Oracle
Primavera Cloud
Timesheets User Guide

Version 22
October 2022

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About This Guide

This guide explains how to use Oracle Primavera Cloud to manage timesheets.

Application administrators who want to set timesheet default settings, timesheet users who want to log time against project assignments, and timesheet supervisors and approvers who want to submit and approve timesheets should use this guide.

Timesheets Overview

Timesheets enable users to enter hours worked against projects. Project hours are logged against resource assignments for activities. Users are assigned different security privileges for timesheets based on which actions they can perform on a timesheet.

- **Timesheet Users** can manage their own timesheets. They can create timesheets, log time against activities on projects, and submit them for approval.
- **Timesheet Supervisors** can create their own timesheets and enter time. They can also create timesheets for the resources assigned to the projects for which they are the timesheet supervisors. They can enter time on behalf of the resources and submit their timesheets for approval.
- **Timesheet Approvers** can create their own timesheets and enter time. They can also create timesheets for the resources for which they have been assigned as the timesheet approver. They can enter time, submit, approve, or reject their resources' timesheets.

Notes:

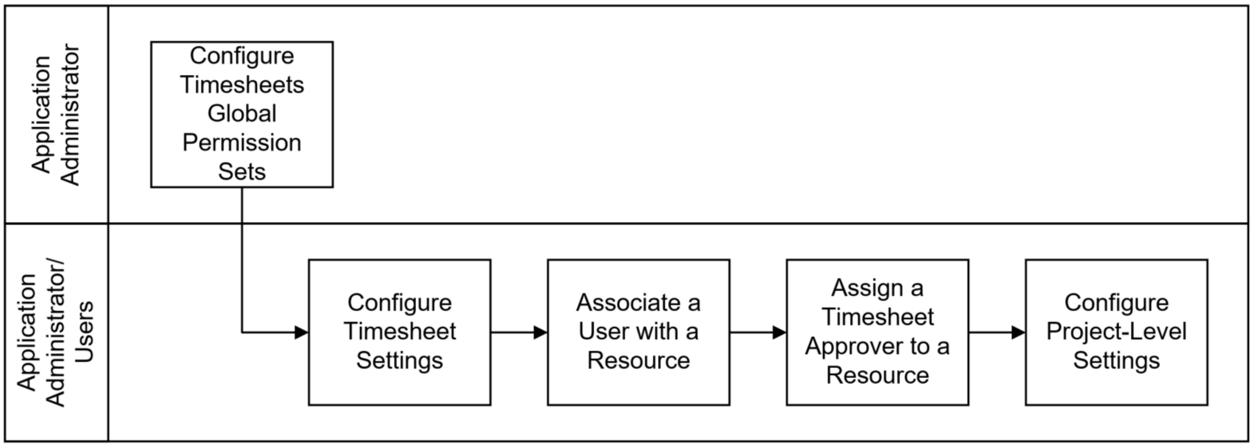
- A timesheet supervisor may also be the timesheet approver for a resource. In such cases, the supervisor is provided additional privileges to approve or reject timesheets.
- Only users with the Schedule license or Progress license can access Timesheets, and only users with the Schedule license can be Timesheet approvers.

Timesheets are processed using a submission and approval workflow. First, users, supervisors, or approvers add a timesheet and enter hours. After the timesheet is submitted, all stakeholders receive a notification. Approvers can now access the timesheets created by the users and supervisors. Upon submission, only the supervisors and approvers can make changes to the submitted timesheets. All additional changes made by the supervisors or approvers are auto-submitted. Users whose timesheets are updated receive a notification in their email and Oracle Primavera Cloud Inbox. Next, the approvers can approve or reject the timesheets. If the timesheet is approved, the approved hours are added to the timesheet actual hours for the assignments for which the timesheet was created. If the timesheet is rejected, the workflow is triggered again.

Get Started with Timesheets

This section details the basic configuration of settings you will need before using timesheets. Timesheet settings are configured on the Timesheet Settings panel, while additional settings can be configured at the project or workspace level by users with access. Based on how you plan to use timesheets, some of these settings may be optional. Most settings can be configured in any sequence.

Complete the following steps to get started with timesheets:


Application Administrator
Configure Timesheets Global Permission Sets
Application Administrator/ Users
Configure Timesheet Settings
Associate a User with a Resource
Assign a Timesheet Approver to a Resource
Configure Project-Level Settings

Configure Timesheets Global Permission Sets

Global permission sets determine a user's access to application settings and administering workflows. Before users can start working on timesheets, the application administrator needs to ***Create a Permission Set in Global Admin*** (on page 9) for timesheets and assign privileges. The application administrator can then edit the user's details to assign the global permission set to the user.

Configure Timesheet Settings

Each new timesheet in Primavera Cloud will inherit the attributes set in the Timesheet Settings. Timesheet default settings and field labels can be configured by application administrators or any user with the appropriate privileges. This includes:

- ***Configure Timesheet Period Settings*** (on page 12): A timesheet period is the span of time between the start and end date on a timesheet for which the time is logged. Timesheet periods must be configured before the user can view and enter time on their timesheet.
- ***Configure Timesheet Hour Types*** (on page 13): Hour types are the category of hours against which the time is logged, such as regular, overtime, sick time.
- ***Change Timesheet Field Labels*** (on page 14): Default field labels may not reflect the terminology of your organization or industry. You can customize labels to meet the needs of your organization in any of the twelve supported languages.

Associate a User with a Resource

When a user of the application is also a resource in the application, you can associate the resource with the user's account. This is required for users updating their timesheets to record progress on activities to which they have been assigned as a resource. You can associate a resource with an application user in a workspace or a project. See ***Associate a User with a Workspace Resource*** (on page 14) and ***Associate a User with a Project Resource*** (on page 15) for more information.

Assign a Timesheet Approver to a Resource

Assign a timesheet approver to a resource to identify the person responsible for approving the resource's timesheet. This could be a resource manager, project manager, or other type of supervisor. A resource must be assigned a timesheet approver to use timesheets. You can assign a timesheet approver to a resource in a workspace or a project. See ***Assign a Timesheet Approver to a Workspace Resource*** (on page 15) and ***Assign a Timesheet Approver to a Project Resource*** (on page 16) for more information

Configure Project-Level Settings

Project-level settings include project-specific configuration options and defaults inherited from the workspace. New projects inherit the default settings configured at the workspace level, but these can be updated at the project level. Settings updated at the project level only apply to that project.

