PRIMAVERA

New Features in Primavera P6 EPPM 15.2

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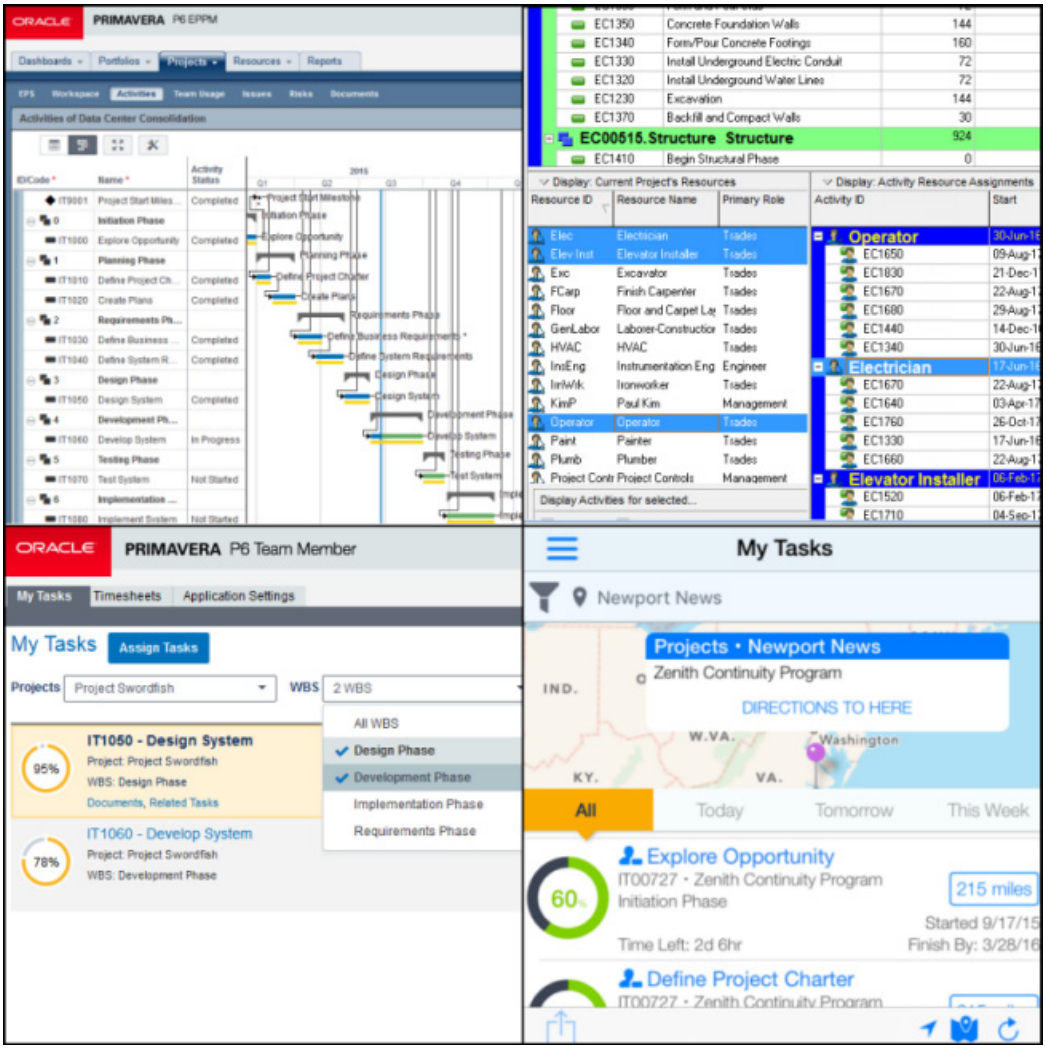
CONTENTS

New Features in Primavera P6 EPPM 15.2 1
Usability Enhancements 2
Global Search and Replace 3
Close All Open Projects from the Right-Click Menu 4
View Usage When Assigning Resources 5
Filter on Rolling Dates 6
Import and Export as a Scheduled Service 7
Export XML as a Job Service 8
Open Log File From a Notification 9
Publish Baselines Immediately 10
Save Detail Window Settings as Part of View 11
Keep Selection After Sorting 12
Database Auditing Improvements 13
Additional Filter Criteria for Codes 14
Microsoft Project XML 2013 Support 15
Applet Removal in P6 EPPM 16
Activities Page Basic View 17
Open Projects Dialog Box 18
P6 Team Member 19
Assign Yourself to an Existing Task 20
Filter Tasks by WBS 21
P6 Mobile 22
Assign Yourself to an Existing Task 23
Toggle Project ID in Task Details 24
Timesheet Improvements 25
Additional Task Filters 26
Demo Mode 27
Set Task and Timesheet Reminders 28
Crop and Annotate Images 29
Subscribe to Mobile Calendars by Project 30
View Task Location Details 31
P6 Professional 32
64-Bit P6 Professional Installation 33
Additional Filter Criteria for Codes 34
Export XML as a Job Service 35
Copy Project as a Job Service 36
Save Resource Selection in the Resource Histogram and Spreadsheet 37
Microsoft Project XML 2013 Support 38
Select Language at Login 39

New Features in Primavera P6 EPPM 15.2

New features include:

- Global search and replace
- HTML-based basic Activities view
- Filter on rolling dates
- Publish baselines immediately
- Assign yourself to a task in Team Member
- Filter by projects and WBS in P6 Mobile
- Crop and annotate images in P6 Mobile
- 64-bit installation of P6 Professional



Usability Enhancements

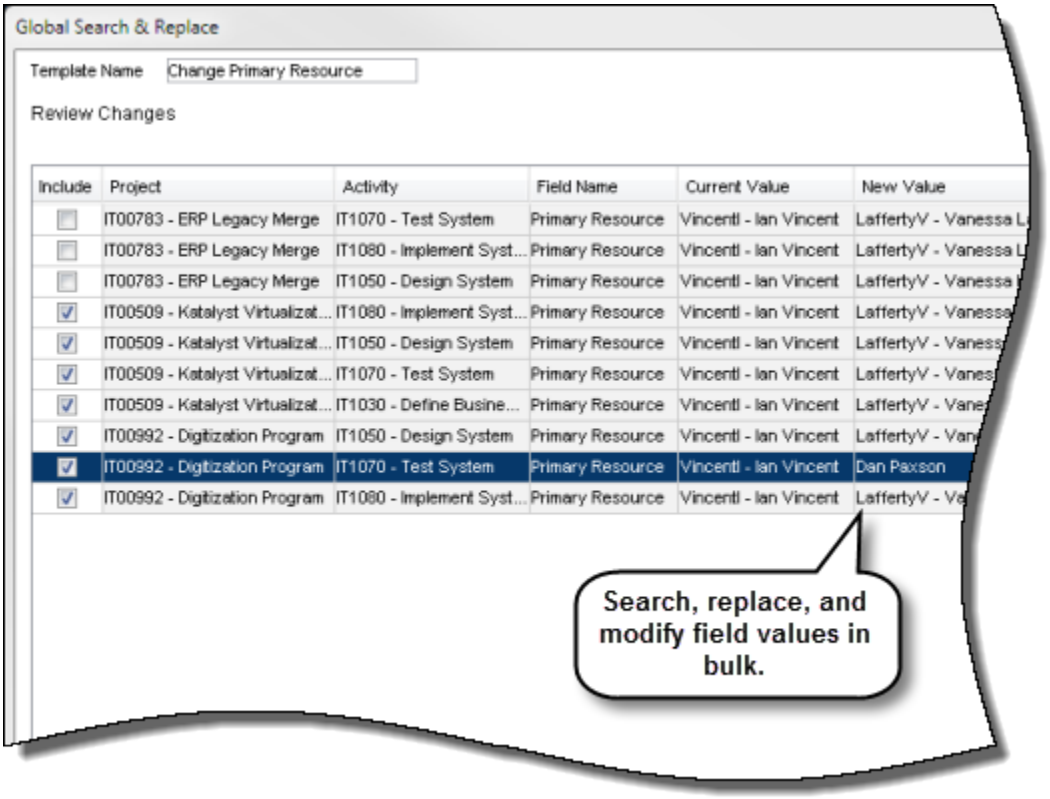
Usability enhancements in P6 EPPM 15.2 include:

- Global search and replace
- Close all projects from right-click menu
- Export XML as job service
- Save detail windows settings as part of view
- Additional filter criteria for codes
- An updated login screen

Global Search and Replace

The new Global Search and Replace feature in P6 15.2 enables you to batch update project, WBS, and activity fields. Create a template and then select up to five fields you want to update. For example, search for activities with a Primary Resource of Ian Vincent and a Start date that occurs after 01-Oct-15, and then replace with a different Primary Resource. On the Review Changes page, de-select activities that you don't want to change and select different values for fields that need further modification.

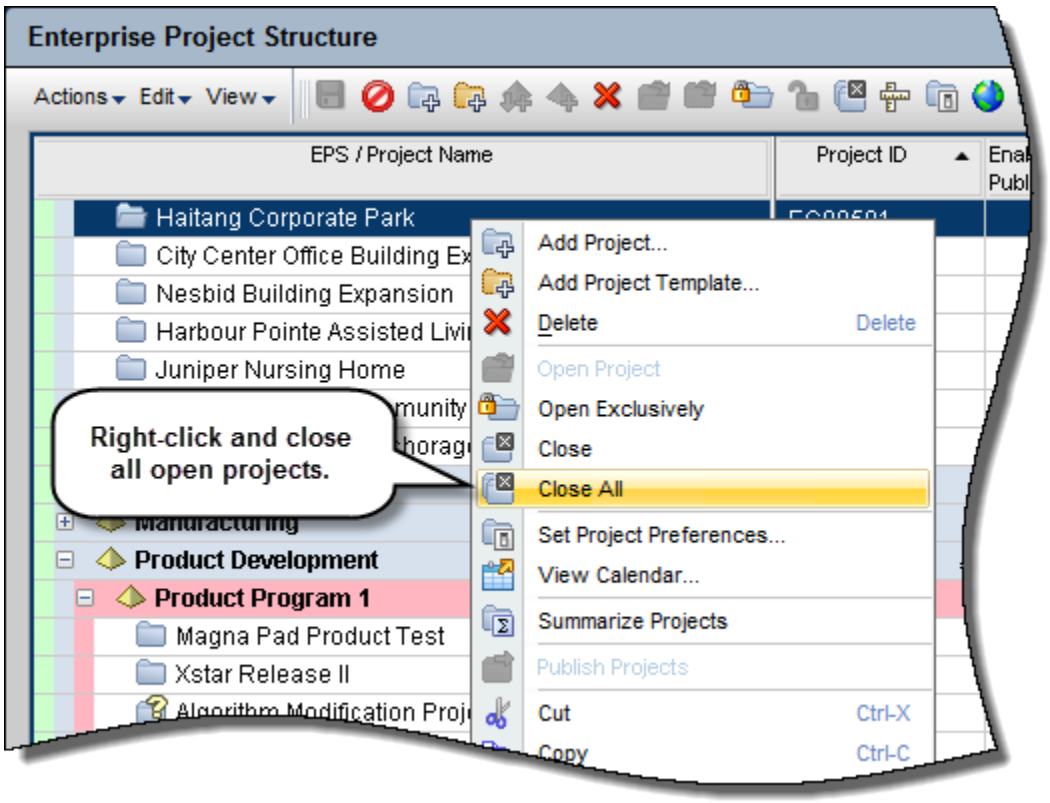
The Global Search and Replace feature runs as a background service.



To access this feature:
On the Actions menu on the EPS page, click Global Search & Replace.

Close All Open Projects from the Right-Click Menu

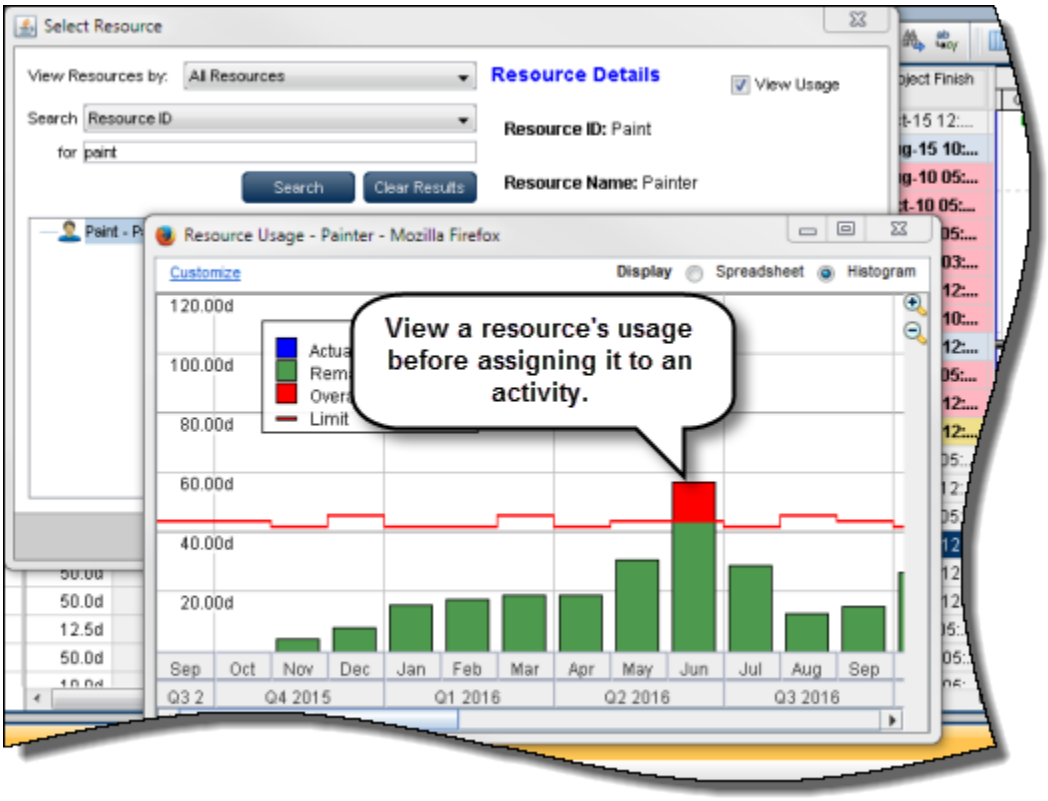
The Close All option is added to the right-click menu on the EPS page. Right-click any row and select Close All to close all open projects.



