog Box, or Run Report Dialog Box of the Reports Page

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Parameters tab

See: Parameters tab of the Add Schedule Dialog Box, Schedule Details Dialog Box or Run Report Dialog Box of the Reports Page

Getting Here

From the Reports view:

1. On the ☰ **Navigation Menu**, select **Reports**.
2. Select a report, and then click **Run...**.

From the Schedules view:

1. On the ☰ **Navigation Menu**, select **Reports**.
2. On the **Reports** page:
   a. Click the **Reports** tab.
   b. Select a report, and then click the **Schedule** detail window.
   c. Select a report, and then click **Run...**.

Schedule Calendar Exception Tab of the CPP Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use the Schedule Calendar Exceptions tab to view and edit the mappings of CPP fields related to the schedule resources.

Screen Elements

Template Name field

The name for the import or export template.

This field is required and can contain up to 40 characters.

Views list

Determines how data is displayed in the mapping columns area.

Default View: Shows all CPP fields and their mappings to P6 fields.

Filtered View: Filters the list of CPP fields to show only unlocked rows.

🔍 **Search**

Searches the view or dialog box for data matching the criteria entered into the box.

Field Name column

The CPP field name.

Locked column

Determines whether the CPP field mapping is fixed to the listed P6 field. If a CPP field mapping is not locked, you can map it to a code, UDF, or notebook topic.

Mapping column

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The P6 EPPM field, code, UDF, or notebook topic mapped to the corresponding CPP field.

Description column

The US Department of Energy's description of the corresponding CPP field.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Export** tab.
   a. Or on the **Export** tab:
      - In the **Export Type** list, select **DOE - CPP**.
      - In the **Project** field, click **Browse** and select a project.
      - Click **Manage Templates**.
4. In the **Manage Templates** dialog box, click a template.
5. In the **CPP Template** dialog box, click the **Schedule Calendar Exception** tab.

Schedule Calendar Std Tab of the CPP Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use the Schedule Calendar tab to view and edit the mappings of CPP fields related to the schedule logic.

Screen Elements

Template Name field

The name for the import or export template.

This field is required and can contain up to 40 characters.

Views list

Determines how data is displayed in the mapping columns area.

Default View: Shows all CPP fields and their mappings to P6 fields.

Filtered View: Filters the list of CPP fields to show only unlocked rows.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Field Name column

The CPP field name.

Locked column

Determines whether the CPP field mapping is fixed to the listed P6 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 column

The P6 EPPM field, code, UDF, or notebook topic mapped to the corresponding CPP field.

Description column

The US Department of Energy's description of the corresponding CPP field.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Export** tab.
   a. Or on the **Export** tab:
      - In the **Export Type** list, select **DOE - CPP**.
      - In the **Project** field, click **Browse** and select a project.
      - Click **Manage Templates**.
4. In the **Manage Templates** dialog box, click a template.
5. In the **CPP Template** dialog box, click the **Schedule Calendar Std** tab.

Schedule Check Report Dialog Box

Overview

Use this dialog box to configure the schedule check and to view potential issues in a schedule.

Screen Elements

- Check Schedule Settings Tab of the Check Schedule Dialog Box
- Report Tab of the Check Schedule Dialog Box

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
   a. Click the **Actions** menu and select **Check Schedule**, then select **Run Check Schedule**.

Schedule Dialog Box of the Activities Page

Overview

Use this dialog box to manage the project schedule according to your requirements.

Screen Elements

Schedule Project tab

See Schedule Project Tab of the Schedule Dialog Box of the Activities Page

Settings tab

See Settings Tab of the Schedule Dialog Box of the Activities Page

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Advanced tab

See Advanced Tab of the Schedule Dialog Box of the Activities Page

> **Note**
>
> The advanced tab is visible if you have only one project open.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Click **Schedule...** (F9).

Schedule EU Tab of the CPP Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use the Schedule tab to view and edit the mappings of CPP fields related to activity estimate uncertainty. P6 does not calculate estimate uncertainty, but this data can be exported to CPP format from codes and UDF fields.

Screen Elements

Template Name field

The name for the import or export template.

This field is required and can contain up to 40 characters.

Auto Map button

Searches P6 EPPM codes, UDFs, and notebook topics for names matching the required CPP fields and configures the mapping accordingly.

Views list

Determines how data is displayed in the mapping columns area.

Default View: Shows all CPP fields and their mappings to P6 fields.

Filtered View: Filters the list of CPP fields to show only unlocked rows.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Field Name column

The CPP field name.

Locked column

Determines whether the CPP field mapping is fixed to the listed P6 field. If a CPP field mapping is not locked, you can map it to a code, UDF, or notebook topic.

Mapping column

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The P6 EPPM field, code, UDF, or notebook topic mapped to the corresponding CPP field.

Description column

The US Department of Energy's description of the corresponding CPP field.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Export** tab.
   a. Or on the **Export** tab:
      - In the **Export Type** list, select **DOE - CPP**.
      - In the **Project** field, click **Browse** and select a project.
      - Click **Manage Templates**.
4. In the **Manage Templates** dialog box, click a template.
5. In the **CPP Template** dialog box, click the **Schedule EU** tab.

Schedule Logic Tab of the CPP Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use the Schedule Logic tab to view and edit the mappings of CPP fields related to relationships.

Screen Elements

Template Name field

The name for the import or export template.

This field is required and can contain up to 40 characters.

Views list

Determines how data is displayed in the mapping columns area.

Default View: Shows all CPP fields and their mappings to P6 fields.

Filtered View: Filters the list of CPP fields to show only unlocked rows.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Field Name column

The CPP field name.

Locked column

Determines whether the CPP field mapping is fixed to the listed P6 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 column

The P6 EPPM field, code, UDF, or notebook topic mapped to the corresponding CPP field.

Description column

The US Department of Energy's description of the corresponding CPP field.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Export** tab.
   a. Or on the **Export** tab:
      - In the **Export Type** list, select **DOE - CPP**.
      - In the **Project** field, click **Browse** and select a project.
      - Click **Manage Templates**.
4. In the **Manage Templates** dialog box, click a template.
5. In the **CPP Template** dialog box, click the **Schedule Logic** tab.

Schedule Performance Portlet of the Dashboards Page

Overview

Use this portlet to view both current and forecast schedule summary performance information, in either costs or labor units. Positive performance schedule values indicate that the project is ahead of schedule; negative values indicate that the project is behind schedule. Positive performance cost values indicate that the project is under budget; negative values indicate that the project is over budget. Status indicators help you gauge whether a variance is within an acceptable range or whether you will need to take corrective action, based on thresholds you define.

The following calculated data is displayed in the Schedule Performance portlet. Data is calculated and displayed in either costs or labor units, depending on your preference selection (see Tips).

Screen Elements

Legend

Key to performance threshold indicators. Use these visual indicators to quickly scan values based on thresholds you define:

Critical: Indicates that a WBS, project, or portfolio requires significant corrective action.

Warning: Indicates that a WBS, project, or portfolio needs attention and is performing below expectations.

Acceptable: Indicates that a WBS, project, or portfolio is performing within an expected range.

Exceptional: Indicates that a WBS, project, or portfolio is exceeding expectations.

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To Date: Schedule field

Determines project performance by calculating the variance between the baseline schedule and the actual schedule to date.

This variance helps address the basic question, "How did we do so far?" It provides concise answers such as *4 days early*, *No Progress*, *on schedule*, or *12 days late*.

This value is expressed in units of time accompanied by a convenient visual indicator mapped to performance thresholds you can define. The value can be derived based on costs or labor units and will often yield different results.

Calculated as (**Baseline Duration** multiplied by **Performance % Complete**) minus (**Baseline Duration** multiplied by **Schedule % Complete**). Where **Performance % Complete** equals **Earned Value** divided by **Budget at Completion** and **Schedule % Complete** equals **Planned Value** divided by **Budget at Completion**.

To Date: Labor Units field

Determines project performance by calculating the variance between the actual and the scheduled labor units. This value is accompanied by a convenient visual indicator mapped to performance thresholds you can define.

Calculated as **Earned Value Labor Units** minus **Actual Labor Units**.

To Date: Cost field

Determines project performance by calculating the variance between earned value and actual cost.

Calculated as **Earned Value Cost** minus **Actual Cost**.

Forecast at Completion: Schedule field

The estimated schedule variance at completion.

Calculated as **Remaining Finish Date** minus **Baseline Finish Date**.

Forecast at Completion: Labor Units field

The estimated labor units at completion.

Calculated as **Budget at Completion Labor Units** minus **Estimate at Completion Labor Units**.

Forecast at Completion: Cost field

The estimated cost at completion.

Calculated as **Budget at Completion** minus **Estimate at Completion**.

Tip

- The Schedule Performance portlet calculates and displays data in cost or labor units based on the option selected on the Global tab in My Preferences.
- You can click a project name in the portlet to display the Performance Status page.
- On the Dashboards page, if a dashboard's Filter by option is set to a portfolio or project code, the portlet lists each project included in the portfolio or project code filter and displays each project's schedule performance data.

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Getting Here

1. On the ☰ **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **Schedule Performance** portlet.

Schedule Project Log Dialog Box of the Activities Page

Overview

Use this dialog box to view errors, warnings, and exceptions as well as basic information about the job, such as option settings and statistics.

Screen Elements

Scheduling Settings section

See Scheduling Settings Section of the Schedule Project Log Dialog Box of the Activities Page.

Statistics section

See Statistics Section of the Schedule Project Log Dialog Box of the Activities Page.

Errors section

See Errors Section of the Schedule Project Log Dialog Box of the Activities Page

Warnings section

See Warnings Section of the Schedule Project Log Dialog Box of the Activities Page.

Scheduling Results section

See Scheduling Results of the Schedule Project Log Dialog Box of the Activities Page.

Exceptions section

See Exceptions Section of the Schedule Project Log Dialog Box of the Activities Page.

Getting Here

1. On the ☰ **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, and click **Schedule...** (F9).
3. In the **Schedule** dialog box:
   a. Configure the options and select the **Display scheduling log upon completion** option.
   b. Click **Schedule Now**.

Schedule Project Tab of the Schedule Dialog Box of the Activities Page

Overview

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Use this tab to specify the data date you want to use when you schedule the open projects and whether you want to display the scheduling log after the projects have been scheduled.

Screen Elements

Data Date options

Determines which data date is applied to the project during scheduling.

All projects use their own data date: Projects are scheduled according to the data date currently specified for each open project. Select this option when the open projects have different data dates and you want to maintain these dates.

Apply selected data date to all open projects: Projects are scheduled using a single date that you select.

Data Date field

The progress point, or "as-of date", for activities in the project. Project status is up-to-date as of the data date. You can set the data date when you schedule the project or apply actuals, or you can set it manually. Set it manually if resources manually update activity progress and you do not plan to reschedule the project or apply actuals.

Display scheduling log upon completion option

Determines whether to display the scheduling log when scheduling is completed.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Click **Schedule...**.
3. In the **Schedule...** dialog box, click **Schedule Project**.

Schedule Resources Tab of the CPP Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use the Schedule Resources tab to view and edit the mappings of CPP fields related to resource assignments.

Screen Elements

Template Name field

The name for the import or export template.

This field is required and can contain up to 40 characters.

Auto Map button

Searches P6 EPPM codes, UDFs, and notebook topics for names matching the required CPP fields and configures the mapping accordingly.

Views list

Determines how data is displayed in the mapping columns area.

Default View: Shows all CPP fields and their mappings to P6 fields.

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Filtered View: Filters the list of CPP fields to show only unlocked rows.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Field Name column

The CPP field name.

Locked column

Determines whether the CPP field mapping is fixed to the listed P6 field. If a CPP field mapping is not locked, you can map it to a code, UDF, or notebook topic.

Mapping column

The P6 EPPM field, code, UDF, or notebook topic mapped to the corresponding CPP field.

Description column

The US Department of Energy's description of the corresponding CPP field.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Export** tab.
   a. Or on the **Export** tab:
      - In the **Export Type** list, select **DOE - CPP**.
      - In the **Project** field, click **Browse** and select a project.
      - Click **Manage Templates**.
4. In the **Manage Templates** dialog box, click a template.
5. In the **CPP Template** dialog box, click the **Schedule Resources** tab.

Schedule Tab of the Add Schedule Dialog Box and the Schedule Details Dialog Box

Overview

Set the options on this tab to determine when your scheduled report output will be generated.

> **Note**
>
> The screen elements available in this dialog box will automatically change to reflect your choice in the **Run** field.

Screen Elements

Run list

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The level of recurrence or frequency with which the selected report is scheduled to generate output. The value you choose answers the question: How often should report output be generated and delivered? Valid values are described below.

Once: You want the report to generate output on a specific date at a specific time.

Daily: You want the report to generate output once a day on specified days of the week at a specific time.

Weekly: You want the report to generate output once a week on a specific day of the week at a specific time.

Monthly: You want the report to generate output once a month during specified months of the year on a specific day within the month at a specific time.

Start Date field

The date for the first report output in the schedule.

For example, if a report is scheduled to run weekly for 3 weeks this field would show the date of the first report output.

Start Time field

The time for the first report output in the schedule.

For example, if a report is scheduled to run weekly for 3 weeks this field would show the time of the first report output.

Finish Date field

The date for the last report output in the schedule.

For example, if a report is scheduled to run weekly for 3 weeks this field would show the date of the third and final report output.

Reoccur Every fields

The boxes that represent each month.

Recurrence field

The day of the month when the report is scheduled to run.

Day field

The day of the week that the report is scheduled to run.

Getting Here

1. On the **Navigation Menu**, select **Reports**.
2. On the **Reports** page:
   a. Click the **Reports** tab.
   b. Select a report, and then click the **Schedule** detail window.
3. In the **Schedule** detail window, click **+ Add Schedule...**.
4. In the **Add Schedule** dialog box, click the **Schedule** tab.

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Schedule Tab of the CPP Template Dialog Box of the Import/Export Project Dialog Box

Overview

Use the Schedule tab to view and edit the mappings of CPP fields related to activities.

Screen Elements

Template Name field

The name for the import or export template.

This field is required and can contain up to 40 characters.

Auto Map button

Searches P6 EPPM codes, UDFs, and notebook topics for names matching the required CPP fields and configures the mapping accordingly.

Views list

Determines how data is displayed in the mapping columns area.

Default View: Shows all CPP fields and their mappings to P6 fields.

Filtered View: Filters the list of CPP fields to show only unlocked rows.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Field Name column

The CPP field name.

Locked column

Determines whether the CPP field mapping is fixed to the listed P6 field. If a CPP field mapping is not locked, you can map it to a code, UDF, or notebook topic.

Mapping column

The P6 EPPM field, code, UDF, or notebook topic mapped to the corresponding CPP field.

Description column

The US Department of Energy's description of the corresponding CPP field.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Export** tab.
   a. Or on the **Export** tab:
      - In the **Export Type** list, select **DOE - CPP**.

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- In the **Project** field, click **Browse** and select a project.
- Click **Manage Templates**.

4. In the **Manage Templates** dialog box, click a template.
5. In the **CPP Template** dialog box, click the **Schedule** tab.

Schedules Detail Window of the Reports Page

Overview

Use this detail window to manage one or more scheduled reports. The same report can be configured with multiple scheduled variations. For example, a listing can be generated as a PDF and delivered through email daily to one person, but delivered just once per week to another.

Screen Elements

Add Schedule... button

Enables you to add and schedule a new report. The new scheduled report job is added to the table.

Run... button

Enables you to configure options for running the selected scheduled report on-demand.

Customize View

Opens the Customize View dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Run: Enables you to configure options for running the selected scheduled report on-demand.

View History: Enables you to view details about the report jobs for the selected report. Details include the date and time each job was run and its status.

View Details: Enables you to view details for the schedule.

Duplicate: Enables you to create and configure a new schedule based on the selected report schedule.

Schedule Name field

The name for the report schedule. A single report can have multiple schedule names.

Delivery Type field

The way users will access or take delivery of this report. On-demand reports can be delivered by email as attachments or downloaded as files. You can only deliver scheduled reports by email.

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Enabled option

Determines whether the selected report schedule is actively generating output as defined by its scheduling settings. When this option is selected, the schedule is active. When this option is cleared, the schedule remains in the list with all its settings but no future report output is actually generated.

Finish Date field

The date and time for the last report output in the schedule.

Report Location field

The path to the predefined source report in the folders shared by P6 and your P6 reporting software.

Report Name field

The title for the report defined in your P6 reporting software.

Report Recipients field

The distribution list showing each Email user set to receive the report.

Run Type field

The recurrence pattern of the scheduled report job.

For example, run once, daily, weekly, or monthly.

Schedule ID field

A unique system-generated identifier assigned by your P6 reporting software to each report schedule.

Start Date field

The date and time for the first report output in the schedule.

Status field

The state of the scheduled report.

Results are:

Completed: All scheduled runs are complete.

Failed: An error occurred during the scheduled run and a report did not generate.

Pending: The entire scheduled report run is not complete.

Suspended: The **Enabled** field is cleared and the scheduled report run will not continue until the **Enabled** field is selected.

User field

The identifier for the user who created the scheduled job.

Tip

Click and drag the fields in the detail window to reorder their sequence of appearance.

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Getting Here

1. On the **Navigation Menu**, select **Reports**.
2. On the **Reports** page:
   a. Select a report and click the detail window.

Schedules Tab of the Reports Page

Overview

Use this page to view details for all scheduled reports, run a scheduled report on-demand, delete scheduled reports, replicate a scheduled report, and view the history for a scheduled run.

Screen Elements

Run... button

Enables you to configure options for running the selected report on-demand.

Export button

Exports all data as it appears in the current view to a Microsoft Excel spreadsheet (.xlsx) file. You can customize the current report to display only the data you want to export.

Customize Columns button

Enables you to select the data fields you want to display as columns in the current table.

Print

Prints the Grid View.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Delete: Removes the selected item or association permanently.

Run: Enables you to configure options for running the selected scheduled report on-demand.

View Details: Enables you to view details for the schedule.

Duplicate: Enables you to create and configure a new schedule based on the selected report schedule.

Schedule Name field

The name for the report schedule. A single report can have multiple schedule names.

Delivery Type field

The way users will access or take delivery of this report. On-demand reports can be delivered by email as attachments or downloaded as files. You can only deliver scheduled reports by email.

Enabled option

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Determines whether the selected report schedule is actively generating output as defined by its scheduling settings. When this option is selected, the schedule is active. When this option is cleared, the schedule remains in the list with all its settings but no future report output is actually generated.

Finish Date field

The date and time for the last report output in the schedule.

Report Location field

The path to the predefined source report in the folders shared by P6 and your P6 reporting software.

Report Name field

The title for the report defined in your P6 reporting software.

Report Recipients field

The distribution list showing each Email user set to receive the report.

Run Type field

The recurrence pattern of the scheduled report job.

For example, run once, daily, weekly, or monthly.

Schedule ID field

A unique system-generated identifier assigned by your P6 reporting software to each report schedule.

Start Date field

The date and time for the first report output in the schedule.

Added Date field

The date the report was added to the schedule.

Status field

The state of the scheduled report.

Results are:

Completed: All scheduled runs are complete.

Failed: An error occurred during the scheduled run and a report did not generate.

Pending: The entire scheduled report run is not complete.

Suspended: The **Enabled** field is cleared and the scheduled report run will not continue until the **Enabled** field is selected.

User field

The identifier for the user who created the scheduled job.

Reports Schedules Page detail windows:

History Detail Window of the Report Schedules Tab

Description Detail Window of the Reports Page

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> **Tip**
>
> For hierarchical data, you must expand the levels to print or export data in the **Schedules** tab.

Getting Here

1. On the **Navigation Menu**, select **Reports**.
2. Select the **Schedules** tab.

Scheduling Results of the Schedule Project Log Dialog Box of the Activities Page

Overview

Use this section to view the results of scheduling for the selected project. All fields are read-only.

Screen Elements

Number of Activities Scheduled field

The number of scheduled activities for the project.

Number of Relationships with other projects field

The number of relationships between the selected project and other projects.

Earliest Early Start Date field

The earliest possible date the activity can start.

When scheduling on the forward pass, if the activity has any driving resource assignments, the application calculates the early start date as the earliest Early Start date of all driving resource assignments.

Latest Early Finish Date field

The latest possible date that the activity can finish.

This date is calculated when the project is scheduled and is used to calculate total float.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, and click **Schedule...** (F9).
3. In the **Schedule** dialog box:
   a. Configure the options and select the **Display scheduling log upon completion** option.
   b. Click **Schedule Now**.

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Scheduling Results Section of the Leveling Report Log

Overview

Use this section to view the results of scheduling for the selected project. All fields are read-only.

Screen Elements

Number of Activities Scheduled field

The number of scheduled activities for the project.

Number of Relationships with other projects field

The number of relationships between the selected project and other projects.

Earliest Early Start Date field

The earliest possible date the activity can start.

When scheduling on the forward pass, if the activity has any driving resource assignments, the application calculates the early start date as the earliest Early Start date of all driving resource assignments.

Latest Early Finish Date field

The latest possible date that the activity can finish.

This date is calculated when the project is scheduled and is used to calculate total float.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, click the **Actions** menu and select **Run Leveler...** (Shift+F9).
3. In the **Level Resources** dialog box, click the **Options** tab.
4. On the **Options** tab, select the **Display leveling log upon completion** and click **Level**.
5. In the **Leveling Report Log**, expand the **Scheduling Results** section.

Scheduling Settings Section of the Leveling Report Log

Overview

Use this section to view the configuration of various scheduling settings. All fields are read-only.

Screen Elements

Ignore relationships to and from other projects option

Determines whether to ignore activity relationships between projects.

Make open-ended activities critical option

Determines whether to label open-ended activities as critical during scheduling.

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Use expected finish dates option

Determines whether the Scheduler uses the Expected Finish Date constraint.

When scheduling progressed activities use option

Determines the type of logic used to schedule dependent activities with out-of-sequence progress. For example, a Finish to Start relationship in which the predecessor has not finished but the successor has started.

Retained Logic: The remaining duration of a progressed activity is not scheduled until all of its predecessors are finished.

Progress Override: The schedule ignores network logic and allows the activity to progress without delay.

Actual Dates: Backward and forward passes are calculated using actual dates.

Calculate Start-to-Start lag from option

Determines when you want the successor to start. When a start to start relationship exists and the predecessor starts out of sequence, the scheduler delays the successor activity until the lag expires and all predecessor relationships have been satisfied. Use this option to specify whether to subtract the lag from the predecessor's early start date or its actual start date.

Early Start: Calculates the expired lag as the number of work periods between the actual start and the data date and determines the successor's start date as the predecessor's remaining early start plus any remaining lag. Select this option when the successor's start depends on the amount of work that the predecessor activity accomplishes.

Actual Start: Calculates the successor's start date as the data date plus any remaining lag. Select this option when you want the successor's start to depend on the time elapsed from the predecessor's actual start (regardless of the amount of work that has been accomplished in the predecessor activity).

Define critical activities as Total Float less than or equal to field

Determines which activities are critical based on the number and time unit which specify the minimum float time for activities before they are marked critical.