- ***Assign a Timesheet Supervisor to a Project*** (on page 16): Timesheet supervisors can create timesheets for the resources assigned to their projects. They can also enter time on behalf of the resources and submit their timesheets for approval. Users can configure the project-level timesheet settings to assign a timesheet supervisor to a project.
- ***Link Timesheet Actual Hours and Assignment Actual Units*** (on page 17): Users may also link timesheet actual hours to assignment actual units if the hours spent recorded from the timesheets and approved by the timesheet approver directly impact the assignment actual units and dates for their organization.
- ***Allow Resources to Assign Themselves to Activities*** (on page 18): Timesheet resources can assign themselves to activities when they are adding hours to their timesheets depending on project-level settings.

Create a Permission Set in Global Admin

The Permission Sets page in Global Admin provides application administrators one location to create and edit global permission sets as well as object permission sets, including workspaces, projects, portfolios, programs, custom logs, files, ideas, and reports.

All users added to Primavera Cloud will receive a global permission set. You must choose a global permission set to be the default permission set for new users who are added to the application. Select the default permission set for all new users by selecting the Default Permission Set check box in the privileges section of the Permission Sets page. The global permission set can be changed from the default permission set when a user is being added.

When creating permission sets for workspaces and the other objects, you will first select the workspace where the permission set will be owned. These permission sets are inherited by all child workspaces. Inherited permission sets are also displayed on the Permission Sets page. The Owning Workspace of the permission set is the workspace where the permission set was created. Permission sets for objects can also be created in Summary & Settings.

To create a permission set on the Permission Sets page of Global Admin:

1) In the object selector, select **Global Admin**.
2) In the sidebar, select **Permission Sets**.
3) On the **Permission Sets** page, select an object tab.
4) In the **Workspace** picker, select a workspace to add a new permission set in that workspace.

> **Note**: You do not need to select a workspace on the **Global** tab.

5) On the **Permission Sets** page, on the object tab, select + **Add**.
6) In the **Name** field, enter a unique name.
7) Expand each category to assign privileges.
8) Select **Save**.

Tips

- To duplicate a permission set, select the **Context** menu, and then select **Duplicate**. The Administrator (System) permission set cannot be duplicated.
- To delete a permission set, select the **Context** menu, and then select **Delete**. The View Only (System) and Administrator (System) global permission sets cannot be deleted.
- For quicker configuration, use **Select All** to select or deselect all check boxes. Select the check box in a privilege column to select all privileges in that column.

Edit User Details

Edit general information for a user, such as name and language, as well as user permissions such as user type, licenses, and global permission sets.

To edit user details from the Edit User Details panel:

1) In the object selector, select **Global Admin**.
2) In the sidebar, select **Users**.

> **Note**: This can also be done from the General page for a company. To access the General page, select a company on the Companies page.

3) On the **Users** page, select the **Context** menu for a user row, and then select **Edit User Details**.
4) On the **Edit User Details** panel, edit user details.
5) Select **Save**.

> **Note**: The user type for an existing user can't be updated to Contact Only.

Global Security Privileges Definitions

When creating a permission set, use the following definitions to determine the functionality each privilege controls and other privileges that may also be required. Selecting one privilege may automatically select other privileges if they are required for the original privilege to function properly. These other privilege selections cannot be changed without affecting the selection of the original privilege. Any privilege requirements are noted in the definition.

Configuration

Administer Workflow Instances

Enables users to view and manage all workflow instances on the **Monitor Workflows** page.

Application Settings

Enables users to edit application settings, which set global preferences for Oracle Primavera Cloud.

Assign Proxy Users

Enables users to assign other users to act as a proxy user.

Companies

Enables users to add, edit, and delete companies.

If Add is selected, the Edit privilege for Companies is also selected and cannot be changed. If Delete is selected, the Add and Edit privileges for Companies are also selected and cannot be changed. Selecting Add, Edit, or Delete also selects the Enable User Administration privilege and cannot be changed.

Create and Run User Reports

Enables users to create and run user reports.

Download Excel Files

Enables users to download tables as Microsoft Excel files.

Export Projects

Enables users to export projects to P6 XML and Microsoft Project XML.

Manage Timesheets

Enables users to enter time and submit, approve, or reject a resource's timesheets.

If Enable is selected, the Add, Edit, Delete, and View privileges for Timesheets are also selected and cannot be changed.

Supervise Timesheets

Enables users to enter time and submit timesheets on behalf of the resources assigned to the projects.

If Enable is selected, the Add, Edit, Delete, and View privileges for Timesheets are also selected and cannot be changed.

Timesheet Settings

Enables users who are not application administrators to manage timesheet settings.

If Edit is selected, the View privilege for Timesheets is also selected and cannot be changed.

Timesheets

Enables users to add, edit, delete, and view timesheets.

User Administration

Enables users who are not application administrators to add and edit users.

This privilege can be assigned to users from another company. However, users that are also marked as restricted can only add and edit users from their company.

Configure Timesheet Period Settings

The timesheet period is the span of time between the start and end date on a timesheet for which the time is logged. The timesheet period settings can be configured by any user with the necessary privileges. Timesheet periods must be created before the user can view and enter time on their timesheet.

To configure timesheet period settings:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select the **Actions** ▼ menu, and then select **Manage Timesheet Settings**.
4) In the **Timesheet Settings** panel, select the **Defaults** tab.
5) In the **Timesheet Period** section, update the following fields:
    a. **Future Timesheets Allowed:** Define the number of future timesheets a user can create.
    b. **Frequency:** Configure the duration between timesheet period start date and timesheet period end date. **Frequency** is set to weekly by default.
    c. **End Day:** Specify the day of the week the timesheet period ends.
    d. **Start Date:** Define the start date for the timesheet period.
    e. **End Date:** Define the end date for the timesheet period.
6) Select **Create Timesheet Periods** to create timesheet periods between the specified start date and end date.

   The **Timesheet Period Summary** section shows the number of time periods created between the selected **Start Date** and **End Date**.
7) Select **Save**.
8) In the **Timesheet Settings** panel, select ✕ **Close**.

Note: Changes made to the timesheet default settings are effective from the next timesheet period.

Tips

- The **Timesheet Settings** panel can also be accessed from the **Actions** ▼ menu on the **Timesheet Details** page.