To access this feature:
On the EPS page, right-click a project and select Close All.

View Usage When Assigning Resources

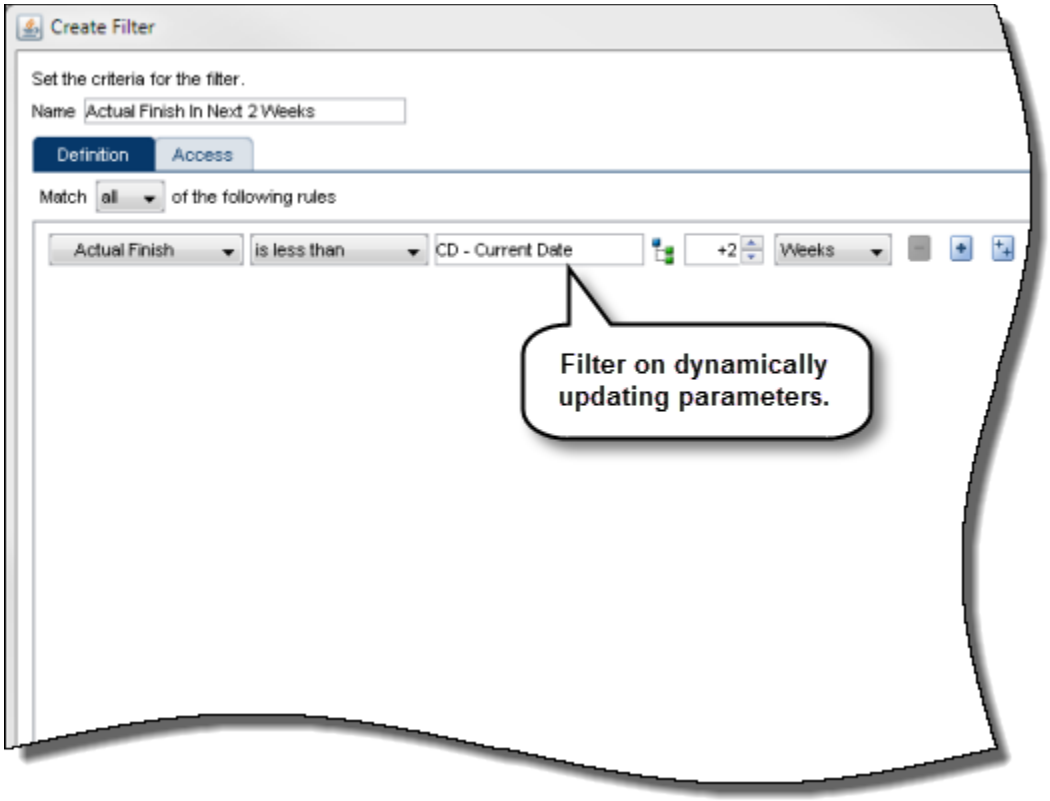
P6 15.2 enables you to access resource usage details when assigning a resource on the Activities or Assignments pages. In the Select Resource dialog box, click View Usage to view the selected resource's usage data in a spreadsheet or histogram. This feature allows you to quickly access resource allocation data when deciding whether to assign a resource.



To access this feature:
In the Select Resource dialog box on the Activities or Assignments page, select the View Usage check box.

Filter on Rolling Dates

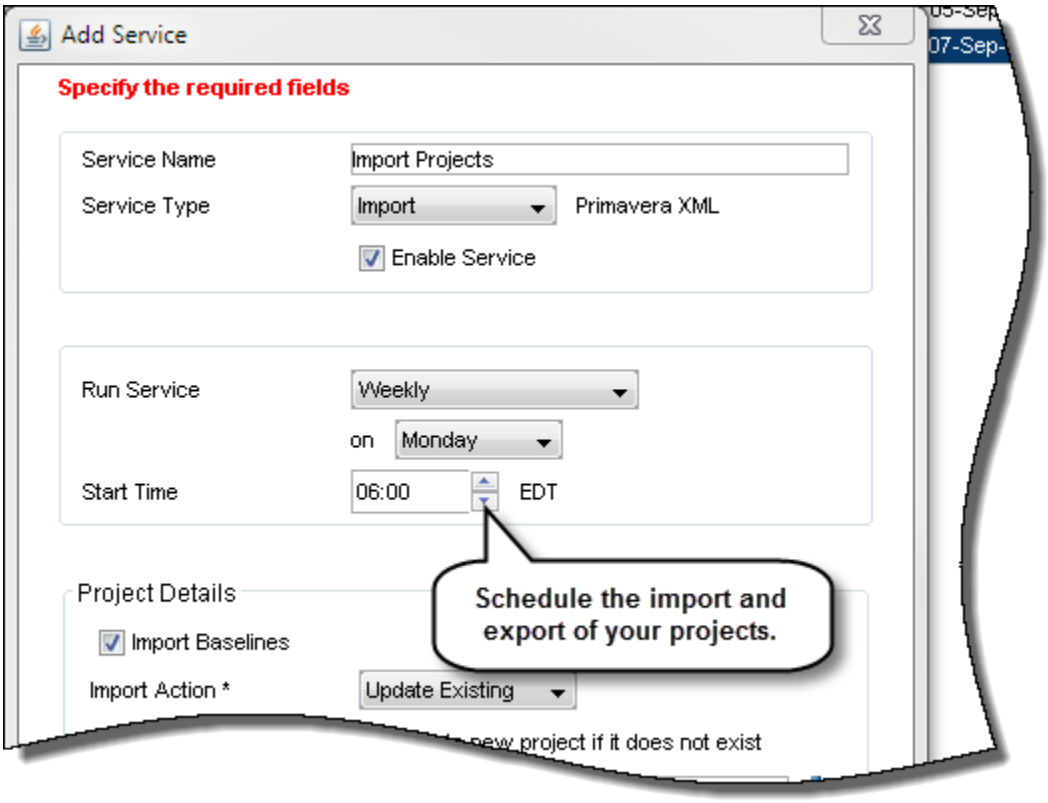
P6 15.2 enables you to filter data on the EPS, Activities, and Assignments page based on rolling dates -- dates or date ranges that automatically update according to time or project data changes. For example, Current Week is a rolling date that changes over time and can be applied to a selection of date fields. As the Current Week changes, different activities are filtered according to the rolling date applied. Create rolling date ranges by adding upper or lower limits. For example, *Actual Finish within range of Current Date and Current Date Plus 2 Weeks* will display any activity whose Actual Finish is within the next two weeks. Use rolling dates to display a dynamically updating selection of projects, activities, or resources based on the parameters of the filter.



To access this feature:
On the EPS, Activities, or Assignments page, click Add New Filter or open the Modify Filter dialog box.

Import and Export as a Scheduled Service

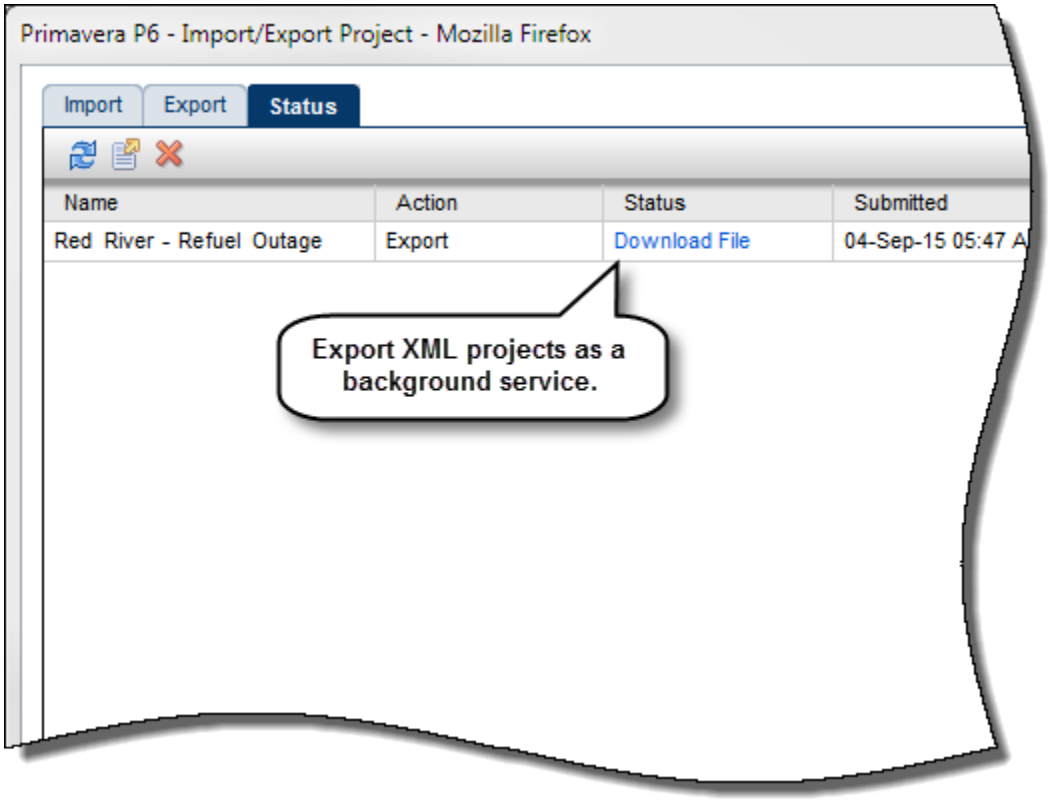
P6 15.2 enables you to import and export projects as scheduled services -- for example, make weekly backups of your projects or share project and baseline data with another organization. Do so by creating an export service to run at a specified time. You can create multiple import and export services to fulfill different processes within your organization.



To access this feature:
Click the arrow on the Projects tab, and then click Project Scheduled Services.

Export XML as a Job Service

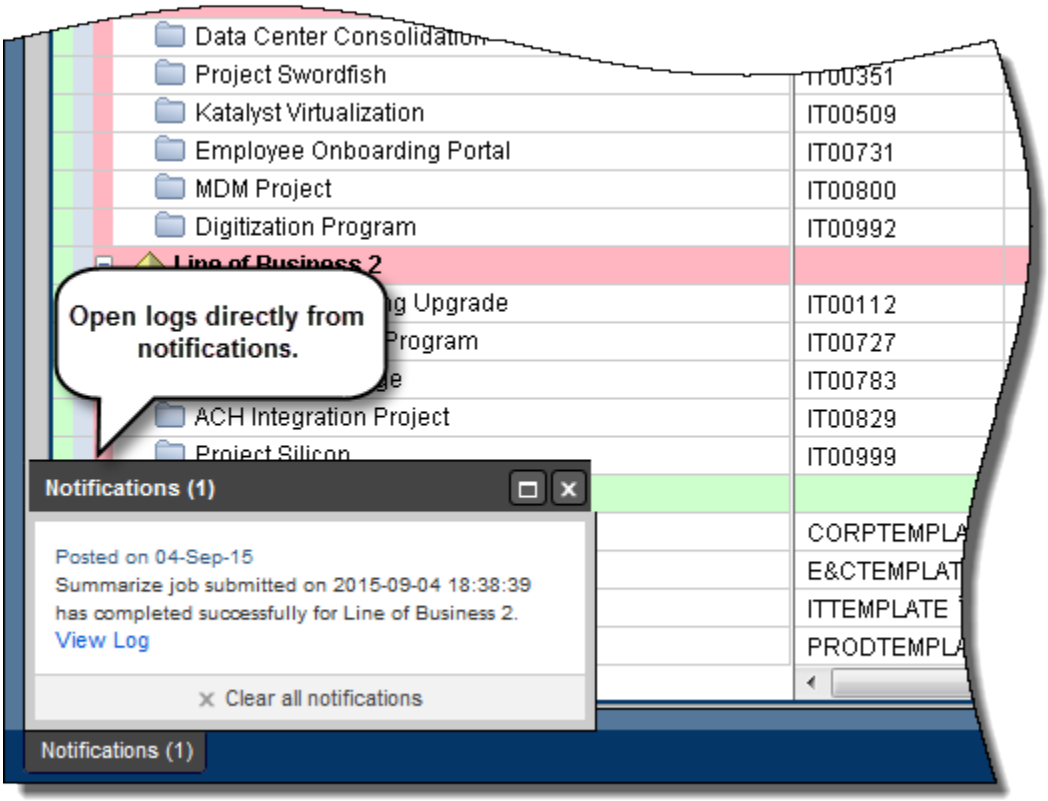
Export projects in XML format as a job service, which enables you to continue working in P6 while the service runs in the background. A notification displays when the service is completed. On the Status tab of the Import/Export Project dialog box, click Download File to download the XML file.



