Primavera P6 Enterprise Project Portfolio Management

Oracle Primavera P6 Team Member Help

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P6 Team Member Web Overview

P6 Team Member Web is a status and time reporting application, which enables you to communicate status on your work quickly and efficiently, using activity lists or timesheets.

Activities Features

- 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.

Timesheets Features

- Open and view timesheets and report and review actual time spent on activities by day or by reporting period.
- Assign your resource to an activity.

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- Add activities or overhead time to timesheets.
- If your organization allows, you can enter overtime hours worked on activities.
- Submit timesheets reflecting your work assignments on projects.
- Communicate with the project manager about an activity by viewing and posting messages using the Discussion feature. All messages are saved with the selected activity.
- Edit timesheets on behalf of another resource.
- Generate a timesheet report and print it from your browser.
- View and edit timesheet notes.

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

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 Team Member Web.

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 Team Member Web.

You can withdraw your consent at any time by clicking Forget User Acceptance in the Preferences page.

Your Role as a Team Member

P6 is the application used by your project manager to manage the projects you are working on. Your responsibilities on a project are broken down into activities, also referred to as assignments. Activities might be assigned to you by your project manager who can also assign you as the activity owner. Alternatively you can assign activities to yourself and make yourself the activity owner. Once an activity is assigned to you in P6, you can view and update your status on the activity in P6 Team Member Web.

The fields available for you to view and update are set for each project by the project manager in P6. The fields in your view may vary by project.

Have a conversation with your project manager to determine:

- If you are a resource assignment, activity owner, or if you are assigned a Team Member work distribution filter. The fields that display in the progress pane are specific to one of these roles.
- Which fields are important for you to update when providing status.
- How often you need to provide status.
- Whether you can assign yourself to activities and as the activity owner.

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Keyboard Shortcuts for My Activities

You can access functions in the My Activities page of P6 Team Member Web using the following keyboard shortcuts.

Global

Action	Shortcut
Open the Preferences dialog box	Ctrl+Alt+P
Open the Help	Ctrl+Alt+H
Log out of the application	Ctrl+Alt+L
Assign activities	Ctrl+Alt+0
Open the Projects filter list	Ctrl+Alt+1
Open the WBS filter list	Ctrl+Alt+2
Open the Status list	Ctrl+Alt+3
Open the Time frame list	Ctrl+Alt+4
Open the resource filter	Ctrl+Alt+5
Open the sort by filter list	Ctrl+Alt+6
Focus on the search filter list	Ctrl+Alt+7
Clear the Filter field	Ctrl+Alt+R
Open the Status Other Resource dialog	Ctrl+Alt+K
Save	Ctrl+Alt+Enter
Cancel (or exit a grid or table)	Esc
Move to the next element	Tab
Move up and down a list	Up and down arrows
Confirm a selection	Enter

Dialog Boxes

Action	Shortcut
Close the dialog box	Esc or Ctrl+Alt+X
Open the Help	Ctrl+Alt+H

Activity Pane

Action	Shortcut
Focus on the activity list	Ctrl+Alt+T
Start an activity	Ctrl+Alt+S
Open Discussion dialog box	Ctrl+Alt+D
Send an email	Ctrl+Alt+E
Star an activity	Ctrl+Alt+F
Complete an activity	Ctrl+Alt+C
Open Notebooks dialog box	Ctrl+Alt+N
Open Documents dialog box	Ctrl+Alt+O
Open Related Activities dialog box	Ctrl+Alt+J

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Progress Panel

Action	Shortcut
Focus on the Start By field in the progress panel	Ctrl+Alt+Y
Undo an action	Ctrl+Alt+Z
Open the selected Date-Time picker	F2
Navigate inside the Date-Time picker	Arrow keys

Steps Panel

Action	Shortcut
Focus on the Steps panel	Ctrl+Alt+U
Undo an action	Ctrl+Alt+Z
Open More link	Ctrl+Alt+M
Select ✓ **Complete Step**	Ctrl+Alt+C
Add a step	Ctrl+Alt+A

Steps Dialog Box

Action	Shortcut
Select ✓ **Complete Step**	Ctrl+Alt+C
Add a step	Ctrl+Alt+A
Delete a step	Ctrl+Alt+R

Codes and UDFs Panel

Action	Shortcut
Focus on Codes and UDFs panel	Ctrl+Alt+I
Select More link to open the Codes and UDFs dialog box	Ctrl+Alt+M
Undo an action	Ctrl+Alt+Z

Documents Dialog Box

Action	Shortcut
View a document	Ctrl+Alt+V
Send an email to the person who created the document	Ctrl+Alt+E
Send an email to the person who most recently modified the document	Ctrl+Alt+Q
Focus on the Documents tab	Ctrl+Alt+P
Focus on the Work Product Documents tab	Ctrl+Alt+W

Notebooks Dialog Box

Action	Shortcut
Edit a Notebook Topic	Ctrl+Alt+E
Preview	Ctrl+Alt+P
Save	Ctrl+Alt+Enter

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Move out of the list of Notebook Topics	Esc

Status Other Resrouces Dialog Box

Action	Shortcut
Mark an assignment complete	Ctrl+Alt+C
Move out of the list of Assignments	Esc

Keyboard Shortcuts for Timesheets

You can access functions in the Timesheets page of P6 Team Member Web using the following keyboard shortcuts.

Global

Action	Shortcut
Open the Preferences dialog box	Ctrl+Alt+P
Open the Help	Ctrl+Alt+H
Log out of the application	Ctrl+Alt+L
Open Discussion Dialog box	Ctrl+Alt+D
Add Existing Activity	Ctrl+Alt+1
Add Overhead Time	Ctrl+Alt+2
Assign Resource To Activity	Ctrl+Alt+3
Edit Resource's Timesheet	Ctrl+Alt+4
Open Timesheet list	Ctrl+Alt+5
Focus on the search filter list	Ctrl+Alt+6
Submit Timesheet	Ctrl+Alt+S
Save Timesheet	Ctrl+Alt+Enter
Cancel (or exit a grid or table)	Esc
Move to the next element	Tab
Confirm a selection	Enter

Dialog Boxes

Action	Shortcut
Cancel	Esc
Close the dialog box	Esc or Ctrl+Alt+X

Timesheet Rows

Action	Shortcut
Move up and down the activity list	Up and down arrows
Complete an activity	Ctrl+Alt+C
Open Assignment Details	Enter
Remove an activity from the timesheet	Ctrl+Alt+R

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Assign Resource to Activity Dialog Box

Action	Shortcut
Assign	Ctrl+Alt+O
Assign and Add	Ctrl+Alt+A

Add Existing Activity and Add Overhead Time Dialog Boxes

Action	Shortcut
Select activity	Space
Add	Ctrl+Alt+A

Edit Resource's Timesheet Dialog Box

Action	Shortcut
Login as subordinate resource	Ctrl+Alt+E

Known Browser Issues

If you experience an issue working in P6 Team Member Web, review the known issues to determine if your problem has a resolution.

General Browser Issues

If you experience unexplained behavior, such as the steps in the Steps dialog box not matching the steps in the Steps panel, clear your browser history.

Safari

Shortcut key Ctrl+Shift+T does not work when using Safari on a Macintosh

The keyboard shortcut for changing tabs on the Preferences dialog box, Ctrl+Shift+T, does not work when using Safari on a Macintosh. You must select the tab using a mouse or by tapping the tab, depending on your device.

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User Control Panel Overview

The User Control Panel provides access to user-specific features. From the User Control Panel you can log out, view application help from any page, and access your preferences. You can also access any announcements posted by the system administrator.

Access the following items on the User Control Panel:

Preferences: Enables you to customize data display formats. The options you customize are exclusively yours. You can alter global preferences, including formats for time units and dates.

Get P6 Mobile: Enables you to configure access to your activities and timesheets on your Android or iOS mobile device.

Logout: Enables you to log out of the application.

Help: Contains resources for receiving application assistance. Select help to access help documentation for the active page or select User Productivity Kit to access courses and tutorials on using the application. The Help menu also enables you to access the full documentation library for the application and Oracle's support network if you require further assistance.

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Working with Activities

The My Activities view is your main work area. Use this area to view your assigned activities. When you select an activity in the activity pane, all panels on the right, which include the progress panel, Steps panel, and Codes and UDFs panel, display information for the activity. Use the progress panel to update your activities to show progress.