Configure Timesheet Hour Types

Hour types are the category of hours against which the time is logged, such as regular, overtime, sick time.

To configure timesheet hour types:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select the **Actions** ▼ menu, and then select **Manage Timesheet Settings**.
4) In the **Timesheet Settings** panel, select the **Defaults** tab.
5) In the **Hour Types** section, select the ⚙ **Context** menu next to an existing hour type**,** select **Add**, and then complete the following fields:
    - **Name**: Specify a name for the hour type.
    - **Abbreviation**: Enter an abbreviation for the hour type.
    - **Default**: Select the default option to make it a default hour type**.**
6) In the **Log Timesheet Hours Using** section, select whether the hour type **Name** or **Abbreviation** will be displayed on the timesheet.
7) Select **Save**.
8) In the **Timesheet Settings** panel, select × **Close**.

Note: Changes made to the timesheet default settings are effective from the next timesheet period.

Tips

- The **Timesheet Settings** panel can also be accessed from the **Actions** ▼ menu on the **Timesheet Details** page.
- To delete an hour type, select the ⚙ **Context** menu next to an existing hour type, and then select **Delete**. The hour type set as the default hour type cannot be deleted.

Change Timesheet Field Labels

Default field labels may not reflect the terminology of your organization or industry. You can customize labels to meet the needs of your organization in any of the twelve supported languages. In the table of standard fields, the Column Name field specifies the original field name. The Column Label field specifies the custom label, entered by the user. By default it matches the original field name.

Oracle Primavera Cloud documentation uses default field labels. If you change a field label in the application, it will no longer match the label used in documentation.

To edit a standard timesheet field:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select the **Actions** ▼ menu, and then select **Manage Timesheet Settings**.
4) In the **Timesheet Settings** panel, select the **Field Labels** tab.
5) In the table, select a field.
6) In the **Column Label** field, enter a new label.
7) In the **Localization** detail window, select the **Column Label** field of the language, and enter a new label.
8) Select **Save**.
9) In the **Timesheet Settings** panel, select × **Close**.

Tips

- The **Timesheet Settings** panel can also be accessed from the **Actions** ▼ menu on the **Timesheet Details** page.
- You can restore the default label of a standard field by selecting the ⚙ **Context** menu, and then selecting **Reset Label**.

Associate a User with a Workspace Resource

When a user of the application is also a resource in the application, you can associate the user's account with the resource. This is required for users updating their timesheets to record progress on activities to which they have been assigned as a resource.

You can only associate users with labor resources. Users can only be associated with one resource at a time.

If you have the required privileges, you can also add and associate a workspace resource with an existing user in Global Admin.

To associate an application user with a workspace resource:

1) ***Navigate to the workspace resource page*** (see page 34).
2) In the table, select the resource.

Note: You can only associate users with labor resources.

3) Select the **General** detail window.
4) In the **User** field, select the username for the resource.

Note: If a user is already associated with the resource, select the username in the **User** column of the resource table, and then select **Remove**.

5) All changes made to this page are saved automatically.

Tips

- The **Owned By** column indicates the workspace or project to which the resource belongs. Most resource information can only be edited in the workspace or project where it is owned.

Associate a User with a Project Resource

When a user of the application is also a resource in the application, you can associate the user's account with the resource. This is required for users updating their timesheets to record progress on activities to which they have been assigned as a resource.

You can only associate users with labor resources. Users can only be associated with one resource at a time.

To associate an application user with a project resource:

1) ***Navigate to the project resources page*** (see page 35).
2) In the table, select the resource.

Note: You can only associate users with labor resources.

3) Select the **General** detail window.
4) In the **User** field, select the username for the resource.

Note: If a user is already associated with the resource, select the username in the **User** column of the resource table, and then select **Remove**.

5) All changes made to this page are saved automatically.

Tips

- The **Owned By** column indicates the workspace or project to which the resource belongs. Most resource information can only be edited in the workspace or project where it is owned.

Assign a Timesheet Approver to a Workspace Resource

Assign a timesheet approver to a workspace resource to identify the person responsible for approving the resource's timesheet. This could be a resource manager, project manager, or other type of supervisor. A resource must be assigned a timesheet approver to use timesheets.

To assign a timesheet approver to a workspace resource:

1) ***Navigate to the workspace resource page*** (see page 34).
2) In the table, select the resource.
3) Select the **General** detail window.
4) In the **Timesheet Approver** field, select a user.

> **Note**: A user must have the **Manage Timesheets** global permission enabled to appear in this list.

5) All changes made to this page are saved automatically.

Tips

- The **Owned By** column indicates the workspace or project to which the resource belongs. Most resource information can only be edited in the workspace or project where it is owned.

Assign a Timesheet Approver to a Project Resource

Assign a timesheet approver to a project resource to identify the person responsible for approving the resource's timesheet. This could be a resource manager, project manager, or other type of supervisor. A resource must be assigned a timesheet approver to use timesheets.

To assign a timesheet approver to a project resource:

1) ***Navigate to the project resources page*** (see page 35).
2) In the table, select the resource.
3) Select the **General** detail window.
4) In the **Timesheet Approver** field, select a user.

> **Note**: A user must have the **Manage Timesheets** global permission enabled to appear in this list.

5) All changes made to this page are saved automatically.

Tips

- The **Owned By** column indicates the workspace or project to which the resource belongs. Most resource information can only be edited in the workspace or project where it is owned.

Assign a Timesheet Supervisor to a Project

Configure timesheet settings for a project to assign a timesheet supervisor to the project.

To configure timesheet supervisor:

1) ***Navigate to the project settings page*** (see page 38).
2) Select the **Timesheets** tab.
3) In the **Timesheet Supervisors** section, select + **Add** .

4) In the **Add Supervisors** dialog box, select a supervisor, select > **Move Right** to move it to the selected list, and then select **Select**.
5) Select the **Default** option to select one of the supervisors as the default timesheet supervisor.

Notes:

- A project user must have the **Supervise Timesheets** global permission enabled to be assigned as a timesheet supervisor.
- A project can have multiple timesheet supervisors, but only one can be selected as the default supervisor.
- To delete a timesheet supervisor, select a supervisor, select the ⚙ **Context** menu, and then select **Delete**. The default timesheet supervisor cannot be deleted.

6) Save your changes:

In **Primavera Cloud**:

a. Select **Save**.

b. In the **Summary & Settings** panel, select × **Close**.