Compute Total Float As option

Determines the method to calculate total float for all activities based on the following methods:

Start Float: The difference between the early and late start dates (Start Float equals Late Start minus Early Start).

Finish Float: The difference between the early and late finish dates (Finish Float equals Late Finish minus Early Finish).

Smallest value: Select to use the most critical value, which is the smaller of the start float and finish float values.

Calendar for scheduling Relationship Lag is list

The calendar used to calculate relationship lag.

Predecessor Activity Calendar: Calculates lag based on the predecessor activity's calendar

Successor Activity Calendar: Calculates lag based on the successor activity's calendar

24 hour Calendar: Specifies work time 7 days/week and 24 hours/day

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Project Default Calendar: Uses the calendar that is designated as the default for new activities

Calculate multiple float paths option

Determines whether multiple critical float paths (sequences of activities) are calculated in the project schedule.

Recalculate Assignment Costs option

Determines whether the costs of resource or role assignments that use multiple rates are recalculated.

Using this option ensures that costs remain accurate when rescheduled dates reflect a rate change.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, click the **Actions** menu and select **Run Leveler...** (Shift+F9).
3. In the **Level Resources** dialog box, click the **Options** tab.
4. On the **Options** tab, select the **Display leveling log upon completion** and click **Level**.
5. In the **Leveling Report Log**, expand the **Scheduling Settings** section.

Scheduling Settings Section of the Schedule Project Log Dialog Box of the Activities Page

Overview

Use this section to view the configuration of various scheduling settings. All fields are read-only.

Screen Elements

Ignore relationships to and from other projects option

Determines whether to ignore activity relationships between projects.

Make open-ended activities critical option

Determines whether to label open-ended activities as critical during scheduling.

Use expected finish dates option

Determines whether the Scheduler uses the Expected Finish Date constraint.

When scheduling progressed activities use option

Determines the type of logic used to schedule dependent activities with out-of-sequence progress. For example, a Finish to Start relationship in which the predecessor has not finished but the successor has started.

Retained Logic: The remaining duration of a progressed activity is not scheduled until all of its predecessors are finished.

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Progress Override: The schedule ignores network logic and allows the activity to progress without delay.

Actual Dates: Backward and forward passes are calculated using actual dates.

Calculate Start-to-Start lag from option

Determines when you want the successor to start. When a start to start relationship exists and the predecessor starts out of sequence, the scheduler delays the successor activity until the lag expires and all predecessor relationships have been satisfied. Use this option to specify whether to subtract the lag from the predecessor's early start date or its actual start date.

Early Start: Calculates the expired lag as the number of work periods between the actual start and the data date and determines the successor's start date as the predecessor's remaining early start plus any remaining lag. Select this option when the successor's start depends on the amount of work that the predecessor activity accomplishes.

Actual Start: Calculates the successor's start date as the data date plus any remaining lag. Select this option when you want the successor's start to depend on the time elapsed from the predecessor's actual start (regardless of the amount of work that has been accomplished in the predecessor activity).

Define critical activities as Total Float less than or equal to field

Determines which activities are critical based on the flexibility of scheduled dates.

Compute Total Float As option

Determines the method to calculate total float for all activities based on the following methods:

Start Float: The difference between the early and late start dates (Start Float equals Late Start minus Early Start).

Finish Float: The difference between the early and late finish dates (Finish Float equals Late Finish minus Early Finish).

Smallest value: Select to use the most critical value, which is the smaller of the start float and finish float values.

Calendar for scheduling Relationship Lag is list

The calendar used to calculate relationship lag.

Predecessor Activity Calendar: Calculates lag based on the predecessor activity's calendar

Successor Activity Calendar: Calculates lag based on the successor activity's calendar

24 hour Calendar: Specifies work time 7 days/week and 24 hours/day

Project Default Calendar: Uses the calendar that is designated as the default for new activities

Calculate multiple float paths option

Determines whether multiple critical float paths (sequences of activities) are calculated in the project schedule.

Recalculate Assignment Costs option

Determines whether the costs of resource or role assignments that use multiple rates are recalculated.

Using this option ensures that costs remain accurate when rescheduled dates reflect a rate change.

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Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, and click **Schedule...** (F9).
3. In the **Schedule** dialog box:
   a. Configure the options and select the **Display scheduling log upon completion** option.
   b. Click **Schedule Now**.

Screen Elements of Calendar Tab of the Resource / Project Calendars Page

Today button

Returns to the current day, week, month, or year.

Previous

Displays the previous day, week, month, or year.

Next

Displays the next day, week, month, or year.

Day button

Displays a single day view.

Week button

Displays a single week view.

Month button

Displays a single month view.

Year button

Displays a single calendar year view.

Print

Opens the Print Options dialog box.

Full Screen

Expands the current work area so it fills the entire display.

Calendar View area

Enables you to view a day, week, month, or year of the calendar to identify standard time, nonwork time and calendar exceptions.

Legend area

Displays the standard, exception, nonwork, global exception, and global nonwork colors represented in the chart.

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Screen Elements of Standard Work Week Tab of Calendars Pages

Print

Opens the Print Options dialog box.

Day label

The name of each day.

Total Hours field

The total number of work hours for each day.

Calendar View area

Enables you to view a day, week, month, or year of the calendar to identify standard time, nonwork time and calendar exceptions.

Work Period display

Displays a box that represents each work period in a day. If you change the number of hours covered by the work period boxes for a day, P6 updates the Total Hours field.

Screen Elements of Summary Tab of Calendar Pages

Standard Work Week area:

Standard Work Week table

Enables you to see an overview of the work time periods configured for each day of the week in the calendar.

Time Periods area:

Hours per Time Period fields

The values that will be used as conversion factors when users choose to display time units and durations in units other than hours.

Base Calendar area:

Base Calendar field

The global calendar that is assigned to the calendar to determine work days, nonwork days (for example, global holidays), and calendar exceptions.

For example, multinational corporations will have one or more global calendars per country to represent global holidays for each region. Exceptions are used when the standard work day is modified.

Exceptions area:

Date Range options

Determines the Start and Finish of the date range for which you want to view exceptions.

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Print

Opens the Print Options dialog box.

Exceptions table

Enables you to see a list of all the exceptions configured for the calendar within the selected date range.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Select Baselines Dialog Box

Overview

Use this detail window the baselines exported each time the service runs.

Screen Elements

Export on the basis of assignments: area

Project Baselines option

Determines that the assigned project baseline for each project will be exported.

User Baselines option

Determines that all the user baselines configured by the current user will be exported for each project.

Primary option

Determines that the primary user baselines configured by the current user will be exported for each project.

Secondary option

Determines that the secondary user baselines configured by the current user will be exported for each project.

Tertiary option

Determines that the tertiary user baselines configured by the current user will be exported for each project.

Export on the basis of assignments: area

Baseline ID - Name field

The name and ID of each baseline.

Assigned Baselines field

Shows whether the baseline is selected as a project, primary, secondary, or tertiary baseline.

Baseline Type field

The baseline type, used to categorize the baseline's purpose.

Data Date field

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The data date for the project.

Last Updated Date field

The most recent time the project was updated.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Scheduled Services**.
2. On the **Scheduled Services** page, click **Project**.
3. Click the **Project Settings** detail window.
4. In the **Baselines** field, click **Select**.

Select Calendar to Copy Dialog Box

Overview

Use this dialog box to create a new calendar from an existing calendar.

Screen Elements

View calendar type list

Determines the type of calendar displayed in the search results area.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Select button

Applies your selection and closes the dialog box.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Global Calendars**.
3. On the **Global Calendars** page, click the **Calendar** tab.
4. Click **Add**

Select Code Value Dialog Box of the Activities Page

Overview

Use the Select Code Value dialog box to assign an appropriate code to an activity.

Screen Elements

Select a Code Type list

Determines the code types which will be listed in the codes and code values area.

Global: Global activity codes can be used in all projects within the enterprise

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EPS: EPS activity codes can be used only in projects that belong to a specified EPS, including its subordinate EPS nodes, if any.

Project: Project activity codes can be used only in one project.

Search field

Activates the search based on your search criteria.

Add menu

Code: Enables you to add a new code.

Code Value: Enables you to add a new value to an existing code. This option is only available if you have selected a code in the list.

Codes and Code Values

The list of available codes and code values.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **Codes** detail window.
3. Select **Assign...**.

Select Financial Period Calendar Dialog Box or Assign Financial Period Calendar Dialog Box

Overview

Use this dialog box to assign a financial period calendar to a project or to select an existing financial period calendar to copy when creating a new financial period calendar.

Screen Elements

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Financial Period Calendars list

The list of all available Financial Period Calendars.

Financial Period Calendar Name field

The name chosen for the financial period calendar.

Usage Count field

The number of projects assigned the corresponding Financial Period Calendar.

Show / **Hide** button

Shows or hides an expandable pane. This button is available in the Assign Financial Period Calendar dialog box.

Financial Period Calendars tab:

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To see this tab, select a calendar and click **Show** ».

Show Financial Periods for settings

Start: The earliest financial period to view in the list.

Finish: The latest financial period to view in the list.

Name field

The name chosen for the financial period.

Start Date field

The date the financial period begins.

Finish Date field

The date the financial period ends.

Used By tab:

To see this tab, select a calendar and click **Show** ».

ID field

The ID of the project, activity, or resource assigned to the calendar.

Name field

The name of the project assigned to the calendar.

Stored Data Periods list

Lists the periods with data stored for the project.

Getting Here

From the EPS page:

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project and click the **General** detail window.
   b. In the **Financial Period Calendar** field, click ••• **Select**.

From the Financial Periods page:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Financial Periods**.
3. On the **Financial Periods** page:
   a. Click **Add** ▾ and select **Copy from existing financial period calendar**.

Select Parent Resource Dialog Box of the Users Page

Overview

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Use this dialog to select a parent resource under which a resource with your name will be created and assigned to your user.

Screen Elements

View Resources By list

Determines which resources to show in the resource list in the Select a Resource dialog box.

Active Resources: Shows all active resources.

All Resources: Shows both active and inactive resources, in the resource hierarchy.

Primary Role: Shows all active resources, grouped by primary role.

Resource Code: Shows all active resources, grouped by resource code.

Resource Team: Shows all active resources, grouped by resource team.

Search field

Activates the search based on your search criteria.

If you are searching for a resource, select a resource field to search.

Resource List

Displays the resources that match your search criteria.

Add... button

Adds a new resource under the resource selected.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. In the **User Administration** pane, click **Users**.
3. On the **Users** page, select a login name, click **Context** and select **Create Resource**.

Select Project Code dialog box of the EPS Page

Overview

Use the Select Code Value dialog box to assign an appropriate code to a project.

Screen Elements

Add menu

Code: Enables you to add a new code.

Code Value: Enables you to add a new value to an existing code. This option is only available if you have selected a code in the list.

Search

Enables you to perform a search based on the value you enter in the search bar.

Available codes

The list of all available codes.

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Selected codes

The list of codes that you have selected from the Available codes list.

Getting Here

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select a project and click the **Codes** detail window.
3. Click **Assign...**.

Select Project Step of the Global Search & Replace Wizard of the EPS Page

Overview

Use this step to select projects for Global Search & Replace templates.

Screen Elements

Template Name

The name of the Global Search & Replace template.

Organize By

Groups the Available Projects list by **EPS**, **Portfolios**, or **Project Codes**.

Available Projects

The list of all available projects.

Search

Enables you to perform a search based on the value you enter in the search bar.

Selected Projects

The list of projects that you have selected from the Available Projects list.

Add Projects to Selected Projects

Adds the selected item or items from the available list to the selected list.

Remove Projects from Selected Projects

Removes the selected item or items from the selected list.

Previous

Moves to the previous step in the wizard.

Next

Moves to the next step in the wizard.

Getting Here

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.

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2. On the EPS page, click the **Actions** menu and select **Global Search & Replace**.

Select Replacement Global Calendar, Select Replacement Project Calendar, or Select Replacement Resource Calendar Dialog Box

Overview

If there are many redundant and under utilized calendars in your database, you can use this dialog box to move activities or resources from one calendar to another. After the replacement, you can view, print and download a list of items that were moved.

Screen Elements

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Add Calendar button

Enables you to create a new calendar to use as the replacement calendar for the selected assignments.

Assign button

Assigns the selected calendar to the selected objects. This button is visible only when the Add New Calendar section is not visible.

Add New Calendar area

To see this area, click **Add Calendar**

Calendar Name field

Enables you to type a name for the new calendar.

Select Calendar to Copy field

Searches the view or dialog box for data matching the criteria entered into the box.

Calendar Type list

Enables you to filter the list to calendars of the type you select.

Reset button

Closes the Add New Calendar panel without creating a new calendar.

Select button

Creates the new calendar and closes the panel.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, either:
   - Expand **Global** and click **Global Calendars**.

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- Expand **Projects** and click **Project Calendars**.
- Expand **Resource** and click **Resource Calendars**.

3. On the **Global Calendars**, **Project Calendars**, or **Resource Calendars** page, click the **Used By** tab.
4. On the **Used By** tab, expand the groupings, then select **Context** and choose **Assign Global Calendar**, **Assign Project Calendar**, or **Assign Resource Calendar**.

Select Responsible Manager Dialog Box

Overview

Use this dialog box to assign a responsible manager to a WBS element, threshold, or issue.

Screen Elements

Search

Searches the view or dialog box for data matching the criteria entered into the box.

EPS hierarchy

The EPS nodes available to the user.

Project Security Profile field

Determines the project access granted to the user.

Select button

Applies your selection and closes the dialog box.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. In the **User Administration** page, select **Users**.
3. Select a user and select the **Project Access** detail window.
4. Click **Assign OBS**.

Service Settings Detail Window

Overview

Use this detail window to configure settings to automatically publish global data.

Screen Elements

Schedule Settings area

Run Service list

Determines the interval by which the service is automatically run. If you select After Previous Service, the service will start to run immediately after the previous service has finished.

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> **Note**
>
> If multiple services are configured with Run Service set to After Previous Service, it is possible for scheduled services to affect CPU utilization.

On list

Determines the day of the week on which the service is automatically run. This option is only displayed if Weekly is selected on the **Run Service** list.

On the list

Determines the dates on which a service is automatically run. For example, select a service to automatically run on the first Monday of every month. This option is only displayed if Every Two Weeks or Monthly is selected on the **Run Service** list.

Start Time field

Determines the time at which the service is automatically run.

Enable email notifications option

Determines whether you want the listed users to be notified by email when a Primavera Unifier schedule sheet integration service fails. Specify the users to notify in the Recipients field. The user who created the service will also receive a notification about the failed service in the notifications pane of P6.

This setting is only available for Schedule Sheet integration services.

Recipients field

The list of email addresses which will be sent notification by email when a Primavera Unifier schedule sheet integration service fails.

This setting is only available for Schedule Sheet integration services.

Parameters area

To see this area, select a Project Checker service.

Options

Determines the checks to be run. Select one of the following:

All: Runs checks against unique key constraints, foreign key constraints, and business rules.

Unique key checks only: Runs checks against the selected projects in each table of the database, to determine whether any unique key constraints have been violated.

Foreign key checks only: Runs checks against the selected projects in each table of the database, to determine whether any foreign key constraints have been violated.

Business rule checks only: Runs checks against the selected projects to help adherence to good practice and to determine whether any business rules have been violated.

Limit Report Rows option

Enables you to specify the maximum number of rows to return for each of the checks included in the report.

Maximum Rows field

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Determines the number of rows to return for each of the checks included in the report if the Limit Report Rows option is selected.

Options area

To see this area, select a Project Checker service.

Delivery Type list

Determines whether the Project Checker Report will be delivered by email or as a file.

If you select Email, select **Configure Email** to configure the recipients, subject and body of the email.

Notifications options

Determines the situations that will trigger an email to be generated:

Report completed: Triggers an email to be sent whenever a Project Checker report has been generated successfully.

Report completed with warnings: Triggers an email to be sent when the Project Checker service is completed with warnings.

Report failed: Triggers an email to be sent when the Project Checker report service fails to run.

Server Location Settings area

To see this area, select an Import Primavera XER, Import Primavera XML, Export Primavera XER, or Export Primavera XML service.

Sub Folder field

Enables you to specify a folder or folder path for import or export files. If your server is running Windows, separate folders in the path with a backslash. If your server is running Unix or Linux, separate folders in the path with a forward slash.

This field is only available for import and export services.

> **Note**
>
> The Sub Folder field is only applicable on premises or if you have not selected to store files in the database.

Filename field

The file to be imported. This field is only available for import services.

Export to ZIP option

Determines whether to compress the exported projects into a zip file.

To enable this option, you must select Primavera XML or Primavera XER in the Export Type list. This option is only available for export services.

Add time stamp to file name option

Determines whether to append the date and time the file was exported to the file name if you choose not to store files in the database. As well as providing a record of the date and time the

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export was created, adding a time stamp to the file name prevents newer files replacing previously exported files stored in the same folder. The date and time used for the timestamp is the date and time according to the executing server and may differ from the date and time in the user's timezone.

To enable this option, you must select Primavera XML or Primavera XER in the Export Type list. This option is only available for export services.

> **Tip**
>
> The name of Service Settings detail window varies based on the service you select. For example, if you select the Publish Security service, the Publish Security Settings detail window is displayed.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Scheduled Services**.
2. On the **Scheduled Services** page, click **Global** or **Project**.
3. Click the **Service Settings** detail window.

Service Summary Detail Window

Overview

Use this detail window to view a summary of the service settings.

Screen Elements

Service Summary field

Displays a summary of the service.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Scheduled Services**.
2. On the **Scheduled Services** page, click **Global** or **Project**.
3. Click the **Service Summary** detail window.

Services Page

Overview

Use this page to configure publication and summarization period settings.

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> **Note**
>
> The publisher and summarizer services always use the project baseline for earned value calculations, regardless of the *Baseline to be used for earned value calculations* setting in each project's preferences. Therefore earned value data viewed in areas of the software using published or summarize data might differ from the same data viewed in areas of the software using live data. For further information see: Summarized, Published, and Live Data Usage in P6*Summarized, Published, and Live Data Usage in P6*

Screen Elements

Publication section:

Start date field

Determines the date on which publication for time-distributed data will begin. Oracle recommends that this value be set to the earliest project start date in the database so that time-distributed reports can be produced for any date range, if your organization reports against past project data. If this value is changed after data has been published, all project and global data will be automatically recalculated.

You must be assigned the *Admin Superuser* global security profile to edit this field.

Finish date is current date plus list

Determines the future period of time that is added to the current date of the service whenever it runs to determine the finish date for publication of time-distributed data. Data is published covering the period of time that begins with the start date and extends through the finish date. If this setting is changed after data has been published, all project and global data will be automatically republished. Set this value to an interval that will allow users to produce time-distributed reports for a reasonable amount of time in the future. This value should typically be in the 2-5 year range.

For example, if the value is 5 years, time-distributed data will always be published covering the period of time that begins with the value in the Start Date field and extends five years into the future each time a service runs.

You must be assigned the *Admin Superuser* global security profile to edit this field.

Time distributed interval list

Determines the interval by which time-distributed data will be calculated and stored. If this setting is changed after data has been published, all project and global data will be automatically republished. Set to Day if this level of granularity is required for spread data. Set to Week if performance of the services is most important (this may only be necessary for very large databases). The default setting is Day.

You must be assigned the *Admin Superuser* global security profile to edit this field.

Project Publication section:

Enable Publish Projects option

Determines whether Publish Projects is enabled. This option must be marked to publish projects and to run the Check Overallocation service. You should not enable Publish Projects until all projects are ready for publication.

You must be assigned the *Edit Application Settings* security privilege to modify this option.

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Publish projects every list

Determines the interval by which projects are polled to be published. The interval should be set to a low number (less than 5 minutes) to ensure that ASAP Publish Project and Check Overallocation services are processed in a timely fashion. However, if your users will not be using these ASAP services, you can set this value higher.

Start Time field

Determines the start time for scheduled jobs when the *Publish projects every* field contains a value less than 1 day.

Publish a changed project when the...

Number of changes exceeds field

Determines the number of changes that must exist since a project was last published before the *Publish Projects* service is automatically initiated again.

Time since last publication exceeds field

Determines the time interval that must elapse since a project was last published before the *Publish Projects* service is automatically initiated again. This setting only applies to projects that have changed during the time interval, but have not exceeded the number of changes threshold and therefore have not yet been automatically queued for publication. Set this value to a timeframe in which your project data must be current in the extended schema tables. For example, if you set this to 24h, this ensures that all projects actively being worked on will be published at least once a day, even if the edit threshold is not passed.

Publish idle projects option

Adds migrated projects to the service queue after your database is upgraded, if your organization is upgrading to P6.

This will publish all your projects in the queue and refresh the available data for reporting. After all projects have been published once, this setting is not applicable, and projects will be submitted to the queue based on the threshold values specified on the **Application Settings** page. Do not mark this checkbox if you only want to publish projects actively being worked on to the extended schema tables. If your organization does not report against completed projects, it may not be necessary to publish projects not actively being worked on.

Maximum number to publish field

Determines the maximum number of idle projects that can be added to the service queue. This setting is only applicable immediately following an upgrade, when all projects are considered idle.

When all projects have been published, the service queue will no longer be constrained based on this setting.

Publish resource and role data option

Determines whether to allow resource and role data in the Team Usage view to be published for reporting.

Enable Baseline Publication option

Determines whether to allow baseline data to be published for reporting.

Enable Notification Email option

Determines whether to send an email when a publication service fails.

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Notification Email address field

Determines the email address which will be sent the notification email.

If this field is left blank, the notification email will be sent to the email address associated with the user who switched on the **Enable Notification Email** option.

Summarization section:

Summarize by Calendar option

Determines whether to display the summarization periods by calendar.

WBS Level list

Use the list arrow to choose Week or Month.

Resource/Role Assignment list

Use the list arrow to choose Week or Month.

Summarize by Financial Periods option

Determines whether to display the summarization periods by financial periods.

Getting Here

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Services**.

Settings Detail Window of the Resources Tab of the Administration Page

Overview

Use this detail window to choose user settings such as calendar, overtime factor, resource currency, and P6 Progress Reporter settings.

Screen Elements

General section

Calendar field

The name of the calendar selected for the resource.

Calculate Costs from Units option

Determines whether by default any new assignments for this resource will have its costs recalculated whenever any quantity changes occur.

Auto Compute Actuals option

Determines whether the activity actual and remaining units, and start and finish dates for the resource are calculated automatically using the planned dates, planned units, and the activity's schedule percent complete.

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If this option is selected, the actual/remaining units and actual dates are automatically updated when project actuals are applied. This assumes that all work by the resource proceeds according to plan.

This option is not available if the **Uses Timesheets** option is selected.

Overtime Allowed option

Determines whether the resource is allowed to log overtime hours.

Default Units/Time field

The default units/time for resource assignments in projects, which is shown as either a percentage or units/duration depending on your settings in **My Preferences**.

If you change the default setting, existing resource assignments are not affected. The default setting only applies to new resource assignments.