To access this feature:
On the Actions menu on the EPS page, click Import/Export, XML Project Import/Export.

Open Log File From a Notification

Click View Log in a notification to open the log file for the service. This feature allows you to view service statuses and log details in the notification without having to navigate to the Service Status dialog box.

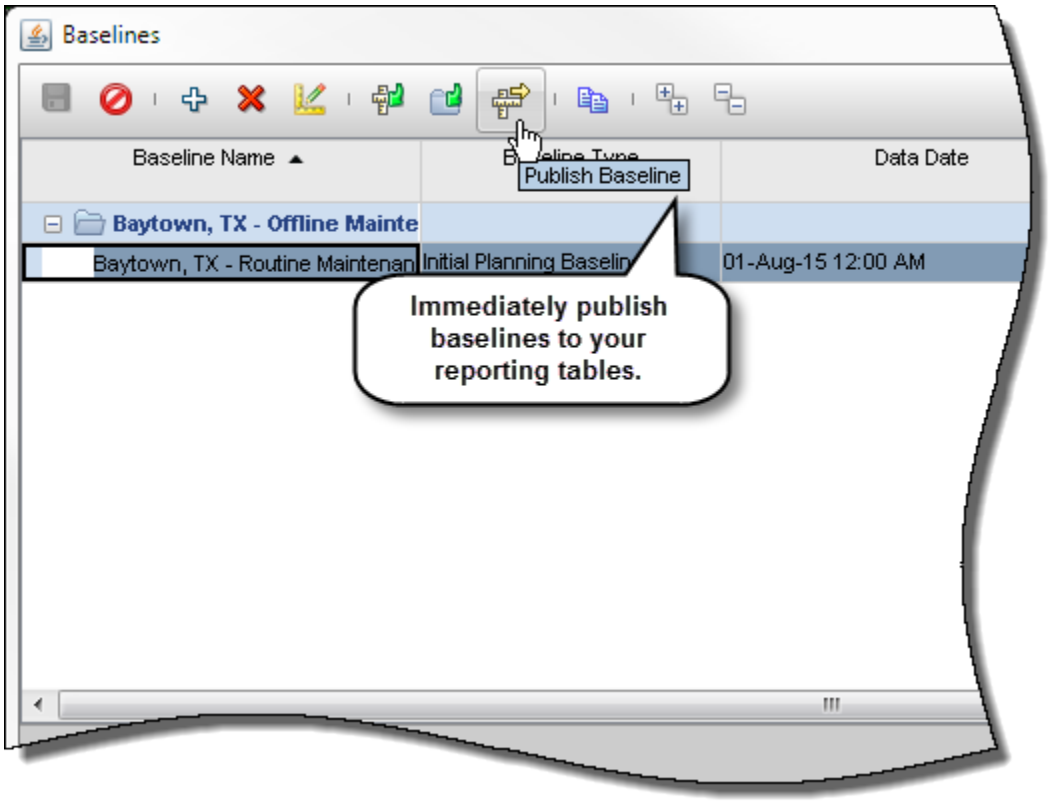


To access this feature:

In the Notifications window that will appear on the bottom left of your screen, click View Log to open the Log File.

Publish Baselines Immediately

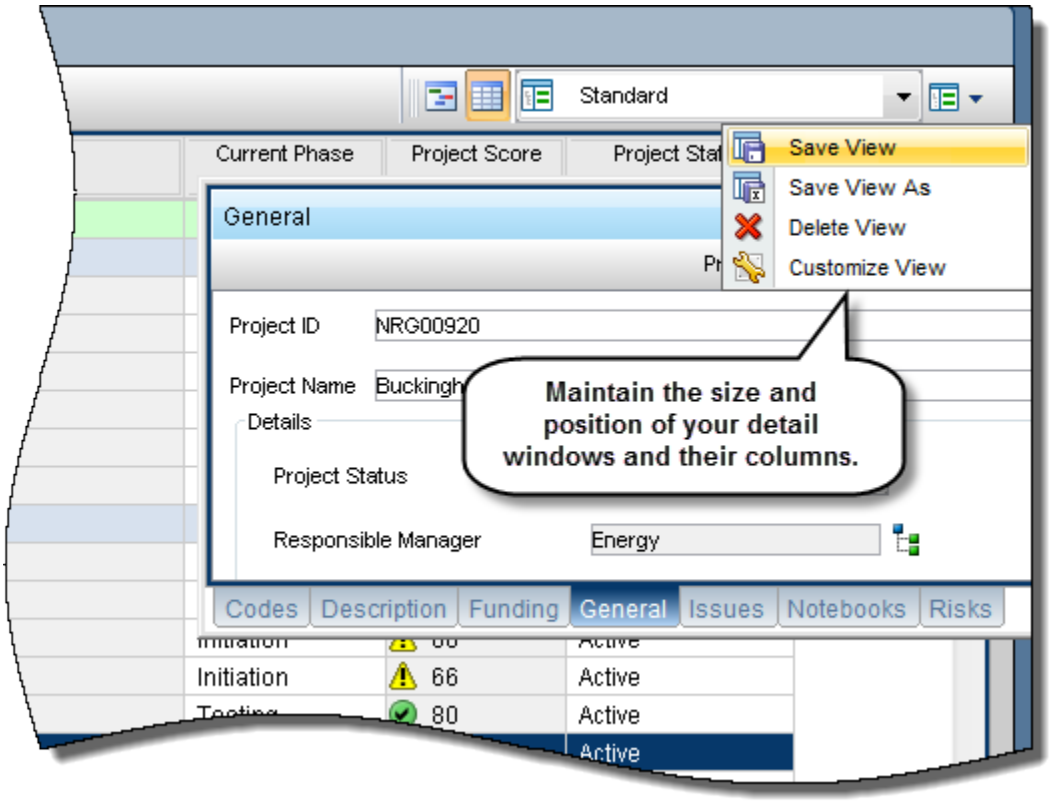
P6 15.2 enables you to publish selected project baselines as an ASAP service without having to republish the entire project. This feature is useful in situations where baselines have been added or updated since a project was last published. Publish baselines to bring the necessary reporting tables up to date. You must publish a project before you can publish any of its baselines.



To access this feature:
Click Define Baselines on the Actions menu on the EPS or Activities Page. In the Baselines dialog box, select a baseline and click the Publish Baseline icon.

Save Detail Window Settings as Part of View

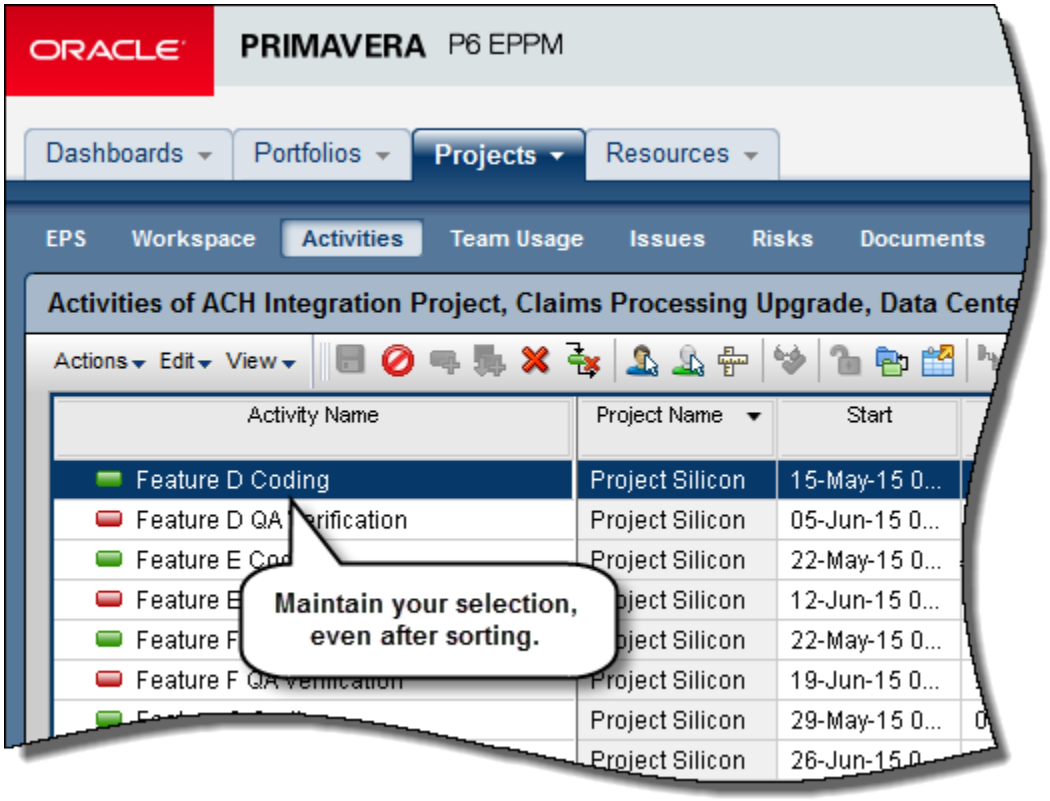
In P6 15.2, maintain the appearance of your detail windows by saving your settings as part of a view. Adjust detail window size, screen position, and column widths, and then click Save View or Save View As on the View menu. You can collapse the detail windows and save that state as part of the view.



To access this feature:
On the EPS or Activities page, adjust the appearance of your detail windows, and then click Save View.

Keep Selection After Sorting

In previous versions of P6 your selection reverted to the top row of a list after sorting, de-selecting the row you had selected. In P6 15.2 the row you select is maintained when you change sorting order. If multiple rows are selected when sorting, the top row selection is maintained.



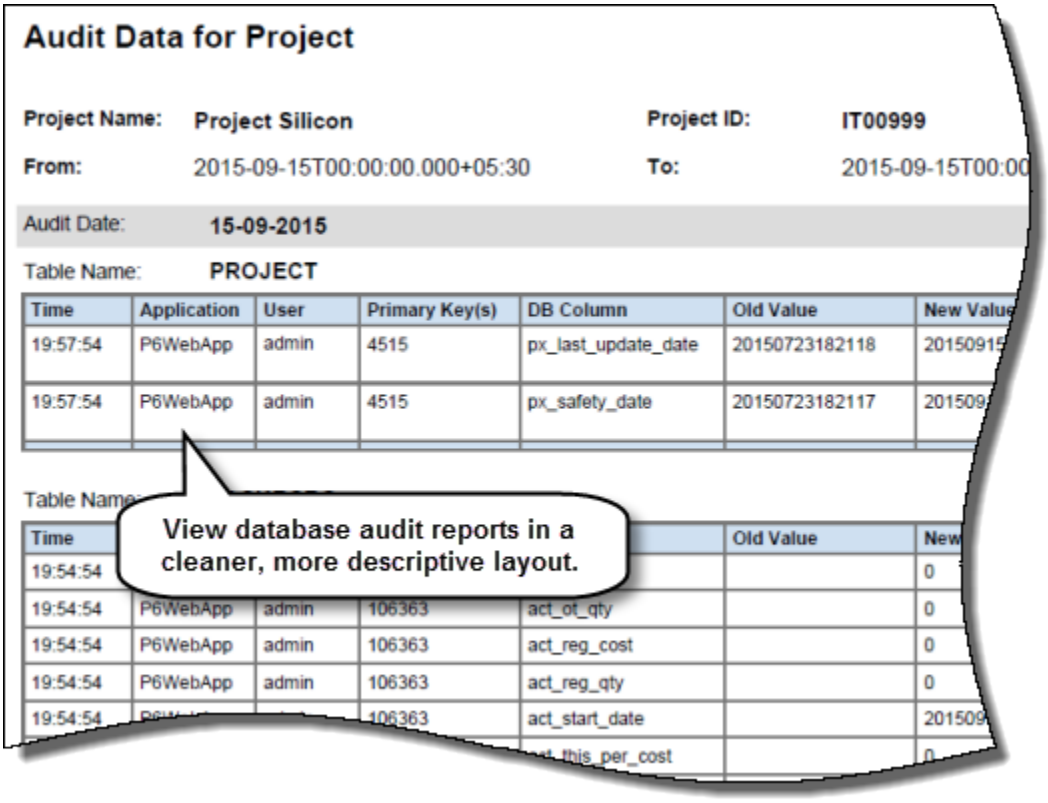
To access this feature:
On the EPS, Activities, or Assignments page, click a column header to sort the list of items.