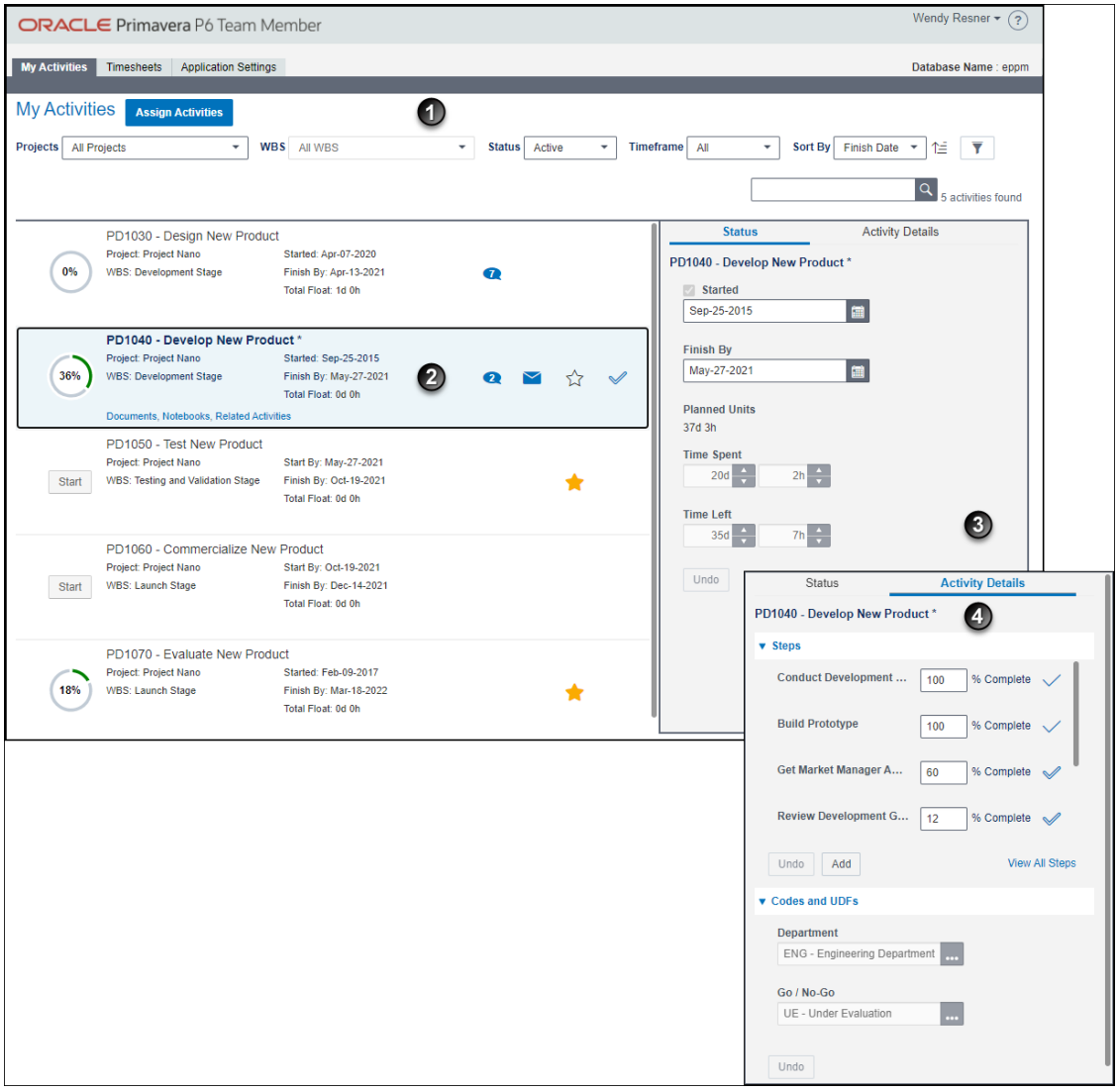


Table of Screen Highlights

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Item	Description
1	**Control bar**: In this area you can assign yourself to activities, filter the tasks in your view, and search for tasks. When you make changes to activities, you can see a count of the number of activities you have updated. The count is reset when you select Save or Cancel. Changed activities that have not yet been saved show with an asterisk * and italicized text. WBS (work breakdown structure) is a project management term used for the logical breakdown and arrangement of activities in a project. The WBS path helps you to understand exactly where your activity fits within the scope of the project.
2	**Activity cards**: Each activity is represented by an activity card in the main area of the screen. The activity card provides important status information and allows you to perform actions for the activity. Here you can see whether you are assigned to the activity via an  **Assignment** or as the  **Owner**. A project level administrative setting controls whether you see an activity multiple times on the My Activities page depending on whether you are a resource, primary resource or the owner. A progress indicator for each activity provides a visual representation of your progress. The indicators are color coded to allow you to view your progress at a glance. A green indicator shows the finish date for the activity has not been reached and a red indicator shows that the finish date is in the past and the activity is now overdue. On the activity card you can: • Indicate you started the activity. • Mark an activity as completed. • Send an email. • Mark the activity as important by starring it. • Read and participate in discussions. • View Notebook topics, Related Activities, and Documents related to your activity.
3	**Status tab**: Use this area to communicate dates and time worked. The fields available in your view are set by your project manager. **Status Other Resources** link: Opens a dialog box showing other resources' assignments on the selected activity. This link only appears if the system is set up to allow you to update status for other resources. **Baseline Dates**: Allows you to view the baseline dates for an activity. This section only appears if the system is set up to allow you to see baseline dates.

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Item	Description
4	**Activity Details tab**: Use this area to view and update more detailed information about the activity. The fields available in your view are set by your project manager. **Steps**: Allows you to see and update steps for the activity. The project manager can configure the system to allow you to add new steps. This section only appears if the system is set up to allow you to see steps. **Codes and UDFs**: Allows you to see codes and UDFs assigned to an activity. The project manager can determine the codes and UDFs you can see and whether you are allowed to edit them. This section only appears if the system is set up to allow you to see codes and UDFs.

Viewing Activities

The application automatically displays all active activities assigned to you by your project manager. You can identify critical activities by looking for the **Critical** icon next to the activity. An activity is critical if a delay to the activity will delay the end of the project. You can also identify if an activity is on the longest path by looking for the Longest Path check on the Activity Details pane. Icons also identify **Due** and **Overdue - Not Started** (in red) or **Overdue - In Progress** (in orange) activities. There are filtering, sorting, and project selection options that can be used in combination to enable you to refine your list and status your activities more efficiently.

To modify your activity view:

1. View activities for a select group of projects by selecting the **Projects** list and choosing one or more projects. Once you make your selection, select another area of the application to close the list, or press **Esc**.
   - Use ctrl or shift to select multiple items.
   - If you have selected only one Project, you can use the **WBS** list to choose one or more WBS elements.
2. Set your filtering preferences by selecting one of the following options in the **Status** list.

   Active: Displays all activities that are currently assigned to you and are not marked complete.

   Due: Displays all the activities that you are scheduled to complete today.

   Overdue: Displays all active activities where the current date is past the due date.

   Completed: Displays all activities that were marked complete and the Finished date is within your chosen Timeframe for complete activities. See: Configuring My View Preferences

   Starred: Displays all active activities that you starred. Starred activities signify importance. For example, you can star all your high priority activities. Or, you can star all activities you are currently working on to make it easier to view your current workload.
3. Select a **Timeframe** option to customize the list to a specified period of time. For example, if you select **All projects** where the **Status** equals **Due** and the **Time frame** is **This Week**, then you will see the activities for all your projects that are due in the next seven days.

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> **Note**
>
> You cannot choose a **Time frame** when the **Status** option is **Overdue** or **Starred**.

4. Select whether you want to filter activities according to the assigned **Resources**. You can choose to view activities where one or more resources are assigned as the Primary Resource, or activities for all resources.
   - Use ctrl or shift to select multiple resources.
   - You can type into this field to search for a resource (except on a touch device).
5. Select a **Sort By** option and order. For example, you can sort all the activities in your view according to the Finish Date, in descending order to see the activities which are due to finish soonest at the top of the list.
6. Select **Filters** to apply to the view.
7. Enter search criteria in the **Search** field to locate an activity or group of activities. The search retrieves matches for activities that include all words entered in the **Filter** field as you type.

> **Tip**
>
> - You can change the way the My Activities view is grouped by selecting Group by Project, Group by WBS, or both in Preferences.
> - Filters applied in the Projects, WBS, Status, Timeframe, and Resources lists are combined with any filters you apply in the Manage Filters dialog box. If your My Activities list is empty, check that the Projects, WBS, Status, Timeframe, and Resources lists are not in conflict with the filter conditions applied in Manage Filters.

Status Filter Definitions

The timeframes stated in these filter are determined as follows:

- The beginning of the day is 00:00 and the end of the day is 23:59 as determined by the P6 EPPM application server.
- *Today* is from 00:00 until 23:59 on today's date.
- The start of the week is 00:00 on the day specified by the *First day of week for calendars* setting in the General page of Application Settings in P6. The end of the week is 23:59 on the last day of the week.
  For example, if the *First day of week for calendars* is set to Sunday, the week begins at 00:00 on Sunday and ends at 23:59 the following Saturday.
- This week is the week in which today falls, according to the *First day of week for calendars* setting.
- A month is defined as a calendar month.

The filter type stated in these filters is defined as follows:

- The *Active* filter shows all your in progress activities and assignments plus any not started activities or assignments matching the timeframe filter you select.

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Activities and assignments match the time frame filter if their scheduled start or finish date is in the specified time period or if they span the time period (that is if they are scheduled to start before the specified time period and end after the specified time period).

- The *Due* filter shows all your activities with a finish date scheduled within the specified time period.
- The *Completed* filter shows all your activities with an Actual Finish date within the specified time period.

For example, if today's date is 17th February 2025 and the Starting day of the week is Sunday:

- Select the *Active in the next 2 weeks* filter to see all your activities scheduled to start or finish between 00:00 on Sunday 23rd February 2025 and 23:59 on Saturday 8th March 2025.
- Select the *Due tomorrow* filter to see all your activities scheduled to finish between 00:00 and 23:59 on Tuesday 18th February 2025.
- Select the *Due next month* filter to see all your activities scheduled to finish between 00:00 on 1st March 2025 and 23:59 on 31st March 2025.
- Select the *Completed last week* filter to see all your activities with an Actual Finish between 00:00 on Sunday 9th and 23:59 on Saturday 15th February 2025.

Assigning Activities

Assign activities to yourself to view them in your activity list and record your progress.

To assign an activity:

1. Select **Assign Activities**.
2. In the **Assign Activities** dialog:
   a. Select a project.
   b. Optionally use the **Search** options to reduce the number of activities in the list.

      > **Note**
      >
      > You can search for an activity either in all fields of the activity, or by restricting your search to the Activity ID, Activity Name, WBS, or Activity Status fields.

   c. Select the activities you want to assign.
   d. Select **Assign**.

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Tip

You can only assign yourself to activities for which you have OBS access unless the project has the *Allow resources to assign themselves to activities outside assigned OBS access* option selected.

- You cannot assign yourself to activities in a project unless the project preferences *Team members are assigned to activities as: is set to Activity Owners/Primary Resources* and *Include Primary Resources* option are selected.
- You cannot assign yourself to activities in baselines, scenarios, templates, requested projects, what if projects, inactive projects, or planned projects.

Assigning Yourself As Activity Owner

Assign yourself to be the owner of an activity to update activity status when resource assignments are not being used for status updates or if you are reporting status on behalf of a team or crew.

Note

You cannot assign yourself as the owner of an activity if that activity has pending updates under review.

To assign an activity to yourself as the owner:

1. Select **Assign as Owner**.
2. In the **Assign as Owner** dialog:
   a. Select a project.
   b. Optionally use the **Search** options to reduce the number of activities in the list.

      Note

      You can search for an activity either in all fields of the activity, or by restricting your search to the Activity ID, Activity Name, WBS, or Activity Status fields.

      You can only assign yourself as the owner to activities for which you have OBS access unless the project has the Allow resources to assign themselves to activities as owners outside assigned OBS access option selected.

   c. Select the activities you want to assign.
   d. Select **Assign**.

Reassigning the Activity Owner

Reassign the activity owner to another team member if someone else will be updating the activity, for example, if the work will be carried out by a different person or team or if you are handing over your activities to a colleague while you are unavailable. You can only assign

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owners to activities for which they have OBS access unless the project has the Allow resources to assign themselves to activities as owners outside assigned OBS access option selected. A project-level setting controls whether activity owners can be reassigned.

> **Note**
>
> You cannot reassign the owner of an activity if that activity has pending updates under review.

To reassign an activity a new owner:

1. Select **Assign as Owner**.
2. In the **Assign as Owner** dialog:
   a. Select a project.
   b. Optionally use the **Search** options to reduce the number of activities in the list.

      > **Note**
      >
      > You can search for an activity either in all fields of the activity, or by restricting your search to the Activity ID, Activity Name, WBS, or Activity Status fields.

   c. Select the activities you want to assign.
   d. Enter the name of the new owner in the Activity Owner field for each activity.
   e. Select **Assign**.

Assigning Yourself to Role Assignments

Assign yourself to assignments of activities with existing unstaffed roles that match your role.

To assign yourself to an unstaffed role assignment:

1. Select **Staff Role Assignments**.
2. In the Staff Role Assignments dialog box:
   a. Select a project.
   b. Optionally use the **Search** options to reduce the number of activities in the list.

      > **Note**
      >
      > You can search for an activity either in all fields of the activity, or by restricting your search to the Activity ID, Activity Name, WBS, Activity Status. Role ID, or Proficiency fields.

   c. Select one or more activities.
   d. Select **Assign**.

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> **Tip**
>
> A project-level setting determines whether a project is listed so you can assign yourself to its activities. If you need to assign yourself to a project that is not listed, contact your project manager or P6 administrator.

Starting Activities

After you start working on an activity, report your progress.

> **Note**
>
> The fields displayed in your view are customized by your project manager. Not all fields mentioned here are available in your view and there may be additional fields in your view not mentioned in the procedure. Discuss with your manager the fields you need to update to provide status on your assignments.

To start an activity:

1. Select an activity.
2. Select **Start** (Ctrl+Alt+S).
3. On the Status tab of the progress panel:
   a. Update the **Started** date field, if you started the activity on a date other than the scheduled date.

      > **Note**
      >
      > You cannot set the Started date to a date that is later than the current date.

   b. Enter your status. For example, **Time Spent** or **% Complete**.