Currency field

The preferred currency for viewing monetary values.

For example, US Dollars or Japanese Yen.

Overtime Factor field

The overtime factor used to compute the overtime price for the resource. The default overtime factor is 1.5.

Calculated as **Standard Price** multiplied by **Overtime Factor**.

Team Member section

User Login field

The login name for the timesheet user login.

Timesheet Approval Manager field

The resource manager assigned to approve timesheets for the resource.

Uses Timesheets option

Determines whether the labor resource uses timesheets to record hours for assigned activities.

This option is not available if the Auto Compute Actuals option is selected.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab, click the **Settings** detail window.

Settings Tab of the Schedule Dialog Box of the Activities Page

Overview

Use this tab to specify various scheduling settings such as how to schedule progressed activities, calculate start-to-start lag, and the method used to determine critical activities.

Screen Elements

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Use scheduling options from list

The project whose scheduling options will be used when scheduling multiple projects.

Ignore relationships to and from other projects option

Determines whether to ignore activity relationships between projects.

Make open-ended activities critical option

Determines whether to label open-ended activities as critical during scheduling.

Use expected finish dates option

Determines whether the Scheduler uses the Expected Finish Date constraint.

Level resources during scheduling option

Determines whether to level resources automatically each time you schedule a project.

This option is automatically cleared and can not be selected if the user does not have leveling permission on any of the open projects. The selection you make for this option is saved at the user level and applies to any additional projects you open and schedule.

Recalculate assignment costs after scheduling option

Determines whether the application should enforce that costs remain accurate when rescheduled dates reflect a rate change.

Select to recalculate the costs of resource or role assignments that use multiple rates.

P6 stores your selection at the user-level and applies it to all projects you open and schedule.

When scheduling progressed activities use option

Determines the type of logic used to schedule dependent activities with out-of-sequence progress. For example, a Finish to Start relationship in which the predecessor has not finished but the successor has started.

Retained Logic: The remaining duration of a progressed activity is not scheduled until all of its predecessors are finished.

Progress Override: The schedule ignores network logic and allows the activity to progress without delay.

Actual Dates: Backward and forward passes are calculated using actual dates.

Calculate Start-to-Start lag from option

Determines when you want the successor to start. When a start to start relationship exists and the predecessor starts out of sequence, the scheduler delays the successor activity until the lag expires and all predecessor relationships have been satisfied. Use this option to specify whether to subtract the lag from the predecessor's early start date or its actual start date.

Early Start: Calculates the expired lag as the number of work periods between the actual start and the data date and determines the successor's start date as the predecessor's remaining early start plus any remaining lag. Select this option when the successor's start depends on the amount of work that the predecessor activity accomplishes.

Actual Start: Calculates the successor's start date as the data date plus any remaining lag. Select this option when you want the successor's start to depend on the time elapsed from the predecessor's actual start (regardless of the amount of work that has been accomplished in the predecessor activity).

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Define critical activities as option

Determines the method used to identify critical activities:

Total float less than or equal to: Select this option to identify critical activities based on the lack of flexibility in their scheduled dates. Enter a number and time unit to specify a minimum float duration. When the project is scheduled, activities with total float values less than or equal to this value are marked critical. The value you specify is automatically converted to hours, regardless of your **Display Durations in** display setting in **My Preferences**.

The subsequent calculation for total float is based on the Hours per Time Period application settings located on the Time Periods page. If the **Use assigned calendar to specify the number of work hours for each time period** option is clear (not checked), then the calculation uses the **Hours/Day** value. If that option is selected (checked), then the conversion uses the standard work week values in the calendar assigned to the project. This explains why a float definition of `1 day` can be converted to `5 hours` or `20 hours`, depending on other settings.

Longest Path: Select this option to define critical activities based on the sequence of driving activities that determine the project end date.

Calculate float based on finish date of option

Determines whether to calculate float based on the finish date of each project or projects.

Each Project: Schedules external relationships on the backward pass using each project's finish date for open-ended activities, including activities that have an external relationship.

Opened Projects: Schedules external 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 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 option

Determines the method to calculate total float for all activities based on the following methods:

Start Float: The difference between the early and late start dates (Start Float equals Late Start minus Early Start).

Finish Float = Late Finish - Early Finish: The difference between the early and late finish dates (Finish Float equals Late Finish minus Early Finish).

Smallest value: Select to use the most critical value, which is the smaller of the start float and finish float values.

Calendar for scheduling Relationship Lag is list

The calendar used to calculate relationship lag.

Predecessor Activity Calendar: Calculates lag based on the predecessor activity's calendar

Successor Activity Calendar: Calculates lag based on the successor activity's calendar

24 hour Calendar: Specifies work time 7 days/week and 24 hours/day

Project Default Calendar: Uses the calendar that is designated as the default for new activities

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> **Note**
>
> Lag entered in a unit other than hours is converted to hours based on the predecessor activity's calendar.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Click **Schedule...**.
3. In the **Schedule** dialog box, click **Settings**.

Site Allow List dialog box

Overview

Use the Site Allow List dialog box to specify a list of websites that users can launch by clicking a link in user defined fields (UDFs), projects websites, P6 Team Member Web, or Notebook topics. In P6 users can launch the sites by clicking on them. In P6 Team Member Web, users launch sites from the menu next to the site.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Selected

Enables you to specify whether a website should be clickable for users.

Address field

The address of a site or web services which is allowed.

> **Tip**
>
> To delete a website, click **Context** next to it and choose **Delete**.

Getting Here

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Integration & Allow Lists**.
3. On the **Integration & Allow Lists** page, in the Site Allow List section, click **Edit List**.

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Soft Constraints - Constraints That Do Not Prevent Activities Being Moved Section of the Schedule Check Report Dialog Box

Overview

Use this section to view activities in the schedule with soft constraints. Soft constraints do not prevent activities from being moved, but they can distort float and create negative float.

Only a subset of activities in the open projects are checked. WBS summary activities, activities with an actual finish date, and Level of Effort activities are removed from the subset to create the list of activities check for Soft Constraints. Start constraints are ignored if they are on activities that have an actual start. The Actual percentage is calculated as the number of activities found that match the check divided by the total number of subset activities checked.

Screen Elements

Project ID field

The unique identifying code of the project containing the activity which failed the check. Click this link to view the project.

Activity ID field

The unique identifying code for the activity which failed the check. Click this link to view the activity.

Activity Name field

The name of the listed activity. Click this link to view the activity.

Constraint Type field

The type of constraint on the activity.

A hard constraint type prevents activities from being moved. In P6, 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, 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.

Constraint Date field

The date for which the activity's constraint applies. Depending on the constraint type, this date could be a start or finish.

For example, for 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 is empty.

Position field

The constraint position: primary or secondary.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
    a. Click the **Actions** menu and select **Check Schedule**, then select **View Report**.

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Sorting tab of the Customize View Dialog Box

Overview

Use this tab to sort data in the view.

Screen Elements

Context menu

Add Above: Adds a new item to the list above the selected item.

Add Below: Adds a new item to the list below the selected item.

Delete: Deletes the selected item.

Move Up: Moves the selected item up the list.

Move Down: Moves the selected item down the list.

Columns list

A list of the columns showing in this view.

Order list

Determines whether the application sorts values in ascending, descending or hierarchical order.

Getting Here

1. Click **Customize View**.
2. In the **Customize View** dialog box, click **Sorting**.

Sorting tab of the Manage Views Dialog Box of the Activities Page, EPS Page or Assignments Page

Overview

Use this dialog box or tab to sort data in the view.

Screen Elements

Context menu

Add Above: Adds a new item to the list above the selected item.

Add Below: Adds a new item to the list below the selected item.

Delete: Deletes the selected item.

Move Up: Moves the selected item up the list.

Move Down: Moves the selected item down the list.

Columns list

A list of the columns showing in this view.

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Order list

Determines whether the application sorts values in ascending, descending or hierarchical order.

Getting Here

1. Click **Navigation Menu**
2. On the **Navigation Menu**, either:
   - Expand **Projects** and click **Activities** or **EPS**.
   - Expand **Resources** and click **Assignments**.
3. Click the **Views** menu and select **Manage Views...**.
4. In the **Manage Views** dialog box, click **Sorting**.

Spreadsheet tab of the Customize View Dialog Box

Overview

Use this tab to modify your planning spreadsheet.

Screen Elements

Available Columns list

The list of columns available for display.

Search

Enables you to perform a search based on the value you enter in the search bar.

Select Items (Ctrl+Shift+Right Arrow)

Adds the selected item or items from the available list to the selected list.

Deselect Items (Ctrl+Shift+Left Arrow)

Removes the selected item or items from the selected list.

Selected Columns list

The columns you selected from the Available Columns list. Double-click a column in the Selected Columns list to remove it from the list. If the view includes pinned columns, they are listed first and separated from the other columns in the list.

Move Item Up

Advances the selected item up in the sequence (moves a table column to the left).

Move Item Down

Advances the selected item down in sequence (moves a table column to the right).

Options section

Start Date list

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Determines the start date of the spreadsheet cells.

Current Date: Enables you to specify a specific start date for the spreadsheet.

Timescale section

Timescale list

The Spreadsheet chart time interval options. Select from one of the following intervals:

Month/Week: The Spreadsheet View is divided into months which are then divided into weeks.

Quarter/Month: The Spreadsheet View is divided into quarters which are then divided into months.

Year/Quarter: The Spreadsheet View is divided into years which are then divided into quarters.

Financial Period: The Spreadsheet chart is divided into years which are then divided into financial periods.

Financial Period Calendar list

Specifies the financial period calendar that will determine the spreadsheet columns. To see this field, you must select Financial Period from the Timescale list.

Getting Here

1. Click **Customize View**.
2. In the **Customize View** dialog box, click **Spreadsheet**.

Spreadsheet tab of the Customize View Dialog Box of the Assignments Page

Overview

Use this tab to modify your assignment spreadsheet.

Screen Elements

Available Columns list

The list of columns available for display.

Search

Enables you to perform a search based on the value you enter in the search bar.

Select Items (Ctrl+Shift+Right Arrow)

Adds the selected item or items from the available list to the selected list.

Deselect Items (Ctrl+Shift+Left Arrow)

Removes the selected item or items from the selected list.

Selected Columns list

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The columns you selected from the Available Columns list. Double-click a column in the Selected Columns list to remove it from the list. If the view includes pinned columns, they are listed first and separated from the other columns in the list.

Move Item Up

Advances the selected item up in the sequence (moves a table column to the left).

Move Item Down

Advances the selected item down in sequence (moves a table column to the right).

Options section

Start Date list

Determines the start date of the date range.

Current Date: Enables you to specify that the start date for the search should be a given number of days, weeks, months, quarters, or years before or after the current date.

Earliest Project Date: Enables you to set the start date of the search to equal the earliest scheduled start date of all loaded projects.

Custom Date: Enables you to select the exact start date for the date range.

Finish Date list

Determines the finish date of the date range.

Start Date: Enables you to specify that the finish date for the search should be a given number of days, weeks, months, quarters, or years after the start date for the range.

Latest Project Date: Enables you to specify that the finish date for the search should be the date of the latest scheduled finish date of all loaded projects.

Custom Date: Enables you to select the exact end date for the date range.

Calculate average for units and costs option

Determines whether to calculate the average for units and costs.

Divide values by: The number by which the average is divided. This field is only available if the corresponding option is selected.

Timescale section

Timescale list

The Gantt chart time interval options. Select from one of the following intervals:

Week/Day: The Gantt View is divided into weeks which are then divided into days.

Month/Week: The Gantt View is divided into months which are then divided into weeks.

Quarter/Month: The Gantt View is divided into quarters which are then divided into months.

Year/Month: The Gantt View is divided into years which are then divided into months.

Year/Quarter: The Gantt View is divided into years which are then divided into quarters.

Financial Period: The Gantt chart is divided into years which are then divided into financial periods.

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Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. Click the **Views** menu and select **Manage Views...**.
3. In the **Customize View** dialog box, click **Spreadsheet**.

Spreadsheet tab of the Customize View Dialog Box of the Team Usage Page or the Analysis page

Overview

Use this tab to modify the spreadsheet in the view.

Screen Elements

Resource area:

Display Fields options

Determines which fields to display for resources.

Actual Costs: Determines whether to show the actual non-overtime plus overtime cost for the resource assignment on the activity.

Allocated Units: Determines whether to show the units allocated to the resource in the specified time period.

Remaining Costs: Determines whether to show the remaining cost for the resource assignment on the activity.

Under/Over Allocated Units: Determines whether to show the underallocated or overallocated units for the resource.

Role area:

Display Fields options

Determines which fields to display for roles.

Actual Units/Costs: Determines whether to show the sum of the actual non-overtime and the overtime units or costs worked by resources assigned to the role on the activity.

Staffed Units/Costs: Determines whether to show the total units or costs currently assigned to individual resources for each role.

Unstaffed Units/Costs: Determines whether to show the total units or costs that require resource assignments for each role.

General area:

Limit options

Determines whether to display maximum Resource and Role availability. These options are based on live data to help you evaluate usage against the benchmark.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Team Usage**.

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2. Click **Customize View**.
3. In the **Customize View** dialog box, click **Spreadsheet**.

Or:

1. On the **Navigation Menu**, expand **Resources** and click **Analysis**.
2. Click **Customize View**.
3. In the **Customize View** dialog box, click **Spreadsheet**.

Spreadsheet View Format of the Assignments Page of the Projects Section

Overview

Use the Spreadsheet format to view time distributed usage data in spreadsheet format.

> **Note**
>
> Overallocation is calculated by week. If a resource is overallocated on one day of the week but is underallocated for the week as a whole, the resource will show as underallocated.

Screen Elements

Right-clicking on the timescale will display:

Timescale list

The Gantt chart time interval options. Select from one of the following intervals:

Week/Day: The Gantt View is divided into weeks which are then divided into days.

Month/Week: The Gantt View is divided into months which are then divided into weeks.

Quarter/Month: The Gantt View is divided into quarters which are then divided into months.

Year/Month: The Gantt View is divided into years which are then divided into months.

Year/Quarter: The Gantt View is divided into years which are then divided into quarters.

Financial Period: The Gantt chart is divided into years which are then divided into financial periods.

Spreadsheet columns

Only the default fields that appear as columns in Assignments Spreadsheet are described below.

Limit field

The maximum units per time for the resource.

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This field is only available in the Spreadsheet view format of the Overallocated Resources view.

Actual Units field

The sum of the actual non-overtime and the overtime units worked by the resource on the activity.

Calculated as **Actual Regular Units** plus **Actual Overtime Units**.

Values for **Actual Regular Units** and **Actual Overtime Units** are obtained from either timesheets when project actuals are applied, or directly from the updated fields in the interface.

Remaining Early Units field

The units remaining to complete the assignment distributed between the **Early Start** and **Early Finish** of the assignment.

Calculated as **Remaining Duration** multiplied by **Remaining Units per Time**.

Under/Overallocated field

The underallocated or overallocated units for the resource.

This field is calculated by summing the Actual Units and Remaining Early Units and then subtracting the Limit. Positive values show that the resource is overallocated. Negative values show that the resource is underallocated. This field is only available in the Spreadsheet view format of the Overallocated Resources view.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Assignments**.
2. Click **Spreadsheet View**.

Spreadsheet View Format of the Assignments Page of the Resources Section

Overview

Use the Spreadsheet format to view time distributed usage data in spreadsheet format.

Screen Elements

Right-clicking on the timescale will display:

Timescale list

The Gantt chart time interval options. Select from one of the following intervals:

Week/Day: The Gantt View is divided into weeks which are then divided into days.

Month/Week: The Gantt View is divided into months which are then divided into weeks.

Quarter/Month: The Gantt View is divided into quarters which are then divided into months.

Year/Month: The Gantt View is divided into years which are then divided into months.

Year/Quarter: The Gantt View is divided into years which are then divided into quarters.

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Financial Period: The Gantt chart is divided into years which are then divided into financial periods.

Spreadsheet columns

Only the default fields that appear as columns in Assignments Spreadsheet are described below.

Remaining Early Units field

The units remaining to complete the assignment distributed between the **Early Start** and **Early Finish** of the assignment.

Calculated as **Remaining Duration** multiplied by **Remaining Units per Time**.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. Click **Spreadsheet View**.

Spreadsheet View Format of the Planning Page of the Resources Section

Overview

Use the Spreadsheet format to view time distributed usage data in spreadsheet format.

Screen Elements

Planning Table columns

% Allocation field

The percentage of the resource or role's Maximum Units/Time that is allocated to the selected project level assignment.

When you change the **% Allocation** field, P6 assigns the specified percentage of the resource or role's maximum units per time to the selected project. This does not consider their existing allocations and can therefore cause them to become overallocated. Changing the resource or role's allocation recalculates the total units for the assignment and the corresponding spread of allocated units in the spreadsheet.

Committed option

Determines whether the resource is committed to the project. If a resource is committed to a project, their availability for high level resource planning for other projects is adjusted accordingly.

Finish Date field

The finish date for the assignment. If the Life of Project option is selected, this date is the same as the Forecast Finish Date. If the Life of Project option is cleared, you can select a finish date for the planning assignment.

Forecast Finish Date field

The planned finish date of a project or WBS based on a what-if scenario designed to simulate project performance and outcomes and to plan resource allocation.

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Life of Project option

Determines that the assignment is for the entire duration of the project. When the Life of Project option is selected for an assignment, you cannot directly edit its start and finish dates. Use Synchronize Resource Dates on the Actions menu to set the the start of the assignment to the Project Forecast Start and the finish of the assignment to the Forecast Finish Date.

Name field

The name of the resource. This column is always visible on this page.

Project Forecast Start field

The planned start date of the project based on a what-if scenario designed to simulate project performance and outcomes.

Resource ID field

The unique identifier for the resource. This column is always visible on this page.

Resource Type field

The type of resource/role assignment.

Valid values are:

Labor: Indicates that the selected resource performs labor, which is measured in units of time.

Nonlabor: Indicates that the selected resource does not perform labor, but its work is measured in units of time.

Material: Indicates that the selected resource does not perform labor, and its work is measured in units you specify.

Role ID field

The unique identifier of the associated role.

Role Name field

The name of the role assigned to the resource.

Search Criteria field

Indicates whether the assignment has any associated search criteria with a **Yes** or **No** link.

When search criteria have been specified, this field shows a **Yes** link that provides access to the stored resource request search criteria used to search for a qualified resource.

When you assign a resource using the *Request Resources* feature with your custom resource search criteria, the search criteria you specify is saved. A **Yes** link appears in the **Search Criteria** column beside the assignment, indicating search criteria is specified. This saved search criteria can be useful later if you ever need to modify the resource assignment and want to reuse the same criteria.

A **No** link appears when the assignment was made directly without any search criteria; however, you can click the **No** link to specify search criteria for the resource or role assignment.

Start Date field

The start date for the assignment. If the Life or Project option is selected, this date is the same as the Project Forecast Start. If the Life of Project option is cleared, you can select a start date for the planning assignment.

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Status field

The current status of the assignment, used to classify assignments. Valid values are **None**, **Draft**, **Filled**, and **Submitted**.

Total Units field

The resource or role units allocated to the project. You can enter a number of units as hours, days, weeks, months, or years.

Spreadsheet columns

Right-clicking on the timescale will display:

Timescale list

The Spreadsheet chart time interval options. Select from one of the following intervals:

Month/Week: The Spreadsheet View is divided into months which are then divided into weeks.

Quarter/Month: The Spreadsheet View is divided into quarters which are then divided into months.

Year/Quarter: The Spreadsheet View is divided into years which are then divided into quarters.

Financial Period Calendar: The Spreadsheet chart is divided into financial periods according to the assigned financial periods calendar.

Allocation field

The total units for the assignment spread between the start and finish date of the assignment. The units are spread according to the appropriate calendar for the assignment and takes into account exception and non-work hours.

If you enter or modify the figure in this field, P6 will update the Total Units for the assignment accordingly.

Under/Overallocated field

The number of units for the time period that the resource or role has available to be assigned or by which the resource is overallocated. A negative value indicates that the resource or role has available units to be assigned for the time period. A positive value on a red background indicates that the resource or role is overallocated for the time period.

All committed assignments for the resource or role on the page are counted towards the resource or role's availability.

Calculated as Allocation minus Limit.

Limit field

The maximum units the resource or role can work for the time period.

For roles, the limit is calculated according to the *Display the role limit based on* setting in the Resources section of the Global tab of the My Preferences page. For resources the limit is calculated as the Max Units/Time multiplied by the working hours for the resource during the period according to their calendar.

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Tip

You can change the financial period calendar for the view on the Spreadsheet tab of the Customize View dialog box.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. Click **Spreadsheet View**.

Standard Work Week Tab of the Global Calendars Page

Overview

Use this tab to specify the length of work hours in a day or to calculate the total number of hours worked in a particular day.

Screen Elements

Work area

The typical work week that can be modified by day and hour. After choosing a calendar to be added while on the calendar tab, the **Standard Work Week** tab will display the similar template by days and hours.

Print

Opens the Print Options dialog box.

Day label

The name of each day.

Total Hours field

The total number of work hours for each day.

Calendar View area

Enables you to view a day, week, month, or year of the calendar to identify standard time, nonwork time and calendar exceptions.

Work Period display

Displays a box that represents each work period in a day. If you change the number of hours covered by the work period boxes for a day, P6 updates the Total Hours field.

Tip

- Modify the start day of the week in the Application Settings pane.
- There can be multiple work period boxes displayed in one day.

Getting Here

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1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Global Calendars**.
3. On the **Global Calendars** page, click the **Standard Work Week** tab.

Standard Work Week Tab of the My Calendar dialog box, Global Calendars Page, Project Calendars Page, or Resource Calendars Page

Overview

Use this tab to specify the length of work hours in a day or to calculate the total number of hours worked in a particular day.

Screen Elements

Print

Opens the Print Options dialog box.

Day label

The name of each day.

Total Hours field

The total number of work hours for each day.

Calendar View area

Enables you to view a day, week, month, or year of the calendar to identify standard time, nonwork time and calendar exceptions.

Work Period display

Displays a box that represents each work period in a day. If you change the number of hours covered by the work period boxes for a day, P6 updates the Total Hours field.

> **Tip**
>
> You can change the **Starting Day of Week** setting in the **General** tab of the **Application Settings** page.

Getting Here

From the Enterprise Data page:

1. On the ☰ **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource Calendars**.
3. On the **Resource Calendars** page, click the **Standard Work Week** tab.

From the **My Calendar** dialog box:

1. Click the **User** menu and select **My Calendar**.

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2. In the **My Calendar** dialog box, select the **Standard Work Week** tab.

Standard Work Week Tab of the View Calendar Dialog Box of the Activities Page, EPS Page, Assignments Page, or Resources Page

Overview

Use this tab to view the length of work hours in a day and the total number of hours worked in a particular day.

Screen Elements

Work area

The typical work week that can be modified by day and hour. After choosing a calendar to be added while on the calendar tab, the **Standard Work Week** tab will display the similar template by days and hours.