Database Auditing Improvements

Auditing reports on database tables are faster, more informative, and easier to read in P6 15.2:

- Performance improvements allow you to generate larger auditing reports in less time.
- The report format is updated to include more information regarding database table changes, the user who made the changes, and the application in which the changes were made.

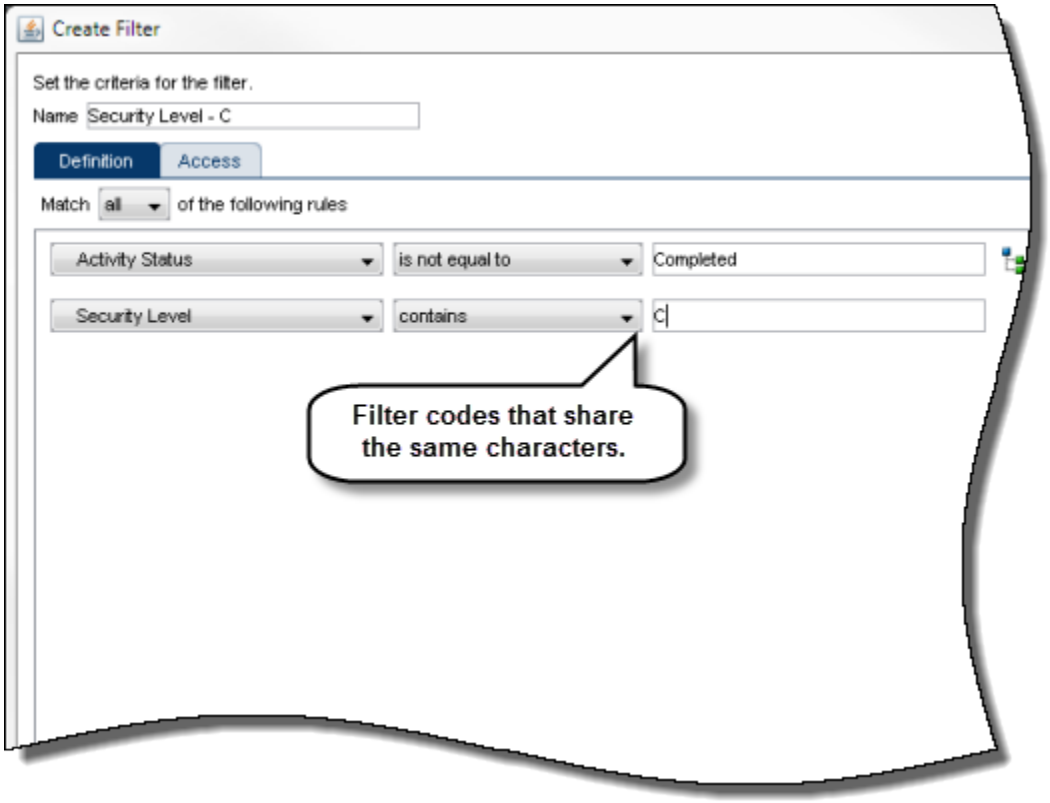
Publish audit data as a Global Scheduled Service to update tables for reporting.



To access this feature:
On the Reports page, run a report on the database tables you want to audit.

Additional Filter Criteria for Codes

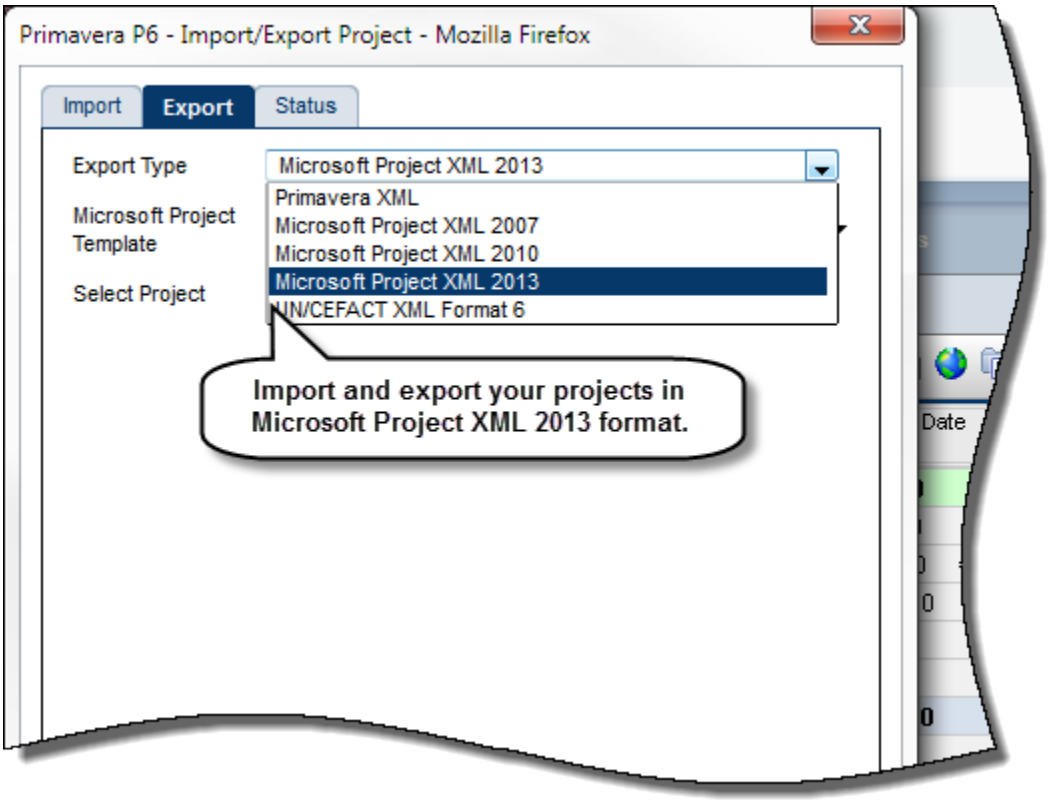
Filter activity, project, and resource codes on two new criteria -- Contains and Does Not Contain. These options are useful when filtering codes that share some of the same numbers or characters in their values



To access this feature:
On the EPS, Activities, or Assignments page, open the Create Filter or Modify Filter dialog boxes.

Microsoft Project XML 2013 Support

Import and export projects in Microsoft Project XML 2013 format. Share project data between P6 and Microsoft Project 2007, 2010, or 2013 by importing and exporting your projects in the corresponding format.



To access this feature:
On the Actions menu on the EPS page, click Import/Export, XML Project Import/Export.

Applet Removal in P6 EPPM

Starting with Primavera P6 EPPM 8.4, Oracle Primavera began the process of removing Java-based applets from the application in exchange for pages written in HTML5, which load faster and do not require additional plug-ins. Each release of P6 will include additional elements converted to HTML5.

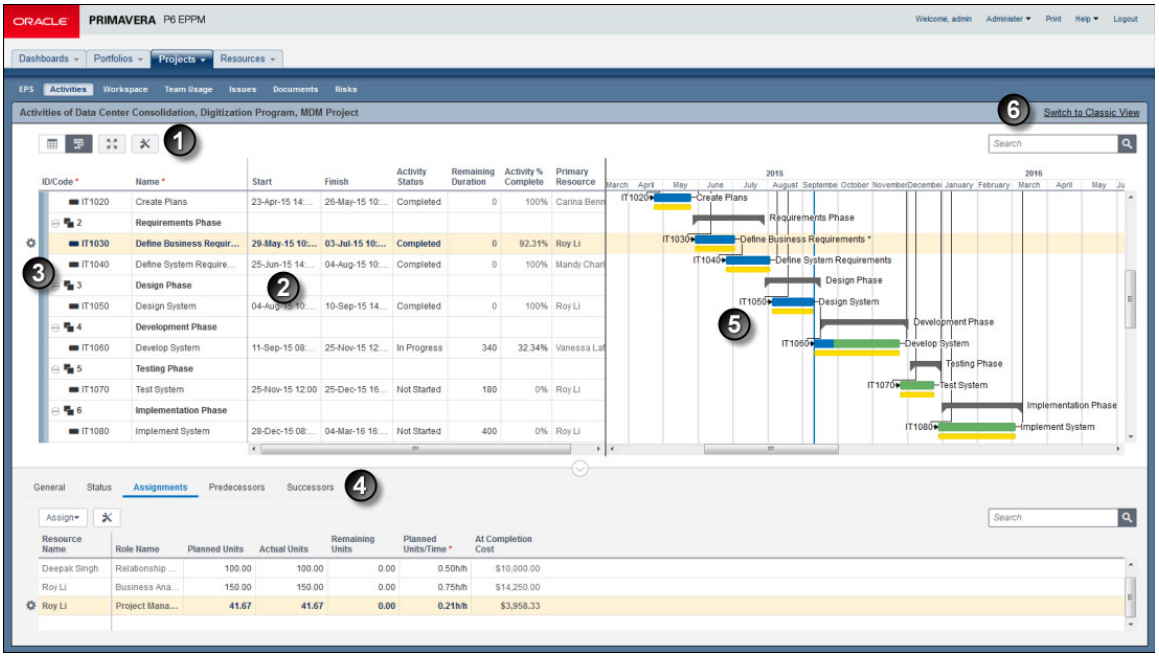
The following pages are updated to HTML5 in P6 15.2:

- The Activities page can be switched to an HTML-based Basic View for basic functionality or the applet-based Classic View for more complex tasks.
- The Open Projects dialog box is now written in HTML5.

Activities Page Basic View

P6 15.2 offers a Basic View for the Activities page that provides basic functionality in a fast and efficient format. Use the Basic View to manage activities and WBS elements, customize the activity grid layout, edit activity information in the details pane, and view your schedule in a configurable Gantt chart. Switch to the Activities page Classic View to perform more complex tasks.

On the User Interface Views page, enable or disable access to the Classic View and Basic View, and choose one to set as the default Activities page view.



1 Use the **Toolbar** to switch between a grid-only view, or a grid and Gantt chart view. Enable Fullscreen mode, open the Customize View dialog box, and print the current view (Grid View only).

2 Add, edit, and delete activities in the **Grid**.

3 The **Row Actions** menu allows you to add and delete activities and add, delete, expand, and collapse WBS nodes.

4 Edit activity information in the **Details Pane**.

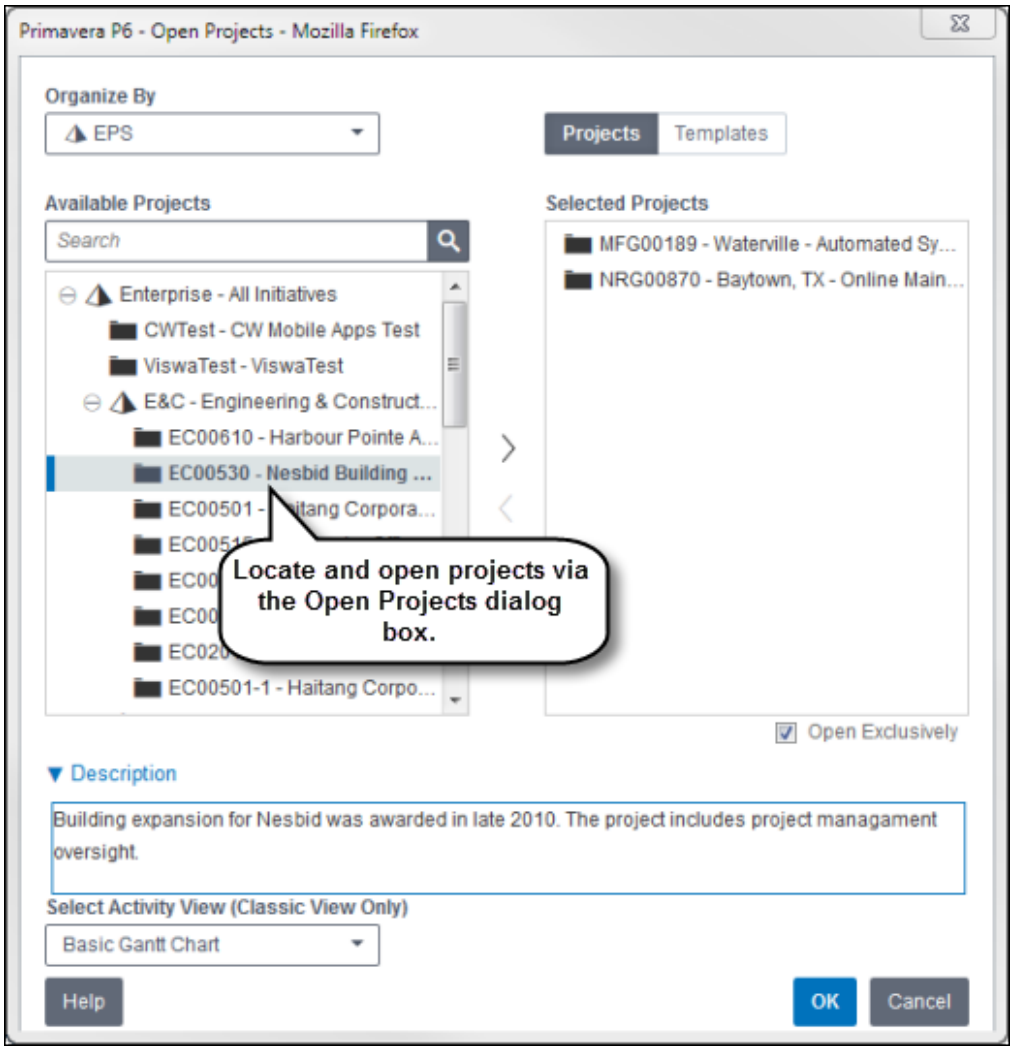
5 The **Gantt chart** provides a visual representation of your activities. Customize bars, labels, colors, timescale, and lines in the Customize View dialog box.