      > **Note**
      >
      > If **Time Left** is greater than zero, the amount of time added to **Time Spent** will be deducted from the amount in **Time Left**. If **Time Left** is zero, then there is no change to this field.

4. Select **Save** (Ctrl+Alt+Enter).

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Tip

- As you make updates to your work units, your progress is shown in the progress indicator in the activity pane.
- You can mark an activity complete without indicating progress. When you mark an activity that has not been started as complete, the activity is automatically marked as started, the planned dates become the started and finished dates, and the time left becomes the time spent.
- If your activity is a milestone, you are not presented with a start button. For a milestone, select **Mark Activity Complete** (Ctrl+Alt+C) and update the **Started** date for a start milestone, or the **Finished** date for a finish milestone.

Filtering Activities

Filter your view to help you to see the activities of interest to you at one time. You can create up to five conditions for each filter.

To create a filter:

1. Click **Filters** and select **Manage Filters...**.
2. On the Manage Filters page:
   a. In the filters list:
      - Click **Context** next to the **Global** category heading to create a new filter available to all users or next to the **User** category heading to create a new filter available only to you, then click **Add**.
      - Double click the **Name** field, enter a name that describes the filter you are creating.
   b. In the Filter Details area:
      - Click **Add a filter condition...** to create the first filter condition.
      - Click **Context** and click **Add Above** or **Add Below** to configure additional filter criteria.
3. In the **Filters** list, select the filters that you want to apply.
4. Click **Save**.

Grouping Activities

Group the activities in your view to quickly identify activities sharing a common characteristic. You can group by project, WBS, the critical and longest path columns, activity codes, project codes, activity UDFs, and project UDFs. You can group by up to five fields at the same time, or none.

To group a view:

1. Click **Customize View**.

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2. On the Customize View page:
   a. In the Group By area:
      - In the **Group By** list, select the field by which you want to group the view.
      - In the **Sort Order** list, select how you want the view to be sorted.
      - Click **Context** next to the **Group By** list to add, delete, or rearrange grouping levels.
   b. In the Band Options area:
      - Select **Show field title** to include the name of the field in each grouping band.
3. Click **Apply**.

Updating Activities

Update your activities to record your progress.

> **Note**
>
> The fields displayed in your view are customized by your project manager. Not all fields mentioned here are available in your view and there may be additional fields in your view not mentioned in the procedure. Discuss with your manager the fields you need to update to provide status on your assignments.

To update an activity:

1. Select an activity.
2. On the Status tab of the progress panel:
   a. Enter your status. For example, **Time Spent**, **% Complete**, or **Remaining Duration**.

      > **Note**
      >
      > - If **Time Left** is greater than zero, the amount of time added to **Time Spent** will be deducted from the amount in **Time Left**. If the **Time Left** is zero, then there is no change to this field.
      > - If the **% Complete** field is disabled, your percent complete is automatically calculated using steps.
      > - A project level setting determines whether you can update **Time Spent** directly, or whether you **Log Additional Time**. If you log additional time, that time will be added to the **Time Spent** automatically.

   b. Update your **Finish By** or **Expected Finish** date, if necessary.
3. On the Activity Details tab of the progress panel:
   - Update **% Complete** for your assigned steps, if applicable.
4. Select **Save** (Ctrl+Alt+Enter).

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Tip

- **Locked Project** indicates the project is locked for editing by a user in P6. Activities cannot be updated until the project lock is released.
- When an activity is started, you can set it to not started by clearing the Started option in the progress panel. You can only set a started activity or assignment to not started if the start was applied in P6 Team Member Web, P6 for Android, or P6 for iOS and there are not yet any approved status updates for the activity or assignment.
- You can remove the expected finish date by deleting the entry in that field.
- If Time Spent is disabled, either you did not select Start to indicate progress has begun, the activity is a milestone, you should enter your progress in the timesheet view, or you should enter your progress as additional time.
- If an activity has suspend date but no resume date, you cannot mark the activity completed.
- As you make updates to your work units, your progress is shown in the progress indicator in the activity pane.
- You can mark an activity complete without indicating progress. When you mark an activity that has not been started as complete, the activity is automatically marked as started, the planned dates become the started and finished dates, and the time left becomes the time spent.
- If your Administrator selected Percent Complete under Specify the field resources use to status their activities on the project preferences, you cannot update activities using percent complete after the first time that Apply Actuals is run against an activity. If you need to update an activity multiple times, report your actual work, rather than percent complete.

Updating Activities for Other Resources

Update activities for other resources to record time for resources which do not have access to Team Member. A project-level administrative setting determines whether you can provide status for other resources.

Note

The fields displayed in your view are customized by your project manager. Not all fields mentioned here are available in your view and there may be additional fields in your view not mentioned in the procedure. Discuss with your manager the fields you need to update to provide status on your assignments.

To update an activity:

1. Select an activity.
2. On the Status tab of the progress panel, select **Status Other Resources**.
3. In the **Resources** dialog box:
   a. Select a resource from the **Resources** list.

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b. Enter their status. For example, **Time Spent**, **Time Left**, **Units Consumed** or **Units Left**.

c. Update their **Finish By** date, if necessary.

d. Select ✓ **Mark Activity Complete**, if the resource has completed work on the activity.

e. Select **Save** (Ctrl+Alt+Enter).

Tip

- The Status Other Resources option is only available on activities which represent activities in P6. It is not available on activities which represent resource assignments in P6.
- If Time Spent is disabled, either you did not select Start to indicate progress has begun or the activity is a milestone, you should enter progress in the timesheet view, or you should enter progress as additional time.
- As you make updates to your work units, your progress is shown in the progress indicator in the activity pane.
- You can mark an activity complete without indicating progress. When you mark an activity that has not been started as complete, the activity is automatically marked as started, the planned dates become the started and finished dates, and the time left becomes the time spent.

Resubmitting Status Updates

When you update an activity, a reviewer may reject your update if they identify a problem. You see rejected status updates in the Action Required tab. It is your responsibility to make any changes necessary and then resubmit the status update.

To resubmit a rejected status update:

1. Select **Action Required**.
2. Select a status update.
3. In the **Resubmit Requested** pane:
   a. Read the comments made by the rejecting reviewer.
   b. Enter values for any fields which need to be changed.
   c. Enter your comments in the **Resubmission Comments** field.
   d. Select **Resubmit**.

Sending Email About an Activity

To communicate with your project manager or team members about an activity, send an email from the activity pane. The email will include the project name, activity name and ID, WBS, and codes and UDFs. Additional fields may display depending on the settings your project manager configured for the project.

To send an email:

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1. Select an activity.
2. In the activity pane, select **Send Email** (Ctrl+Alt+E).

Starring Activities

You can mark an activity with a star to designate it as important and track it in a separate list with other starred activities. For example, you can star all your high priority activities. Or, you can star all activities you are currently working on to make it easier to view your current workload.

To star an activity:

1. Select an activity.
2. In the activity pane, select **Mark Activity Starred** (Ctrl+Alt+F).
3. Select **Save**.

Tip

- When an activity is marked complete, it is removed from the Starred view.
- You cannot star a completed activity.
- No one else will see which activities you marked with a star.
- The starring feature is not available to users assigned Team Member work distribution filters.

Completing Activities

Mark an activity complete when you have finished your work for the activity.

To mark an activity complete:

1. Select an activity.
2. In the activity pane, select **Mark Activity Complete** (Ctrl+Alt+C).
3. On the Status tab of the progress panel:
   a. Update the status fields.
   b. Update the **Finished** date if the finish date is not the scheduled **Finished by** date.

Note

You cannot set the **Finished** date to a date past the current date.

4. Select **Save**.

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Tip

- Once you complete an activity, you can return the activity to an active state by selecting **Mark Activity In-Progress**.
- If your activity entry is a milestone, select **Mark Activity Complete** (Ctrl+Alt+C) and update the **Started** date for a start milestone, or the **Finished** date for a finish milestone.
- If the **Update actual units when activities or assignments that were never started are marked complete in My Activities** setting is selected in the General section of Application Settings and the activity you mark complete has never been updated, marking the activity complete will update the actual units for the activity to match the planned units.

Changing Completed Activities to In Progress

To change a completed activity to in progress:

1. Select an activity.
2. In the activity pane, select **Mark Activity In-Progress**.
3. Select **Save**.

Note

If you are the owner of an activity, you can mark a completed activity as in progress for other resources using **Status Other Resources**.

Working with Discussions

Use the Discussion dialog box to communicate with your project manager about an activity. If more than one team member is assigned to the same activity, all messages are captured in the same dialog box for that activity.

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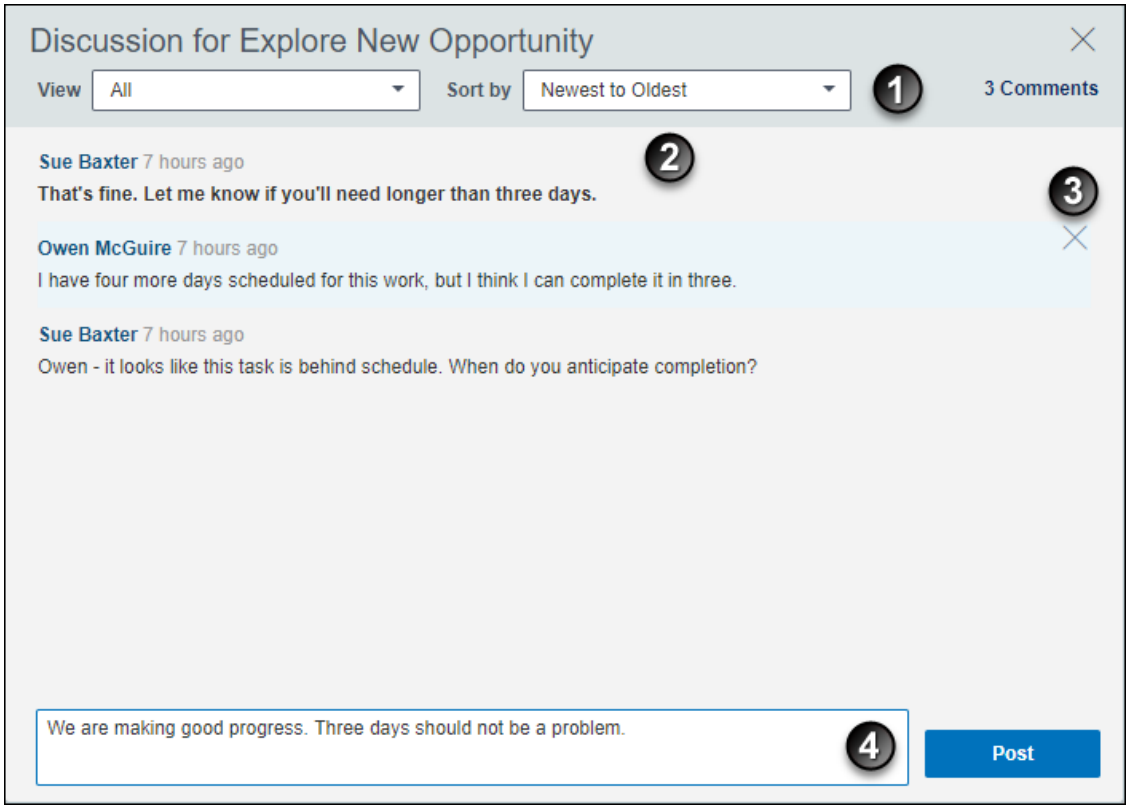


Table of Screen Highlights

Item	Description
1	Filter your view options. Choose to show All messages, or Sent or Received messages. Sort by the most recent postings or earlier postings.
2	Review all messages posted by you, your project manager, or another team member assigned to the same activity, depending on your filter settings. Bold text indicates the message is new since the last time you opened the dialog box.
3	Hover over a comment to delete it.
4	Post a question, answer, or general information about the activity for your project manager or other team members assigned to the activity to view.