Day label

The name of each day.

Total Hours field

The total number of work hours for each day.

Calendar View area

Enables you to view a day, week, month, or year of the calendar to identify standard time, nonwork time and calendar exceptions.

Work Period display

Displays a box that represents each work period in a day. If you change the number of hours covered by the work period boxes for a day, P6 updates the Total Hours field.

> **Tip**
>
> There can be multiple work period boxes displayed in one day.

Getting Here

From the Activities page:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select an activity.
   b. Click **Context** and select **View Calendar**.
3. In the **View Calendar** dialog box, select **Standard Work Week**.

From the EPS page:

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1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project.
   b. Click **Context** and select **View Calendar**.
3. In the **View Calendar** dialog box, select **Standard Work Week**.

From the **Assignments** page:

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. On the **Assignments** page:
   a. Select an assignment.
   b. Click **Context** and select **View Calendar**.
3. In the **View Calendar** dialog box, select **Standard Work Week**.

From the Resources tab:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab:
   a. Select a resource.
   b. Click **Context** and select **View Calendar**.
4. In the **View Calendar** dialog box, select **Standard Work Week**.

Start Review Dialog Box

Overview

Use this page to initiate the review process for a document.

Screen Elements

Name field

The name of the review.

Review Type list

Determines the type of review:

Anyone May Review: Enables any one of the listed reviewers to approve or reject the document version. Once one reviewer approves it, the review status changes to Review Approved; once one reviewer rejects it, the review status changes to Review Rejected.

Everyone Must Review: Requires each listed reviewer to respond to the document review to complete it. To change the review status to Review Approved, all reviewers must approve the document. To change the review status to Review Rejected, only one reviewer needs to reject the document.

Everyone Must Review in Sequence: Requires each listed reviewer to respond to the document review in a designated sequence to complete it. To change the review status to Review Approved, all reviewers must approve the document. To change the review status to

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Review Rejected, only one reviewer needs to reject the document. Once one reviewer rejects the document, the review is complete.

Reviewers field

The selected users assigned to review the document.

You can use the arrows to move the selected users up or down in the sequence; this is the order in which they will review if you select the option **Everyone Must Review in Sequence**.

Due Date field

The date by which all reviewers need to complete the review. If no due date is specified for the review, then this field appears blank.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Create Review button

Creates a review based on the entered criteria. Once the review is created, the document appears in the Action Required portlet on a dashboard for each specified reviewer.

Tip

- To create the review, you must select at least one reviewer. Once a review is created, you cannot add additional reviewers to the list. You can select as many reviewers as you want.
- Use the up and down arrows to specify the order of the names in the list. If you have selected the Everyone Must Review in Sequence review type, the order of the names in the list determines the sequence in which each user is required to review the document.
- If the review type is Everyone Must View in Sequence, then all reviewers must complete the review by the specified Due Date.
- You can customize a dashboard to display the Action Required portlet.

Getting Here

From the Documents page:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab, select a document.
4. In the **Security Policy** list, select **Shared** or **Read Only**.
5. Click **Start Review**.

From the Dashboards page:

1. On the **Navigation Menu**, expand **Dashboard**.

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2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand the **My Documents** portlet and select the **Recent Documents** tab.
4. On the **Recent Documents** tab, select a document with the Security Policy set to Shared or Read Only and click **Start Review**.

Statistics Section of the Leveling Report Log

Overview

Use this section to view activity statistics of the selected project. All fields are read-only.

Screen Elements

Number of Activities field

The number of activities associated with the selected project.

Number of Not Started Activities field

The number of activities that have not been started.

Number of In Progress Activities field

The number of activities that have been started but not completed.

Number of Completed Activities field

The number of activities that have been completed.

Number of Relationships field

The number of relationships within the activities.

Number of Activities with constraints field

The number of activities that have constraints.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, click the **Actions** menu and select **Run Leveler...** (Shift+F9).
3. In the **Level Resources** dialog box, click the **Options** tab.
4. On the **Options** tab, select the **Display leveling log upon completion** and click **Level**.
5. In the **Leveling Report Log**, expand the **Statistics Section** section.

Statistics Section of the Schedule Project Log Dialog Box of the Activities Page

Overview

Use this section to view activity statistics of the selected project. All fields are read-only.

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Screen Elements

Number of Activities field

The number of activities associated with the selected project.

Number of Not Started Activities field

The number of activities that have not been started.

Number of In Progress Activities field

The number of activities that have been started but not completed.

Number of Completed Activities field

The number of activities that have been completed.

Number of Relationships field

The number of relationships within the activities.

Number of Activities with constraints field

The number of activities that have constraints.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, and click **Schedule...** (F9).
3. In the **Schedule** dialog box:
   a. Configure the options and select the **Display scheduling log upon completion** option.
   b. Click **Schedule Now**.

Status Detail Window of the Activities Page

Overview

Use this detail window to configure activity durations, general information, constraints, and units and costs.

Screen Elements

Status section

Started option

Determines whether the activity has started. Click **Select Date** to select the date from a calendar.

Finished option

Determines whether the activity has been completed. Click **Select Date** to select the date from a calendar.

Activity % Complete field

The percent of the activity that has been completed.

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The calculation is based on the formula for the selected Percent Complete Type. The Percent Complete Type can be *Units*, *Duration*, *Physical, or Scope*.

If the selected activity's percent complete type is *Duration*, the percent complete is calculated as (**Planned Duration** minus **Remaining Duration**) divided by **Planned Duration**.

If the activity's percent complete type is *Units*, the percent complete is calculated as (**Actual Labor Units** plus **Actual Nonlabor Units**) divided by (**Actual Labor Units** plus **Actual Nonlabor Units** plus **Remaining Labor Units** plus **Remaining Nonlabor Units**).

If the activity's percent complete type is *Physical*, either the user records the percent complete manually or the field is set to calculate using steps. To calculate using steps, the **Calculate Activity % Complete from activity steps** option must be set in Project Preferences.

If the activity's percent complete type is *Scope*, the percent complete originates from Oracle Primavera Cloud and cannot be modified in P6.

Expected Finish field

The date on which the primary resource, the person who assigns the expected finish date, anticipates work on the activity will finish.

Only the primary resource can edit this field if the activity has started.

Durations section

Planned Duration field

The expected amount of time required to complete an activity.

The planned working time is calculated using the activity's calendar. The duration is measured from the activity's planned start date to its planned finish date.

Actual Duration field

The total working time from the activity **Actual Start** date to the **Actual Finish** date for completed activities, or the total working time from the **Actual Start** date to the data date for in-progress activities.

The actual working time is computed using the activity's calendar.

Remaining Duration field

The total working time from the activity remaining start date to the remaining finish date.

The remaining working time is calculated using the activity's calendar. Before the activity is started, the remaining duration is the same as the planned duration. After the activity is completed the remaining duration is zero.

At Completion Duration field

The total working time from the activity's current start date to the current finish date.

The current start date is the planned start date until the activity is started, and then it is the actual start date. The current finish date is the activity planned finish date while the activity is not started, the remaining finish date while the activity is in progress, and the actual finish date once the activity is completed. The total working time is calculated using the activity's calendar.

Total Float field

The amount of time the activity can be delayed before risking a delay to the project finish date.

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A float of zero hours indicates that the activity cannot be delayed at all and a negative float indicates that the project is already behind schedule. In a complex schedule, negative total float on some activities might not cause a delay to the project finish date.

Calculated as **Late Start** minus **Early Start** or as **Late Finish** minus **Early Finish**.

Free Float field

The amount of time the activity can be delayed before delaying the start date of any successor activity.

Units and Costs section

Units and Cost list

Determines which types of units and costs the application will track: Labor Units, Labor Costs, Non-Labor Units, Non-Labor Costs, or Material Costs.

The fields that display in this section depend upon what type of unit or cost you choose.

Labor Units fields:

Planned Labor Units field

The planned number of units for all labor resources assigned to the activity.

Actual Labor Units field

The number of units expended for all labor resources assigned to the activity.

Remaining Labor Units field

The remaining units for all labor resources assigned to the activity.

The Remaining Labor Units reflect the work remaining to be done for the activity. Before the activity is started, the remaining units are the same as the planned units. After the activity is completed, the remaining units are zero.

At Completion Labor Units field

The sum of the actual plus remaining units for all labor resources assigned to the activity.

It is the same as the planned labor units if the activity is not started, and the actual labor units once the activity is completed.

Calculated as **Actual Labor Units** plus **Remaining Labor Units**.

Nonlabor Units fields:

Planned Nonlabor Units field

The planned units for all nonlabor resources assigned to the activities in the project.

Actual Nonlabor Units field

The number of nonlabor units that have been expended on the activity.

Remaining Nonlabor Units field

The remaining units for all nonlabor resources assigned to the activities.

The remaining units reflect the work remaining to be done for the activity. Before the activity is started, the remaining units are the same as the planned units. After the activity is completed, there are zero remaining units.

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At Completion Nonlabor Units field

The non labor units at completion. The sum of the actual plus remaining units for all nonlabor resources assigned to the activity.

It is the same as the planned nonlabor units if the activity is not started, and the actual nonlabor units once the activity is completed.

Calculated as **Actual Nonlabor Units** plus **Remaining Nonlabor Units**.

Labor Cost fields:

Planned Labor Cost field

The planned costs for all labor resources assigned to the activity.

If no resources are assigned, calculated as **Activity Planned Labor Units** multiplied by **Project Default Price/Unit** divided by **Time**.

Actual Labor Cost field

The actual costs for all labor resources assigned to the activity.

If no resources are assigned, calculated as the **Actual Labor Units** multiplied by **Project Default Price** divided by **Time**.

Remaining Labor Cost field

The remaining costs for all labor resources assigned to the activity.

If no resources are assigned, calculated as the **Activity Remaining Labor Units** multiplied by **Project Default Price** divided by **Time**.

At Completion Labor Cost field

The sum of the actual and remaining costs for all labor resources assigned to the activity.

If the activity is not started, this equals the planned labor costs. If the activity is completed, this equals the actual labor costs.

Calculated as **Actual Labor Cost** plus **Remaining Labor Cost**.

Nonlabor Cost fields:

Planned Nonlabor Cost field

The planned costs for all nonlabor resources assigned to the activity.

If no resources are assigned, calculated as **Activity Planned Nonlabor Units** multiplied by **Project Default Price** divided by **Time**.

Actual Nonlabor Cost field

The actual costs for all nonlabor resources assigned to the activity.

If no resources are assigned, calculated as the **Activity Actual Nonlabor Units** multiplied by **Project Default Price** divided by **Time**.

Remaining Nonlabor Cost field

The remaining costs for all nonlabor resources assigned to the activity.

If no resources are assigned, calculated as **Activity Remaining Nonlabor Units** multiplied by **Project Default Price** divided by **Time**.

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At Completion Nonlabor Cost field

The nonlabor cost at completion. The sum of the actual and remaining costs for all nonlabor resources assigned to the activity.

It is the same as the planned nonlabor costs if the activity is not started, and the actual nonlabor costs once the activity is completed.

Calculated as **Actual Nonlabor Cost** plus **Remaining Nonlabor Cost**.

Material Cost fields:

Planned Material Cost field

The planned cost for all material resources assigned to the activity.

Actual Material Cost field

The actual cost for all material resources assigned to the activity.

Remaining Material Cost field

The sum of all material resource remaining costs.

At Completion Material Cost field

The material cost at completion. It is the sum of the actual and remaining costs for all material resources assigned to the activity.

It is the same as the planned material costs if the activity is not started, and the actual material costs once the activity is completed.

Calculated as **Actual Material Cost** plus **Remaining Material Cost**.

Constraints section

Primary Constraint list

Determines the primary constraint on the activity. Choose from one of the following options:

Start On: Imposes the specific start date you choose. The Start On constraint can delay an activity's early start or move forward an activity's late start to satisfy the constraint date.

Start On or Before: Defines the latest date an activity can start. This constraint only affects late dates and might decrease total float. When calculating a schedule, P6 imposes the start on or before constraint in the backward pass only if the calculated late start date will be later than the imposed date

Start On or After: Defines the earliest date an activity can begin. This constraint affects only early dates. When calculating a schedule, P6 imposes the start on or after constraint in the forward pass only if the calculated early start date will be earlier than the imposed date.

Finish On: Imposes the specific finish date you choose. The Finish On constraint can delay an activity's early finish or move forward an activity's late finish to satisfy the constraint date

Finish On or Before: Defines the latest time an activity can finish. The finish on or before constraint affects only late dates.

Finish On or After: Defines the earliest date an activity can finish. 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 with few predecessors that must finish before the next phase of a project.

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As Late As Possible: Imposes a restriction on an activity with positive float to allow it to start as late as possible without delaying its successors. When calculating a schedule, P6 sets the activity's early dates as late as possible without affecting successor activities.

Mandatory Start: Imposes the early and late start dates you choose. P6 uses the mandatory early start date 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.

Mandatory Finish: Imposes the early and late finish dates you choose. P6 uses the mandatory finish date 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.

Primary Constraint Date field

The constraint date for the activity, if the activity has a constraint. The activity's constraint type determines whether this is a start date or finish date.

Activity constraints are used by the project scheduler.

Secondary Constraint list

Determines the secondary constraint on the activity. Available only when the Primary Constraint is not Start On, Finish On, Mandatory Start, or Mandatory Finish. Choose from one of the following options:

Start On or After: Defines the earliest date an activity can begin. This constraint affects only early dates. When calculating a schedule, P6 imposes the start on or after constraint in the forward pass only if the calculated early start date will be earlier than the imposed date.

Finish On or After: Defines the earliest date an activity can finish. 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 with few predecessors that must finish before the next phase of a project.

Secondary Constraint Date field

The date for the activity's secondary constraint, if the activity has a secondary constraint.

The activity's constraint type determines whether this is a start date or finish date. This field is only available if a primary constraint has been selected.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **Status** detail window.

Status Section of the Activity Form Page

Overview

Use this section to add or edit activity status details, if you have the required privileges.

Screen Elements

Dates section:

Started option

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Determines whether the activity has started.

Finished option

Determines whether the activity has been completed.

Suspend Date field

The date work has temporarily stopped on a given activity.

For example, an event might force an activity to be interrupted or resource constraints might put an activity on hold.

The suspend date must be later than the actual start date, which the activity must have. Activity progress can resume when the Resume Date is set. The suspend/resume period behaves like non-work time on the activity calendar or resource calendar for task and resource dependent activities.

Resume Date field

The date when a suspended task or activity is resumed.

The resume date must be later than the suspend date and earlier than the actual finish date.

The suspend/resume period behaves like non-work time on the activity calendar.

Percent field

The type of percent you see depends on the percent complete type you select for the activity in the **General** section of the **Activity Form** page.

The type can be *Units*, *Duration*, *Physical, or Scope*. If the Percent Complete Type is *Units*, percent complete is calculated from the actual and remaining units. If the Percent Complete Type is *Duration*, the percent complete is calculated from the actual and remaining duration. If the Percent Complete Type is *Physical*, the user will enter the percent complete for the activity. If the Percent Complete Type is *Scope*, the percent complete is calculated by Oracle Primavera Cloud and cannot be modified in P6.

Total Float field

The amount of time the activity can be delayed before risking a delay to the project finish date.

A float of zero hours indicates that the activity cannot be delayed at all and a negative float indicates that the project is already behind schedule. In a complex schedule, negative total float on some activities might not cause a delay to the project finish date.

Calculated as **Late Start** minus **Early Start** or as **Late Finish** minus **Early Finish**.

Constraints section:

Primary Constraint list

The primary constraint type for the selected activity.

Primary Constraint Date field

The constraint date for the activity, if the activity has a constraint. The activity's constraint type determines whether this is a start date or finish date.

Activity constraints are used by the project scheduler.

Secondary Constraint field

The secondary constraint type for the selected activity.

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This field is only available if a primary constraint has been selected.

Secondary Constraint Date field

The date for the activity's secondary constraint, if the activity has a secondary constraint.

The activity's constraint type determines whether this is a start date or finish date. This field is only available if a primary constraint has been selected.

Expected Finish field

The date on which the primary resource, the person who assigns the expected finish date, anticipates work on the activity will finish.

Only the primary resource can edit this field if the activity has started.

Duration section:

Planned field

The expected number of work periods required to complete the selected activity.

Actual field

The total working time from the activity **Actual Start** date to the **Actual Finish** date for completed activities, or the total working time from the **Actual Start** date to the data date for in-progress activities.

The actual working time is computed using the activity's calendar.

Remaining field

The number of work periods needed to complete the activity.

Labor Units section:

Planned field

The expected number of labor units required to complete the activity.

Actual field

The number of labor units that have been expended on the selected activity.

Remaining field

The number of labor units required to complete the activity.

Non-Labor Units section:

Planned field

The expected number of non-labor units required to complete the activity.

Actual field

The number of non-labor units that have been expended on the selected activity.

Remaining field

The number of non-labor units required to complete the activity.

Total Costs section:

Planned field

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The planned total cost for the activity, including labor resources, nonlabor resources, and project expenses.

Calculated as **Planned Labor Cost** plus **Planned Nonlabor Cost** plus **Planned Expense Cost**.

Actual field

The actual total cost incurred for the activity as of the project data date.

Calculated as **Actual Labor Cost** plus **Actual Nonlabor Cost** plus **Actual Material Cost** plus **Actual Expense Cost.**

Remaining field

The remaining total cost for the activity, including labor resources, nonlabor resources, and project expenses.

Calculated as **Remaining Labor Costs** plus **Remaining Nonlabor Costs** plus **Remaining Expense Costs**.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand any portlet containing activities.
4. In the portlet, click an activity.
5. On the **Activity Form** page, expand the **Status** section.

Step Templates Page

Overview

Use this page to add and configure step templates.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

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Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Template Name field

The name of the activity step template.

Step Count field

The number of steps assigned to each template.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Steps detail window

See Steps Detail Window of the Step Templates Page.

Getting Here

To access enterprise data:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Step UDFs**.

Step UDFs Page

Overview

Use this page to add and configure user defined fields for steps.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

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Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently. The item will be deleted permanently.

User Defined Field field

The name of the user defined field. This column is always visible on this page.

Data Type list

The name of the type of data that corresponds to each user-defined field. The data type you select determines the type of data you can specify in a field. The following data types are available:

Text: Allows you to use text or a combination of text and numbers.

Start Date: Allows you to enter Start Date information only.

Finish Date: Allows you to enter Finish Date information only.

Cost: Allows you to enter currency values.

Number: Allows you to use numerals with two decimal places.

Integer: Allows you to use numeric data, but not a number related to money.

Indicator: Allows you to use an indicator field that you can use to icons in columns.

This column is always visible on this page.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

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Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

> **Tip**
>
> - Right-click any field to add or delete a UDF.
> - When a user-defined field (UDF) is deleted, all its values are also deleted from all of their respective appearances throughout the application. This includes user interface views, activity views, calculated UDFs, reports, Activity Networks, filters, sorts, groupings, waterlines, and columns.

Getting Here

To access enterprise data:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Step UDFs**.

Steps Detail Window of the Activities Page

Overview

Use this detail window to add new steps, add a predefined group of steps, remove or revise a step, or report completed progress. Select the step name to edit it.

Screen Elements

Add

Adds a new row to the list.

Assign... button

Opens the **Select Activity Step Template** dialog box.

Customize View

Opens the Customize View dialog box.

Context menu

Add: Adds a new item to the list.

Delete: Deletes the selected item.

Move Up: Moves an item up the list.

Move Down: Moves an item down the list.

Step Name field

The name of the activity step which is unique to the activity.

Step % Complete field

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The completed percentage for each step.

Step Weight field

The weight assigned to the step.

Step weight indicates the step's importance to the activity. The higher the value, the greater the importance. Step weight is used to calculate Physical Percent Complete and Activity Percent Complete.

If you do not enter a step weight, the application assigns the step a default weight of one.

Step Description field

The brief narrative for the step.

The description provides more information than short names or titles. It can give background information or establish a purpose for the step. These details help differentiate between steps with similar names and are especially useful in multi-user environments.

Completed option

Determines whether the step has been completed.

Step Weight Percent field

The step weight as a percentage.

Calculated as (**Step Weight** divided by **Sum of Weight** for all steps) multiplied by 100.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **Steps** detail window.

Steps Detail Window of the Step Templates Page

Overview

Use this detail window to add, organize, and weigh steps in a step template.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Customize View

Opens the Customize View dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

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Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Step Name field

The name of the step in the step template.

Description field

The description of the activity step.

Weight field

The weight of each corresponding step. To indicate the portion of activity work that a single step represents, you can assign it a numerical value, or step weight.

Once work for a step is underway, P6 can use the step weight and the reported progress of step work (Step Percent Complete) to calculate the percentage of total work that has been completed for the activity (Activity Percent Complete).

Getting Here

To access enterprise data:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Activities** and click **Step Templates**.
3. On the **Step Templates** page, click the **Steps** detail window.

Steps Section of the Activity Form Page

Overview

Use this section to review existing activity steps and their status. You can customize the data columns in the Steps section to display percent complete and user defined fields. If you are the primary resource, you can report steps as completed and, depending on administrative and security settings, you can edit user defined fields associated with steps.

Screen Elements

Add Steps link

Opens the add steps page.

Add Steps from Templates link

Opens a dialog box to search and select a template to apply.

Step Name field

The name of the activity step which is unique to the activity.

Step Weight field

The weight assigned to the step.

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Step weight indicates the step's importance to the activity. The higher the value, the greater the importance. Step weight is used to calculate Physical Percent Complete and Activity Percent Complete.

If you do not enter a step weight, the application assigns the step a default weight of one.

Step Weight Percent field

The step weight as a percentage.

Calculated as (**Step Weight** divided by **Sum of Weight** for all steps) multiplied by 100.

Step % Complete field

The completed percentage for each step.

Completed field

The status of the step.

Displays *Yes* if the step is complete and *No* if the step is not complete.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand any portlet containing activities.
4. In the portlet, click an activity.
5. On the **Activity Form** page, expand the **Steps** section.

Store Period Performance Log dialog box

Overview

Use this log to view details for a Store Period Performance service.

Screen Elements

Started Store Period Performance on field

The date and time the Store Period Performance service began.

Store Period Performance as user field

The user name of the user who originated the service.

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> **Tip**
>
> To view the Store Period Performance Log, you must first store the period performance for a project.

Getting Here

1. Click the **User** menu and select **View Service Status...**.
2. In the **Service Status** dialog box, select a Store Period Performance job and click **View Log**.

Stored Images Page

Overview

Use this page to upload images to be used in the header or footer of printed pages. You can upload images in JPEG, JPG, TIFF, TIF, GIF, BMP, or PNG format.

Screen Elements

Add... button

Enables you to select an image file.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Customize View

Opens the Customize View dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Delete: Removes the selected item or association permanently.

Duplicate: Creates a new item as a copy of the selected item.

Download Image: Enables you to download the image file.

Set to Default: Sets the selected image as the default.

Name field

The file name of the uploaded image.

Thumbnail field

A small view of the image.

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Default option

Indicates that the selected image is the default.