6 Switch between the Activities page Classic View and the Basic View.

To access this feature:
Click Activities on the Projects Navigation bar.

Open Projects Dialog Box

The Open Projects dialog box is now HTML-based, providing a quicker experience when opening projects. Toggle between available Projects or Templates and organize the list of available items by EPS, Portfolios (Projects only), or Project Codes. Enter a search term to filter the list. If you have the Classic View enabled, select an Activity View for your opened projects; view users currently in projects; and then open your selections exclusively.



To access this feature:
Click the arrow on the Projects tab, and then click Open Projects.

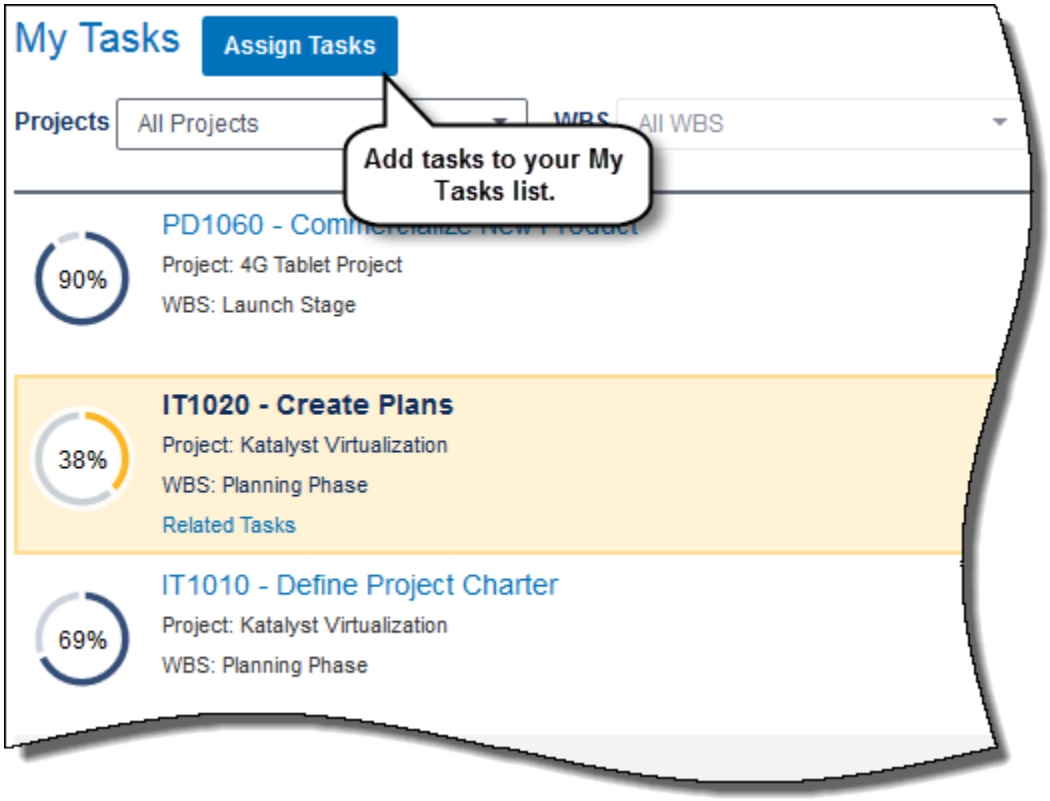
P6 Team Member

P6 Team Member 15.2 enhancements include:

- Assign yourself to an existing task
- Filter tasks by WBS
- An updated user interface and login screen

Assign Yourself to an Existing Task

If you worked on a task to which you are not yet assigned, click the Assign Tasks button on the My Tasks page to assign yourself as a resource to the task. (You can only report time on tasks to which you are assigned.) Select a project, and then select one or more tasks to add to your My Tasks list.

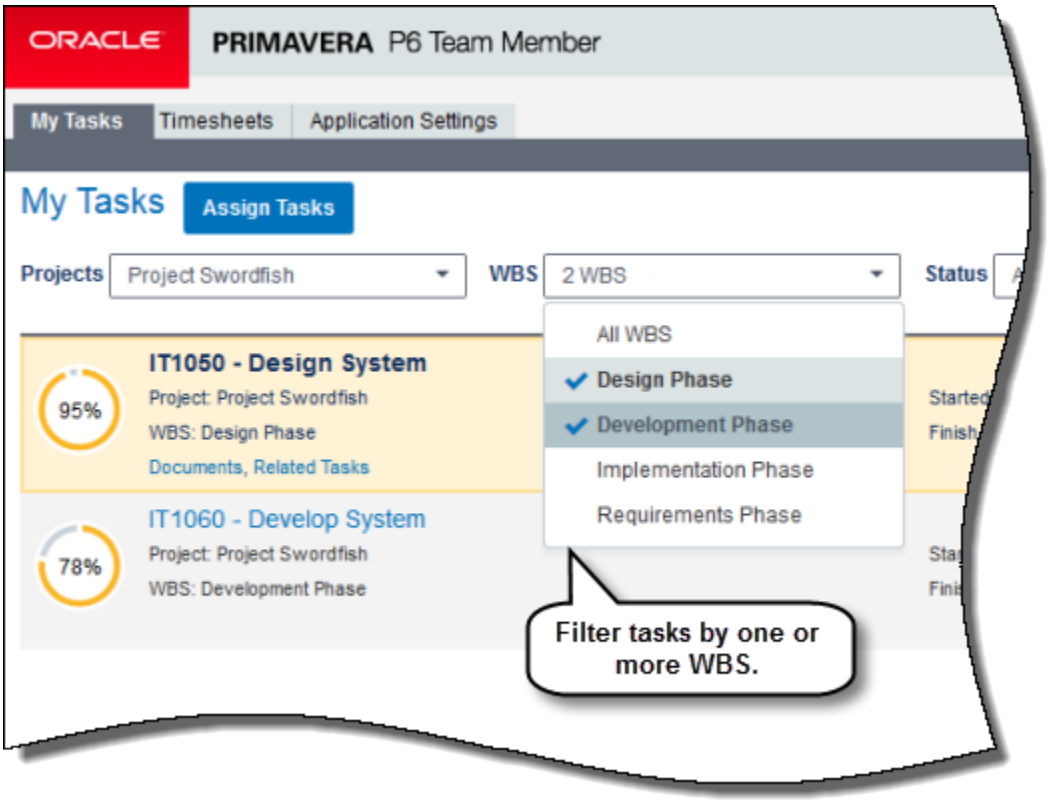


To access this feature:

On the My Tasks page, click Assign Tasks.

Filter Tasks by WBS

In P6 Team Member 15.2, use the WBS filter to further refine the list of tasks on the My Tasks page. Select a project in the Projects filter and then select one or more WBS nodes for the tasks that you want to display.



To access this feature:
On the My Tasks page, click the WBS filter.

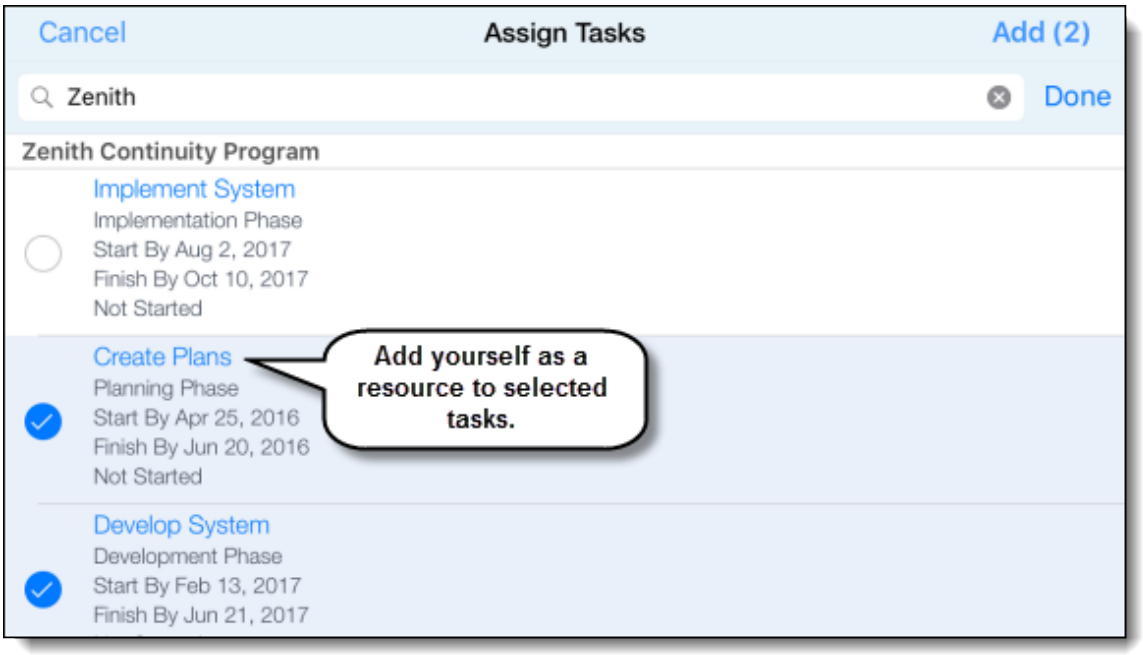
P6 Mobile

P6 Mobile enhancements for 15.2 include:

- Assign yourself to tasks
- Additional task filters
- Crop and annotate attached images
- Demo mode
- Timesheet improvements
- View task location details and mapping directions

Assign Yourself to an Existing Task

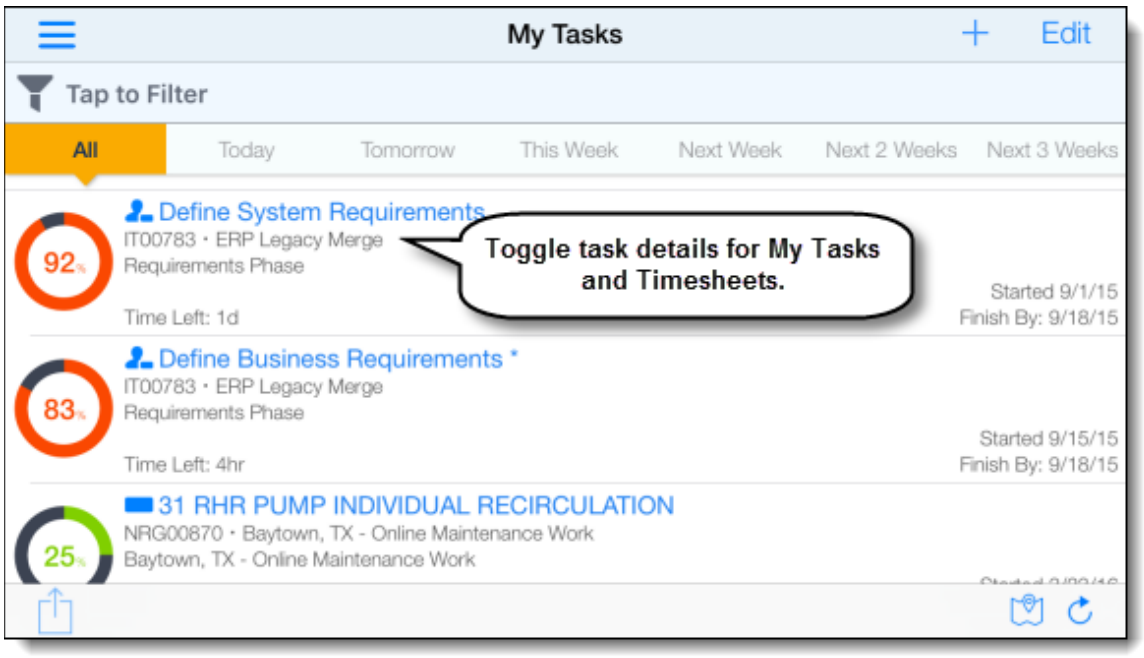
Tap the + button on the My Tasks page to assign yourself as a resource to one or more tasks. Project managers can see the task assignment on the Review Status Updates page in P6.



To access this feature:
On the My Tasks page, tap +.

Toggle Project ID in Task Details

Toggle the display of the Project ID field in task details on the My Tasks page and Timesheets list. Preference settings only apply to your instance of the application.