Communicating with My Project Manager

You can have a conversation about an activity with your project manager using the Discussion dialog box. If you have the relevant privilege, you can also delete comments you have made from the conversation if they are no longer relevant. The conversation is saved with the activity and is available for future reference.

If there are other team members assigned to the activity, you will also see their conversations in the dialog box. Anyone who has access to the activity in P6 can view the conversations. Your project manager uses P6 to view and respond to messages you post in the Discussion dialog box.

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To send a message to your project manager:

1. Select an activity.
2. In the activity pane, select **Discussion** (Ctrl+Alt+D).
3. In the **Discussion** dialog box, type a message and select **Post**.

Tip

- To delete a comment, select **Delete**.
- Your project manager can switch off the discussions functionality on a project-by-project basis.

Notebooks

Notebooks are collections of notes from your project manager providing additional information on your activity. Each notebook has a different subject and is identified by a topic name.

For example, you could have two notebooks and the notebook topics could be called Objectives and Constraints. The Objectives notebook topic might provide a list of the main goals to strive for when working on the activity. The Constraints notebook topic could include information on obstacles or roadblocks that you need to be aware of as you progress through your activity.

Working with Notebooks

Use the Notebooks dialog box to view additional information relevant to your activity.

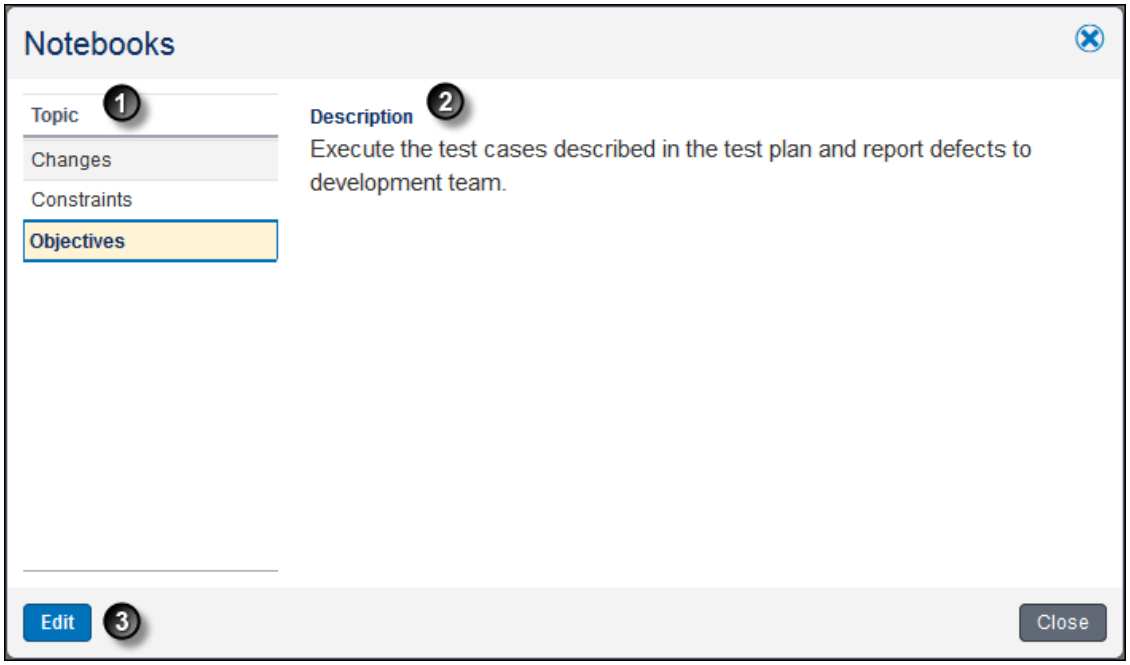


Table of Screen Highlights

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Item	Description
1	**Topic**: Information your project manager shares that is relevant to the activity is divided into separate notebook topics. Select a topic name to view the notes for the topic.
2	**Description**: The description area includes all the notes for the selected notebook topic. These notes can include text, links, and pictures. To launch a link, right-click on the link and open it from the shortcut menu.
3	**Edit button**: You can edit the text and format of Notebooks if your Project Manager has configured the project to allow it.

Viewing Notebook Topics

View notebook topics to review additional information about your activity.

To view a notebook topic:

1. Select an activity.
2. In the activity pane, select **Notebooks** (Ctrl+Alt+N).
3. In the **Notebooks** dialog box, select a **Topic** name.

> **Tip**
>
> The **Notebooks** link is only visible when notebook topics are available for your activity.

Modifying Notebook Topics

Modify notebook topics to update additional information about your activity.

To modify a notebook topic:

1. Select an activity.
2. In the activity pane, select **Notebooks** (Ctrl+Alt+N).
3. In the **Notebooks** dialog box, select a **Topic** name.
4. Select **Edit**.
5. Make changes to the text of the notebook topic.

> **Note**
>
> You can also edit the format of the text, including font and size, color. Select **Preview** to see how your changes will look.

6. When you are done, select **Save**.

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> **Tip**
>
> The **Notebooks** link is only visible when notebook topics are available for your activity.

Documents and Attachments

Your project manager can associate documents to your activity to provide you with additional information relevant to the activity. Documents can include plans, forms, reports, templates, or any type of document that is important as you complete your work.

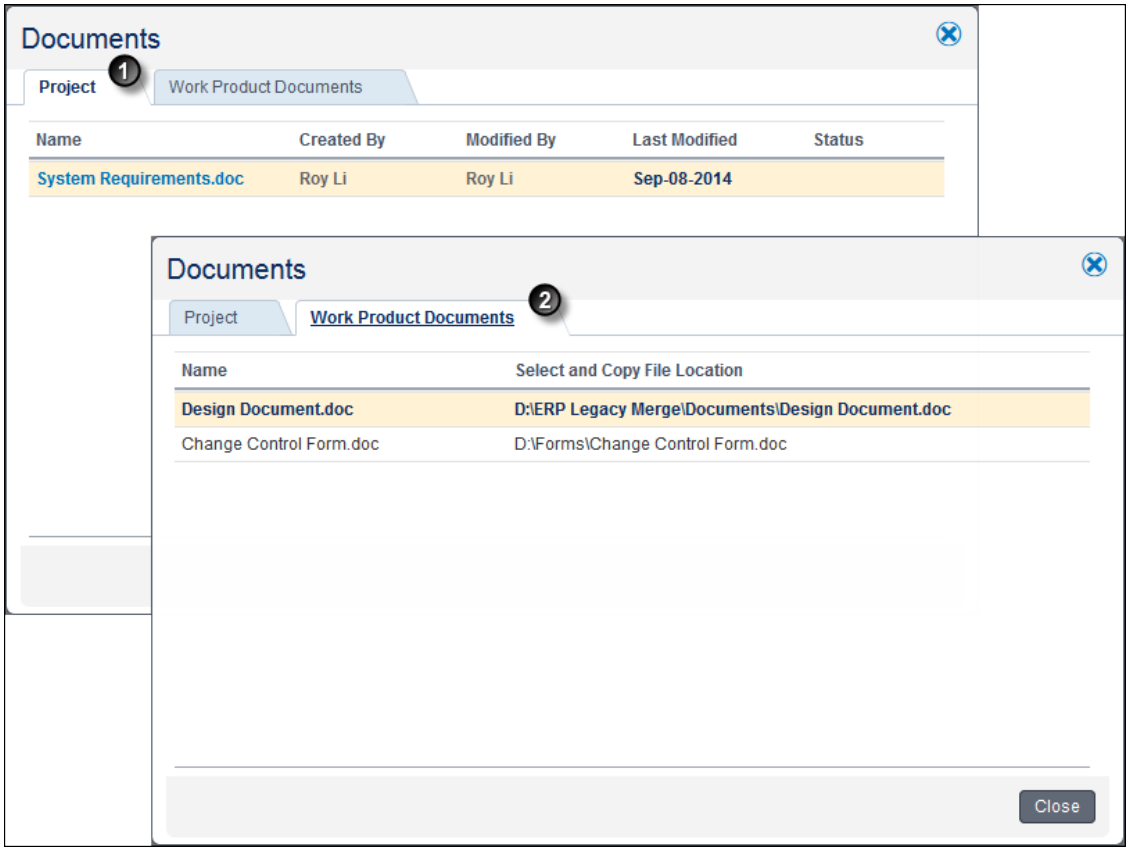
Team members working in P6 for Android or P6 for iOS can attach files to your activity to support their update of an activity's status.

Working with Documents

Use the Documents dialog box to access documents and attachments associated with your activity.

How you access documents is determined by how the documents are stored in P6. If documents are stored in a content repository or in an Oracle database, you can access the document directly. If documents are stored on a file share, you can access them by copying the location to your browser. If your company is using one method to store documents, you will not see the tabs in this dialog box.

Attachments are items uploaded from P6 for Android or P6 for iOS.



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Table of Screen Highlights

Item	Description
1	**Documents** tab: Documents available from this tab are stored in a content repository or in an Oracle database. You can access a document by selecting a document name. You can email the document creator or the last person who modified the document by selecting the person's name if the name is underlined.
2	**Work Product Documents** tab: Documents available from this tab are stored on a local file share. You can access the document by copying the path to your browser.

Viewing Documents

View documents to review additional information about your activity.

To view a document:

1. Select an activity.
2. In the activity card, select **Documents**.
3. In the **Documents** dialog box, select the **Project Documents** or **Work Product Documents** tab.
4. Click the document name.

> **Note**
>
> If the tabs do not display, either select the document name or copy the document location and paste the location in a browser, depending on the options presented in the dialog box.

> **Tip**
>
> The documents link is only visible when documents are available for your activity.
>
> You cannot view documents from the grid view.

Related Activities

Related activities are the activities that have a logical start or end relationship with your assigned activities. Predecessor activities are required to start or finish *before* the selected activity has started or finished; successor activities are required to start or finish *after* the selected activity has started or finished. These relationships are set by your project manager in P6.

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Working with Related Activities

Use the Related Activities dialog box to view predecessor and successor activities and communicate with the activity owners.