Purpose field

The application from which the image was uploaded.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Modified By field

The name of the person who last modified the item.

Modified Date field

The date and time the item was last modified.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Stored Images**.

Successors Section of the Relationships Section of the Activity Form Page

Overview

Use this section to view successor relationships.

Screen Elements

Project ID field

The unique identifier of the project containing the successor activity.

Activity ID field

The unique identifying code for the successor activity.

Activity Name field

The name of the selected activity's successor.

Relationship Type list

The relationship between two activities. Select from the following types:

Finish to Start: A relationship in which the start of a successor activity depends on the completion of its predecessor activity. This is the default activity relationship.

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Finish to Finish: A relationship in which the finish of a successor activity depends on the finish of its predecessor activity.

Start to Start: A relationship between activities in which the start of a successor activity depends on the start of its predecessor.

Start to Finish: A relationship between activities in which a successor activity cannot complete until its predecessor activity starts.

Lag field

The amount of time the predecessor activity was delayed, affecting the ability of its successor activity to start or finish. Lag can be positive (indicating a delay) or negative (indicating that the successor can begin a set time before the predecessor completes).

This value is specified by the project manager and is used by the project scheduler when scheduling activities.

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand any portlet containing activities.
4. In the portlet, click an activity.
5. On the **Activity Form** page, expand the **Relationships** section

Summary Indicators Detail Window of the Project UDFs Page

Overview

Use this detail window to define one or more graphical indicators to appear with the currently selected project user-defined field when its values are summarized or grouped in bands. The parameters you define are based on the relationship between your UDF summary value and other values or fields.

Screen Elements

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently. The data will no longer be available to views, filters, calculations, reports, and waterlines.

Parameter field

The comparison operator expressing the relationship between the project UDF summary value and the value, range, or field you specify. When you select a parameter of **is within range of** or **is not within range of**, the value or field you enter in the **Value** column represents the low values in the range, and the **High Value** column represents the high values in the range.

Low Value Type options

Determines whether the project UDF summary value should be compared with a value you specify or a field value.

Value field

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The manually-specified value or field-supplied value used for the logical comparison in order to define this summary indicator. When you select a comparison parameter of **is within range of** or **is not within range of**, the value or field in this column represents the low value in the range.

High Value Type options

For comparison parameters of **is within range of** or **is not within range of** only, determines whether the project UDF summary value should be compared with a range defined by a high value you specify or determined by a field value.

High Value field

The manually-specified value or field-supplied value representing the high value of the optional range used in the comparison parameter for the summary indicator.

Indicator field

The graphical icon used to symbolically represent a specific project UDF summary value relative to another value, range, or relationship you define.

Bubble Color field

The color used in portfolio view bubble charts to represent this project UDF summary value or range relative to others.

Getting Here

To access from enterprise data:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project UDFs**.
3. On the **Project UDFs** page, select a user-defined field and click the **Summary Indicators** detail window.

Summary Tab of the Global Calendars Page

Overview

Use this tab to view a summary of all the settings for a selected global calendar.

Screen Elements

Standard Work Week area:

Standard Work Week table

Enables you to see an overview of the work time periods configured for each day of the week in the calendar.

Time Periods area:

Hours per Time Period fields

The values that will be used as conversion factors when users choose to display time units and durations in units other than hours.

Exceptions area:

Date Range options

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Determines the Start and Finish of the date range for which you want to view exceptions.

Print

Opens the Print Options dialog box.

Exceptions table

Enables you to see a list of all the exceptions configured for the calendar within the selected date range.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Global Calendars**.
3. On the **Global Calendars** page, click the **Summary** tab.

Summary Tab of the My Calendar dialog box, Project Calendars page, or Resource Calendars Page

Overview

Use this tab to view a summary of all the settings for your personal calendar, a project calendar, or a resource calendar.

Screen Elements

Standard Work Week area:

Standard Work Week table

Enables you to see an overview of the work time periods configured for each day of the week in the calendar.

Time Periods area:

Hours per Time Period fields

The values that will be used as conversion factors when users choose to display time units and durations in units other than hours.

Base Calendar area:

Base Calendar field

The global calendar that is assigned to the calendar to determine work days, nonwork days (for example, global holidays), and calendar exceptions.

For example, multinational corporations will have one or more global calendars per country to represent global holidays for each region. Exceptions are used when the standard work day is modified.

Exceptions area:

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Date Range options

Determines the Start and Finish of the date range for which you want to view exceptions.

Print

Opens the Print Options dialog box.

Exceptions table

Enables you to see a list of all the exceptions configured for the calendar within the selected date range.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

From the Enterprise Data page:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page:
   - Expand **Resources** and click **Resource Calendars**.
   - Or expand **Projects** and click **Project Calendars**
3. On the **Resource Calendars** or **Project Calendars** page, click the **Summary** tab.

From the My Calendar dialog box:

1. Click the **User** menu and select **My Calendar**.
2. In the **My Calendar** dialog box, select the **Summary** tab.

Summary Tab of the View Calendar Dialog Box of the Activities Page, EPS Page, Assignments Page, or Resources Page

Overview

Use this tab to view a summary of all the settings for the calendar.

Screen Elements

Standard Work Week area:

Standard Work Week table

Enables you to see an overview of the work time periods configured for each day of the week in the calendar.

Time Periods area:

Hours per Time Period fields

The values that will be used as conversion factors when users choose to display time units and durations in units other than hours.

Base Calendar area:

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Base Calendar field

The global calendar that is assigned to the calendar to determine work days, nonwork days (for example, global holidays), and calendar exceptions.

For example, multinational corporations will have one or more global calendars per country to represent global holidays for each region. Exceptions are used when the standard work day is modified.

Exceptions area:

Date Range options

Determines the Start and Finish of the date range for which you want to view exceptions.

Exceptions table

Enables you to see a list of all the exceptions configured for the calendar within the selected date range.

Getting Here

From the Activities page:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select an activity.
   b. Click **Context** and select **View Calendar**.
3. In the **View Calendar** dialog box, select **Summary**.

From the EPS page:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project.
   b. Click **Context** and select **View Calendar**.
3. In the **View Calendar** dialog box, select **Summary**.

From the Assignments page:

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. On the **Assignments** page:
   a. Select an assignment.
   b. Click **Context** and select **View Calendar**.
3. In the **View Calendar** dialog box, select **Summary**.

From the Resources tab:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab:
   a. Select a resource.

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b. Click **Context** and select **View Calendar**.

4. In the **View Calendar** dialog box, select **Summary**.

Tasks Detail Window of the Activities Page

Overview

Use this detail window to view tasks for a project integrated from Primavera Cloud. The data in this detail window is read only.

Screen Elements

Customize View

Opens the Customize View dialog box.

Task ID field

The ID of the task.

Task Name field

The name of the task.

Company field

The company associated with the task.

Duration field

The duration of the task.

Due Date field

The date by which the task is due to be completed.

Proposed Due Date field

The proposed due date of the task in Oracle Primavera Cloud. This date is proposed by a contractor.

Status field

The current status of the item.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **Tasks** detail window.

Team Member and P6 Mobile tab of the Consent Notice Page

Overview

Use this page to configure and audit consent notices for P6 Team Member Web, P6 for Android, and P6 for iOS.

Screen Elements

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Copy P6 EPPM and P6 Professional Message option

Copies the text and formatting from the Consent Message in the P6 EPPM and P6 Professional tab into the Consent Message box.

Consent Message section

Preview button

Shows a preview of the consent notice as users will see it.

Consent Message field

The consent message that will be shown to users.

Status of user acceptance section

Forget all users acceptance button

Sets the consent status of all users to Not Responded. All users will be asked to accept consent again.

Enable Consent Notice list

Determines which actions will cause the consent notice to be displayed to users.

Print

Prints the current page, table, chart, or item.

Search

Enables you to perform a search based on the value you enter in the search bar.

Enabled or **Disabled** indicator

Shows whether the specified action will cause the consent notice to be displayed to users.

Context menu

Email User for Consent Rejection: Sends an email to the selected users about their consent status.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Consent Notice**.
3. On the **Consent Notice** page, click **Team Member and P6 Mobile**.

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Team Member Tab of the Project Preferences Dialog Box of the EPS Page

Overview

Use this tab to configure fields for team members' status updates, activity updates and status reviews in P6 Team Member interfaces, P6 for Android, or P6 for iOS for the selected project. If an EPS node is selected, the data shown here represents the default settings for the fields.

Screen Elements

Status Updates section

My Activities area

Team Members are required to status at: options

Assignment Level: Determines whether team members using P6 Team Member interfaces, P6 for Android, or P6 for iOS should report status against resource assignments.

Activity Level: Determines whether team members using P6 Team Member interfaces, P6 for Android, or P6 for iOS should report status for the project against activities.

As Owner: Detemines whether team members report status against activities as the activity owner.

As Primary Resource: Detemines whether team members report status against activities as the primary resource.

If you select both the Assignment Level and Activity Level options and select that Team Members report As Primary Resource, Team Members who are both the primary resource and owner of an activity will see two tiles in the My Activities page:

- The tile which allows the team member to log time against the assignment represents their role as the primary resource.
- The tile which also allows the team member to change the percent complete for the activity represents their role as the owner.

If team members are assigned Team Member work distribution filters, the activity owner option must be selected.

Assignment Fields area

+ Add button

Adds a new row enabling you to choose a field for resource assignments or activity owners to use in P6 Team Member interfaces, P6 for Android, or P6 for iOS to status their activities.

Assignment Fields list

The fields you want team members assigned as resource assignments to use to status their activities.

Activity Fields area

+ Add button

Adds a new row enabling you to choose a field for resource assignments or activity owners to use in P6 Team Member interfaces, P6 for Android, or P6 for iOS to status their activities.

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Activity Fields list

The fields you want team members assigned as activity owners or users assigned Team Member work distribution filters to use to status their activities.

> **Note**
>
> If steps are used to calculate Activity % Complete and Percent Complete Type is set to Physical for an activity, Activity % Complete is calculated from the steps and is not editable.

General area

When updating actual units, team members update via: options

Additional Time Spent: If this option is selected, Team Members will enter time into the Log Additional Time field, which will then automatically be added to time spent.

Total Time Spent: If this option is selected, Team Members will enter time directly as Time Spent.

Show fields in My Activities and Timesheets options

Determines whether team members using P6 Team Member interfaces see planned units, primary baseline dates, total float, and discussions in the My Activities and Timesheets pages.

Timesheets area

Select the field team members use to status activities in Timesheets view options

Determines whether team members using P6 Team Member interfaces, P6 for Android, or P6 for iOS should report status for the project as Percent Complete or Remaining Units.

Allow primary resources to mark activities as complete without approval option

Determines whether team members using P6 Team Member interfaces and assigned as the primary resource on the activity can mark activities as complete without the change requiring approval in the activities page of P6.

Allow primary resources to update activity dates option

Determines whether team members using P6 Team Member interfaces and assigned as the primary resource on the activity can update the dates of an activity in a timesheet.

Activity Updates section

Team members can: options

Determines the actions team members can take using P6 Team Member Web, P6 for Android, or P6 for iOS.

Add and delete steps: Determines whether team members can add and delete steps for activities. If you do not choose this option and steps are added to the activity, team members can view the steps, enter the % Complete, and mark the steps complete.

Update notebooks: Determines whether team members can update notebooks on activities.

Status other resource assignments: Determines whether team members can provide status for other resources.

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Warn team members when their update might put the activity out-of-sequence option

Determines whether team members using P6 Team Member interfaces will see a warning message when an update they attempt to make to an activity could result in the activity being out-of-sequence according to the schedule logic.

> **Note**
>
> Completed predecessors and relationships with activities in other projects are ignored when P6 checks for updates that might put an activity out-of-sequence.

Add Code or UDF button

Adds a new row enabling you to choose a global activity code, EPS activity code, activity UDF, project code, or project UDF.

Code or UDFs list

The additional fields team members can view in P6 Team Member Web, P6 for iOS, or P6 for Android, or update using P6 Team Member Web or P6 for iOS.

Delete button

Deletes the row from the list.

Read Only option

Prevents users in P6 Team Member Web modifying the code or UDF.

Add Step UDF button

Adds a new row enabling you to choose a step UDF.

Step UDFs list

The step UDFs team members can view in P6 Team Member Web.

Delete button

Deletes the row from the list.

Read Only option

Prevents users in P6 Team Member Web modifying the code or UDF.

Project Details Section

Add Code or UDF button

Adds a new row enabling you to choose a global activity code, EPS activity code, or a UDF.

Activity Assignments Section

Team members can: options

Determines the actions team members can take to assign themselves to an activity using P6 Team Member Web, P6 for Android, or P6 for iOS.

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Assign themselves to activities: Determines whether team members can assign themselves to activities.

Outside assigned OBS access: Determines whether team members can assign themselves to activities even if the resource does not have access to the relevant OBS for the activity.

Assign themselves to activities with role assignments matching Team Member's role option

Determines whether team members can assign themselves to activities with unstaffed role assignments that match their role.

When assigning a resource to an existing activity assignment: options

Always use the new resource's Units/Time and Overtime factor: When this option is selected, the system updates the selected assignment to the new resource's units/time and overtime factor.

Always use current assignment's Units/Time and Overtime factor: When this option is selected, the current assignment's units/time and overtime factor are not updated.

When a resource and role share an activity assignment: options

Always use resource's Price/Unit: When this option is selected, the system updates the selected assignment to the resource's price/unit.

Always use role's Price/Unit: When this option is selected, the role's price/unit is used.

Use Assignment Proficiency: If this option is selected, the team members can assign themselves to unstaffed role assignments only if their role proficiency is greater than or equal to the selected proficiency level.

Team members can: options

Determines the actions team members can take to assign themselves or others as an activity owner using P6 Team Member Web.

Assign themselves to activities as owners: Determines whether team members can assign themselves to activities as the activity owner.

Outside assigned OBS access: Determines whether team members can assign themselves to activities as the owner even if the resource does not have access to the relevant OBS for the activity.

Reassign activities to a different owner: Determines whether team members can assign other team members to be the activity owner.

Status Reviews section

Enable review for team member status updates option

Determines if team member status update reviews are enabled for activities in the project. When the option is cleared, all team member status updates are auto-approved.

Review required by default for new activities option

Determines if all new activities added to the project require approval.

To remove this requirement for an activity, clear the **Review Required** option for the activity on the **Activities** page.

Review Type list

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Determines who can review status updates. Available options are **Anyone can review** and **Everyone must review**.

Reviewers list

The people responsible for reviewing activity updates made by team members in P6 Team Member interfaces.

Status reviewers must have the 'Add/Edit Activities Except Relationships' privilege assigned to the project security profile controlling their access to the project. A user with Admin or Project Superuser privileges can also review, update, and approve Team Member status updates.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select a project or EPS node, click the **Context** menu and select **Set Project Preferences**.
3. Click the **Team Member** tab.

Team Usage Page

Overview

Use this page to view cost or usage data at the team level and for individual roles and resources assigned to the project you are working with. Information is displayed in a spreadsheet and chart format.

Screen Elements

Resource button

Enables you to filter the current page with data from Resources.

Role button

Enables you to filter the current page with data from Roles.

Show usage for list

Enables you to filter the current page with data from all projects or open projects. If you select to show usage for all projects, P6 shows usage data for all projects for resources assigned in the projects you have open.

Display list

Enables you to select whether to show units or costs.

Full Screen

Expands the current work area so it fills the entire display.

Customize View

Opens the Customize View dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

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Go to date selector

Enables you to move the spreadsheet and histogram or chart to show a specific timeframe.

Spreadsheet area

Enables you to view the page as a spreadsheet. The spreadsheet displays project data in a timescaled row and column format.

To see earlier time periods, click « **Show 10 More**. To see later timer periods, click » **Show 10 More**.

> **Note**
>
> An application level setting determines whether cost spreads account for changes in resource and role rates over time.

Download link

Enables you to download the currently displayed data as a Microsoft Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all columns are downloaded.

Collapse Dock

Collapses the dock. To view the dock on the right of the page, click **Dock Right**. To view the dock at the bottom of the page, click **Dock Bottom** .

Resource Usage or **Role Usage** detail window

The usage chart displays a graphical view of frequencies for the selected role or resource. To display a dialog box containing units or costs information, hover over a bar on the chart..

Codes detail window

The Codes detail window shows the codes values assigned to the selected resource, role, or project.

UDF detail window

The UDF detail window displays a list of UDFs assigned to the selected resource or project.

> **Note**
>
> An application level setting determines whether cost spreads account for changes in resource and role rates over time.

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Tip

- To view rolled up data for assignments in projects to which you do not have access, customize your view and on the General tab, select to show usage for All projects and select the Include assignments in restricted projects option.
- Under/Overallocated is calculated as Allocated minus Limit. Overallocated values are highlighted with a red background. Underallocated values are negative.
- To show a label for unit values, select **Show unit label** in the Time Units Format section of the Global tab of the My Preferences page.
- For units display, if the project team includes any material resources when you select the project name in the hierarchy, dashes display in the histogram and spreadsheet instead of team summary bars or totals. This occurs because summing unit values for mixed resource types does not provide an accurate total since labor and non-labor resources are usually associated with time (such as hours or days), and material resources are often expressed in non-time units of measure.
- The project must be published with resource and role data before data can be shown in the spreadsheet or histogram. To ensure resource and role data is published with project data, select the Publish resource and role data option in the Project Publication section of the Services page of Application Settings.
- To view a list of activities for a role or resource, expand the row for the role or resource and click a project name in the spreadsheet.
- To view a list of active resources who can fill a selected role, click a role name in the spreadsheet.
- When viewing activities for a resource, the start and finish dates, remaining units, and units percent complete fields contain values for the resource, not the activity. Therefore, the resource information might not match the corresponding information for the activity.

Getting Here

1. On the ☰ **Navigation Menu**, expand **Projects** and click **Team Usage**.

Time Periods Page

Overview

Use this page to define the number of hours in a given time period. You can also specify abbreviations for time units.

Screen Elements

Hours per Time Period fields

The values that will be used as conversion factors when users choose to display time units and durations in units other than hours.

Use assigned calendar to specify the number of work hours for each time period option

Determines whether to use the assigned calendar's Hours per Time Period values as the conversion factors when users choose to display time units and durations in units other than

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hours. If your resources and activities require different hours per time period settings, select this option, then specify the Hours per Time Period in each defined calendar.

If you select the **Use assigned calendar to specify the number of work hours for each time period** option, the **Hours per Time Period** values on this tab are ignored and the application converts units and durations using the **Hours per Time Period** values defined in the activity's or resource's assigned calendar. Using a task-dependent activity as an example, P6 converts units and durations for the activity using the settings defined in the activity's assigned calendar.

You should enter **Hours per Time Period** values on this tab even if you mark the **Use assigned calendar to specify the number of work hours for each time period** option since those values will still be used for planning resources and WBS views in P6 and Global Change in P6 Professional.

In these cases, the **Use assigned calendar to specify the number of work hours for each time period** option will be ignored even if selected.

If you clear the **Use assigned calendar to specify the number of work hours for each time period** option, the **Hours per Time Period** values that you specify on this tab are always used to convert time units and durations.

Time Period Abbreviations fields

The abbreviations for minutes, hours, days, weeks, months, and years.

Getting Here

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Time Periods**.

Timesheet Notes Dialog Box

Overview

Use this dialog box to view all timesheet notes in the history and to add new notes.

Screen Elements

Timesheet Notes History field

The notes added for the timesheet.

Each note is automatically stamped with the date, time, and user name when added. The notes are listed in chronological order.

Add Note area

A text entry area where you may enter a note about the current timesheet for the selected resource.

For example, "Up to 20 hours of additional work is approved for this week."

The entry area supports multiple lines of text. Up to 20,000 characters may be added. The field will automatically scroll down as you enter text.

Getting Here

1. On the **Navigation Menu**, expand **Approvals** and click **Timesheets**.

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2. Select a resource's timesheet and select **View Notes**.

Timesheet Periods Page

Overview

Use this page to view, add, and delete customized timesheet periods or batches of timesheet periods. For example, if resources are paid every other Friday, you would add 26 timesheet periods for an entire year with each period representing two work weeks. You must first create timesheet periods before timesheet users can view and enter time on their timesheets.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Actions menu

Generate Timesheet Periods: Enables you to create a batch of timesheet periods.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Start Date field

The date the timesheet period begins.

Finish Date field

The date the timesheet period ends.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Timesheet Periods**.

Timesheet Table of the Timesheets Page

Overview

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Use this table to view resource timesheet data.

Screen Elements

Group By List

Arranges similar values in a table or list into groups based on a selected field.

None: Organizes risk thresholds alphabetically without grouping them into categories.

Levels: Organizes risk thresholds into level categories.

Type: Organizes risk thresholds into type categories.

Approve button

Enables you to approve the selected timesheets. You can only approve timesheets if you have the appropriate privileges.

Reject button

Rejects the selected resource timesheets. You can only reject timesheets if you have the appropriate privileges. An administaror can configure P6 to prevent timesheets from being rejected if they were submitted before the current week, before the current month, or at all.

Actions menu

Assign Resource Manager Delegate: Enables you to assign an alternate user as a temporary substitute for the approving resource manager.

Assign Project Manager Delegate: Enables you to assign an alternate user as a temporary substitute for the approving project manager.

Expand All

Enables you to see all of the items in a hierarchical list.

Collapse All

Enables you to hide subordinate items in a hierarchical list.

Refresh

Refreshes the current screen with any new, updated, or removed data.

Customize View

Opens the Customize View dialog box.

Print

Prints the Grid View.

Send Email

Enables you to send selected information about the current item to one or more recipients through email.

Full Screen

Expands the current work area so it fills the entire display.

Search

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Searches the view or dialog box for data matching the criteria entered into the box.

Table area

Context menu

Approve: Enables you to approve the selected timesheet. You can only approve timesheets if you have the appropriate privileges.

Reject: Rejects the selected resource timesheet. You can only reject timesheets if you have the appropriate privileges.

Email: Enables you to send selected information about the timesheet to one or more recipients through Email.

View Notes: Enables you to view the most recent note in the current resource's timesheet note history, to view all notes in the history, or to add a new note.

End Date field

The last day of the timesheet period for the selected timesheet.

Start Date field

The first day of the timesheet period for the selected timesheet.

Last Date Status Changed field

The date when this timesheet's status was last modified.

Last Reviewer field

The user who most recently reviewed the timesheet.

Overhead Reg/OT field

The sum of the number of overhead hours and overhead overtime hours.

Project Reg/OT field

The sum of the number of regular hours and standard overtime hours.

Resource ID field

The unique identifier for the resource.

Resource Name field

The name of the resource.

Reviewed Date field

The date when the timesheet was last reviewed.

Status field

The current state of the timesheet.

Submitted Date field

The date the timesheet was submitted.

Total Hours field

The sum of the hours in the **Project Reg/OT** and **Overhead Reg/OT** fields.

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Download link

Enables you to download the currently displayed data as a Microsoft Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all columns are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Approvals** and click **Timesheets**.

