

# What's New in Oracle Primavera P6 Version 20 PPM

## 1 Introduction

Oracle released Primavera P6 Version 20 PPM for download from their web site late in 2020.

Oracle released a document that outlines all the changes from Version 19 to P6 Version 20 in a document titled **Oracle Primavera P6 Cumulative Feature Overview P6 Professional 19.12 - 20.11 Release Feature Overview**.

Oracle Primavera also has two **Cumulative Feature Overview (CFO)** tools for tracking changes in the P6 EPPM and PPM versions:

- The online tool found here: [https://docs.oracle.com/cd/E64687\\_01/EPPM/EPPM\\_CFO.html](https://docs.oracle.com/cd/E64687_01/EPPM/EPPM_CFO.html) and
- The offline tool titled may be downloaded from here: [https://docs.oracle.com/cd/F25600\\_01/index.htm](https://docs.oracle.com/cd/F25600_01/index.htm)
- There is also a Excel spread sheet of the same name that may be downloaded here: [https://docs.oracle.com/cd/E64687\\_01/EPPM/Primavera\\_CFO\\_v1.1.xls](https://docs.oracle.com/cd/E64687_01/EPPM/Primavera_CFO_v1.1.xls)

## 2 Aim

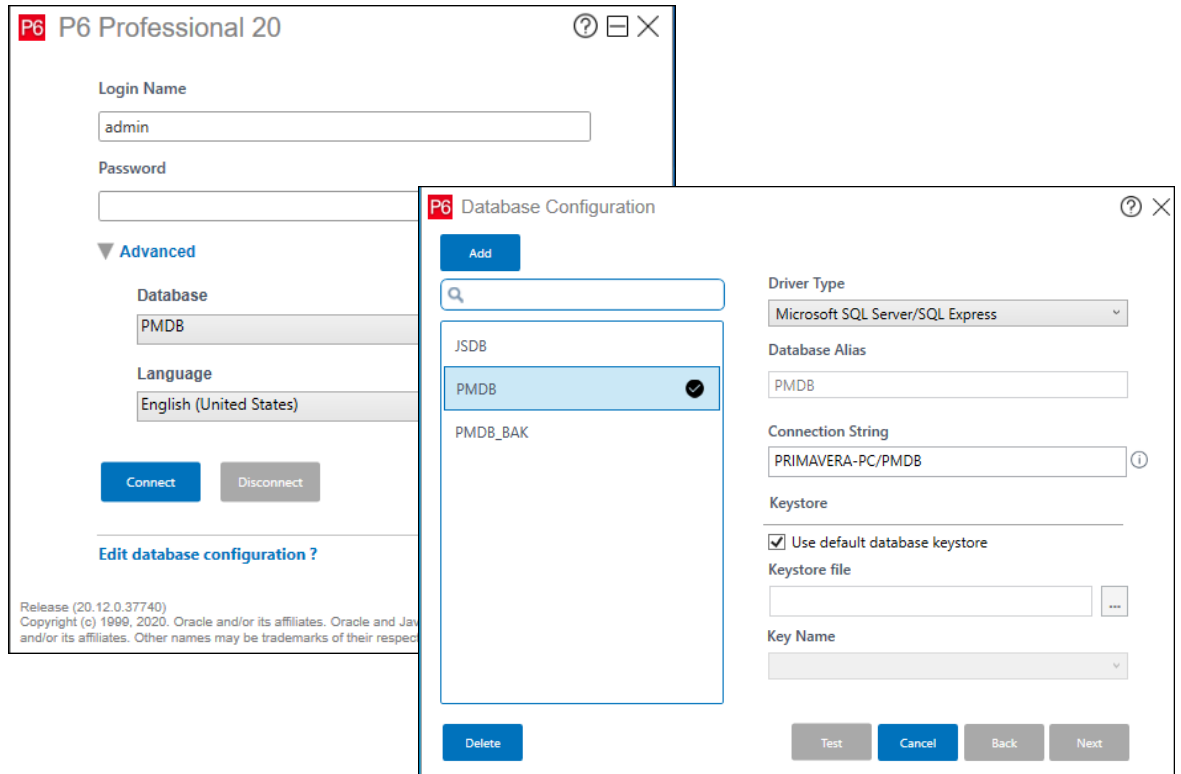
The aim of this document is to expand on the document published by Oracle and outline the changes a PPM user will see in the software and add some comments on the usability of the features including:

- New login screen
- User Defined Fields Details tab
- Relationship Comments
- Role Rate Change Over Time
- Multiple Project Scheduling Data Date Selection
- Multiple Project Scheduling Options Selection
- Lean Tasks may be imported using an XML file
- Different Projects may have different Financial periods
- Assignment Codes
- Histogram Bars Exact Values
- Other Enhancements
  - Resource Assignment Window now allows Grouping and Filtering by Codes and UDFs
  - Fill down available in Activities Window Resource Usage Spreadsheet
  - P6 Continues Working when there is a Network Failure
  - Prevent Risk Categories being Imported into a PPM Database
  - Arabic Language
  - Reset Locked Users
  - Uploading of Harmful Files
  - Exception Site List
  - Role Codes

# What's New in Oracle Primavera P6 Version 20 PPM

## 3 New login screens

P6 Version 20 has introduced new login screens:



These have the same information but just a different format.

## 4 User Defined Fields Details tab

This function was introduced in Version 19 but so useful I have added it to this article. A **User Defined Field Details** tab is now available in many workspaces such as Projects, Resources, Activities and WBS:

Activity ID	Activity Name	Start	Finish	2010	Qtr 4, 2010			
				g	Sep	Oct	Nov	D
EC149	Rough-In Phase Begins	03-Nov-11						
EC169	Rough In Complete		05-Sep-12					
	Elevator	23-Nov-11	11-Sep-12					

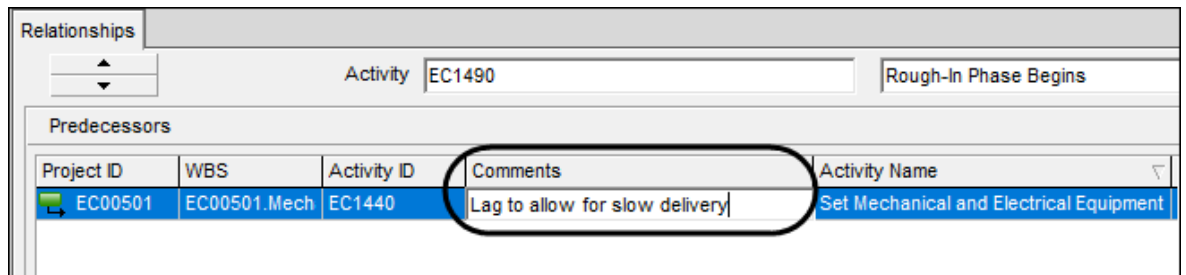
  

User Defined Field	Data Type	Value
Update Finish	Finish Date	17-Dec-20
user_integer1	Integer	9

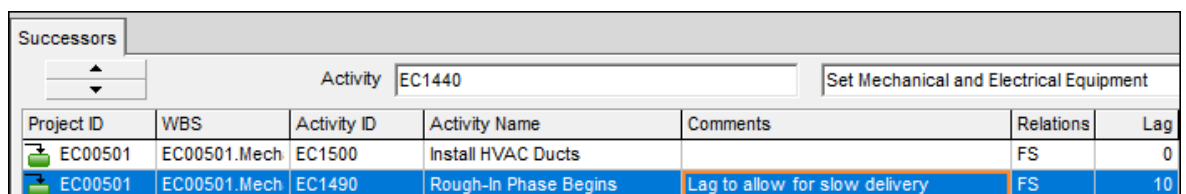
This is extremely useful as it allows users to see and assign UDFs without having to add extra columns to their Layouts.