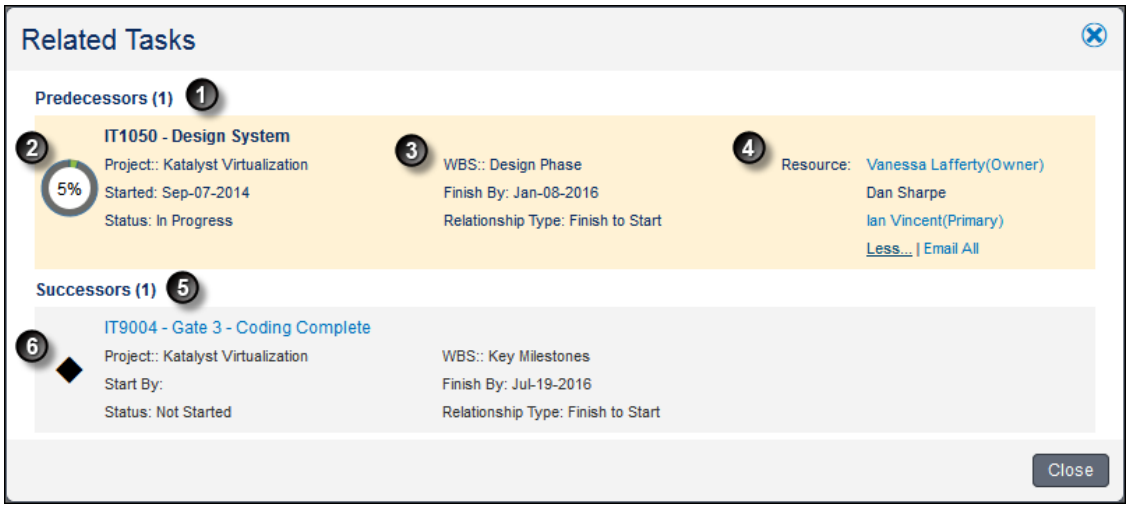


Table of Screen Highlights

Item	Description
1	**Predecessors**: View progress on predecessor activities to determine if you can begin your activity on time.
2	**Progress indicator**: Use the progress indicator to determine how much work has been done on an activity. The color indicates the state of the activity and the shading represents the percent complete. • Gray - Not started • Green - In progress • Red - Overdue
3	**Dates for Predecessors:** • **Start By/Started and Finish By/Finished**: Use these dates along with the progress indicator to determine when the predecessor activity will complete. • **Start By**: Use the milestone date to determine when the milestone is scheduled to begin. **Dates for Successors:** • **Start By/Started and Finish By/Finished**: Use these dates to determine when a successor activity is scheduled to begin and end. • **Finish By**: Use the milestone date to determine when the milestone is scheduled to be complete.

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4	**Resources**: View the name of the people responsible for the activity. Send an email to the activity owner to communicate project status. For example, email the owner of a predecessor activity to request additional information on an activity, or notify an activity owner of a successor activity of a potential issue that could delay the start of their assigned activity. The email feature is only available if the activity owner has an email address assigned in P6.
5	**Successors**: View the activities that have a dependency on you finishing your assigned activity.
6	**Milestone**: The milestone icon indicates this is a start milestone if it is under Predecessors and a finish milestone if it is under Successors.

Viewing Predecessor or Successor Activities

Use the Related Activities dialog box to view information on activities that have a relationship with your assigned activity.

To view predecessor or successor activities:

1. Select an activity.
2. In the activity pane, select **Related Activities** (Ctrl+Alt+J).
3. In the **Related Activities** dialog box:
   a. View the owners of the activities and the start and finish dates.
   b. For Predecessor activities, view the progress indicator to gauge how much work remains before you can begin your activity.

      For Successor activities, view which activities are scheduled to begin after your work is complete. View the progress indicator to determine if the activity owner began work on the activity.

> **Tip**
>
> If you do not have any predecessor or successor activities, this link will not display.

Sending Email to a Predecessor or Successor Activity Owner

To communicate with the person responsible for an activity that begins before or after your assigned activity, you can send an email from the Related Activities dialog box.

To send an email:

1. Select an activity.
2. In the activity pane, select **Related Activities**.
3. In the **Related Activities** dialog box, select the activity owner's name.

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Tip

You will not be able to send an email if either of the following conditions exist:

- An owner has not been assigned to the activity.
- The activity owner does not have an email address assigned in P6.

Field Definitions for Dates and Work Units

The fields available to you in the progress panel are assigned by your project manager in P6. In P6, a team member is assigned as a resource assignment, an activity owner, or a user with a Team Member work distribution filter.

Resource Assignment

Baseline Dates

The date work was scheduled to start and finish according to the baseline.

Finish By

The date you are scheduled to complete the activity.

Finished

The date you actually completed the activity.

Log Additional Time

The amount of time you have worked on the activity since you last reported your work.

Start By

The date you are scheduled to begin the activity.

Started

The date you actually began work on the activity.

Time Left

The total working time left to complete the activity.

Time Spent

The actual amount of time spent working on the activity.

Remaining Duration

The period of time required to complete the activity based on your current work schedule and additional project commitments.

Activity Owner or User Assigned a Team Member Work Distribution Filter

% Complete

The percentage of the activity that has been completed.

The calculation of this field depends on the settings your project manager configured in P6.

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This field is either:

- Calculated using units or duration.
- Calculated using the percentage complete from steps.
- A value you enter based on your own perception of the work you completed on this activity.

Baseline Dates

The date work was scheduled to start and finish according to the baseline.

Expected Finish

The date you expect work on the activity to end.

Finish By

The date you are scheduled to complete the activity.

Finished

The date you actually completed the activity.

Log Additional Time

The amount of time you have worked on the activity since you last reported your work.

Remaining Duration

The period of time required to complete the activity based on your current work schedule and additional project commitments.

Resume

The date work resumed, or will resume, on the activity.

Start By

The date you are scheduled to begin the activity.

Started

The date you actually began work on the activity.

Suspend

The date work was suspended on the activity.

Time Spent (Labor)

The actual amount of time spent working on the activity.

Time Spent (Nonlabor)

The actual amount of time spent on the activity by a nonlabor resource.

Time Left (Labor)

The total working time left to complete the activity.

Time Left (Nonlabor)

The remaining time required of a nonlabor resource to complete the activity.

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Steps

Steps are used to break an activity down into a more granular level of detail. When your assigned activity includes steps, be sure to provide status for the steps when updating the activity. Depending on the settings configured by your project manager, you may have privileges to add, edit, and delete steps and view or update user defined fields associated with steps.

Working with Steps

Use the Steps dialog box to view your assigned steps and report your progress. Open the Steps dialog box to add, edit, and delete steps. The add, edit, and delete functionality is only available if your project manager has turned this setting on for the project.

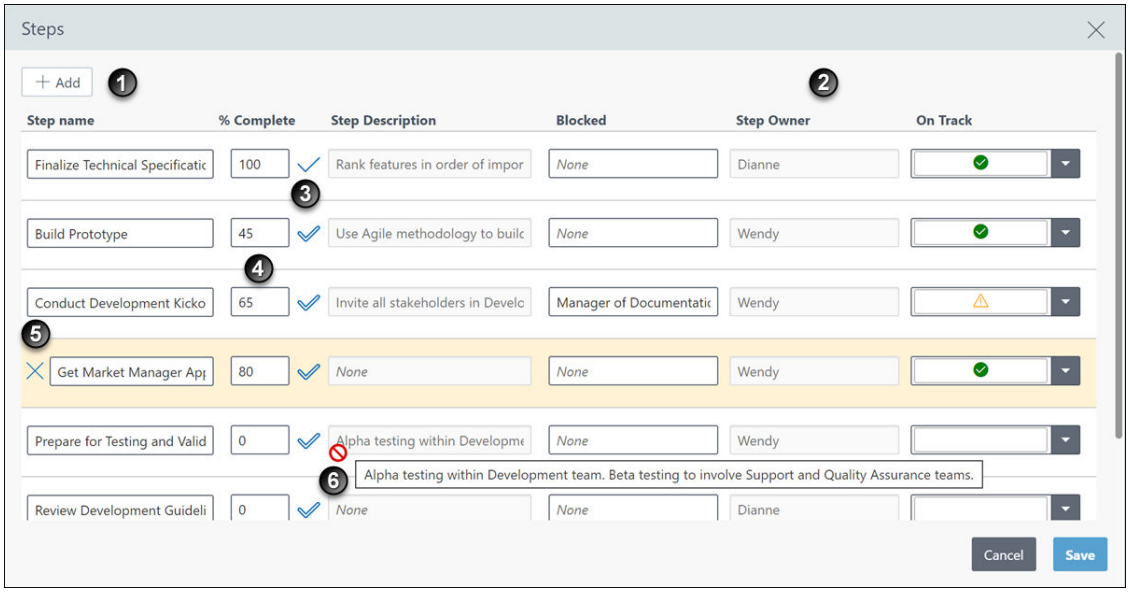


Table of Screen Highlights

Item	Description
1	**Add Step**: Depending on the settings configured by your project manager, you might be able to select + **Add** to create a new step. The new step appears at the bottom of the list.
2	**User Defined Fields**: Depending on the settings configured by your project manager, you might be able to see and edit user defined fields for each step.
3	**Step Completed**: When you are finished with a step, select ✓ **Complete Step** (Ctrl+Alt+C), or enter 100 in the **% Complete** field.

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4	**% Complete**: Enter your percentage complete as you progress through each step.
5	**Delete**: Depending on the settings configured by your project manager, the Delete icon might be visible when you select a row. To delete a step, select ✕ **Delete** (Ctrl+Alt+R) and then **Save**.
6	**Step Description**: If a step description is longer than the space available, you can read the text if you hover over the field.

Adding Steps

Add steps to an activity to list the activities or the process used to complete an activity.

To add a step to an activity:

1. Select an activity.
2. On the Activity Details tab of the progress panel:
   a. Expand the **Steps** section.
   b. Select **Add** (Ctrl+Alt+A).
3. In the **Steps** dialog box:
   a. Enter a name for the step.
   b. Select **Save** (Ctrl+Alt+Enter).

Tip

- If you do not see the **Add** button in the **Steps** section, then you do not have privileges to add steps to the activity.
- To delete a step, select the step and then select ✕ **Delete** (Ctrl+Alt+R).

Updating Progress on Steps

Update your steps to record your progress.

To update progress on a step:

1. Select an activity.
2. On the Activity Details tab of the progress panel:
   a. Expand the **Steps** section.
   b. Select **More** (Ctrl+Alt+M) to view all steps, if all steps are not visible.
   c. In the **% Complete** field, enter a percentage value for your work complete.
   d. Optionally view and change the values for user defined fields associated with the step.
   e. If you are finished with the step, either:
      - Enter **100** in the percentage field.

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- Select ✓ **Complete Step** (Ctrl+Alt+C).

f. Select **Save** (Ctrl+Alt+Enter).

Tip

- Depending on the settings configured by your project manager, your **% Complete** for the activity may be calculated using steps. Steps either have equal weight or are weighted according to the effort required to complete the step.
- Depending on the settings configured by your project manager, you may be able to see and edit user defined fields.
- You can begin reporting progress on your steps for an activity before you start the activity.
- If you do not see the **Steps** section, you do not have any steps to complete on this activity and you do not have privileges to add steps to this activity.

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Codes and UDFs

Codes and UDFs (user-defined fields) are used to provide you with, or to gather, information about an activity or project. Codes and UDFs can be used to provide you with details about an activity or project, such as which department will be performing the work for or what phase of the project the activity is being performed in. Codes and UDFs can also be used to track information about an activity or project, such as delivery dates or purchase order numbers.

Working with Codes and UDFs

Use the Activity Details panel to view or update information about an activity, including the codes and UDFs assigned to the activity and the steps required to complete it. Use the Project Details panel to view or update codes and UDFs assigned to the project to which an activity belongs. Group the My Activities page by codes or UDFs to more easily identify activities assigned the same code or UDF.

Codes and UDFs are selected by your manager at the project level, so every activity you have within the same project will have the same list of codes and UDFs available to you. Depending on the project or the practices at your organization, you may or may not be required to update the codes or UDFs.

Text UDFs can include clickable hyperlinks to websites. An administrative setting in P6 can be used to control the URLs that can be opened directly from a clickable link. If a URL or its pattern is not listed in the setting, P6 Team Member copies the link to your clipboard when you click it.