Timesheets Page

Overview

Use this page to process timesheets. This includes approving or rejecting timesheets, notifying resources about timesheet status, adding timesheet notes, and determining if a resource has not started or has not submitted a timesheet. If you are a timesheet approval manager, you can assign delegates to act in your place when you are not available.

This page displays a filter dock, timesheet table, and a detail dock. The timesheet table lists timesheets, if any, for the time period and filter criteria you specify. For each timesheet you select, the detail dock displays a breakdown of the number of regular, overhead, and total hours for the associated resource. In both tables, you can group and sort based on predefined criteria, customize the columns that appear, search for timesheets or activities, and print.

Screen Elements

Approving As list

The type of manager approving the timesheets. For example, Project Manager or Resource Manager.

This field is automatically populated based on your module access and timesheet approval rights (Project Manager or Resource Manager) and is read-only unless you have rights to approve as a Project Manager and Resource Manager; you must select one option. If you are a delegate approval manager, this field displays the type of manager who delegated approval rights to you (Project Manager or Resource Manager), along with the approval manager's personal name; for example, *Project Manager delegate for John Doe*.

Action Required button

Filters the view to show only timesheets which require your action in the role you select in the **Approving As** list and according to the filters you have configured in the filter dock.

All Timesheets button

Filters the view to show all timesheets to which you have access in the role you select in the **Approving As** list and according to the filters you have configured in the filter dock.

Filter dock

Determines the timesheets which appear in the list. The list of timesheets you see also depends on the selection you make on the **Approving As** list and whether you are viewing only timesheets with **Action Required**, or **All Timesheets**.

Time frame list: Enables you to filter the list by timesheets submitted in the Last week, Last 3 weeks, Last month, Last 3 months, Last 6 months, or in a Custom date range.

Start Date field: The start date of the Custom time frame. This field is only visible if Custom is selected on the **Time frame** list.

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End Date field: The end date of the Custom time frame. This field is only visible if Custom is selected on the **Time frame** list.

Status section:

All option: Shows timesheets of all statuses.

Approved option: Shows timesheets which have been approved. This option is only visible if you are viewing **All Timesheets**.

Not Started option: Shows timesheets which have not been started. This option is only visible if you are viewing **All Timesheets**.

Not Submitted option: Shows timesheets which have been started but have not been submitted. This option is only visible if you are viewing **All Timesheets**.

PM Approved option: Shows timesheets which have already been approved by a project manager.

RM Approved option: Shows timesheets which have already been approved by a resource manager.

Rejected option: Shows timesheets which have been rejected by a timesheets approval manager. This option is only visible if you are viewing **All Timesheets**.

Resubmitted option: Shows timesheets which have previously been rejected and then resubmitted.

Submitted option: Shows timesheets which have been submitted.

Cancel button: Cancels any changes you have made to the fields and options in the Filter dock.

Apply button: Applies the filters configured in the Filter doc to the timesheet list.

Collapse Dock: Collapses the Filter dock.

Timesheet table

See Timesheet Table of the Timesheets Page.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded. Only the Timesheet table is included in the Excel file.

Collapse Dock

Collapses the **Details** dock.

Details dock

See Details Dock of the Timesheets Page.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Approvals** and click **Timesheets**.

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Timesheets Page

Overview

Use this page to specify default timesheet options and approval levels in P6 Team Member interfaces, P6 for Android, or P6 for iOS.

Screen Elements

General:

Allow resources to assign themselves to activities by default option

Determines whether you want every newly created project to grant permission for resources to assign themselves to activities. When you change this setting, it does not affect existing projects; the new setting is applied only when a new project is created. For individual projects, you can override this setting on the Project Preferences dialog box in the EPS page.

Allow resources to assign themselves to activities outside assigned OBS access option

Determines whether you want every newly created project to grant permission for resources to assign themselves to activities even if the resource does not have access to the relevant OBS for the activity. When you change this setting, it does not affect existing projects; the new setting is applied only when a new project is created. For individual projects, you can override this setting on the Project Preferences dialog box in the EPS page.

Assign themselves to activities with role assignments matching Team Member's role option

Determines whether team members can assign themselves to activities with unstaffed role assignments that match their role.

Enable timesheet auditing option

Determines whether you want to save the history of timesheet submission, approval, rejection, reviewers, and associated dates. To view the historical data, you must create reports using your P6 reporting software.

Enable email notifications option

Determines whether you want timesheet approval managers to be notified by email when a timesheet is rejected. If this option is enabled, when a timesheet is rejected an email will be sent to all Project Managers and their delegates, Resource Managers and their delegates, users with the Admin Superuser profile, and users with the Project Superuser profile assigned for any projects included in the timesheet. This function requires that the relevant users have an email address associated with their user profile. The manager who rejected the timesheet will not receive an email notification.

Prevent users from rejecting approved timesheets option

Determines whether you want to prevent users from rejecting approved timesheets and if so within which time period.

To prevent users from rejecting any approved timesheets, select **All** in the Timeframe list.

To prevent users from rejecting timesheets approved during the previous calendar month or earlier, select **Last month or before** in the Timeframe list.

To prevent users from rejecting timesheets approved during the previous week or earlier, select **Last week or before** in the Timeframe list.

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Timesheet hours display list

Select how you want approvers to see hours when approving timesheets. Select **hours (decimal)** if you want approvers to see hours as a decimal number, for example 2.33. Select **hours:minutes** if you want approvers to see hours and minutes, for example 2:20. Select **quarter-hour** if you want approvers to see hours rounded to the nearest quarter-hour, for example 2:15.

Approving Timesheets:

Auto Submission - No submission or approval is required option

Select to indicate that resource timesheets do not need to be submitted or approved.

Auto Approval - Automatically approve upon submission option

Select to indicate that resource timesheets do not require management approval. Timesheets are approved automatically when they are submitted.

One approval level - Resource manager approval required option

Select to indicate that resource timesheets require approval by the resource manager only. If you select this option, the status of all submitted timesheets remains **Submitted** until the approving manager changes the timesheet's status. If you previously required both project manager and resource manager approval, and you select this option, the status of all current timesheets that have received one level of approval changes to **Approved**.

Two approval levels - Project and Resource managers' approval required option

Select to indicate that resource timesheets require approval by project and resource managers. If you select this option, the status of all submitted timesheets remains "Submitted" until both managers approve the timesheet.

Project manager must approve before Resource manager option

Determines whether project managers must approve timesheets before resource managers. The **Two Approval Levels** option must be selected to enable this option.

Default Resource manager approving timesheets when one or two approval levels required field

Select the approver you want to approve timesheets for resources. The default approver will be assigned each time you create a resource who uses timesheets.

Getting Here

1. On the **Navigation Menu**, expand **Administration**, then click **Application Settings**.
2. On the **Application Settings** page, click **Timesheets**.

Tolerance Detail Window of the Risk Scoring Matrices Page

Overview

Use this detail window to view the tolerance threshold assigned to the selected risk scoring matrix.

Screen Elements

Code field

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The short name for the threshold level.

Name field

The name of the threshold level.

Range field

The threshold range values defined for the tolerance assigned to the risk scoring matrix.

Color field

The color representing the threshold in the score field or probability and impact diagram (PID).

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Risks** and click **Risk Scoring Matrices**.
3. On the **Risk Scoring Matrices** page, click the **Tolerance** detail window.

Trace Logic Detail Window of the Activities Page

Overview

Use this detail window to view activity relationships using trace logic.

Screen Elements

Zoom In

Magnifies items in the work area so they appear larger.

Zoom Out

Minimizes items in the work area so they appear smaller.

Zoom to 100%

Restores the magnification of the current work area to its default size of 100%.

Zoom to Fit

Adjusts the height and width or timescale of the current view to fit as much of the data as possible into the current work area.

Predecessor Levels field

The number of predecessor levels to show for the selected activity.

Successor Levels field

The number of successor levels to show for the selected activity.

Trace Logic work area

The area in which you can view and trace logic relationships.

Activity boxes outlined in red are critical activities. Solid red lines between boxes represent critical relationships. Solid lines represent driving relationships, while dashed lines represent non-driving relationships. The selected box has a heavy blue border. Boxes with a black

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diamond in the corner represent milestones. A status icon in the corner of the box identifies **In Progress**, **Completed**, and **Critical** activities.

Activity boxes show the Activity Name, Activity ID, Start Date and Finish Date. You cannot customize activity boxes in Standard View.

> **Tip**
>
> If you have more than one activity or a grouping band selected, the detail window will not be visible.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **Trace Logic** detail window.

UDF Detail Window of the Activities Page

Overview

Use this detail window to see all the UDFs and their values assigned to the selected activity. You can also create or remove a UDF assignment.

> **Note**
>
> You can only assign cost UDFs to activities here if you have the *Edit WBS Costs/ Financials* privilege assigned for this project.

Screen Elements

Assign... button

Opens the Select UDF dialog box.

Group By list

Groups the data according to your selection.

Search

Enables you to perform a search based on the value you enter in the search bar.

User Defined Field field

The name of the user defined field.

Value field

The value of the user defined field.

Data Type field

The data type of the user defined field.

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Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity and click the **UDF** detail window.

UDF Detail Window of the Assignments Page

Overview

Use this detail window to see all the UDFs and their values assigned to the selected resource or role assignment. You can also create or remove a UDF assignment for a resource or role assignment.

You can also view assigned project, WBS, activity, resource, and role UDFs when you select the relevant grouping band. The data you see in project, activity, resource, and role grouping bands is read only on this page.

Screen Elements

Assign... button

Opens the Select UDF dialog box. To see this button, you must select an assignment.

Group By list

Groups the data according to your selection.

Search

Enables you to perform a search based on the value you enter in the search bar.

User Defined Field field

The name of the user defined field.

Data Type field

The data type of the user defined field.

Value field

The value of the user defined field.

Getting Here

1. Click **Navigation Menu**.
2. On the **Navigation Menu:**
   - Expand **Projects** and click **Assignments**.
   - Or expand **Resources** and click **Assignments**.
3. Select an assignment.
4. Click the **UDF** detail window.

UDF Detail Window of the EPS Page

Overview

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Use this detail window to see all the UDFs and their values assigned to the selected project. You can also create or remove a UDF assignment.

All formula UDF that can calculate a value for the selected project are also visible here.

> **Note**
>
> You can only assign cost UDFs to activities here if you have the *Edit EPS Costs/ Financials* privilege assigned for this project.

Screen Elements

Assign... button

Opens the Select UDF dialog box.

Group By list

Groups the data according to your selection.

Customize View

Opens the Customize View dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

> **Note**
>
> Only the default fields that appear as columns in the detail window are described below.

User Defined Field field

The name of the user defined field.

Data Type field

The data type of the user defined field.

Value field

The value of the user defined field.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. Select a project and click the **UDF** detail window.

UDF Detail Window of the Issues Page

Overview

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Use this detail window to see all the UDFs and their values assigned to the selected issue. You can also create or remove a UDF assignment. If you select a Project grouping row, this detail window displays a read only list of the UDFs assigned to the project.

Screen Elements

Assign... button

Opens the Select UDF dialog box. To see this button, select an issue.

Group By list

Groups the data according to your selection.

Search

Enables you to perform a search based on the value you enter in the search bar.

User Defined Field field

The name of the user defined field.

Value field

The value of the user defined field.

Data Type field

The data type of the user defined field.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Issues**.
2. Click the **UDF** detail window.

UDF Detail Window of the Resources Tab of the Administration Page

Overview

Use this detail window to see all the UDFs and their values assigned to the selected resource. You can also create or remove a UDF assignment.

Screen Elements

Assign... button

Opens the Select UDF dialog box.

Group By list

Groups the data according to your selection.

Search

Enables you to perform a search based on the value you enter in the search bar.

User Defined Field field

The name of the user defined field.

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Value field

The value of the user defined field.

Data Type field

The data type of the user defined field.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Administration** page, click the **Resources** tab.
3. Select a resource and click the **UDF** detail window.

UDF Detail Window of the Risks Page

Overview

Use this detail window to see all the UDFs and their values assigned to the selected risk. You can also create or remove a UDF assignment. If you select a Project grouping row, this detail window displays a read only list of the UDFs assigned to the project.

Screen Elements

Assign... button

Opens the Select UDF dialog box. To see this button, select a risk.

Group By list

Groups the data according to your selection.

Search

Enables you to perform a search based on the value you enter in the search bar.

User Defined Field field

The name of the user defined field.

Value field

The value of the user defined field.

Data Type field

The data type of the user defined field.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Risks**.
2. Click the **UDF** detail window.

UDFs Tab of the Import Template Dialog Box of the Import/Export Project Dialog Box

Use this tab to use, remove, or rename user defined fields present in the XML file.

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Screen Elements

User Defined Fields list

Determines how user defined fields are imported.

Select Subject Area list

Determines the area of the product for which you want to define UDFs.

Name list

Displays the name of the UDF 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.

Data Type list

Displays the data type of a UDF.

Action list

Determines if the code is used or removed.

New Name list

The new name for the code.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click the **Actions** menu and select **Manage Import Templates** or **Import/Export Projects**.
3. In the **Import/ExportProjects** dialog box:
   a. Click the **Import** tab.
   b. Click the **Import Type** list and select **Primavera XML.**
   c. Click the **File** field and select a file to import.
   d. Click the **Manage Templates** button.
4. In the **Manage Primavera Templates** or **Manager Primavera XER and XML Templates** dialog box, click the name of a template.
5. In the **Primavera Template** or **Primavera XER and XML Template** dialog box, click the **Advanced** tab.
6. On the **Advanced** tab, click the **UDFs** tab.

Units and Prices Detail Window of the Resources Tab of the Administration Page

Overview

Use this detail window to define the price/unit for up to five available rate types per effective date.

Screen Elements

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Add (Ins)

Enables you to add another line of unit and price information to the grid.

Context menu

Add: Adds a new item to the list.

Delete: Deletes the selected item.

Effective Date field

The date that the corresponding units/time period and rates go into effect for the resource.

Max Units/Time field

The maximum work units per time this resource can perform on all their assigned activities

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.

Price/Unit fields

The non-overtime rates expressed as a series of price per unit values for the resource as of the effective date.

The rates are used to compute resource assignment costs for activities. You can define up to five rates for a resource for a time span starting on the effective date. Your organization can define text titles for each rate type as part of enterprise data.

For example, enter 54 as a **Standard Rate**, 49 as an **Internal Rate**, and 64 as an **External Rate**. The application will automatically format the rates per unit of time, for example, *54/h*.

Shift Start Hour field

The start time of the assigned shift.

Shift start time is a value in a shift calendar assigned to a resource in P6 Professional. If a shift calendar is assigned to a resource, then the fields in the Units and Prices detail window are disabled. If a shift calendar does not exist for a resource, this field is disabled.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab, click the **Units and Prices** detail window.

Units and Prices Detail Window of the Roles Tab of the Administration Page

Overview

Use this detail window to define the price/unit for up to five available rate types per effective date.

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Screen Elements

Add (Ins)

Enables you to add another line of unit and price information to the grid.

Context menu

Add: Adds a new item to the list.

Delete: Deletes the selected item.

Effective Date field

The date that the corresponding units/time period goes into effect for the role.

Max Units/Time field

The maximum work units per time this role can perform on assigned activities.

This number should correspond to the number of people who can fill this role.

Price/Unit fields

The non-overtime rate for the role, which is used to compute costs for any activities to which the role is assigned.

You can define up to five rate types for a role. Your organization can define text titles for each rate type as part of enterprise data.

Getting Here

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Roles**.
3. On the **Roles** tab, click the **Units and Prices** detail window.

Units of Measure Page

Overview

Use this page to add and configure units of measure.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

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Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Unit Abbreviation field

The abbreviation for the unit name.

Unit Name field

The name of the unit of measure.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Units of Measure**.

Update Baselines Dialog Box of the Activities Page or EPS Page

Overview

Use this dialog box to update project baselines.

Screen Elements

Run Optimized option

Determines whether the application will optimize the speed of the baseline update. If you select this option and errors occur during the update, errors are not logged.

Baseline update performance is further optimized when you log in as an Admin Superuser.

Ignore Last Update Date option

Determines whether the application will update all data in the baseline, regardless of when the baseline was last updated.

When you update a baseline, the date and time are stored in the **Last Update Date** field, which you can view in the **Baselines** dialog box. Select the **Ignore Last Update Date** option if you plan to update different data types at different times.

Project Data tab

See: Project Data Tab of the Update Baselines Dialog Box of the Activities Page or EPS Page

Activity Data tab

See: Activity Data Tab of the Update Baselines Dialog Box of the Activities Page or EPS Page

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Update Options tab

See: Update Options Tab of the Update Baselines Dialog Box of the Activities Page or EPS Page

Back button

Navigates to the previous screen.

Preview button

Opens the preview screen to enable you to view the changes which will be made if you choose to update the baseline using the options you have selected.

Update button

Updates the baseline using the options you have selected.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. Click the **Actions** menu and select **Define Baselines**.
3. In the **Define Baselines** dialog box, select a baseline and click **Update Baseline**.

Update Baselines Preview Dialog Box of the Activities Page or EPS Page

Overview

Use this dialog box to view the changes that will be made if you choose to update project baselines with the currently selected settings.

Screen Elements

Subject Area list

Enables you to select the subject area for the data you want to manipulate.

Customize View

Opens the Customize View dialog box.

Filters

Enables you to constrain or reduce the quantity of data shown in the view

Print

Opens the Print Options dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Select All / Deselect All option

Indicates whether no items, some items, or all items in the list are selected.

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Activity ID field

The unique identifier of the activity.

Activity Name field

The name of the activity.

The activity name does not have to be unique.

Field Name field

The field which differs between the baseline and project.

Baseline Field Value field

The value of the field in the baseline.

Project Field Value field

The value of the field in the project.

Update Type field

The type of update that will be made to the field in the baseline.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Update button

Updates the baseline using the options you have selected.

Getting Here

From the Update Baseline dialog box:

1. On the **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.
2. Click the **Actions** menu and select **Define Baselines**.
3. In the **Define Baselines** dialog box, select a baseline and click **Update Baseline**.
4. In the **Updated Baselines** dialog box, select **Preview**.

From the View Service Status dialog box:

1. Click the **User** menu and select **View Service Status...**.
2. In the **View Service Status** dialog box, select the **Update Baseline Preview** job, then select **View Log**.

Update History Detail Window of the Activities Page

Overview

Use this detail window to view the history for all status updates saved by team members using P6 Team Member interfaces.

Screen Elements

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Show updates for list

Determines the type of updates to view.

Activity: The updated activity details if an activity owner or a user with a Team Member work distribution filter is assigned to the activity.

Activity Codes: The updated activity code details if activity codes are available for team members on a project to view and update.

Assignments: The updated activity details if one or more resource assignments are assigned to the activity.

Notebooks: The updated notebook details if notebooks are assigned to the activity.

Steps: The updated step details if steps are assigned to the team member for the activity.

UDFs: The updated UDF details if UDFs are available for team members on a project to view and update.

Filter list

Enables you to see updates made in the **Last Week**, **Last Month**, **Last 3 Months**, or **All** updates.

Customize View

Opens the Customize View dialog box.

Update History grid area:

Status field

The current state of the status review for an activity updated in a P6 Team Member interface.

Pending: An activity update was made by a team member and is awaiting approval from a status reviewer.

Added: An assignment or step was added by a team member.

Held: A hold was placed on the status update by a status reviewer.

Approved: The status update is approved.

Approval Date field

The date the activity status update was approved.

Approved By field

The person who approved the activity status update. An approver can be the assigned status reviewer, or a user with Admin or Project superuser privileges.

Submitted By field

The person responsible for the activity update.

Submitted Date field

The date the activity status update was made by the team member.

The following fields are specific to each option in the **Show updates for** list.

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Activity

Activity % Complete field

The percent of the activity that has been completed.

Actual Finish field

The date on which the activity was completed.

Actual Labor Units field

The number of units expended for the labor resources performing work on the activity.

Actual Nonlabor Units field

The number of nonlabor units that have been expended on the activity.

Actual Start field

The date work began on the activity.

Expected Finish field

The date on which the team member anticipates work on the activity will finish.

Remaining Duration field

The total working time remaining for the activity.

Remaining Labor Units field

The remaining units for all labor resources assigned to the activity.

The Remaining Labor Units reflect the work remaining to be done for the activity. Before the activity is started, the remaining units are the same as the planned units. After the activity is completed, the remaining units are zero.

Remaining Nonlabor Units field

The remaining units for all nonlabor resources assigned to the activities.

The remaining units reflect the work remaining to be done for the activity. Before the activity is started, the remaining units are the same as the planned units. After the activity is completed, there are zero remaining units.

Assignments

Actual Finish field

The date the assignment was completed.

Actual Start

The date work began on the assignment.

Actual Units field

The amount of time a team member spent working on an assignment.

Remaining Duration field

The remaining working time for the resource assignment on the activity.

Remaining Units field

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The units remaining to complete the assignment.

Steps

Pending Step Name field

The name of the step after the step name changed.

Step Name field

The name of the activity step which is unique to the activity.

Step % Complete field

The completed percentage for each step.

Activity Codes

Activity Code field

The name of the activity code with an updated value.

Value field

The new value for the activity code.

UDFs

Name field

The name of the UDF with an updated value.

Value field

The new value for the UDF.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select an activity.
3. Click the **Update History** detail window.

Update Options Tab of the Update Baselines Dialog Box of the Activities Page or EPS Page

Overview

Use this tab to determine which activity data items should be updated in the baseline.

Screen Elements

Update existing activities already in the baseline option

Determines whether to update activities that already exist in the baseline.

When updating activity data include section:

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> **Note**
>
> The following options are ignored if the 'Update existing activities already in the baseline' option is cleared.

General activity information option

Determines whether to include general information related to each activity in the baseline. This data includes the activity name, activity type, duration type, percent complete type, status, calendar, and primary resource.

Activity code assignments option

Determines whether to update project, global and EPS level activity code assignments.

Relationships option

Determines whether to update relationships between activities.

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.

WBS assignments option

Determines whether to update activties' WBS assignments.

Steps option

Determines whether to update activity steps in the baseline.

Step UDFs option

Determines whether to update step UDFs in the baseline.

Expenses option

Determines whether to update expenses assigned to activities in the baseline.

Expense UDFs option

Determines whether to update expense UDFs in the baseline.

Activity notebooks option

Determines whether to update notebooks assigned to activities in the baseline.

Constraints option

Determines whether to update constraints assigned to activities in the baseline. Both the constraint type and any associated constraint date will be updated.

Dates, duration and data date option

Determines whether to update the dates and durations of activities and the data date for the project in the baseline.

The following date fields are not updated when you select this option because they are calculated by the scheduler: Early Start, Early Finish, Late Start, and Late Finish.

Budgeted units and costs for activities without resource assignments option

Determines whether to update budgeted units and cost data for activities in the baseline.

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To update budgeted units and costs of resource assignments, select the **Budgeted units and costs** option in the **When updating resource assignment data include** section.

Actual units and costs for activities without resource assignments option

Determines whether to update the actual units and costs for activities in the baseline.