In **Primavera Professional**:

- Select 💾 **Save**.

Link Timesheet Actual Hours and Assignment Actual Units

Linking timesheet actual hours to assignment actual units copies the timesheet actual hours to resource assignment actual units and timesheet actual start to the resource assignment actual start.

To link timesheet actual hours to assignment actual units:

1) ***Navigate to the project settings page*** (see page 38).
2) In the **Timesheet Actual Hours** section, select the **Link Timesheet Actual Hours and Assignment Actual Units** option to link approved timesheet hours and assignment actual units and dates.

Note: Additionally, the timesheet actual hours are copied to the **Timesheet Actual Units** row on the **Assignment List** page.

3) Save your changes:

In **Primavera Cloud**:

a. Select **Save**.

b. In the **Summary & Settings** panel, select × **Close**.

In **Primavera Professional**:

- Select 💾 **Save**.

Allow Resources to Assign Themselves to Activities

You can determine, at the project level, whether users have the ability to add activities that they have not been assigned to when they are adding hours to their timesheet. If a user adds an activity that they have not been assigned to to their timesheet, then they will be automatically assigned to that activity after the timesheet is approved.

To allow resources to assign themselves to activities:

1) ***Navigate to the project settings page*** (see page 38).
2) In the **Resource Assignment** section, select the **Allow resources to assign themselves to activities** option.
3) Save your changes:

   In **Primavera Cloud**:

   a. Select **Save**.

   b. In the **Summary & Settings** panel, select × **Close**.

   In **Primavera Professional**:

   - Select 💾 **Save**.

Timesheet User Actions

Timesheet users own their timesheets and use them to record progress on activities to which they have been assigned as a resource. They enter hours worked against activities for a project on the timesheet and submit it to the timesheet approver for approval. Timesheet users can view a list of timesheets created by them on the Timesheets page.

Timesheet supervisors and approvers are considered timesheet users for the timesheets that they own.

Add a Timesheet

Add a timesheet to enter hours worked against activities to which you have been assigned as a resource.

To add a timesheet:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select + **Add**.
4) In the **Add Timesheet** dialog box, select a timesheet.

   > **Note**: Clear the **Auto-populate timesheet with project assignments for selected time period** option if you do not want to auto-populate the timesheet with your project assignments for the selected time period.

5) Select **Add**.

Add a Project to a Timesheet

Timesheet users can add a project to a timesheet if it has not been automatically populated. You can add any project to the timesheet that you have access to even if you are not assigned as a resource to the activities in that project.

To add a project:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **My Timesheets** from the **View** menu on the toolbar.
4) On the **Timesheets** page, select a timesheet from the **Name** column.
5) On the **Timesheet Details** page, select + **Add**.
6) In the **Add Project** dialog box, select a project, and then select > **Add from Available** to move it to the selected list.
7) Select **OK**.

Tips

- Projects can only be added to the timesheets that have a status of Not Submitted or Rejected.
- To delete a project from a timesheet, select a project from the **Timesheet Details** page, select ⚙ **Context**, and then select **Delete**.

Add Hours to an Activity on a Timesheet

Timesheet users can log hours against activities for a project on their timesheets on the Timesheet Details page. You can log hours against any activity from a project that you have access to even if you are not assigned as a resource to that activity.

To log hours against an activity on a project:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **My Timesheets** from the **View** menu on the toolbar.
4) On the **Timesheets** page, select a timesheet from the **Name** column.
5) On the **Timesheet Details** page, select a project, select the ⚙ **Context** menu, and then select **Add Hours**.
6) In the new row, select an activity.
7) (Optional) Add a **Project Supervisor** if a default supervisor has not been added for the project.
8) (Optional) In the **Hour Type** column, select the type of hours for which you are logging time, such as overtime or holiday time.
9) Enter hours for each day in the time period.
10) Select **Save**.

Delete an Activity from a Project

Timesheet users can delete an activity from a project if it is no longer needed.

To delete an activity:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **My Timesheets** from the **View** menu on the toolbar.
4) On the **Timesheets** page, select a timesheet from the **Name** column.
5) On the **Timesheet Details** page, expand a project row to view the activities added to it.
6) Select an activity, select the ⚙ **Context** menu, and then select **Delete**.
7) Select **Save**.

Delete a Project from a Timesheet

Timesheet users can delete a project from a timesheet if they no longer need to log time on it.

To delete a project from a timesheet:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **My Timesheets** from the **View** menu on the toolbar.
4) On the **Timesheets** page, select a timesheet from the **Name** column.
5) On the **Timesheet Details** page, select a project, select the ⚙ **Context** menu, and then select **Delete**.
6) Select **Save**.

> **Note**: Projects can only be deleted from the timesheets that have a status of Not Submitted or Rejected.

Submit a Timesheet

Submitting a timesheet notifies the timesheet supervisor and approver. The timesheet approver then triggers the approval or rejection process for the timesheet.

To submit a timesheet:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select a timesheet row, select the ⚙ **Context** menu, and then select **Submit**. Optionally, select the check box next to the timesheet, select the **Actions** ▼ menu from the toolbar, and then select **Submit**.

   An email and Primavera Cloud Inbox notification are sent to the supervisor and approver.

Note:

- After a timesheet is submitted, all non-submitted entries in the timesheet get automatically submitted and no further actions can be taken on them.
- Users are notified if a supervisor or approver makes any updates to their submitted timesheets.

Timesheets can also be submitted from the Timesheet Details page:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **My Timesheets** from the **View** menu on the toolbar.
4) On the **Timesheets** page, select a timesheet from the **Name** column.
5) On the **Timesheet Details** page, select the **Actions** ▼ menu, and then select **Submit**.

Delete a Timesheet

Delete a timesheet if it is no longer needed.

To delete a timesheet:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select a timesheet row, select the ⚙ **Context** menu, and then select **Delete**.
4) Select **Save**.

Note: Only the timesheets with a status of Not Submitted can be deleted.

Timesheet Supervisor Actions

Timesheet supervisors can view a list of their own timesheets on the Timesheets page. They can also view a list of timesheets of the resources who are assigned to the projects that they supervise on this page. Timesheet supervisors can perform all actions as a timesheet user on their own timesheets using the My Timesheets view and can add timesheets for other resources using the Supervisor's Timesheets view.