Viewing and Updating Codes and UDFs

Codes and UDFs provide additional information about your activities and the projects to which they belong. Your project manager may require you to update this information.

To view and update codes and UDFs:

1. Select an activity.
2. On the **Activity Details** or **Project Details** tab of the progress panel:
    a. Expand the **Activity Codes and Activity UDFs** section:
    b. Review the codes and UDFs. If a **More** (Ctrl+Alt+M) link is available, select it to view additional codes and UDFs.
    c. A field will be selectable if you have privileges to make updates to the code or UDF and if the project manager for a project has allowed it to be updated in the preferences of the project. Select a field and use the controls for the field to make an update.
3. Select **Save** (Ctrl+Alt+Enter) if you made changes to a field.

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Tip

- The range for integers is -2,147,483,647 to 2,147,483,647.
- The range for numbers is -1,000,000,000,000.00 to 1,000,000,000,000.00.

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Working with Timesheets

You can report and review actual time spent on activities, send notes about the timesheet, and submit time for approval in the Timesheets view. After you have submitted a timesheet and until it is approved, you can withdraw the timesheet to make changes to it. You can open and view a timesheet and report actual work time if an administrator or project manager has designated you as a timesheet user.

If you have not been designated as a timesheet user, the Timesheet view is not available to you. Depending on the way your organization tracks actual work, you might be required to report actual work time in the My Activities page.

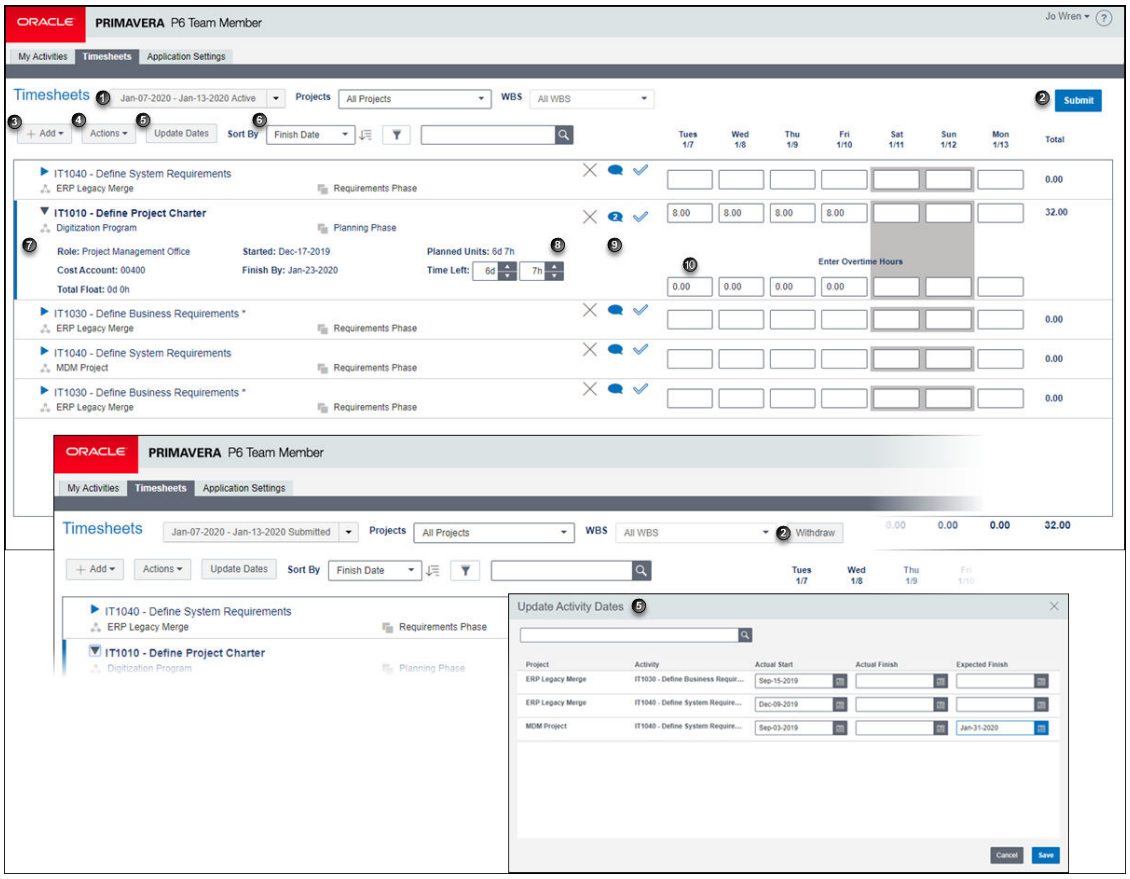


Table of Screen Highlights

Item	Description
1	**Timesheet list**: Choose a timesheet to work with. The number of past and future timesheets you can see is controlled by an administrative privilege.

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Item	Description
2	**Submit**: When you have finished entering hours into your timesheet, you must submit it before those hours will be counted against activities. Once submitted, you can withdraw a timesheet as long as it has not been approved. An administrative setting controls whether timesheets require approval or submission. If your administrator has configured P6 EPPM with the Auto Submission or Auto Approval options, you will not need to submit and you will not be able to withdraw your timesheet.
3	**Add** : You can add activities or overhead time to the timesheet
4	**Actions** : You can assign yourself to an activity, view timesheet notes, edit other resources' timesheets, or generate a timesheet report. You can only edit another resource's timesheet if you have the required privileges. You cannot see timesheet notes for timesheets you have not started.
5	**Update Dates**: Launches a dialog box where you can update the Actual Start, Actual Finish and Expected Finish dates for activities where you are the primary resource. Your Project Manager configures the project to determine whether you can update activity dates in timesheets.
6	**Sort by**: You can sort the list of activities by activity ID or name, project ID or name, start date, finish date or WBS in either ascending or descending order.
7	**Actvity details**: You can see details of activities, select **Expand** to see more details of an activity, or **Collapse** the row to see more activities in one screen.
8	**% Complete** or **Time Left**: Enter the percentage complete for the activity or the time remaining until the activity will be complete. Your Project Manager configures the project to determine whether you report % Complete or Time Left.
9	**Remove This Activity**: Removes the activity from this timesheet. The activity will still be assigned to you and you will be able to see it in My Activities. **Discussion**: Launches a dialog box where you can communicate with your project manager, or another team member assigned to the same activity, regarding the selected activity. A number on the Discussion icon indicates the number of unread messages. **Mark Activity Complete**: Select the check mark when you have finished work on the activity.

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Item	Description
⑩	**Enter regular hours and overtime hours**: You can report hours for the activity either by day or by reporting period (depending on how your administrator has configured the application settings). If your organization allows, you can enter overtime hours worked on the activity. An administrative setting controls whether you can enter hours as a decimal value, hours and minutes, or rounded to the nearest quarter-hour. For example to enter 2 hours and 20 minutes, as a decimal you would enter 2.33, as hours and minutes you would enter 2:20 and rounded to the quarter-hour you would enter 2:15.

Opening a Timesheet

1. Select **Timesheets**.
2. In the **Timesheet** list, select the timesheet you want to open.

   > **Note**
   >
   > If no timesheets are listed, none have been generated for you. Contact your P6 administrator or project manager for assistance.

3. If you are opening a timesheet for the first time, select one of the following options:

   Automatically add current activities to timesheet

   This option adds all activities you are scheduled to work on during the timesheet date range. If you want to add activities scheduled during the timesheet period, but for which you have completed your work (an Actual Finish exists for your assignment), choose the **Add completed activities** option.

   Manually add activities to timesheet

   Use this option to select from a list of your activities.

   Copy activities from previous timesheet This option automatically copies all activities included in the previous timesheet listed. This option is not available if the previous timesheet is Not Started.

   If you want to copy activities scheduled during the timesheet period, but for which you have completed your work (an Actual Finish exists for your assignment), choose the **Copy completed activities** option. An administrative setting determines whether you are allowed to report actual hours for completed activities. To add your currently scheduled activities to the new timesheet, choose the **Add current activities** option.

   To add the activities and the recorded hours from your previous timesheet, choose the **Copy hours from previous timesheet** option.

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> **Note**
>
> If a project's status has changed from active since the last timesheet, activities for that project will not be copied from the previous timesheet.

4. If you chose the **Manually add activities** option, the **Add Existing Activity to Timesheet** window opens. Select one or more activities and choose **Add**.

> **Tip**
>
> - You can change the way the Timesheets view is grouped by selecting Group by Project, Group by WBS, or both in Preferences.
> - To copy the activities and recorded hours from a previous timesheet, the previous and current timesheets must have the same number of days.

Adding Activities to a Timesheet

1. Select **Timesheets**.
2. Select **Add** or **Add** , **Add Existing Activity**.
3. Select one or more activities, then select **Add**.

> **Tip**
>
> - If overhead time is configured for your organization, to add an overhead time, select **Add** or **Add** , **Add Overhead Time**.
> - The **Add Existing Activity to Timesheet** window lists all of your In Progress activities. For Not Started and Completed activities, the list includes activities that fall within the time range specified in your user preferences.
> - Before you add an activity to a timesheet, you must assign yourself to that activity. See Assigning Yourself to an Activity.

Removing Activities from a Timesheet

1. Select **Timesheets**.
2. Select an activity.

   In Classic View:

   a. Select **ExpandExpand**.

   b. Select **Remove This Activity**.

   c. To confirm, choose **Yes**.

In Standard View:

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1. Select **Context** and select **Delete**.
2. To confirm, choose **Yes**.

Assigning Yourself to an Activity

Assign your resource to an activity so that you can add the activity to a timesheet.

1. Select **Timesheets**
2. Select **Actions** , **Assign Activity**.
3. In the **Assign Activities** box:
   a. Select the project you want to assign yourself to.
   b. Select one or more activities.

> **Note**
>
> You can search for an activity either in all fields of the activity, or by restricting your search to the Activity ID, Activity Name, WBS, or Activity Status fields.

   c. Select **Assign & Add** to assign your resource to the activities and add the activities to your timesheet, or **Assign** to assign your resource to the activities without adding them to your timesheet.

Assigning Yourself to a Role Assignment

Assign yourself to assignments of activities with existing unstaffed roles that match your role.

To staff yourself to a role assignment:

1. Select **Timesheets**
2. Select **Actions** , and then select **Staff Role Assignments**.
3. In the Staff Role Assignments dialog box:
   a. Select the project.
   b. Select one or more activities.
   c. Select **Assign & Add** to assign your role to the activities and add the activities to your timesheet, or **Assign** to assign your role to the activities without adding them to your timesheet.

> **Tip**
>
> A project-level setting determines whether a project is listed so you can assign yourself to its activities. If you need to assign yourself to a project that is not listed, contact your project manager or P6 administrator.

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Filtering Timesheets

Filter your view to help you to see the activities of interest to you at one time. You can filter your view by Projects or WBS nodes using the Project and WBS lists. Standard filters in the Manage Filters page allow you to filter your view by activity status. You can also create a custom filter.

To create a custom filter:

1. Click **Filters** and select **Manage Filters....**.
2. On the Manage Filters page:
   a. In the filters list:
      - Click **Context** next to the category Global to create a new filter available to all users or next to the category User to create a new filter available only to you, then click **Add**.
      - In the **Name** field, enter a name that describes the filter you are creating.
   b. In the Filter Details area:
      - Configure the filter criteria.
      - Click **Context** and click **Add Above** or **Add Below** to configure additional filtering criteria.
3. In the filters list, select the filters that you want to apply.
4. Click **Save**.