## 5 Relationship Comments

A **Comments** column may be added to the **Activities** window **Relationships**, **Predecessor** and **Successor** tabs:



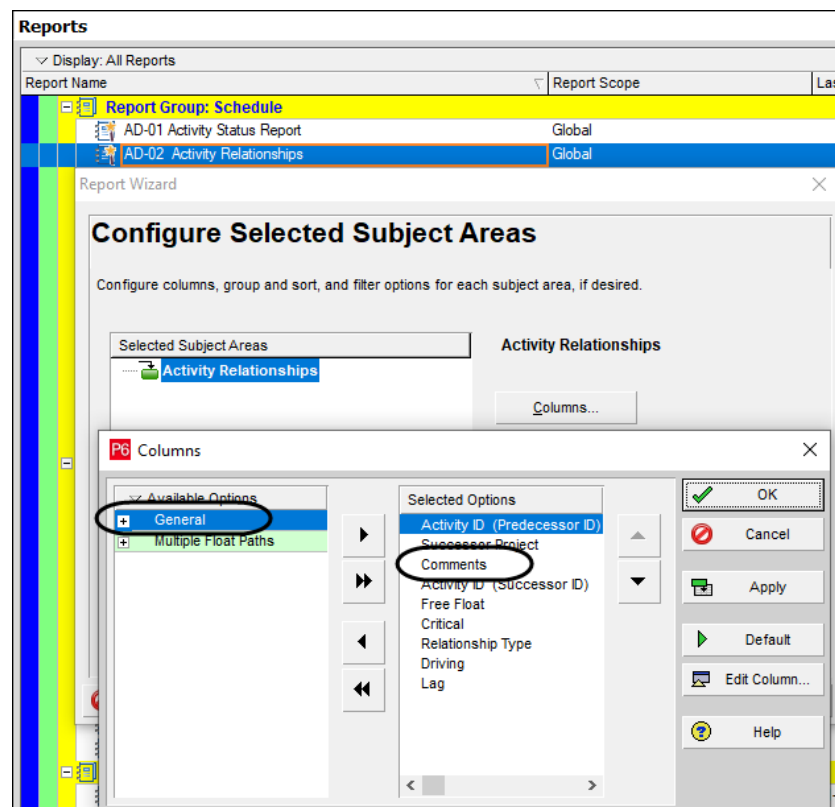
The comment is seen in both the Predecessor and Successor window of each relationship assigned a comment:



This is a very useful function and in the past one had to either use a Note or a UDF assigned to either the predecessor or successor activity to record notes about a relationship.

This function is also useful for recording changes to relationships.

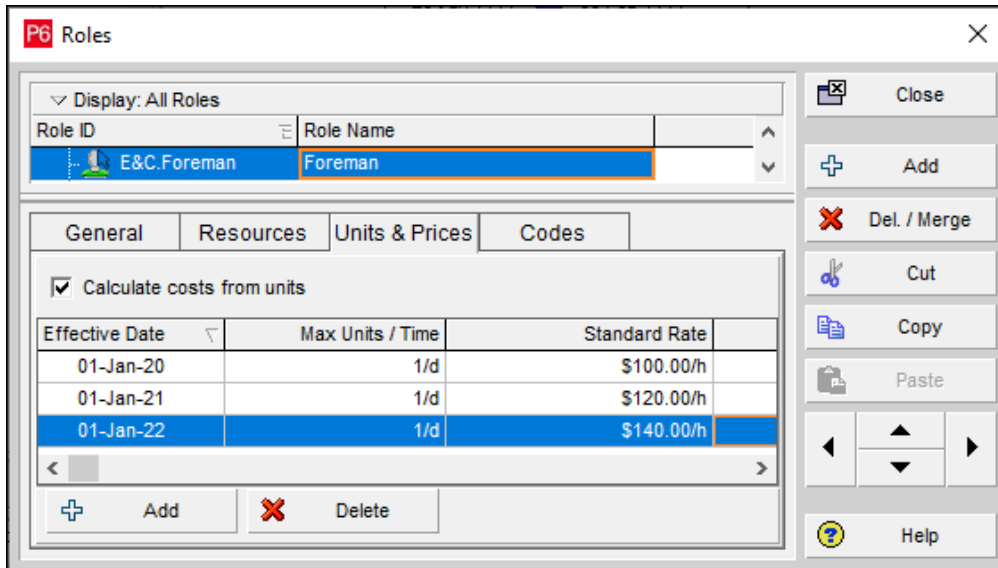
The **Comments** column is available in the Activity Relationship report:



# What's New in Oracle Primavera P6 Version 20 PPM

## 6 Role Rate Change Over Time

Resources have always been able to vary their rate over time but Roles were not and this was one of the drivers to use resources and not roles on projects.