Timesheets View for Supervisors

Timesheet supervisors can view a list of their own timesheets and the list of timesheets for the resources assigned to the projects that they supervise.

To change the view for the Timesheets page:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, from the **View** menu on the toolbar:
    - Select **My Timesheets** to view a list of your own timesheets.
    - Select **Supervisor's Timesheets** to view a list of timesheets for the resources assigned to your projects.

> **Note**: Timesheet supervisors can perform all timesheet user actions in the **My Timesheets** view.

Add a Timesheet for a Resource

On the Timesheets page, timesheet supervisors can add timesheets on behalf of the resources assigned to the projects that they supervise.

To add a timesheet for a resource:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Supervisor's Timesheets** from the **View** menu on the toolbar.
4) Select + **Add**.
5) In the **Add Timesheet** dialog box:
    a. In the **Choose Timesheet Period** step, select a timesheet, and then select **Add**.
    b. In the **Add Employees** step, select a project to view the resources added to it, select a resource, select > **Move Right** to move it to the selected list, and then select **Select**.

Add a Resource to a Project

Timesheets supervisors can add resources to the projects that they supervise as project supervisors and log time against resource assignments. All employees who have access to the project are available to be selected.

To add a resource to a project:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Supervisor's Timesheets** from the **View** menu on the toolbar.
4) Select a timesheet from the **Name** column.
5) On the **Timesheet Details** page, select a project, select the ⚙ **Context** menu, and select **Add Employee**.
6) In the **Add Employee** dialog box, select a resource, and then select > **Add from Available** to add it to the selected list.
7) Select **OK**.

Add Hours to an Activity for a Resource

Timesheet supervisors can enter hours against an activity for a project on behalf of a resource assigned to a project that they supervise. You can select any activity from a project that the user has access to even if the user is not assigned as a resource on that activity.

To enter hours for a resource:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Supervisor's Timesheets** from the **View** menu on the toolbar.
4) Select a timesheet from the **Name** column.
5) On the **Timesheet Details** page, select a resource beneath a project, select the ⚙ **Context** menu, and then select **Add Hours**.
6) In the new row, select an activity.
7) (Optional) Add a **Project Supervisor** if a default supervisor has not been added for the project.
8) (Optional) In the **Hour Type** column, select the type of hours for which you are logging time, such as overtime, holiday time.
9) Enter hours for each day in the time period.
10) Select **Save**.

Delete an Activity from a Project

Timesheet supervisors can delete an activity from a project for a resource if it is no longer needed.

To delete an activity:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Supervisor's Timesheets** from the **View** menu on the toolbar.
4) Select a timesheet from the **Name** column.
5) On the **Timesheet Details** page, expand a project row to view the activities added to it.
6) Select an activity, select the ⚙ **Context** menu, and then select **Delete**.
7) Select **Save**.

Tips

- To delete multiple activities at the same time, select the check box next to each activity, select the ⚙ **Context** menu, and then select **Delete Rows**.

Submit a Timesheet for a Resource

Timesheet supervisors can submit a timesheet on behalf of a resource, which triggers the approval process. After the supervisors submit the timesheet, timesheet users and approvers receive a notification in their emails and Primavera Cloud Inbox notifying them of the submission.

To submit the timesheet for a resource:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Supervisor's Timesheets** from the **View** menu on the toolbar.
4) Select a timesheet from the **Name** column.
5) On the **Timesheet Details** page, expand a project to view the resources added to it.
6) Select the resource for which the timesheet has not been submitted, select the ⚙ **Context** menu, and then select **Submit.** Or, select the check box for the resource, select the **Actions** ▼ menu from the toolbar, and then select **Submit**.

Timesheet Approver Actions

Timesheet approvers can view a list of their own timesheets on the Timesheets page. They can also view a list of timesheets of the resources for which they have been assigned as the timesheet approver. Timesheet approvers can perform all actions as a timesheet user on their own timesheets using the My Timesheets view and can add timesheets for resources, add resources to the timesheets, delete, submit, reject, or approve resources' timesheets using the Employee Timesheets view.

Timesheets View for Approvers

Timesheet approvers can view a list of their own timesheets and the list of timesheets for resources for which they have been assigned as the timesheet approver.

To change the view for the Timesheets page:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, from the **View** menu on the toolbar:
    - Select **My Timesheets** to view the list of your own timesheets.
    - Select **Employee Timesheets** to view the list of timesheets for other resources. Expand a timesheet to view the resources who have logged time in that time period.

> **Note**: Timesheet approvers can perform all timesheet user actions in the **My Timesheets** view.

Add a Timesheet for a Resource

Timesheet approvers can add timesheets for resources for which they have been assigned as the timesheet approver.

To add a timesheet for a resource:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Employee Timesheets** from the **View** menu on the toolbar.
4) Select + **Add**.
5) In the **Add Timesheet** dialog box:
    a. In the **Choose Timesheet Period** step, select a timesheet, and then select **Add**.

    > **Note**: Clear the **Auto-populate timesheet with project assignments for selected time period** option if you do not want to automatically populate the timesheet with the resource's project assignments.

    b. In the **Add Employees** step, select a resource, select > **Move Right** to move it to the selected list, and then select **Select**.

Add a Resource to a Timesheet

Timesheet approvers can add one or more resources to a timesheet.

To add a resource to a timesheet:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Employee Timesheets** from the **View** menu on the toolbar.
4) Select a timesheet row, select the ⚙ **Context**, and then select **Add Employees**.
5) In the **Add Employees** dialog box, select a resource, select > **Move Right** to move it to the selected list, and then select **Add**.

Add a Project for a Resource on a Timesheet

Timesheet approvers can add additional projects to the resources' timesheets. All projects to which a user has access are available to be selected.

To add a project:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Employee Timesheets** from the **View** menu on the toolbar.
4) Select a timesheet from the **Name** column.

5) On the **Timesheet Details** page, select the resource for which you want to add the project.
6) Select the ⚙ **Context** menu, and then select **Add Project**.
7) In the **Add Project** dialog box, select a project, and then select › **Add from Available** to move it to the selected list.
8) Select **OK**.

Tips

- Projects can only be added to the timesheets that have a status of Not Submitted or Rejected.