Managing Timesheet Views

Manage timesheet views to help you to see the information of interest to you. You can modify the columns, filtering, grouping, and sorting of timesheets. You can also configure the spreadsheet area of the timesheet to ensure you can enter the correct data.

To create a custom view:

1. Click **Customize View**.
2. On the Manage Views page:
   a. In the Views list:
      - Click **Context** to create a new view and enter a name that describes the view you are creating.
   b. On the **Columns** tab:
      - In the Available Columns list, select columns you want to add to the view then click **Add column to Selected Columns** (Ctrl + Shift + Right Arrow).
      - In the Selected Columns list, select the columns you want to remove from the view, the click **Remove column from Selected Columns** (Ctrl + Shift + Left Arrow).
   c. On the **Filtering** tab:

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- Select whether you want your view to show activities and assignments that match **all applied** filters or **any applied** filters.
- In the filters list select the filters to apply to the view.
- Optionally click **Edit Filters...** to modify or add filters

d. On the **Grouping** tab:

- Click **Configure** to select the columns to group by and specify the sort order and group interval to use. You can also modify Band Options.
- Click **Theme** to select the style and colors to use for the view. Optionally, click **Add Custom Colors** to create new color palettes.

e. On the **Sorting** tab:

- Select a column and sort order for the view.
- Click **Context** to add or remove sort criteria..

f. On the **Spreadsheet** tab:

- In the Available Columns list, select columns you want to add to the spreadsheet area of the timesheet then click **Add column to Selected Columns** (Ctrl + Shift + Right Arrow).
- In the Selected Columns list, select the columns you want to remove from the spreadsheet area of the timesheet then click **Remove column from Selected Columns** (Ctrl + Shift + Left Arrow).

3. Click **Save**.

Recording Actual Work Time on a Timesheet

Accessibility Tip: To display tool tips for timesheet reporting cells, select the **Display tooltips in time reporting cells** option in the Accessibility section of your Preferences (Ctrl+Alt+P). When using a screen magnifier, these tool tips aid table cell identification.

To record actual work time on a timesheet:

1. **If your timesheet uses daily reporting format**, select the cell that corresponds to the activity and date for which you want to enter time.

   If your timesheet uses period reporting format, select the cell in the Total column that corresponds to the activity for which you want to enter time.

   > **Note**
   >
   > An application setting determines whether you enter time daily or by reporting period.

2. Select an activity.

   In Classic View:

   a. Type the number of regular hours you worked on the activity in the cell corresponding to the date the work took place.

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b. To report an estimate for your remaining work select **ExpandExpand** and change the value in the **Time Left** field.

c. If you have permission to record overtime for an activity, select **ExpandExpand** and type the number of overtime hours in the **Enter Overtime Hours** row.

In Standard View:

1. Type the number of regular hours you worked on the activity in the spreadsheet cell corresponding to the date the work took place.
2. To report an estimate for your remaining work type the number of hours in the **Remaining Units** column.
3. If you have permission to record overtime for an activity, type the number of hours in the **Actual Overtime Units** spreadsheet field.

> **Note**
>
> - An administrative setting determines whether you have permission to log overtime hours. If you do not have permission to log overtime hours, the overtime hours rows are not visible to you.
> - Another administrative setting controls whether you can enter hours as a decimal value, hours and minutes, or rounded to the nearest quarter-hour. For example to enter 2 hours and 20 minutes, as a decimal you would enter 2.33, as hours and minutes you would enter 2:20 and rounded to the quarter-hour you would enter 2:15.

Updating Activity Level Dates on a Timesheet

If you are the primary resource you can update activity level dates in a timesheet.

> **Note**
>
> Your project manager can configure the project settings to prevent you from updating activity level dates in a timesheet.

To update dates in a timesheet:

- Select **Timesheets** and open a timesheet.

  In Classic View:

  1. Select **Update Dates**.
     - To update the Actual Start, select **Select Date** in the **Actual Start** field.
     - To update the Actual Finish, select **Select Date** in the **Actual Finish** field.
     - To update the Expected Finish, select **Select Date** in the **Expected Finish** field.
  2. Select **Save**.

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In Standard View:

1. Update the date in the **Actual Start**, **Actual Finish**, or **Expected Finish** column.

> **Note**
>
> If the Actual Start, Actual Finish, and Expected Finish columns are not visible in the view, select **Customize View** and move the columns from the Available Columns list to the Selected Columns list.

2. Select **Save**.

> **Tip**
>
> - Your project manager may need to approve changes to the Actual Finish date before they are applied to the project.
> - You cannot select an Expected Finish date for an activity that has an Actual Finish.
> - You cannot update dates on an activity in a checked out project.

Reporting a Completed Assignment

When you finish a work assignment, if your project allows, you can mark the assignment as completed.

> **Note**
>
> Completing an activity in a timesheet will not apply an Actual Finish to the activity. The actual finish will be applied in the project in P6 after the Project Manager runs **Apply Actuals**.

To report a completed activity assignment:

1. Select **Timesheets** and open a timesheet.
2. Select an activity.

   In Classic View:

   - Select **Mark Activity Complete** (Ctrl+Alt+C).

In Standard View:

1. Enter te date the work finished in the Actual Finish column.

Editing Other Resource's Timesheets

If you have the appropriate privileges, you can report time for other resources.

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1. Select **Timesheets**
2. Select **Actions** , **Edit Resource's Timesheet**.

Adding or Viewing Timesheet Notes

Timesheet notes allow you to communicate with your timesheet reviewer.

To add or view timesheet notes:

1. Select **Actions** .
2. Select **View Timesheet Notes**.
3. View any notes which already exist and to add notes, type in the **Enter Notes** section and select **Add**. The most recently added notes display at the top of the Notes History section.
4. When finished, close the window.

Saving or Printing a Timesheet

To save or print a timesheet:

- Select **Timesheets**.

  In Classic View:

  - Select **Actions** , **Generate report**.

In Standard View:

1. Select **Print**.

Submitting a Timesheet

A P6 administrator or project manager specifies settings that determine whether you are required to submit timesheets for approval. If your timesheets are set for auto-submission, the Submit current timesheet feature will be unavailable and your timesheet will automatically be submitted when you select **Save**.

Once you submit a timesheet, you will not be able to change it unless it is rejected by your time approval manager. If a timesheet is rejected, you will receive a notification in P6 Team Member Web to correct and resubmit the timesheet.

To submit a timesheet, select **Submit** and choose Yes to confirm.

Withdrawing a Timesheet

You can withdraw a timesheet you have submitted, if it has not yet been approved or rejected.

To withdraw a timesheet:

1. Select **Timesheets**.

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2. In the **Timesheet** list, select a timesheet with the status Submitted.
3. Select **Withdraw**.

List of Accessibility Features

- Full keyboard-only access. See Keyboard Shortcuts for Timesheets.
- Support for assistive technologies, including accessible exposure of interface elements, input focus, and text information, as well as logical arrangement of interface elements and information for keyboard navigation.
- Recommended structural markup of table columns and rows enables assistive technologies to accurately identify cell content for non-visual users.
- Respect for user-defined display preferences, such as color, contrast, and font size settings that are available as operating system accessibility options.
- **Display tooltips in time reporting cells** Preferences option aids table cell identification when using a screen magnifier.
- Avoidance of color alone to convey meaning.

Printing a Timesheet

Your organization might require that you keep a hard copy of submitted timesheets, or to submit paper timesheets in addition to updating your progress in P6 Team Member Web timesheets.

To print a timesheet:

1. Click **Print**.
2. On the Print Options page, in the Settings pane:
   a. Select the appropriate **Paper Size**.
   b. Select an **Orientation** for the printed page.
   c. Edit the **Top**, **Left**, **Right**, and **Bottom** margins.

      The default unit is inches. To enter margin sizes in centimeters, type "cm" after the number.
   d. Select whether you want to show a watermark.

      If you select **Show watermark**, enter the text for the watermark in the field.
   e. Select the **Scaling** you want to apply to the printed page.
   f. Select a **Page layout** for the printed page.
   g. Select whether you want to insert a page break at the end of each group.
   h. Select whether you want to **Repeat column headers** if the table runs across multiple pages.
   i. Select whether you want to **Show row numbers** in the table.
3. Hover over the print preview to **Edit Header**, **Edit Content**, or **Edit Footer**.
4. Review the print preview.

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You can **Zoom Out**, **Zoom In**, **Zoom to Default**, **Zoom to Fit**, and show **Continuous** pages.

5. Click **Print**.

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About Preferences

Preferences allow you to customize your view to display dates and work units in a format that you prefer, specify which window to show at start up, and determine what identifying information to show for projects and WBS elements. You can also change your password, contact information, and accessibility preference. The options you customize are exclusively yours.

Configuring My User Details

To change your P6 Team Member Web user details:

1. On the **User Control Panel**, select your user name and click **Expand User Control Panel**.
2. On the user menu, select **Preferences**.
3. In the **User Set Up** Section:
   a. Enter your phone number in the **Office Phone** field.
   b. Enter your email address in the **Email** field.
4. Select **Save**.

Changing My Password

You can reset your password at any time.

The password setting is hidden if your company is running enterprise authentication.

To change your password:

1. On the **User Control Panel**, select your user name and click **Expand User Control Panel**.
2. On the user menu, select **Preferences**.
3. In the **Login** section select **Password**.
4. In the **Change Password** diaog box:
   a. In the **Current Password** field, enter your current password.
   b. In the **New Password** field, enter a new password.

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> **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 Password** field, enter the new password again for verification.

d. Select **Save** (Ctrl+Alt+Enter).

Unlocking My Account

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**.

> **Tip**
>
> - 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.

Configuring My Start Up Preferences

To determine which page opens when you start P6 Team Member Web:

1. On the **User Control Panel**, select your user name and click **Expand User Control Panel**.

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2. On the user menu, select **Preferences**.
3. In the **Start Up** section:
   - Select the page you want to see when you open P6 Team Member Web.
4. Select **Save**.

Configuring My Date, Time, and Unit View Preferences

You can choose how to format dates, time, and units that display in the application.

To configure your view preferences:

1. On the **User Control Panel**, select your user name and click **Expand User Control Panel**.
2. On the user menu, select **Preferences**.
3. In the **Date and Time** section:
   a. In the **Date Format** list, choose a format to display the day, month, and year.
   b. To display hours along with the dates, select **Display Time**.
   c. In the **Time Format** list, choose to view either a 12 or 24 hour format.
   d. In the **Unit and Duration Format** list, choose a format to view and enter work units.

      If you select Days or Hours, select the number of **Decimal Places** to show.
   e. Select **Save** (Ctrl+Alt+Enter).

Configuring My View Preferences

You can choose how to show information about Projects and WBS nodes.

To configure your view preferences:

1. On the **User Control Panel**, select your user name and click **Expand User Control Panel**.
2. On the user menu, select **Preferences**.
3. In the **View** section:
   a. In the **Timeframe for completed activities** list, choose how many days of completed activities will show when you select the All filter in My Activities.
   b. To show the project ID, select **Show Project ID**.
   c. To show the project name, select **Show Project Name**.
   d. To show the WBS ID, select **Show WBS ID**.
   e. To show the WBS name, select **Show WBS Name**.
   f. To group the Timesheets view by project, select **Group by Project**.
   g. To group the Timesheets view by WBS, select **Group by WBS**.
   h. To show only an activity's own WBS while filtering activities by WBS, select **Show only Activity's WBS**.