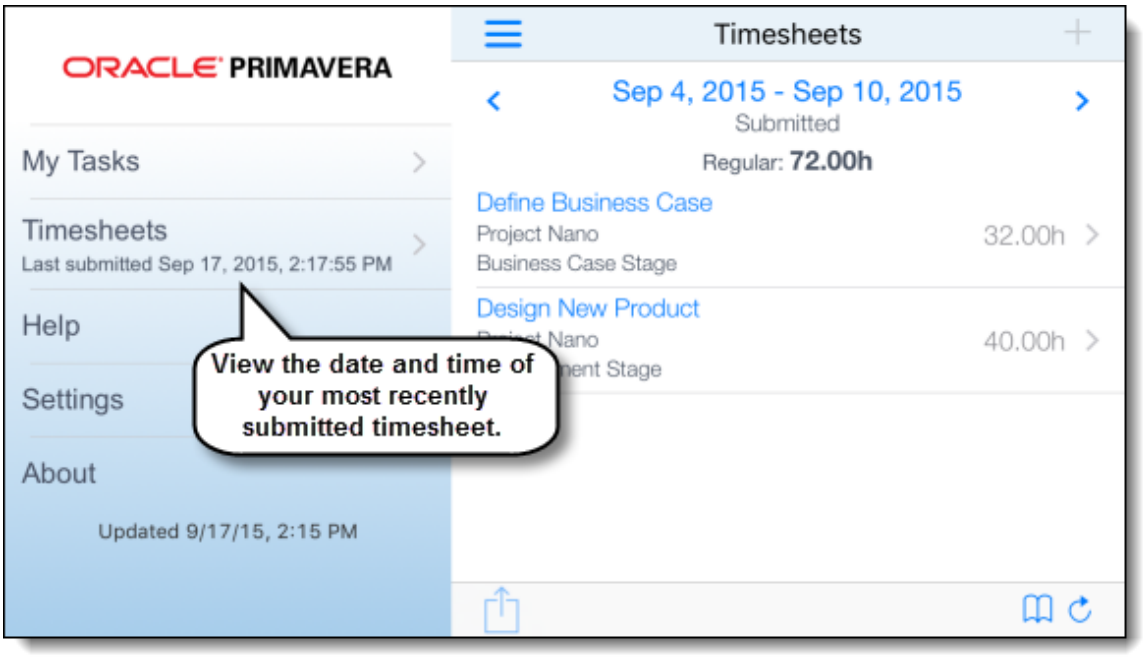
To access this feature:
On the P6 Settings page, slide the Display Project ID switch to On.

Timesheet Improvements

Timesheets on the Timeframe Selection page are now marked with bars to indicate action is required:

- A blue bar marks the current timesheet.
- A red bar marks rejected, reactivated, and overdue timesheets.

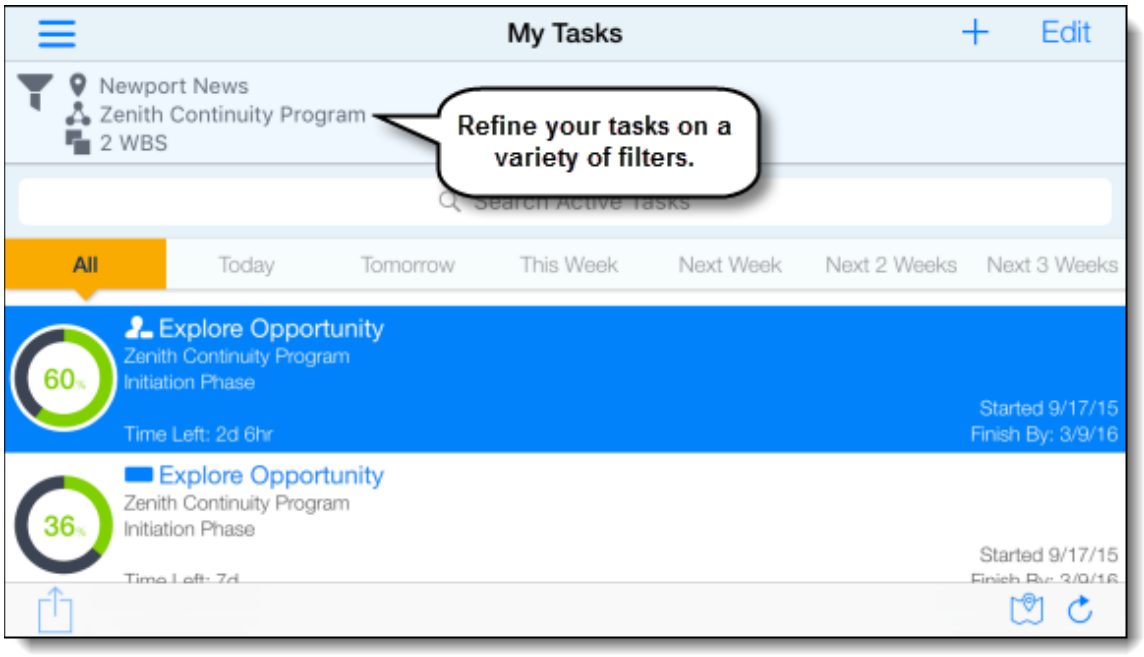
Submit the timesheet to remove the indication. Once submitted, the date and time of the last submitted timesheet is displayed on the navigation menu.



To access this feature:
On the navigation menu, tap Timesheets.

Additional Task Filters

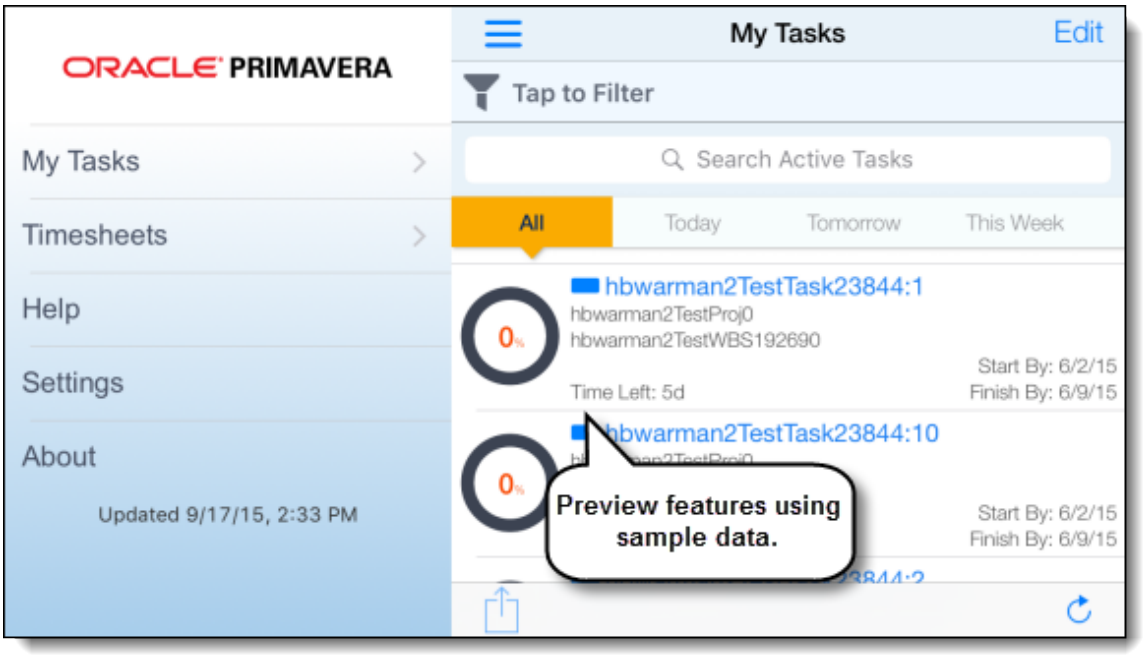
Refine your task list by applying filters. In addition to the current Status and Timeframe filters, you can now apply Location, Project, and WBS filters. Filter task lists by one or more projects, and then choose individual WBS elements whose tasks you want to view. In the Location filter, view tasks assigned a specific location or choose Near Me to view tasks within a specified distance of your current location. Apply a combination of filters to quickly find a selection of tasks from hundreds or thousands of available tasks.



To access this feature:
On the My Tasks page, tap the Filters icon.

Demo Mode

P6 for iOS 15.2 provides a Demo mode that allows you to access the application without providing user credentials or server information. You can modify tasks details, view settings, and update timesheets in Demo mode. Changes you make to the sample data are not saved to a server. Demo mode is for P6 for iOS only.



To access this feature:
On the login page, tap Demo.

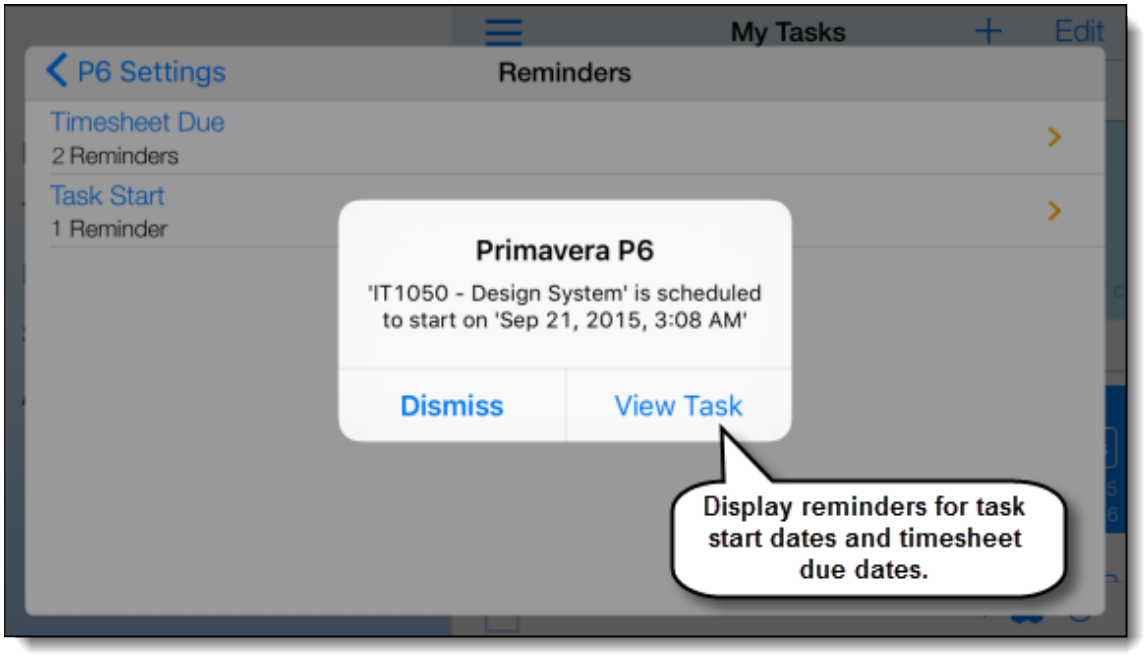
Set Task and Timesheet Reminders

Configure reminders to display for your tasks and timesheets. Reminders appear before the next task is set to start or when your next timesheet is due to be submitted.

For each task reminder, select a time for the reminder to appear -- for example, 2 days before. Task reminders display for all tasks assigned to you.

For each timesheet reminder, select a day and time -- for example, 2 days before at 4 pm. Set multiple reminders if you want to be reminded multiple times -- for example, one day before a timesheet is due and then one day after.

When a reminder appearsm, select Dismiss to close the reminder or View Task or View Timesheet to navigate to the corresponding page. Task reminders are for P6 for iOS only.



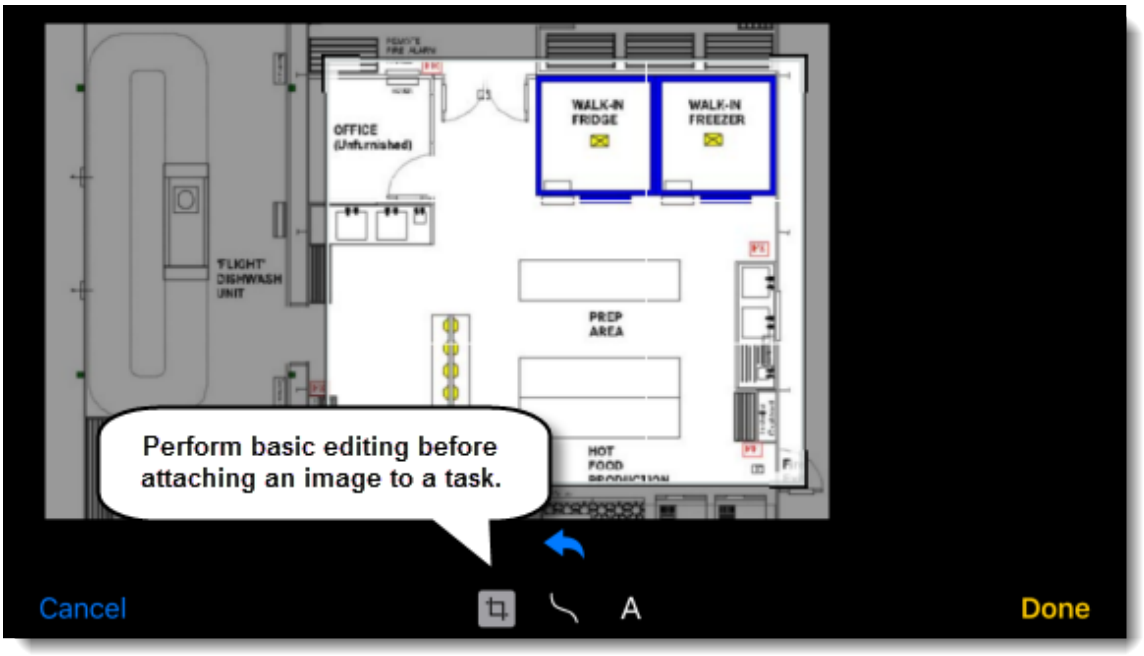
To access this feature:
On the navigation menu, tap Settings.