Add Hours to an Activity for a Resource

Timesheet approvers can enter hours against an activity for a project on behalf of their resources. You can select any activity from a project that the user has access to even if the user is not assigned as a resource on that activity

To enter hours for a resource:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Employee Timesheets** from the **View** menu on the toolbar.
4) Select a timesheet from the **Name** column.
5) On the **Timesheet Details** page, expand a resource to view their projects.
6) Select a project, select the ⚙ **Context** menu, and then select **Add Hours**.
7) In the new row, select an activity.
8) (Optional) Add a **Project Supervisor** if a default supervisor has not been added for the project.
9) (Optional) In the **Hour Type** column, select the type of hours for which you are logging time, such as overtime, holiday time.
10) Enter hours for each day in the time period.
11) Select **Save**.

Delete an Activity from a Project

Timesheet approvers can delete an activity from a project for a resource if it is no longer needed.

To delete an activity:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Employee Timesheets** from the **View** menu on the toolbar.
4) Select a timesheet from the **Name** column.
5) On the **Timesheet Details** page, expand a resource to view their projects.

6) Expand the project from which you want to delete an activity.
7) Select an activity, select the ⚙ **Context** menu, and then select **Delete**.
8) Select **Save**.

Tips

- To delete multiple activities at the same time, select the check box next to each activity, select the ⚙ **Context** menu, and then select **Delete Rows**.

Delete a Project for a Resource

Timesheet approvers can delete a project for a resource if it is no longer needed.

To delete a project:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Employee Timesheets** from the **View** menu on the toolbar.
4) Select a timesheet from the **Name** column.
5) On the **Timesheet Details** page, expand a resource to view their projects.
6) Select a project, select the ⚙ **Context** menu, and then select **Delete**.
7) Select **Save**.

Tips

- To delete multiple projects at the same time, select the check box next to each project, select the ⚙ **Context** menu, and then select **Delete Rows**.

Delete a Timesheet for a Resource

Timesheet approvers can delete resources' timesheets if they are no longer needed.

To delete a timesheet:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Employee Timesheets** from the **View** menu on the toolbar.
4) Expand a timesheet row to view the resources added to it.
5) Select a row for a resource, select the ⚙ **Context** menu, and then select **Delete**.
6) Select **Save.**

Delete a Resource from a Timesheet

Timesheet approvers can delete a resource from a timesheet if the resource no longer needs to log time on any projects during that time period.

To delete a resource from a timesheet:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Employee Timesheets** from the **View** menu on the toolbar.
4) Select a timesheet from the **Name** column.
5) On the **Timesheet Details** page, select the resource, select the ⚙ **Context** menu, and then select **Delete**.
6) Select **Save.**

Tips

- To delete multiple resources at the same time, select the check box next to each resource, select the ⚙ **Context** menu, and then select **Delete Rows**.

Submit a Timesheet for a Resource

Timesheet approvers can submit timesheets on behalf of other resources.

To submit a timesheet:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Employee Timesheets** from the **View** menu on the toolbar.
4) Expand a timesheet row to view the resources added to it.
5) Select a row for a resource, select the ⚙ **Context** menu or **Actions** ▼ menu from the toolbar, and then select **Submit**.

   An email and Primavera Cloud Inbox notification are sent to the supervisor and approver.

Timesheets can also be submitted from the Timesheet Details page:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Employee Timesheets** from the **View** menu on the toolbar.
4) Select a timesheet from the **Name** column.
5) On the **Timesheet Detail** page, select the resource for which you want to submit the timesheet, select the ⚙ **Context** menu, and then select **Submit.** Or, select the check box for the resource and select **Submit** from the **Actions** ▼ menu on the toolbar.

Approve a Timesheet for a Resource

After a timesheet is submitted, timesheet approvers provide their final approval on it. They can view the timesheet by selecting the link within the submission notification email or by navigating to it from the app itself.

To approve a timesheet:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Employee Timesheets** from the **View** menu on the toolbar.
4) Expand a timesheet row to view the resources added to it.
5) Select a row for a resource, select the ⚙ **Context** menu, and then select **Approve**. Or, select the check box for the resource and select **Approve** from the toolbar.

Timesheets can also be approved from the Timesheets Details page:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Employee Timesheets** from the **View** menu on the toolbar.
4) Select a timesheet from the **Name** column.
5) On the **Timesheet Detail** page, select a resource, select the ⚙ **Context** menu, and select **Approve**. Or, select the check box for the resource, and then select **Approve** from the toolbar.

Notes:

- Only the timesheets with a status of Submitted can be approved.
- No further actions can be taken on a timesheet after it has been approved.
- The timesheet users receive a notification in their email and Primavera Cloud Inbox notifying them of the approval.
- If the **Link Timesheet Actual Hours to Assignment Actual Units** option is selected on the **Project Settings** page, then after the timesheet is approved, the timesheet actual hours are copied to the resource assignment actual units and timesheet actual start is copied to the resource assignment actual start. Additionally, the timesheet actual hours are copied to the **Timesheet Actual Units** row on the **Assignment List** page.

Reject a Timesheet for a Resource

Timesheets approvers can reject the timesheet for a resource if any changes are required before the final approval.

To reject a timesheet:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Employee Timesheets** from the **View** menu on the toolbar.

4) Expand a timesheet row to view the resources added to it.
5) Select a row for a resource, select the ⚙ **Context** menu or **Actions** ▼ menu from the toolbar, and then select **Reject**.
6) In the **Reject Timesheet** dialog box, provide a reason for rejection in the **Comments** field, and then select **Reject**.

> **Note**: The timesheet users receive a notification in their email and Primavera Cloud Inbox notifying them of the rejection.

Timesheets can also be rejected from the Timesheet Details page:

1) In the header, select your username.
2) On the **User** menu, select **Timesheets**.
3) On the **Timesheets** page, select **Employee Timesheets** from the **View** menu on the toolbar.
4) Select a timesheet from the **Name** column.
5) On the **Timesheet Detail** page, select a resource, select the ⚙ **Context** menu, and select **Reject**. Or, select the check box for the resource, and then select **Reject** from the **Actions** ▼ menu on the toolbar.
6) In the **Reject Timesheet** dialog box, provide a reason for rejection in the **Comments** field, and then select **Reject**.

Apply a Quick Filter

You can use quick filters on the Timesheets page or the Timesheet Details page to refine the timesheet data displayed on a page. Select one or more values on which to filter. Clear a filter to show more results. Quick filters are not saved with the view.