To update actual units and costs of resource assignments, select the **Actual units and cost** option in the **When updating resource assignment data include** section.

Activity UDFs option

Determines whether to update UDFs assigned to activities in the baseline.

Risk assignments option

Determines whether to update risks associated with activities in the baseline.

When updating resource assignment data include section:

Update existing resource and role assignments option

Determines whether to update all resource assignments associated with activities in the baseline.

Select further options in the **When updating resource assignment data include** section to determine what data of these resource assignments should be updated.

Actual units and cost option

Determines whether to update actual units and costs related to existing assignments for activities in the baseline.

Budgeted units and cost option

Determines whether to update budgeted units and costs related to existing assignments for activities in the baseline.

Add new resource and role assignments option

Determines whether to add new resource and role assignments to activities in the baseline.

Actual units and cost option

Determines whether to update actual units and costs related for resource assignments of activities in the baseline.

Budgeted units and cost option

Determines whether to update budgeted units and costs for resource assignments of activities in the baseline.

Activity resource assignment codes option

Determines whether to update codes related to resource and role assignments for activities in the baseline.

Activity resource assignment UDFs option

Determines whether to update UDFs related to resource and role assignments for activities in the baseline.

Getting Here

1. On the ☰ **Navigation Menu**, expand **Projects** and click **Activities** or **EPS**.

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2. Click the **Actions** menu and select **Define Baselines**.
3. In the **Define Baselines** dialog box, select a baseline and click **Update.**
4. Select the **Update Options** tab.

Used By Tab of the Financial Period Calendars Page

Overview

Use this tab to view projects assigned to the financial period calendar.

Screen Elements

Full Screen

Expands the current work area so it fills the entire display.

Print

Opens the Print Options dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

ID field

The ID of the project assigned to the calendar.

Name field

The name of the project assigned to the calendar.

Stored Data Periods list

Lists the periods with data stored for the project.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Financial Period**.
3. On the **Financial Periods** page, click the **Used By** tab.

Used By Tab of the Global Calendars Page

Overview

Use this tab to view the activities and resources assigned to projects on the selected global calendar. You can also replace the calendar assigned to activities and resources using the selected global calendar.

Screen Elements

Print

Opens the Print Options dialog box.

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Search

Searches the view or dialog box for data matching the criteria entered into the box.

ID field

The ID of the project, activity, or resource assigned to the calendar.

Name field

The name of the resource assigned to the calendar.

Context menu

Assign Global Calendar: Enables you to select a global calendar to replace the selected items' calendar assignments.

Assign Project Calendar: Enables you to select a project calendar to replace the selected items' calendar assignments. This option is available for activities and projects only.

Assign Resource Calendar: Enables you to select a resource calendar to replace the selected items' calendar assignments. This option is available for resources only.

Tip

- Resources must be assigned calendars irrespective of their assignment to activities or projects.
- If you select a project row, the replacement calendar you choose will be assigned to all the activities in the project that are currently using this calendar, as well as the default calendar for new activities for the project (as assigned in the project's preferences).

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Global Calendars**.
3. On the **Global Calendars** page, click the **Used By** tab.

Used By Tab of the Project Calendars Page

Overview

Use this tab to view the activities assigned to projects on the project calendar. You can also replace the calendar assigned to activities using the selected project calendar.

Screen Elements

Print

Opens the Print Options dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

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ID field

The ID of the project, activity, or resource assigned to the calendar.

Name field

The name of the resource assigned to the calendar.

Context menu

Assign Global Calendar: Enables you to select a global calendar to replace the selected items' calendar assignments.

Assign Project Calendar: Enables you to select a project calendar to replace the selected items' calendar assignments.

> **Tip**
>
> If you select a project row, the replacement calendar you choose will be assigned to all the activities in the project that are currently using this calendar, as well as the default calendar for new activities for the project (as assigned in the project's preferences).

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **Project Calendars**.
3. On the **Project Calendars** page, click the **Used By** tab.

Used By Tab of the Resource Calendars Page

Overview

Use this tab to view resources assigned to the resource calendar. You can also replace the calendar assigned to resources using the selected resource calendar.

Screen Elements

Print

Opens the Print Options dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

ID field

The ID of the project, activity, or resource assigned to the calendar.

Name field

The name of the resource assigned to the calendar.

Context menu

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Assign Global Calendar: Enables you to select a global calendar to replace the selected items' calendar assignments.

Assign Resource Calendar: Enables you to select a resource calendar to replace the selected items' calendar assignments.

> **Tip**
>
> Resources must be assigned calendars irrespective of their assignment to activities or projects.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Resources** and click **Resource Calendars**.
3. On the **Resource Calendars** page, click the **Used By** tab.

User Count Dialog Box of the Users Page

Overview

Use this dialog box to view the number of users assigned to each module.

Screen Elements

Export button

Exports all data as it appears in the current view to a Microsoft® Excel spreadsheet file. You can customize the current spreadsheet to display only the data you want to export.

Print

Prints the Grid View.

Module field

The name of each module. Modules represent components or distinct role-based functions of the P6 EPPM suite.

User Count field

The number of users assigned to each module.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. In the User Administration pane, click **Users**.
3. On the Users tab, click **Actions** and select **User Count...**.

User Defined Section of the Activity Form Page

Overview

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Use this section to assign and configure user defined fields for activities.

Screen Elements

Assign User Defined Fields link

Opens a dialog box for configuring user defined fields.

User Defined Field field

The name of the selected user defined field.

Click a name to display a page on which you can enter a value for the selected UDF.

User Defined Field Value field

The value of the corresponding user defined field..

Getting Here

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard, expand any portlet containing activities.
4. In the portlet, click an activity.
5. On the **Activity Form** page, expand the **User Defined** section.

User Interface Views Page

Overview

Use this page to view or configure how a user views the entire application.

Screen Elements

Add (Ins)

Creates a new User Interface View.

Full Screen

Expands the current work area so it fills the entire display.

Search

Enables you to perform a search based on the value you enter in the search bar.

Name list

The list of available user interface views.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Duplicate: Creates a new item as a copy of the selected item.

Set as Default View: Sets the selected user interface view as the default profile for new users.

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Edit View area:

Content tab

See: Content Tab of the User Interface View Details Page

Activity Editing tab

See: Activity Editing Tab of the User Interface View Details Page

Users tab

See: Users Tab of the User Interface View Details Page

> **Tip**
>
> The Search field on this page automatically adjusts the list of matching views based on the name or characters you enter. Click **Clear** in the search box for all user interface views to re-appear in the list.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Interface Views**.

Users Detail Window of the OBS Page

Overview

Use this detail window to view and assign users for a selected organizational breakdown structure (OBS).

Screen Elements

Assign button

You can assign users, by their login names, to the OBS elements to grant access to the corresponding EPS nodes or projects.

Context menu

Delete: Removes the selected item or association permanently. You must select both a single OBS element and a single user to perform this command. Only the user's assignment to the OBS element is deleted, not the actual user account.

Login Name field

The login name for the user.

Personal Name field

The personal name for the user. This name might be a nickname, full name, reference to a role or department, or include any information recognized by your organization to identify the user.

Project Security Profile field

Determines the project access granted to the user.

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Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **OBS**.
3. On the **OBS** page, click the **Users** detail window.

Users Page

Overview

Use this page to create user accounts and configure their security profiles and access privileges.

Screen Elements

Add menu

Users from LDAP: Enables you to add users from an LDAP directory.

Users from LDIF: Enables you to add users from an LDIF file.

> **Note**
>
> This option is only available if you have configured P6 with LDAP.

Add button

Enables you to create a new user. You can assign a login name, personal name, and password to the new user.

Actions menu

To see this menu, you must be logged in as a user with the Admin Superuser global security profile.

Copy User Settings: Opens the Copy User Settings dialog box. The Copy User Settings dialog box enables you to copy user settings from one user to other users. The copied settings include global and project security profiles, module access, OBS access, resource access and User Interface View access. You must have the Admin Superuser global security profile to see this menu item.

User Count: Opens the User Count dialog box. The User Count dialog box enables you to view the number of users with access to each module of the application. For example, 12 users might be assigned access to the Projects module while only 3 are assigned to the Resources module.

Expand All button

Enables you to see all of the items in the hierarchical list or grouped view. To see this option, apply grouping to the view.

Collapse All button

Enables you to hide subordinate items in the hierarchical list or grouped view. To see this option, apply grouping to the view.

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Group By field

Arranges similar values in a table or list into groups based on a selected field.

Filters menu

Hide Inactive Users: Filters out the inactive users from the view. An inactive user is one with no module assignments.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Customize View

Opens the Customize View dialog box.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Delete: Removes the selected item or association permanently. If the user is assigned as an owner of an activity, the user name is removed from the Owner field on the activity. If the user has an associated resource, the association between the resource and the user is removed, but the resource and the resource assignments remain in the database.

Change Password: Enables you to enter a new password for the selected user. You can only change passwords if you have the required privileges.

Cut: Cuts the selected item.

Copy: Copies the selected item.

Paste: Pastes a previously cut or copied item into the selected position.

Fill Down: Copies the data from the first cell selected to all other selected cells in the same column. Use CTRL or SHIFT to select multiple cells.

Deactivate User: Enables you to remove all module access from the selected user accounts. Inactive users cannot log into any P6 EPPM application, including P6 Team Member Web, P6 for Android, P6 for iOS, and P6 EPPM Web Services.

Reset User Preferences: Enables you to reset all preferences for the selected users to the defaults.

Create Resource: Enables you to create a resource from the selected user or users.

Login Name field

The login name for the user.

Associated Resource field

The associated resource of each user.

Associated resources can be used to pair users with timesheets, personal calendars, and assignments (for email or phone updates).

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Contributor option

Determines limited user access to P6, such as the Dashboards and Projects sections (Activities page). For user interface views, only the options on the Activity Editing tab apply to contributors. Access to P6 functionality is additionally determined by a user's OBS access and relationship to the project, that is, whether the user is assigned as a resource to activities or designated as an activity owner. You must clear all other module access options in order to select Contributor module access; conversely, you must clear Contributor module access in order to select any other module access option.

Edit Global User Preferences field

Determines whether the user account can change settings on the Global tab in My Preferences.

Edit View User Preferences field

Determines whether the user account can change settings on the View tab in My Preferences.

Email field

The Email address for the user.

Enterprise Reports option

Determines user access to the Reports section in P6. By selecting this module access option, the P6 EPPM user will be able to run reports.

> **Note**
>
> Security for reports is enforced when the report is run. See the *P6 EPPM Oracle Analytics Publisher Configuration Guide* for more information on security.

Global Security Profile field

Determines the user's access to application-wide information. The global security profile provides read-only access to all global data except cost and resource data. Privileges can be added to global security profiles to allow users to add, edit, and delete global data, and view global cost data.

Integration API option

Determines whether a user has access to P6 Integration API.

Logged In field

The modules the selected user is currently logged into.

Module Access field

The modules assigned to the user.

P6 Analytics option

Determines user access only to the Star database through Oracle Business Intelligence. By selecting this module access option, a Star user is created for the P6 EPPM user as long as the user name matches Oracle database user name requirements. For example, if the P6 EPPM user name begins with anything other than a letter, a Star user cannot be created. Once a Star user is created, the user will be able to access the Oracle Business Intelligence Dashboards application.

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P6 Professional option

Determines user access to P6 Professional.

Personal Name field

The personal name for the user. This name might be a nickname, full name, reference to a role or department, or include any information recognized by your organization to identify the user.

Phone field

The telephone number for the user.

Portfolios option

Determines user access to the following functionality in P6: the Portfolios section, Project Performance portlets, the Portfolio View portlet in the Dashboards section, document management functionality (if the Content Repository is configured), and workflow functionality (if the integration with Oracle BPM is configured).

Project Access field

The OBS level that determines the projects a user is allowed to access.

Projects option

Determines user access to the following functionality in P6: the Projects section, Project Performance portlets in the Dashboards section, document management functionality (if the Content Repository is configured), and workflow functionality (if the integration with Oracle BPM is configured).

Resource Access field

The resource access for the user.

The resource may have access to all resources, up to five selected resources, or no resources. This field is blank if the user does not have access to a resource.

Resources option

Determines user access to the following functionality in P6: the Resources section, Resources portlets in the Dashboards section, document management functionality (if the Content Repository is configured), and workflow functionality (if the integration with Oracle BPM is configured).

Status field

Determines whether the user account can log into P6 EPPM applications.

System User field

Determines that the user is a system user, which is for Oracle use only. Do not modify the access rights or privileges of a system user.

Team Member option

Determines user access to the P6 for Android and P6 for iOS mobile apps and P6 Team Member interfaces: P6 Team Member Web and Email Statusing Service. All modules provide access rights to Email Statusing Service, P6 for Android, and P6 for iOS on iPhone, but only the Team Member Interfaces module access option provides access rights to P6 Team Member Web and P6 for iOS on iPad.

Team Member Filter field

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The Team Member work distribution filters assigned to the user.

Timesheet option

Determines user access to Timesheets in P6 Team Member.

User Interface View field

The user interface view assigned to the user.

Visualizer option

Determines user access to Visualizer.

Web Services option

Determines user access to P6 EPPM Web Services, which uses open standards, including XML, SOAP, and WSDL, to seamlessly integrate P6 EPPM functionality into other applications. Using P6 EPPM Web Services, organizations can share P6 EPPM data between applications independent of operating system or programming language.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Module Access detail window

See Module Access Detail Window of the Users Page.

Project Access detail window

See Project Access Detail Window of the Users Page.

Resource Access detail window

See Resource Access Detail Window of the Users Page.

> **Tip**
>
> Users with the *Admin Superuser* global security profile will always see all user accounts on this page. Other users will see only the user accounts permitted by their currently assigned Resource Access settings.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Administration**.
2. On the **User Administration** page, click **Users**.

Users Tab of the User Interface View Details Page

Overview

Use this tab to assign users to a user interface view. You can also allow or disallow the user to edit options in the view.

Screen Elements

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Available Users

The list of users who are available to access the view.

Select a user or press **Ctrl** or **Shift** and click multiple users to have access to the view.

Search

Enables you to perform a search based on the value you enter in the search bar.

Selected Users

The users you have selected to access the view.

(Ctrl+Shift+Right Arrow)

Adds the selected item or items from the available list to the selected list.

(Ctrl+Shift+Left Arrow)

Removes the selected item or items from the selected list.

Editable column

Shows whether the user can modify their own view preferences. Users can modify their own view preferences if the Enable Modify option is selected against for that user on the Users page on the User Administration pane.

Do not allow edit button

Changes the Editable column to No for the selected user.

Allow Edit button

Changes the Editable column to Yes for the selected user.

> **Tip**
>
> You can search for users in the Available Users list based on user name or personal name. To clear the search, click **Clear**.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **User Interface Views**.
2. On the **User Interface Views** page, click the **Users** tab.

Version Tab of the Document Details Page or Dialog Box (with content repository)

Overview

Use this tab to view a list of all the stored versions of a selected document.

Your access to Documents features and functionality are determined by the type of content repository installed. Features not supported by your content repository are unavailable in P6, although they might be described in P6 Help.

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Screen Elements

Version field

The version number of the document. Version 1 is the original version of the document.

If the version number is a link, you can click the link to view that version of the document.

Review Status field

The current review status of the document.

The review statuses are *Blank*, *In Review*, *Approved*, *Rejected*, and *Terminated*. If the document is not under review, this field is blank.

This field is not available when you access document details from the **My Documents** portlet.

Modified By field

The name of the person who last modified the document.

Modified Date field

The date and time the document was last modified.

Comments field

Any comments associated with the document version.

Getting Here

From the **Documents** page:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **Project** tab.
3. On the **Project** tab, select a project and then select a document.
4. In the **Document Details** dialog box, click the **Version** tab.

From the **Dashboards** page:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the dashboard tab, expand the **My Documents** portlet and select the **Private Documents** tab.
4. On the **Private Documents** tab, select a document and click **Edit Details**.
5. In the **Document Details** dialog box, click the **Version** tab.

View Calendar Dialog Box of the Activities Page, EPS Page, Assignments Page, or Resources Page

Overview

Use this dialog box to view the calendar and standard work week associated with the selected project.

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Summary tab

See Summary Tab of the View Calendar Dialog Box of the Activities Page, EPS Page, Assignments Page, or Resources Page

Calendar tab

See Calendar Tab of the View Calendar Dialog Box of the Activities Page, EPS Page, Assignments Page, or Resources Page

Standard Work Week tab

See Standard Work Week Tab of the View Calendar Dialog Box of the Activities Page, EPS Page, Assignments Page, or Resources Page

Getting Here

From the Activities page:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Select an activity.
   b. Click **Context** and select **View Calendar**.

From the EPS page:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select a project.
   b. Click **Context** and select **View Calendar**.

From the Assignments page:

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. On the **Assignments** page:
   a. Select an assignment.
   b. Click **Context** and select **View Calendar**.

From the Resources tab:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Resources** page, click **Resources**.
3. On the **Resources** tab:
   a. Select a resource.
   b. Click **Context** and select **View Calendar**.

View Service Status Dialog Box

Overview

Use this dialog box to view the status of services.

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Screen Elements

View Log button

Opens the log for the selected service.

Refresh

Refreshes the current screen with any new, updated, or removed data.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the Grid View.

Filters menu

My Services: Constrains the service list to only services that you initiated.

My Services for Open Projects: Constrains the service list to only services for open projects.

All Services: Shows all services in the service list. You must be assigned the Admin Superuser global security profile to see this filter option.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Service List columns

Service field

The type of service.

Status field

The status of the service.

Statuses include:

Delegated: When the summarize service is running and waiting for child records to complete summarizing.

Pending: When the service was just created or if the service is waiting in queue to be run.

Running: When the service is running on the service machine.

Failed: When the service cannot complete, an error occurs, or data could not be committed. View the log file to determine the cause of the errors.

Completed: When the service completes successfully.

Download File: When the service completes successfully and results in a file to be downloaded. Click the link to download the file.

Download Zip: When the service completes successfully and results in a zipped file to be downloaded. Click the link to download the zipped file.

Completed with Errors: When the service completes, but one or more errors occurred. For example, Completed with Errors is returned if only one project in a group could not be summarized. View the log file to determine the cause of the errors.

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Submitted field

The date the service was submitted.

Completed field

The date the service was completed.

Initiator field

The personal name of the user who initiated the service.

Projects field

The IDs and names of the projects or EPSs that were included in the service job.

Getting Here

1. Click the **User** menu and select **View Service Status...**.

View Tab of the My Preferences Page

Overview

Use this tab to customize the user interface view for all sections of the application.

Screen Elements

Start Page field

The page which will show first when a user logs in.

Dashboards section

Enables you to customize which functions you can access from the **Dashboards** menu.

Move Up button

Moves the selected item one level higher in the list.

Move Down button

Moves the selected item one level lower in the list.

Selected / Unselected option

Enables you to select or clear the selection of an item in a list.

Menu Items options

Determines which functions you can access under the **Dashboards** menu. By selecting the Menu Items option, you can access all menu items.

Manage Dashboards: Enables you to access the Manage Dashboards page where you can create, customize, assign, and delete dashboards.

Displayed Dashboards option

Lists the dashboards you can access, based on what your P6 administrator assigned to you.

Portfolios section

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Enables you to customize which functions you can access from the **Portfolios** menu and which pages you can access within the Portfolios section.

Move Up button

Moves the selected item one level higher in the list.

Move Down button

Moves the selected item one level lower in the list.

Selected / Unselected option

Enables you to select or clear the selection of an item in a list.

Menu Items options

Determines which functions you can access from the **Portfolios** menu. By selecting the Menu Items option, you can access all menu items.

Open Portfolio: Enables you to open a group of projects by EPS, code, or portfolio.

Manage Portfolios: Enables you to review the list of projects in each portfolio, and to create, modify, and delete portfolios.

Manage Portfolio Views: Enables you to create, modify, and delete portfolio views. A portfolio view is a scorecard or chart providing high-level information spanning an entire group of projects.

Pages options

Determines which pages display on the Portfolios navigation bar. If you select the Pages option, you can access all pages.

Portfolio Analysis: Use this page to analyze portfolio data, conduct side-by-side comparisons of two project groups, and apply waterline analysis techniques to assist with executive-level critical decision making.

Capacity Planning: Use this page to analyze role allocation and cost over time.

Performance Status: Use this page to display summarized schedule and cost or labor unit data based on the performance metric you select.

Projects section

Enables you to customize which functions you can access from the **Projects** menu and which pages you can access within the Projects section.

Move Up button

Moves the selected item one level higher in the list.

Move Down button

Moves the selected item one level lower in the list.

Selected / Unselected option

Enables you to select or clear the selection of an item in a list.

Menu Items options

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Determines which functions you can access from the **Projects** menu. By selecting the Menu Items option, you can access all menu items.

Open Projects: Enables you to open projects by EPS, project code, or portfolio.

Pages options

Determines which pages are available on the Projects navigation bar. If you select the Pages option, you can access all pages.

EPS: Use this page to manage the Enterprise Project Structure (EPS) and its projects. The EPS page displays schedules for any single project or group of projects you choose with detail windows, a Gantt chart, and a table.

Activities: Use this page as your central project management tool for all project activities and their associated details. This includes all WBS elements, activities, steps, issues, notebooks, resource assignments, risks, and other details.

Team Usage: Use this page to view cost or usage data at the team level and for individual roles and resources assigned to the project you are working with.

Assignments: Use this page to view and modify resource assignment data using filters, which enables you to view resource assignment data for only the resources or projects that you need to view.

Issues: Use this page to view a list of all the issues for the currently open projects or portfolios.

Documents:

With a content repository enabled: Use this page to view, check in, check out, and download selected documents from one or more projects, associate additional items with a selected document, and compare documents across projects.

Without a content repository enabled: Use this page to view document details and send email about a document. This page also enables you to associate an activity, WBS, issue, or another document with a document and edit document information.

Risks: Use this page to add, modify, or delete project risks.

View field

The view which will be opened by default when the page is opened. In the Select View dialog box, you can select the Default View button to create a new view with default values.

Display View Picker option

Determines whether to allow you to select a view to use when you open the page. This option overrides the selection of a default view for the page in the View field. The page will not display any data until you select a view.

Resources section

Enables you to customize which functions you can access from the Resources menu and which pages you can access within the Resources section.

Move Up button

Moves the selected item one level higher in the list.

Move Down button

Moves the selected item one level lower in the list.

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Selected / Unselected option

Enables you to select or clear the selection of an item in a list.

Pages options

Determines which pages are available on the Resources navigation bar. If you select the Pages option, you can access all pages.

Administration: Use this page to create, modify, and delete resources, resource teams, roles, and role teams.

Planning: Use this page to specify, review, or modify project-level and WBS-level allocation data for individual resources and roles across a project life cycle.

Assignments: Use this page to view and modify resource assignment data using filters, which enables you to view resource assignment data for only the resources or projects that you need to view.

Analysis: Use this page to compare resource utilization between resource teams, role teams, resources, and roles all from one central location.