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i. To show an activity's WBS and its parent WBS while filtering activities by WBS, select **Show Activity's WBS parent**.

j. Select **Save** (Ctrl+Alt+Enter).

Tip

- If you select neither Show Project nor Show Project ID, P6 Team Member Web will display both the Project ID and Project Name in the project filter, but elsewhere neither the Project ID nor the Project Name will appear.
- The options for grouping by Project and WBS on this page are applicable only for the Timesheets view. To group the Activities view, use Customize View.
- If you group the Timesheets view by WBS, your view will also be grouped by Project.

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About Application Settings

Application Settings allow administrators to customize how your users will work in P6 Team Member Web. The options you customize apply to all P6 Team Member Web users.

> **Note**
>
> You need to have the Edit Application Settings global security privilege assigned to your profile to see this page.

Configuring Application Settings

1. Select **Application Settings**.
2. In the **General** section:
   a. Select the **Maximum search results** to limit the number of results returned in the **Assign Resource to Activity** dialog box.
   b. Select the **Allow editing of subordinate timesheets** option to allow supervisors to modify subordinate resources' timesheet.
   c. Select the **Enable timesheet auditing** option to save the history of timesheet submission, approval, rejection, reviewers, and associated dates. This setting can also be managed from P6.
   d. Select the **Update actual units when activities or assignments that were never started are marked complete in My Activities** option to allow actual units to be updated in P6 when, on the My Activities page, you set the Mark Activity Complete or Mark Assignment Complete check mark against an activity or assignment which has never been started. This option is useful if you track your work at a high level.
   e. Choose the Default Timesheets View.

      If you select **Classic View**, users will see a simplified timesheet entry screen.

      If you select **Standard View**, users will see a timesheet entry screen with a look and feel more similar to P6 that allows them to filter, group and sort their view, add and removes columns in the grid, and use the quick search functionality.
3. In the **Email Service** section:
   - Choose whether you want to **Use a separate email client** or **Use P6 Team Member email client**. If you choose to use a separate email client, you must have an email client installed to send email.
4. In the **Status Updates** section:
   a. Choose the time to use as the start time for activities when a user selects or taps Start in P6 Team Member Web, P6 for Android, or P6 for iOS after the scheduled start date of the activity.

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If you select **Current time**, when a team member selects or taps Start the start time of the activity is set to the date and time when the team member selects or taps Start.

If you select **Start of day**, when a team member selects or taps Start the start time of the activity is set to 00:00 (midnight) of the date when the team member selects or taps Start.

If you select **Calendar work period start**, when a team member selects or taps Start the start time of the activity is set to the beginning of the work period on the date when the team member selects or taps Start according to the calendar governing the activity's dates. If a team member selects or tap Start during a non-work period according to the calendar governing the activity's dates, the start date of the activity is set to the date and time when the team member selects or taps Start.

b. Select the status or statuses from the **Status**: list that you want to appear as due or overdue to team members.

   Configure the field, operator, and value in the **Overdue:** section to determine how P6 EPPM will identify activities and assignments as overdue.

   Configure the field, operator, and value in the **Due:** section to determine how P6 EPPM will identify activities and assignments as due.

   Click **Restore Defaults** to return these settings to their default values.

5. In the **Entering Timesheets** section:

   a. Choose how you would like users to enter hours on timesheets:

      If you select **Daily**, you can also select to **Restrict the maximum hours a resource can enter per day** and specify the maximum number of hours a resource can enter for all of their assigned activities (minimum 0.5, maximum 24). For example, if you set this value to 12 a resource cannot report more than 12 hours per day, even if they report fewer than 12 hours on each individual activity that day.

      If you select **By reporting period**, all resources will report their hours as a single time value for each assigned activity in a timesheet reporting period, regardless of the number of days included in the timesheet period.

   b. Select the **Timesheet hours entry** for users entering hours on timesheets.

      If you select **hours (decimal)**, all resources will report their hours as a decimal value. For example 2 hours and 20 minutes would be reported as 2.33.

      If you select **hours:minutes**, all resources will report their hours as the number of hours and the number of minutes. For example 2 hours and 20 minutes would be reported as 2:20.

      If you select **quarter-hour**, all resources will report their hours as the number of hours and either 00, 15, 30, or 45 minutes. Minutes values other than 00, 15, 30, or 45 will automatically be rounded to the nearest quarter-hour value. For example, 2 hours and 20 minutes could be reported as 2:20 but would be stored as 2:15.

   c. Select the **Number of decimal digits for recording hours**.

   d. Select the **Number of future timesheets users can access** beyond the current timesheet period.

   e. Select the **Number of past timesheets users can access** before the current timesheet period.

6. In the **Privileges for Entering Hours on Timesheets** section:

   a. Select the **Log hours on future timesheets** option to indicate that users can report hours on timesheets with dates after the current timesheet period (for example, entering vacation time in advance).

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b. Select the **Log hours on not-started activities** option to indicate that users can report hours for activities that have not been started.

c. Choose whether you want users report hours for **Activities and Assignments** or **Assignments only** that have been marked as completed.

d. Select whether you want users to be able to **Log hours on activities before the assignment start date** and **Log hours on activities before the activity start date**.

e. Select whether you want users to be able to **Log hours on activities after the assignment finish date** and **Log hours on activities after the activity finish date**.

f. Select the **Allow resource to enter negative hours against activities and assignments** option to allow users to enter a negative number of hours in a cell on a timesheet.

g. Select the **Allow total hours to be negative** option to allow users to make an entry on a timesheet that would cause the activity's total hours to become negative.

> **Note**
>
> When the Allow total hours to be negative option is not selected, it is still possible for users to enter a negative value of hours in a timesheet, for example if it is necessary to correct a previous entry. However with this option selected, users will not be allowed to enter a number of hours that would result in the activity hours being calculated as less than zero.

h. If the Allow Negative Actual Units preference in the EPS table is selected for the project, it is also possible for negative actual units to be applied to activities by the Apply Actuals feature.

7. Select **Save**.

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About P6 Mobile

P6 for Android and P6 for iOS allow you to view and update your activities and timesheets on your mobile device.

Configuring P6 for Android from P6 Team Member Web

To configure access to your activities and timesheets from your Android device:

1. Install P6 for Android on your mobile device.

   > **Note**
   >
   > You can email yourself a link to the download page from this screen.

2. In P6 Team Member Web:
   a. On the **User control panel**, select your user name.
   b. On the user menu, select **Get P6 Mobile**.
3. On your mobile device:
   a. On the Android Home screen, tap **P6**.
   b. On the P6 for Android Login screen, tap .
   c. Point the camera of your Android device at the QR code on screen in P6 Team Member Web until it scans the code.
   d. Type your password and tap **Sign In**.

Configuring P6 for iOS from P6 Team Member Web

To configure access to your activities and timesheets from your iOS device:

1. Install P6 for iOS on your mobile device.

   > **Note**
   >
   > You can email yourself a link to the download page from this screen.

2. In P6 Team Member Web:
   a. On the **User control panel**, select your user name.
   b. On the user menu, select **Get P6 Mobile**.

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3. On your mobile device:
   a. On the iOS Home screen, tap **P6**.
   b. On the P6 for iOS Login screen, tap .
   c. Point the camera of your Android device at the QR code on screen in P6 Team Member Web until it scans the code.
   d. Type your password and tap **Sign In**.

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UAP Topics Hidden in TOC

Cookies Policy P6 Team Member Web

Oracle might use cookies for authentication, session management, remembering application behavior preferences and performance characteristics, and to provide documentation support.

Also, Oracle might use cookies to remember your log-in details, collect statistics to optimize site functionality, and deliver marketing based on your interests.

My Activities

As an activity owner, you are responsible for communicating progress by statusing your activities in P6 Team Member Web.

An activity might also be referred to as an activity or an assignment. Each activity has start and finish dates as well as fields used to show your progress. These fields are customized by your project manager using an application called P6.

Step me through...

Viewing Activities

Grouping Activities

Assigning Activities

Assigning Yourself to Role Assignments

Starting Activities

Updating Activities

Sending Email About an Activity

Starring Activities

Completing Activities

Communicating with My Project Manager

Viewing Notebook Topics

Viewing Documents

Viewing Predecessor or Successor Activities

Learn more about...

Field Definitions for Dates and Work Units

Working with Activities

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Working with Discussions

Working with Notebooks

Working with Documents

Working with Related Activities

Keyboard Shortcuts for My Activities

Preferences

You can customize your view to display dates and work units in a format that you prefer, specify which window to show at start up, and determine what identifying information to show for Projects and WBS elements. You can also withdraw your acceptance of a consent notice, and change your password, contact information, and accessibility preference.

Step me through...

Configuring My User Details

Configuring My Start Up Preferences

Configuring My View Preferences

Configuring My Date, Time, and Unit View Preferences

Changing My Password

Learn more about...

About Preferences

Timesheets

As a resource, your organization might require you to report the progress you make against specific activities by submitting timesheets. For each activity in a timesheet, you can mark the activity as started, report the number of hours you have worked, and mark the activity as completed if appropriate. After you have submitted a timesheet and until it is approved, you can withdraw the timesheet to make changes to it. Depending how the system is configured, you might also be able to report time for other resources and any overtime hours that you have worked.

Step me through...

Opening a Timesheet

Adding Activities to a Timesheet

Removing Activities from a Timesheet

Filtering Timesheets

Assigning Yourself to an Activity

Assigning Yourself to a Role Assignment

Filtering Timesheets

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Recording Actual Work Time on a Timesheet

Updating Activity Level Dates on a Timesheet

Reporting a Completed Assignment

Editing Other Resource's Timesheets

Adding or Viewing Timesheet Notes

Saving or Printing a Timesheet

Submitting a Timesheet

Withdrawing a Timesheet

Learn more about...

Working with Timesheets

Keyboard Shortcuts for Timesheets

Application Settings

Use this page to specify how users will interact with the Timesheets.

Step me through...

Configuring Application Settings

Learn more about...

About Application Settings

Get P6 Mobile Page

Step me through...

Configuring P6 for Android from P6 Team Member Web

Configuring P6 for Android from P6 Team Member WebConfiguring P6 for iOS from P6 Team Member WebConfiguring P6 for Android from P6 Team Member WebConfiguring P6 for iOS from P6 Team Member WebConfiguring P6 for Android from P6 Team Member WebConfiguring P6 for iOS from P6 Team Member WebConfiguring P6 for Android from P6 Team Member Web

Learn more about...

About P6 Mobile

Manage Filters

You can customize your views to show only activities which share certain attributes. You can create multiple filters and apply as many as you need. Each filter can include up to five conditions.

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Step me through...

Viewing Activities

Filtering Activities

Filtering Timesheets

Learn more about...

Working with Activities

Working with Timesheets

Manage Views

You can customize the standard view of the timesheets page to show the information you need to see in the order you need it.

Step me through...

Managing Timesheet Views

Filtering Timesheets

Configuring My View Preferences

Configuring My Date, Time, and Unit View Preferences

Configuring Application Settings

Learn more about...

Working with Timesheets

Action Required

If a status update is rejected by a reviewer, you are responsible for making any necessary changes and resubmitting the status update.

Step me through...

Viewing Activities

Updating Activities

Resubmitting Status Updates

Communicating with My Project Manager

Learn more about...

Working with Activities

Working with Discussions

Working with Notebooks

Working with Documents

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Working with Related Activities

Keyboard Shortcuts for My Activities

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