To apply a quick filter:

1) On the toolbar, select the ▽ **Filters** icon.
2) In the **Quick Filters** list, select applicable filter values and then select **Apply**.
3) To remove a filter, expand the filter list, and select **Clear**.

Add a Discussion

Discussions provide a way for team members to communicate and exchange information on a wide variety of objects including activities, costs, resources, risks, scope assignments, tasks, and more. Comments are saved with the object and are available to all team members with the required security privileges. You can use the Discussion feature to collaborate throughout the application.

To add a discussion:

- Select **Discuss** to open the Discussion panel.

> **Note**: If no comments have been posted to the Discussion panel, the **Discuss** icon is empty.

To post a new comment:

- In the **Post a comment** field, enter a comment, and select **Post**.

To reply to a comment:

- Select **Comment**.
- In the **Post a reply** field, enter a reply, and select **Reply**.

Tips

- A user mention sends a notification to the user inviting them to join the discussion. To mention a user, enter @<*FirstNameLastName*> or @<*username*> and select the user.
- You can resize the Discussion panel by selecting the left edge of the panel and dragging to the desired size.
- You cannot edit or delete a posted comment.
- Select **Like** to show that you approve or support a comment. Select **Unlike** to remove your Like.
- You can choose to show or hide the discussion icon in a table. Select the **Settings** icon and, in the **Standard Column Options** section, select the **Show Discussion Indicator** option.

Appendix of Referenced Navigation Steps

Navigate to the WBS page

In **Primavera Cloud**:

a) In the object selector, select a project.

b) In the sidebar, hover over **Schedule** or **Scope**, and select **WBS**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** tab, select a project, and then select **Open**.
c) On the **Project** menu, select **WBS**.

Navigate to the Activities page

In **Primavera Cloud**:

a) In the object selector, select a project or program.

b) In the sidebar, hover over **Schedule**, and select **Activities**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Project** or **Program** menu, select **Activities**.

Navigate to the project Activities page

In **Primavera Cloud**:

a) In the object selector, select a project.

b) In the sidebar, hover over **Schedule**, and select **Activities**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** tab, select a project, and then select **Open**.
c) On the **Project** menu, select **Activities**.

Navigate to the Baselines page

In **Primavera Cloud**:

a) In the object selector, select a project.

b) In the sidebar, hover over **Scope** or **Schedule**, and select **Baselines**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** tab, select a project, and then select **Open**.
c) On the **Project** menu, select **Baselines**.

Navigate to the Baselines or Activities page

In **Primavera Cloud**:

a) In the object selector, select a project.
b) In the sidebar, hover over **Scope** , and select **Baselines** or hover over **Schedule**, and select **Baselines** or **Activities**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** tab, select a project, and then select **Open**.
c) On the **Project** menu, select **Baselines** or **Activities.**

Navigate to the Schedule Comparison page

In **Primavera Cloud**:

a) In the object selector, select a project.
b) In the sidebar, hover over **Schedule**, and select **Schedule Comparison**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** tab, select a project, and then select **Open**.
c) On the **Project** menu, select **Schedule Comparison**.

Navigate to the workspace resource page

In **Primavera Cloud**:

a) In the object selector, select a workspace.
b) In the sidebar, hover over **Resources**, and select **Resource List**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Workspace** menu, select **Resources.**

Navigate to the project resources page

In **Primavera Cloud**:

a) In the object selector, select a project.
b) In the sidebar, hover over **Resources**, and select **Resource List**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** tab, select a project, and then select **Open**.
c) On the **Project** menu, select **Resources**.

Navigate to the workspace or project resources page

In **Primavera Cloud**:

a) In the object selector, select a workspace or project.
b) In the sidebar, hover over **Resources**, and select **Resource List**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Workspace** or **Project** menu, select **Resources**.

Navigate to the workspace role page

In **Primavera Cloud**:

a) In the object selector, select a workspace.
b) In the sidebar, hover over **Resources**, and select **Role List**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Workspace** menu, select **Roles**.

Navigate to the project roles page

In **Primavera Cloud**:

a) In the object selector, select a project.
b) In the sidebar, hover over **Resources**, and select **Role List**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** tab, select a project, and then select **Open**.
c) On the **Project** menu, select **Roles**.

Navigate to the workspace or project roles page

In **Primavera Cloud**:

a) In the object selector, select a workspace or project.
b) In the sidebar, hover over **Resources**, and select **Role List**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Workspace** or **Project** menu, select **Roles**.

Navigate to the workspace resource assignments page

In **Primavera Cloud**:

a) In the object selector, select a workspace.
b) In the sidebar, hover over **Resources**, and select **Assignment List**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Workspace** menu, select **Resource Assignments**.

Navigate to the project or program resource assignments page

In **Primavera Cloud**:

a) In the object selector, select a project or program.
b) In the sidebar, hover over **Resources** or **Schedule**, and select **Assignment List**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Project** or **Program** menu, select **Resource Assignments**.

Navigate to the workspace resource analysis page

In **Primavera Cloud**:

a) In the object selector, select a workspace.

b) In the sidebar, hover over 👥 **Resources**, and select **Analysis**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.

b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.

c) In the **Workspace** menu, select **Resource Analysis**.

Navigate to the project or program resource analysis page

In **Primavera Cloud**:

a) In the object selector, select a project or program.

b) In the sidebar, hover over 👥 **Resources**, and select **Analysis**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.

b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.

c) On the **Project** or **Program** menu, select **Resource Analysis**.

Navigate to the files page

In **Primavera Cloud**:

a) In the object selector, select a project, portfolio, program, or idea.

b) In the sidebar, hover over 🗀 **Files**, and select **File List**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.

b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.

c) On the **Project** or **Program** menu, select **Files**.

Navigate to the project files page

In **Primavera Cloud**:

a) In the object selector, select a project.

b) In the sidebar, hover over 🗀 **Files**, and select **File List**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.

b) In the **Open** dialog box, select the **Projects** tab, select a project, and then select **Open**.

c) On the **Project** menu, select **Files**.

Navigate to the project or portfolio files page

In **Primavera Cloud**:

a) In the object selector, select a project or portfolio.

b) In the sidebar, hover over 🗀 **Files**, and select **File List**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** tab, select a project, and then select **Open**.
c) On the **Project** menu, select **Files**.