Crop and Annotate Images

P6 for iOS 15.2 enables you to crop and annotate an image before assigning it to a task or attaching to an email. For example:

- Crop and zoom to focus on an important area.
- Draw shapes, lines, and text using a variety of colors and line widths.

To attach a photo, you must be connected to a P6 server configured with a content repository.

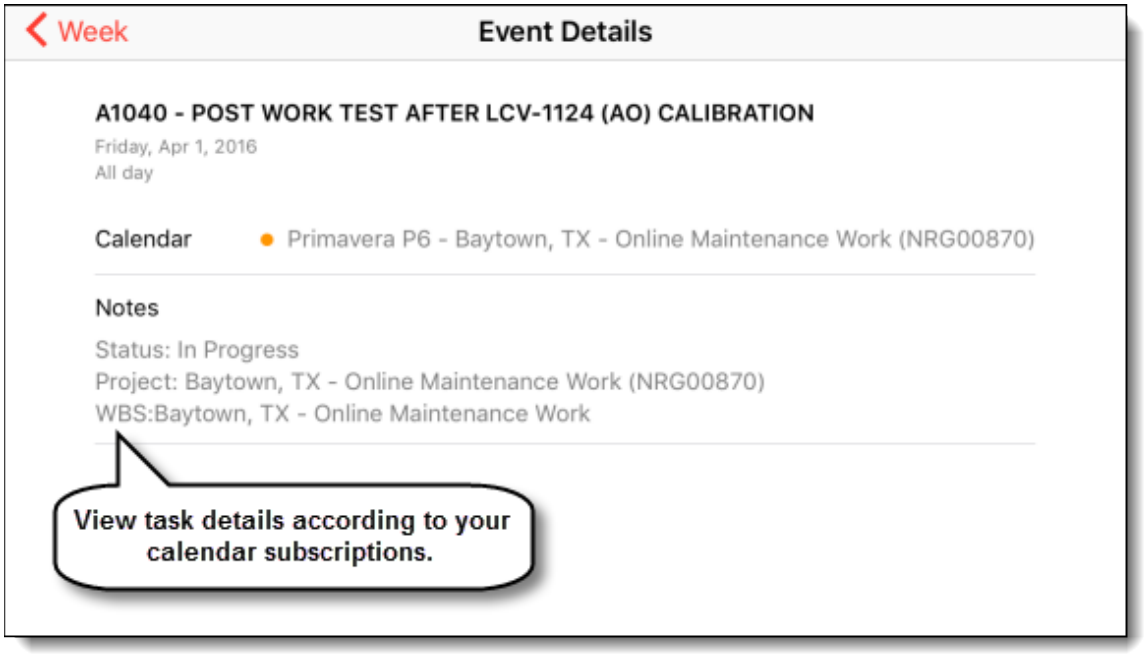


To access this feature:
On the My Tasks page, select a task, and then tap the camera icon in the task details.

Subscribe to Mobile Calendars by Project

P6 for iOS 15.2 enables you to subscribe to a calendar containing all of your assigned tasks or tasks from selected projects. On the Settings page, select My Owned/Assigned Tasks to subscribe to the calendar.

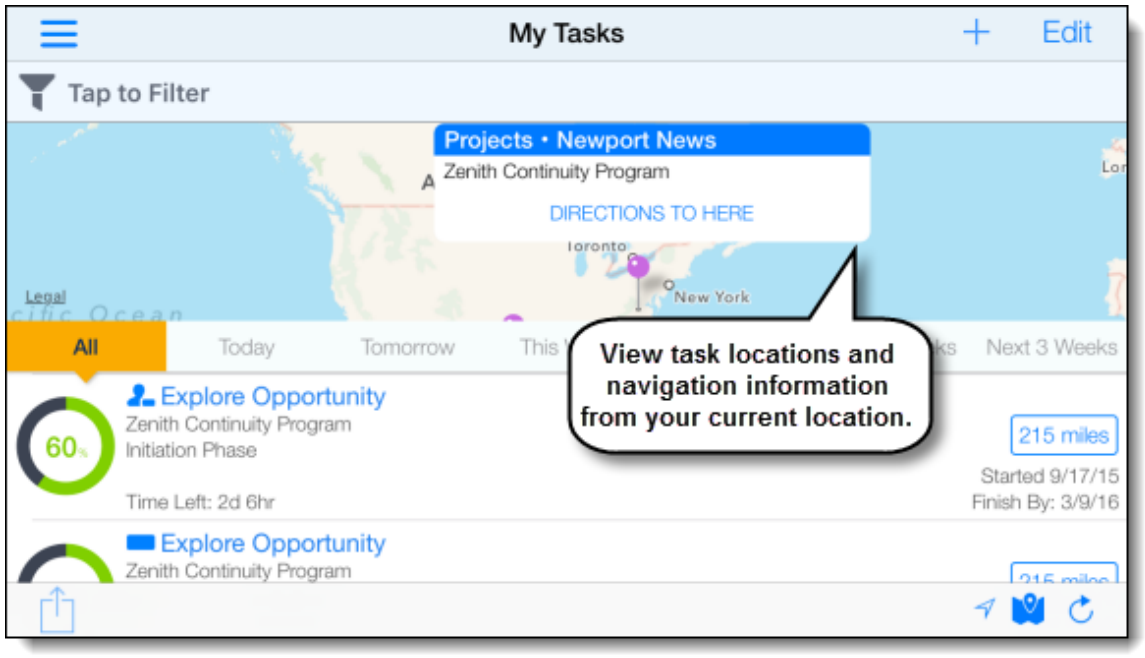
Navigate to the Calendar app to view tasks for each calendar by day. View task dates, task status, project name and ID, and WBS. Toggle the display of individual calendars from your Calendar app.



To access this feature:
On the P6 Settings page, tap Calendar Subscriptions.

View Task Location Details

A new Map View in P6 for iOS 15.2 shows the location of your tasks as pins on a map. Tap a pin to view the location and projects assigned to that location. Receive navigation directions from your current location to a pin location using your device's mapping application. In the task list, view the distance of each task from your current location. When you apply location filters to your task list, the map will zoom to fit any pins that match your filters. This feature is available for P6 for iOS only.



To access this feature:
On the My Tasks page, tap the map icon.

P6 Professional

Enhancements in P6 Professional 15.2 include:

- 64-bit installation
- Additional filter criteria for codes
- Export as job service

64-Bit P6 Professional Installation

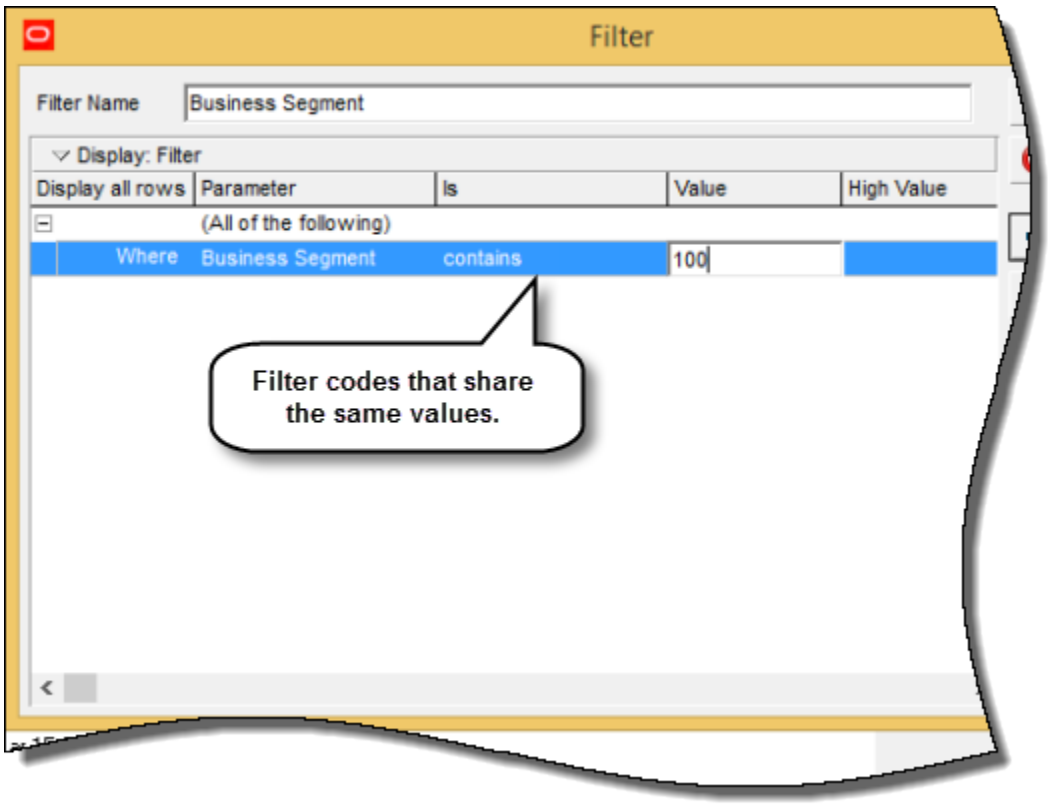
Primavera P6 Professional 15.2 is available as a 64-bit installation. If you are running a 64-bit operating system, choose between a 32-bit or 64-bit version during application installation.

64-bit offers key advantages over the 32-bit version of P6 Professional:

- Handle larger and more complex projects, with faster response time from P6 Professional components.
- An upgrade from the ANSI character set to the Unicode standard enables you to work with multiple languages in P6 Professional at the same time.
- Higher memory ability leads to better performance.
- Crashes due to memory issues are reduced.

Additional Filter Criteria for Codes

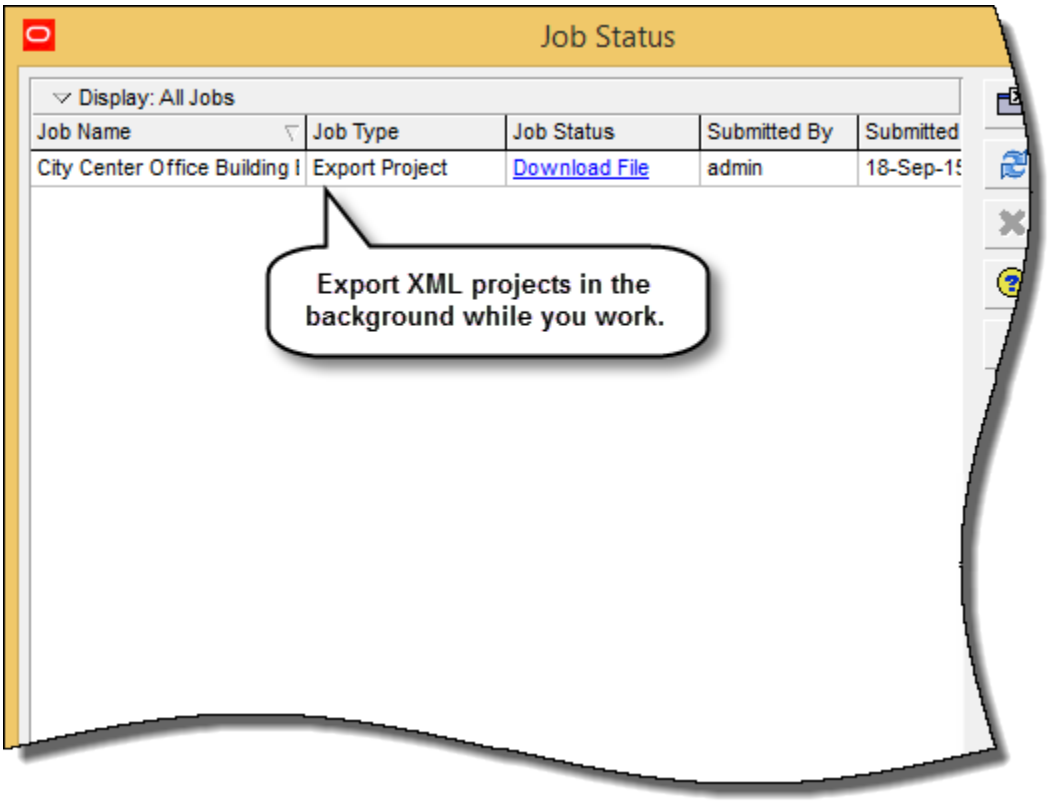
Filter activity, project, and resource codes on two new criteria -- Contains and Does Not Contain. These options are useful when filtering codes that share some of the same numbers or characters in their values.