View field

The view which will be opened by default when the page is opened. In the Select View dialog box, you can select the Default View button to create a new view with default values.

Display View Picker option

Determines whether to allow you to select a view to use when you open the page. This option overrides the selection of a default view for the page in the View field. The page will not display any data until you select a view.

Approvals section

Enables you to customize which approvals pages you see.

Move Up button

Moves the selected item one level higher in the list.

Move Down button

Moves the selected item one level lower in the list.

Selected / Unselected option

Enables you to select or clear the selection of an item in a list.

Pages options

Determines which pages are available on the Approvals navigation bar. If you select the Pages option, you can access all pages.

Status Updates: Use this page to review updates your team members made to their assigned tasks. From this dialog you can modify the data, approve status updates, or place a hold on a status update to reconcile at a later time.

Timesheets: Use this page to process timesheets. This includes approving or rejecting timesheets, notifying resources about timesheet status, adding timesheet notes, and determining if a resource has not started or has not submitted a timesheet. If you are a timesheet approval manager, you can assign delegates to act in your place when you are not available.

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Administration section

Enables you to customize which administration functions you can access.

Move Up button

Moves the selected item one level higher in the list.

Move Down button

Moves the selected item one level lower in the list.

Selected / Unselected option

Enables you to select or clear the selection of an item in a list.

Menu Items options

Determines which Administration items you can access. By selecting the Menu Items option, you can access all menu items.

Application Settings: Enables your organization to define a series of application-wide parameters and values that apply globally and to set defaults and settings that affect how the application behaves. For example, configure general application settings including calendar and activity duration defaults, URLs for related applications, summarization time periods (also used to store past period performance actuals), and also enable the optional password policy setting.

Enterprise Data: Enables you to define series of application-wide data that apply to all projects. For example, you can set global data, such as currencies and financial periods; project data, such as baseline types and funding sources; activity data, such as activity codes and step templates; resource data, such as rate types and units of measure; risk data, such as risk categories and scoring matrices; issue data, such as issue codes and UDFs; and document data, such as document categories and statuses.

Scheduled Services:

Global Scheduled Services: Enables you to create and configure services to publish global data to use in reporting, including enterprise data, enterprise summary data, resource management data, security data, and audit data.

Project Scheduled Services: Enables you to create and configure services to schedule routine recurring project management jobs, including apply actuals, export, import, level, schedule, sumnarize, and send to schedule sheet.

User Administration: Enables you to create user accounts, assign access, manage the organizational breakdown structure (OBS) and configure profiles.

User Interface Views: Enables you to create pre-configured sets of options you assign to users so their view of Dashboards, Portfolios, Projects, Resources, and Administration is optimized for their role. User interface views permit visibility to features essential for a user's role while hiding functionality that is not applicable.

Getting Here

1. Click the **User** menu and select **My Preferences**.
2. On the **My Preferences** page, click the **View** tab.

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Warnings Section of the Leveling Report Log

Overview

Use this section to view warnings for various projects.

Screen Elements

Activities without predecessors and **Activities without successors** tables

The information about the activities that do not have predecessors or successors in a table format.

Project ID: The unique identifying code for the project associated with the activity.

Project Name: The name of the project associated with the activity.

Activity ID: The unique identifier of the activity.

Activity Name: The name of the activity.

Start: The current start date of the activity.

Finish: The current finish date of the activity.

Project ID field

The unique identifying code for the project associated with the activity.

Project Name field

The name of the project associated with the activity.

Activity ID field

The unique identifier of the activity.

In order to identify and track activities, P6 assigns each activity a unique Activity ID that is the result of joining the Activity ID Prefix with the Activity ID Suffix and then adding an Increment value.

For example, a prefix of `PROJ-A#` combined with a suffix of `2500` and an Increment of `5` will yield the following activity IDs: `PROJ-A#2500`, `PROJ-A#2505`, etc.

Activity Name field

The name of the activity.

The activity name does not have to be unique.

Out of sequence activities field

The activities that have started before their predecessor activity has completed.

Activities with actual date later than data date field

The activities in which the data date is before the actual date.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.

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2. On the **Activities** page, click the **Actions** menu and select **Run Leveler...** (Shift+F9).
3. In the **Level Resources** dialog box, click the **Options** tab.
4. On the **Options** tab, select the **Display leveling log upon completion** and click **Level**.
5. In the **Leveling Report Log**, expand the **Warnings** section.

Warnings Section of the Schedule Project Log Dialog Box of the Activities Page

Overview

Use this section to view warnings for various projects.

Screen Elements

Activities without predecessors and **Activities without successors** tables

The information about the activities that do not have predecessors or successors in a table format.

Project ID: The unique identifying code for the project associated with the activity.

Project Name: The name of the project associated with the activity.

Activity ID: The unique identifier of the activity.

Activity Name: The name of the activity.

Start: The current start date of the activity.

Finish: The current finish date of the activity.

Out of sequence activities table

The activities that have started before their predecessor activity has completed in a table format.

Project ID: The unique identifying code for the project associated with the activity.

Project Name: The name of the project associated with the activity.

Activity ID: The unique identifier of the activity.

Activity Name: The name of the activity.

Start: The current start date of the activity.

Finish: The current finish date of the activity.

Activities with actual date later than data date table

The activities in which the data date is before the actual date in a table format.

Project ID: The unique identifying code for the project associated with the activity.

Project Name: The name of the project associated with the activity.

Activity ID: The unique identifier of the activity.

Activity Name: The name of the activity.

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Start: The current start date of the activity.

Finish: The current finish date of the activity.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page, and click **Schedule...** (F9).
3. In the **Schedule** dialog box:
   a. Configure the options and select the **Display scheduling log upon completion** option.
   b. Click **Schedule Now**.

Waterline tab of the Customize View Dialog Box

Overview

Use this tab to modify the waterline.

> **Note**
>
> The view you are in affects which settings are available.

Screen Elements

Display waterline on scorecard (this will override any grouping and sorting defined elsewhere) option

Determines whether to display the waterline on scorecard.

Parameter list

The field used as a parameter when setting the waterline level limit. The available list of fields is pre-filtered to include only numeric project-level fields. Select from one of the following categories:

Budget: The fields that provide budget information.

Cost: The fields that provide cost information.

Durations: The fields that provide duration information.

Earned Value: The fields that provide earned value information.

General: The fields that provide basic information.

Number of Activities: The fields that provide information on activity counts.

Percent Complete: The fields that provide information on percent complete.

Project User Defined: The additional fields created to capture important information that is not available from the standard fields.

Units: The fields that provide information on units.

Is field

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Determines the logical relationship between the **Parameter** field and your entry in the associated **Value** field.

For example, a budget field may be defined as *equal to*, *greater than*, or *less than* a currency value of 500,000. Only projects with field values that meet the filter criteria are included in the portfolio.

Value field

Enter a value for the field to complete the waterline level limit.

For example, enter 100 in the field to complete a limit where the **Parameter** field is set to *Total Activities* and the **Is** field is set to *Is less than*.

First rank by field

The field you want to use to sort projects in the scorecard.

Sort Order list

Select an **Ascending** (A to Z; 1 up to high value) or **Descending** (Z to A; high value down to 1) sort order for data rows sorted by the **First rank by** field.

Then rank by field

Select a field from one of the following categories to sort the scorecard a second time. For example, if multiple rows share the same Parent EPS, they will all appear when sorted by this field. Choose a second field to further sort the data.

Baseline: The fields that provide baseline information.

Budget: The fields that provide budget information.

Cost: The fields that provide cost information.

Dates: The fields that provide date information.

Durations: The fields that provide duration information.

Earned Value: The fields that provide earned value information.

General: The fields that provide general information.

Number of Activities: The fields that provide information on activity numbers.

Percent Complete: The fields that provide information on percent complete.

Project Codes: The global project code fields defined in the system.

Project User Defined: The additional fields created to capture important information that is not available from the standard fields.

Publication: The fields that provide information publication.

Summary: The fields that provide summary information.

Units: The fields that provide information on units.

Sort Order list

Determines whether to use **Ascending** (A to Z; 1 up to highest value) or **Descending** (Z to A; highest value down to 1) sort order.

Getting Here

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1. Click **Customize View**.
2. In the **Customize View** dialog box, click **Waterline**.

WBS Budget Log Detail Window of the Activities Page

Overview

Use this detail window to create, delete, or modify a WBS budget log.

Screen Elements

Original Budget field

The estimate of the total amount you require for the selected WBS, including all contributed funds.

Current Budget field

The current budget for the WBS.

Calculated as **Original Budget** plus the sum of the Approved budget changes from the budget log.

Proposed Budget field

The proposed budget for the WBS.

Calculated as **Original Budget** plus the sum of the Approved and Pending budget changes from the budget log.

Add button

Adds an item to the table.

Date field

The date and time the line item was added to the budget log.

Amount field

The value in units of currency of the budget change request.

Responsible field

The name of the person with signature approval for the budget log line item.

Status field

The approval status of the line item.

Reason field

A short description summarizing the events or circumstances prompting the proposed change to the budget.

This field can also be used to store the decision justifying the budget line item's status.

Change Number field

The number associated with the change request.

Useful for reporting or tracking changes to the original budget.

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> **Tip**
>
> If you have more than one WBS selected, the detail window will not be visible.

Getting Here

1. On the ☰ **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select a WBS and click the **Budget Log** detail window.

WBS Categories Page

Overview

Use this page to add and configure WBS categories in all projects.

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently.

Move Up: Moves the selected item up within the same level in the hierarchical arrangement.

Move Down: Moves the selected item down within the same level in the hierarchical arrangement.

Category field

The name of the WBS category. You can use custom WBS categories to organize, filter, and report WBS information in all projects.

To see the following columns, click Analyze Data Usage.

Project Count field

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The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **WBS Categories**.

WBS Documents Detail Window of the Activities Page

Overview

Use this detail window to relate or remove documents from an activity or to view a related document.

> **Note**
>
> - Your ability to manage document relationships depends on two factors: your application security privileges and the security policy of an individual document (if the document was added from the content repository).
> - To view WBS detail windows, group your view by all levels of the WBS.

Screen Elements

Add menu

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The add menu contains the following options for adding documents to an activity:

WP & Docs: Opens the Add Document dialog box.

Assign... button

Opens the Select Document dialog box.

Title field

The names of the documents assigned to the activity.

Document Category list

The classification label used to organize documents.

Status field

The current status of the document.

Location field

The file location of the selected document. All project participants can view this file.

Getting Here

1. On the ☰ **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select a WBS and click the **Documents** detail window.

WBS Earned Value Detail Window of the Activities Page

Overview

Use this detail window to configure the technique for computing earned value components including the Performance Percent Complete and Estimate to Complete (ETC) for the selected WBS. Earned Value cost is the portion of the planned total cost of the activity that is actually completed as of the project data date; it is calculated as:

Earned Value =**Performance % Complete** x **Budget At Completion (BAC)**

The method for computing the Performance Percent Complete depends on the earned-value technique you select for the activity's WBS.

> ⓘ **Note**
>
> To view WBS detail windows, group your view by all levels of the WBS.

Screen Elements

Technique for computing performance percent complete section

The options for computing the performance percent complete.

Activity Percent Complete option

Determines whether to calculate earned value according to current activity completion percentages.

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Use resource curves/future period buckets option

Determines whether to use resource curves or future period buckets in the calculation of earned value instead of using current activity completion percentages.

When selected, this setting overrides the **Activity Percent Complete** type for activities that have a resource curve assigned to at least one of the resource assignments, or for activities that have assignments with manually-defined future period bucket values. If a curve is assigned, **Units Percent Complete** is always multiplied by the **Budget at Completion** to calculate earned value.

WBS Milestones Percent Complete option

Determines whether to calculate earned value based on the completion of weighted WBS milestones.

As progress occurs and you check off each completed milestone, the WBS element's performance percent complete is calculated based on the weights of the milestones.

For example, if four WBS milestones are weighted 2.0, 1.0, 1.0, and 1.0, and you mark the first one completed, the percent complete would be set to 40%.

0/100 option

Determines whether to calculate earned value as either 0 or 100 percent. An activity's performance percent complete remains 0% until it is completed and then its percent complete is set to 100%.

50/50 option

Determines whether to calculate performance percent complete as either 50 or 100 percent. An activity's performance percent complete remains 0% until it is started and then its percent complete is set to 50%. When the activity is complete, its percent complete is set to 100%.

Custom percent complete option

Determines whether earned value is calculated based on a percentage you specify between 0 and 100. This percentage applies after the activity starts until it ends. After the activity is completed, its percent complete is 100%.

Technique for computing Estimate to Complete (ETC) section

The options for computing the Estimate to Complete (ETC).

ETC=remaining cost for activity option

Determines whether to calculate ETC values as the remaining cost to complete an activity.

The remaining cost is calculated as the remaining duration of an activity in units of time multiplied by its applicable resource rates in units of currency.

ETC=PF * (Budget at Completion - Earned Value) option

Determines whether ETC is equal to a performance factor (PF) multiplied by (Budget at Completion minus Earned Value). If you select this option, you must select one of four options to set a value for the performance factor:

PF=1: The performance factor will equal 1. This method yields an optimistic result with ETC equal to the Budget At Completion (BAC) minus Earned Value Cost.

PF=1/Cost Performance Index:The performance factor will equal 1 divided by the Cost Performance Index (CPI), where the CPI = Earned Value Cost divided by Actual Cost. This method yields the most likely result.

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PF=1/(Cost Performance Index * Schedule Performance Index): The performance factor will equal 1 divided by the Cost Performance Index multiplied by the Schedule Performance Index (the Earned Value Cost divided by the Planned Value Cost). The equation can be interpreted as: PF equals 1 divided by (EVC divided by AC) multiplied by (EVC divided by PVC). This method yields a pessimistic result.

PF=<value>: The performance factor will equal a value you specify. If you select this option, enter a factor in the field.

> **Tip**
>
> If you have more than one WBS selected, the detail window will not be visible.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select a WBS and click the **Earned Value** detail window.

WBS General Detail Window of the Activities Page

Overview

Use this detail window to configure general information about the activity or WBS.

> **Note**
>
> To view WBS detail windows, group your view by all levels of the WBS.

Screen Elements

Customize View

Opens the Customize View dialog box.

General detail window columns

Only the default fields that appear as columns in the **General** detail window when a WBS is selected are described below.

WBS Code field

The unique identifier of the WBS.

WBS Name field

The name of the WBS element.

Anticipated Start field

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.

If there are no children elements, the anticipated start is the start date listed for the item in the table.

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The Anticipated Start date is used as the Start date if there are no activities assigned to the project or WBS.

Anticipated Finish field

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.

If there are no children elements, the anticipated finish is the finish date listed for the item in the table.

The Anticipated Finish date is used as the Finish date if there are no activities assigned to the project or WBS.

Responsible Manager field

The organizational breakdown structure (OBS) responsible for completion of the WBS tasks.

Project Status list

The current state of the project or WBS element. For activities, this field reflects the current state of its parent WBS or project. The status type determines how project, WBS, activity, and resource assignment data are handled by applications within P6 EPPM.

The status you assign to a project automatically applies to all its WBS elements and their activities. By default, when you create and save a new WBS, it automatically inherits the **Project Status** value of its parent WBS or project; however, subject to certain logical constraints, you can change the individual status of a WBS. For example, within an *Active* project you can designate WBS elements that are *Active*, *Inactive*, and *Planned*. The following status values can appear in this field:

Active: This is the default setting for new projects. Use this status to reflect actual authorized WBS or project work at your organization. When you designate a project as *Active*, P6 Team Member Web timesheet users can view all activities included in its active WBS elements. Depending on their timesheet privileges, users may also be able to assign themselves to and perform work on activities that are included in an active WBS element.

Inactive: Use this status to designate a WBS or project that is on hold, terminated, or no longer active. Select the **Resources can view activities from an inactive project** option on the **Team Member** page of the **Project Preferences** dialog box to allow P6 Team Member Web timesheet users to view, but not edit, activities that are included in an inactive WBS element or project.

Planned: Use this status to designate a project or WBS that is in its planning phase. If a WBS element's status is *Planned*, P6 Team Member Web timesheet users cannot view any of its activities. This prevents P6 Team Member Web timesheet users from assigning themselves to and performing work on unauthorized activities not yet officially designated *Active*.

What If: This status can only be designated at the project level. Use this status to designate a project is only being considered or is undergoing analysis before establishing a more defined project schedule. When a project's status is *What If*, P6 Team Member Web timesheet users cannot view any of its activities. This prevents P6 Team Member Web timesheet users from assigning themselves to and performing work on unauthorized activities not yet officially designated *Active*.

Reflection projects created in P6 Professional appear in P6 as What If projects.

Template: This status appears in this field only for template projects or for a WBS element that belongs to a template project. This status is set by P6; you cannot directly set this value.

Original Budget field

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The estimate of the total amount you require for the selected WBS, including all contributed funds.

WBS Category field

The category of the selected WBS.

Use this category to organize, filter, and report WBS information in all projects. The category applies to this WBS in all projects to which the WBS item is assigned.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select a WBS and click the **General** detail window.

WBS Issues Detail Window of the Activities Page

Overview

Use this detail window to manage the issues associated with the selected WBS.

Screen Elements

Add button

Adds an item to the table.

Customize View

Opens the Customize View dialog box.

Search

Enables you to perform a search based on the value you enter in the search bar.

Issue Name field

The name of the project issue.

In P6 Professional, issues which are automatically generated by the threshold monitor are named after the threshold parameter that triggered the project issue.

Issues grid area:

Applies To field

The WBS or project to which the issue applies.

Associated Project field

The project associated with the issue.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Identified By field

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The user name of the person who identified the issue.

Identified Date field

The date the issue was identified.

Issue Name field

The name of the project issue.

In P6 Professional, issues which are automatically generated by the threshold monitor are named after the threshold parameter that triggered the project issue.

Owner field

The resource who is responsible for the issue.

Priority field

The level of importance assigned to the issue.

Resolution Date field

The date the selected issue was resolved.

Responsible Manager field

The organizational breakdown structure (OBS) assigned to the issue.

If the field is editable and you have edit privileges, you can select a different responsible manager.

Status field

The current status of the issue.

Tip

- If you have more than one WBS selected, the detail window will not be visible.
- If you have a project template open, the icons in the detail window will be disabled.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select a WBS and then click the **Issues** detail window.

WBS Milestones Detail Window of the Activities Page

Overview

Use this detail window to configure milestones for the selected WBS.

Screen Elements

Percent Complete field

The percent of activities that have been completed toward full completion of the milestone.

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Add button

Adds an item to the table.

WBS Milestone field

The name of a milestone associated with the selected WBS.

Weight field

The weight of the milestone in relation to other milestones in the same project. The weight value determines the importance of the milestone.

For example, a milestone with a weight of 1 has a lower measure of importance than an item with a weight of 10.

Completed option

The completion status of the WBS milestone.

When selected, this option indicates that the WBS milestone is complete. When clear, this option indicates that the WBS milestone is not complete.

> **Tip**
>
> If you have more than one WBS selected, the detail window will not be visible.

Getting Here

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select a WBS and click the **WBS Milestones** detail window.

WBS Notebooks Detail Window of the Activities Page

Overview

Use this detail window to assign a notebook topic to an activity; view, add, or assign a notebook topic; or remove a topic assignment.

> **Note**
>
> To view WBS detail windows, group your view by all levels of the WBS.

Screen Elements

Assign... button

Opens the **Select Notebook Topic** dialog box.

Context menu

Delete: Deletes the selected item.

Topic field

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The name of the associated notebook topic.

Description field

A detailed summary for the item.

The description provides more information than short names or titles. It can give background information or establish a purpose for the item. These details help differentiate between items with similar names and are especially useful in multi-user environments.

Getting Here

1. On the ☰ **Navigation Menu**, expand **Projects** and click **Activities**.
2. Select a WBS and click the **Notebooks** detail window.

WBS UDFs Page

Overview

Use this page to add and configure user defined fields for work breakdown structures (WBSs).

Screen Elements

Add (Ins) button

Creates a new entry in the current table.

Analyze Data Usage button

Analyzes the usage of the data items listed in the grid.

Full Screen

Expands the current work area so it fills the entire display.

Print

Prints the current page, table, chart, or item.

Search

Searches the view or dialog box for data matching the criteria entered into the box.

Context menu

Add: Creates a new item.

Delete: Removes the selected item permanently. The data will no longer be available to views, filters, calculations, reports, and waterlines.

User Defined Field field

The name of the user defined field. This column is always visible on this page.

Data Type list

The name of the type of data that corresponds to each user-defined field. The data type you select determines the type of data you can specify in a field. The following data types are available:

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Text: Allows you to use text or a combination of text and numbers.

Start Date: Allows you to enter Start Date information only.

Finish Date: Allows you to enter Finish Date information only.

Cost: Allows you to enter currency values.

Number: Allows you to use numerals with two decimal places.

Integer: Allows you to use numeric data, but not a number related to money.

Indicator: Allows you to use an indicator field that you can use to icons in columns.

This column is always visible on this page.

To see the following columns, click Analyze Data Usage.

Project Count field

The number of projects and baselines currently using the corresponding data item. The number reported in this column includes all projects and baselines in which the data item is assigned, regardless of your project access. To see a list of the projects and baselines using the corresponding data item, click the link. The list you see is restricted to those projects to which you have access.

Latest Update field

The most recent date that the corresponding data item was modified.

Latest Assignment Update field

The most recent date that the corresponding data item was assigned.

Latest Summarized Date field

The most recent time that a project or baseline using the corresponding data item was summarized.

Latest Published Date field

The most recent time that a project or baseline using the corresponding data item was published.

Latest Scheduled Date field

The most recent time that a project or baseline using the corresponding data item was scheduled.

Download

Enables you to download the data as an Excel file. For hierarchical data, the top level and any expanded levels are downloaded. For flat lists, all rows are downloaded.

Tip

- Right-click any field to add or delete a UDF.
- When a user-defined field (UDF) is deleted, all its values are also deleted from all of their respective appearances throughout the application. This includes user interface views, activity views, calculated UDFs, reports, Activity Networks, filters, sorts, groupings, waterlines, and columns.

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Getting Here

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Projects** and click **WBS UDFs**.

WP & Docs Tab of the Documents Page (with content repository)

Overview

Use this tab to view all the documents that have been added for a project.

Screen Elements

Refresh Documents

Refreshes the current screen with any new, updated, or removed data.

Add Document

Enables you to select a document from your computer or a device attached to your computer to add to the selected project.

Delete

Permanently deletes the selected items.

Email Document Details

Enables you to send and email about the selected work product or document.

Search

Enables you to perform a search based on the value you enter in the search bar.

Getting Here

From the **Documents** page:

1. On the **Navigation Menu**, expand **Projects** and click **Documents**.
2. On the **Documents** page, click the **WP & Docs** tab.

From the **Dashboards** page:

1. On the **Navigation Menu**, expand **Dashboard**.
2. On the **Dashboards** page, select a dashboard.
3. On the **Dashboard**, expand the **My Documents** portlet and click the **WP & Docs** tab.

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