Navigate to the project Details page

In **Primavera Cloud**:

a) In the object selector, select a project.

b) In the sidebar, select ⚙ **Summary & Settings**.
c) On the **Summary & Settings** menu, select **Details**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** tab, select a project, and then select **Open**.
c) On the **Project** menu, select **Details**.

Navigate to the project settings page

In **Primavera Cloud**:

a) In the object selector, select a project.

b) In the sidebar, select ⚙ **Summary & Settings**.
c) On the **Summary & Settings** menu, select **Settings**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** tab, select a project, and then select **Open**.
c) On the **Project** menu, select **Project Settings**.

Navigate to the program settings page

In **Primavera Cloud**:

1) In the object selector, select a program.

2) In the sidebar, select ⚙ **Summary & Settings**.

a) On the **Summary & Settings** menu, select **Settings**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Programs** tab, select a program, and then select **Open**.
c) On the **Program** menu, select **Details**.

Navigate to the program codes page

In **Primavera Cloud**:

1) In the object selector, select a program.

a) In the sidebar, select ⚙ **Summary & Settings**.
b) On the **Summary & Settings** menu, select **Codes**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Programs** tab, select a program, and then select **Open**.
c) On the **Program** menu, select **Program Codes**.

Navigate to a dictionary page

In **Primavera Cloud**:

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.
c) On the **Summary & Settings** menu, select **Dictionaries**, and then select a dictionary item.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Dictionaries** menu, select a dictionary item.

Navigate to the Calendars dictionary page

In **Primavera Cloud**:

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.
c) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Calendars**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.

c) On the **Dictionaries** menu, select **Workspace**, and then select **Calendars**.

Navigate to the Codes dictionary page

In **Primavera Cloud**:

a) In the object selector, select a workspace.
b) In the sidebar, select ⚙ **Summary & Settings**.
c) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Codes**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Dictionaries** menu, select **Workspace**, and then select **Codes**.

Navigate to the Curve Profiles dictionary page

In **Primavera Cloud**:

1) In the object selector, select a workspace.
2) In the sidebar, select ⚙ **Summary & Settings**.
3) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Curve Profiles**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Dictionaries** menu, select **Workspace**, and then select **Curve Profiles**.

Navigate to the Units of Measure dictionary page

In **Primavera Cloud**:

a) In the object selector, select a workspace.
b) In the sidebar, select ⚙ **Summary & Settings.**
c) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Units of Measure**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Dictionaries** menu, select **Workspace**, and then select **Units of Measure**.

Navigate to the Locations dictionary page

In **Primavera Cloud**:

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Locations**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.

b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.

c) On the **Dictionaries** menu, select **Workspace**, and then select **Locations**.

Navigate to the Currencies dictionary page

In **Primavera Cloud**:

a) In the object selector, select a workspace.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Currencies**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.

b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.

c) On the **Dictionaries** menu, select **Workspace**, and then select **Currencies**.

Navigate to the project Calendars dictionary page

In **Primavera Cloud**:

a) In the object selector, select a project.

b) In the sidebar, select ⚙ **Summary & Settings**.

c) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Calendars**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.

b) In the **Open** dialog box, select the **Projects** tab, select a project, and then select **Open**.

c) On the **Dictionaries** menu, select **Project**, and then select **Calendars**.

Navigate to the project Codes dictionary page

In **Primavera Cloud**:

a) In the object selector, select a project.

b) In the sidebar, select ⚙ **Summary & Settings**.
c) On the **Summary & Settings** menu, select **Dictionaries**, and then select **Codes**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** tab, select a project, and then select **Open**.
c) On the **Dictionaries** menu, select **Project**, and then select **Codes**.

Navigate to an object configuration page

In **Primavera Cloud**:

a) In the object selector, select a workspace.
b) In the sidebar, select ⚙ **Summary & Settings**.
c) On the **Summary & Settings** menu, select **Defaults & Options**, and then select an object.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Workspace** menu, select **Configuration**, and then select an object.

Navigate to the Activity configuration page

In **Primavera Cloud**:

a) In the object selector, select a workspace.
b) In the sidebar, select ⚙ **Summary & Settings**.
c) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Activity**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Workspace** menu, select **Configuration**, and then select **Activity**.

Navigate to the File configuration page

In **Primavera Cloud**:

a) In the object selector, select a workspace.
b) In the sidebar, select ⚙ **Summary & Settings**.
c) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **File**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Workspace** menu, select **Configuration**, and then select **Files**.

Navigate to the Project configuration page

In **Primavera Cloud**:

a) In the object selector, select a workspace.
b) In the sidebar, select ⚙ **Summary & Settings**.
c) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Project**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Workspace** menu, select **Configuration**, and then select **Project**.

Navigate to the Program configuration page

In **Primavera Cloud**:

a) In the object selector, select a workspace.
b) In the sidebar, select ⚙ **Summary & Settings**.
c) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Program**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Workspace** menu, select **Configuration**, and then select **Program**.

Navigate to the Resource/Role configuration page

In **Primavera Cloud**:

a) In the object selector, select a workspace.
b) In the sidebar, select ⚙ **Summary & Settings**.
c) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Resource/Role**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.

b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Workspace** menu, select **Configuration**, and then select **Resource/Role**.

Navigate to the Resource Assignment configuration page

In **Primavera Cloud**:

a) In the object selector, select a workspace.
b) In the sidebar, select ⚙ **Summary & Settings**.
c) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **Resource Assignment**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Workspace** menu, select **Configuration**, and then select **Resource Assignment**.

Navigate to the WBS configuration page

In **Primavera Cloud**:

a) In the object selector, select a workspace.
b) In the sidebar, select ⚙ **Summary & Settings**.
c) On the **Summary & Settings** menu, select **Defaults & Options**, and then select **WBS**.

In **Primavera Professional**:

a) On the **File** menu, select **Open**.
b) In the **Open** dialog box, select the **Projects** or **Programs** tab, select a project or program, and then select **Open**.
c) On the **Workspace** menu, select **Configuration**, and then select **WBS**.

Navigate to the Manage Services page

In **Primavera Cloud**:

a) In the header, select your username.
b) On the **User** menu, select **Manage Services**.

In **Primavera Professional**:

- On the **User** menu, select **Manage Services.**

Navigate to the Preferences page

In **Primavera Cloud**:

a) In the header, select your username.
b) On the **User** menu, select **Preferences**.

In **Primavera Professional**:

- On the **User** menu, select **Preferences**.

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