To access this feature:
Select a code in the Filter dialog box.

Export XML as a Job Service

Export projects in XML format as a job service, allowing you to continue working in P6 Professional while the service runs in the background. A notification displays when the service is completed. In the Job Status dialog box, click Download File to download the XML file. This functionality is not available in Standalone mode.

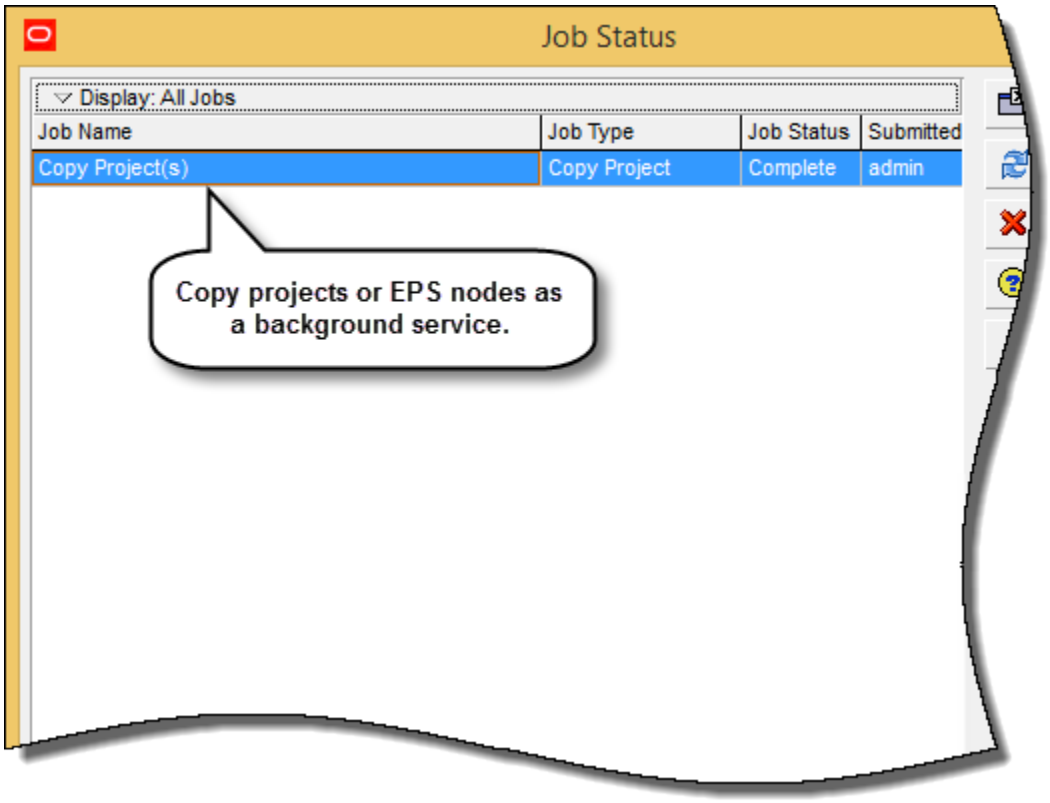


To access this feature:
On the File menu, click Export.

Copy Project as a Job Service

Copy Projects as a Job Service

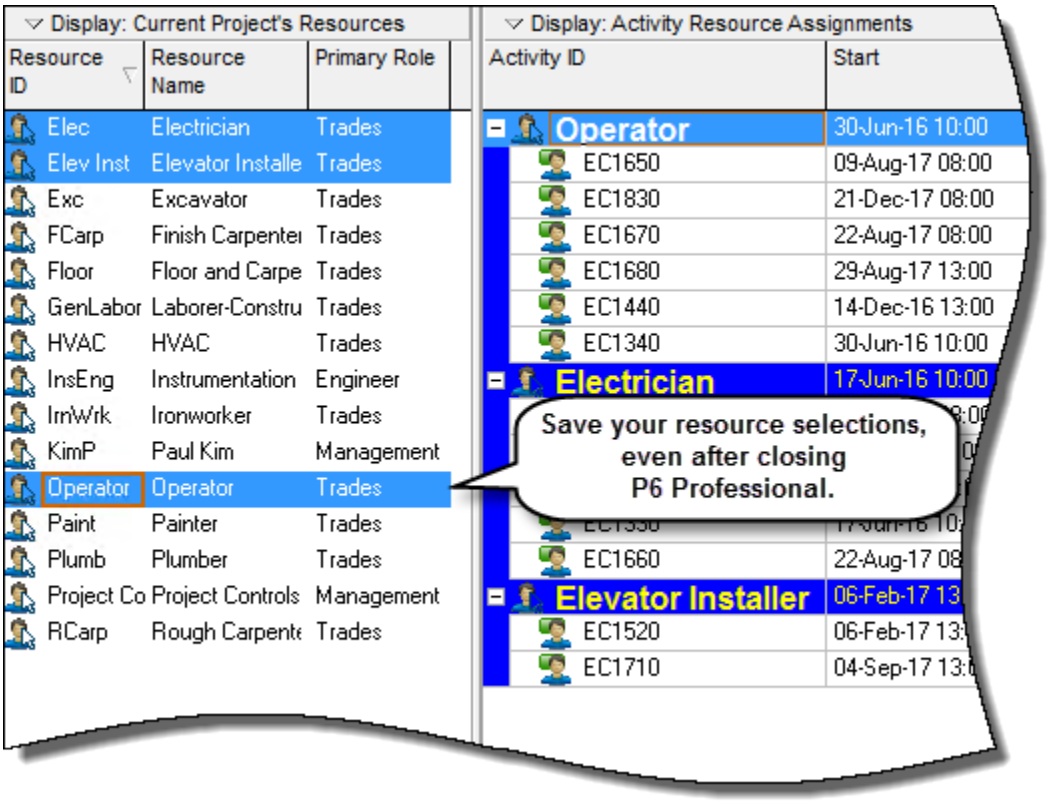
Copy projects or EPS nodes as a job service in P6 Professional 15.2, allowing you to continue working in P6 Professional while the service runs in the background. A notification displays when the service is completed. View the status of the service in the Job Status dialog box. This feature requires connection to a P6 EPPM database.



To access this feature:
On the Projects page, select a project or EPS node, right-click and select Copy. Highlight a new location, right-click, and select Paste.

Save Resource Selection in the Resource Histogram and Spreadsheet

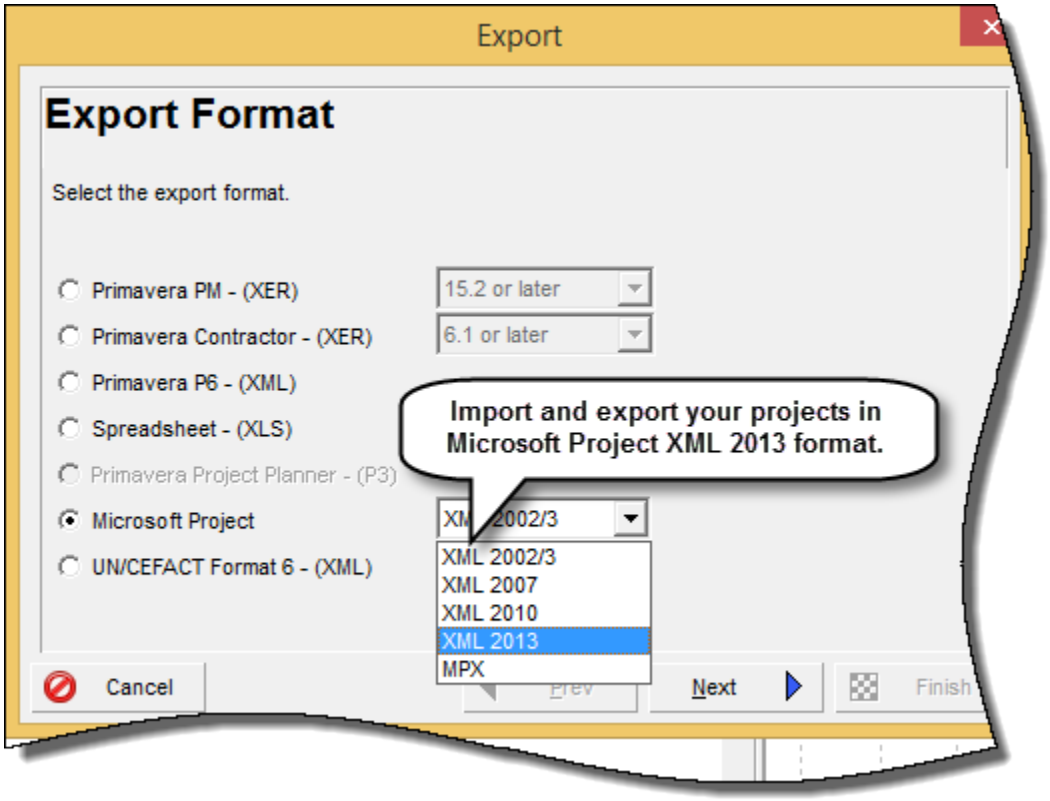
When you select resources in the Resource Histogram or Spreadsheet and then close P6 Professional, those selections are maintained the next time you start the application. This new feature in P6 Professional 15.2 saves time by retaining your resource selections. The selected resource filter -- All Resources, All Active Resources, or Current Project's Resources -- is also maintained. The state of the resource histogram and spreadsheet can be saved as part of the layout.



To access this feature:
Update your resources using the Resource Usage Spreadsheet or Resource Usage Profile, and then save your layout or close the application.

Microsoft Project XML 2013 Support

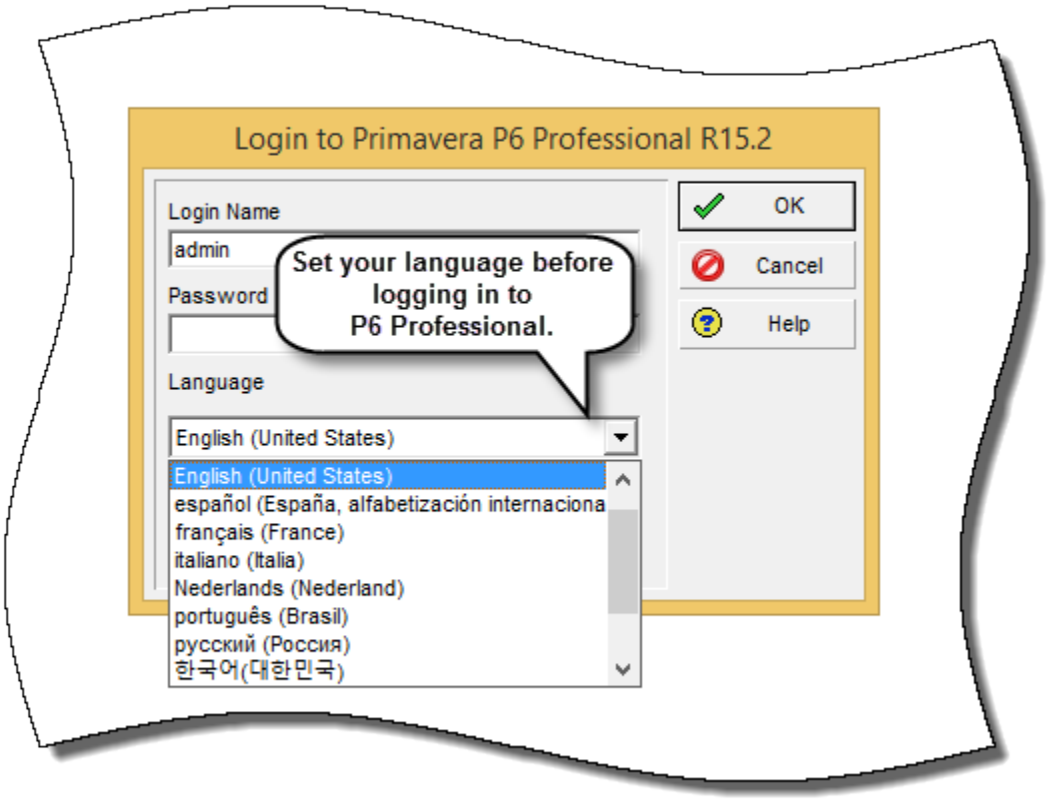
P6 Professional 15.2 enables you to import and export projects in Microsoft Project XML 2013 format. Share project data between P6 and Microsoft Project 2007, 2010, or 2013 by importing and exporting your projects in the corresponding format.



To access this feature:
On the File menu, click Import or Export.

Select Language at Login

P6 Professional 15.2 enables you to choose your language in the Login dialog box before you log in. This enhancement makes it easier to change your language of choice. The Set Language option on the Tools menu is removed from the application.



To access this feature:
In the Login dialog box, choose a language from the list.