When an activity spans two periods then P6 calculates a proportional rate based on the activity duration in each period. You must use the **Recalculate Cost Assignment** function during or after rescheduling.

The pictures below show the result of assigning the Role Foreman above and has 4 days work in 2020 and 6 in 2021 and then 3 and 7 days. They demonstrate how the cost are calculated which are not entirely correct as the costs should be lower in 2021 and higher in 2022.

		Dec 28							Jan 04								
Sat	Sun	Mon	Tue	Wed	Thr	Fri	Sat	Sun	Mon	Tue	Wed	Thr	Fri	Sat	Sun	Mon	
		28-Dec-20				08-Jan-21											
					01-Jan-21												

		Dec 28							Jan 04								
Sat	Sun	Mon	Tue	Wed	Thr	Fri	Sat	Sun	Mon	Tue	Wed	Thr	Fri	Sat	Sun	Mon	
		1	1	1	1	1			1	1	1	1	1				
		\$112	\$112	\$112	\$112	\$112			\$112	\$112	\$112	\$112	\$112				

		Dec 28							Jan 04								
Sat	Sun	Mon	Tue	Wed	Thr	Fri	Sat	Sun	Mon	Tue	Wed	Thr	Fri	Sat	Sun	Mon	
			29-Dec-20														

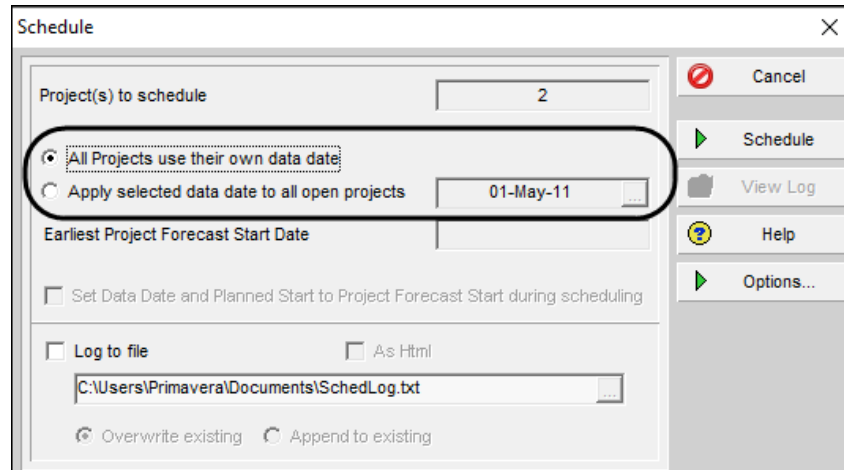
		Dec 28							Jan 04								
Sat	Sun	Mon	Tue	Wed	Thr	Fri	Sat	Sun	Mon	Tue	Wed	Thr	Fri	Sat	Sun	Mon	
			1	1	1	1			1	1	1	1	1			1	
			\$114	\$114	\$114	\$114			\$114	\$114	\$114	\$114	\$114			\$114	

Note: This is the same way that resources calculate when an Activity spans an Effective Date.

## 7 Data Date Selection in Multiple Project Scheduling

When scheduling multiple projects you now have a choice of the Data Date used for calculating:

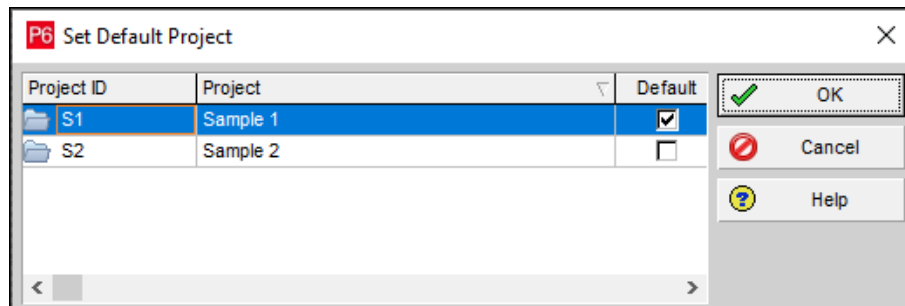
- All projects may be assigned a new **Data Date** in the **Schedule** form, or
- New in P6 Version 20, you may schedule all projects with their own **Data Date**.



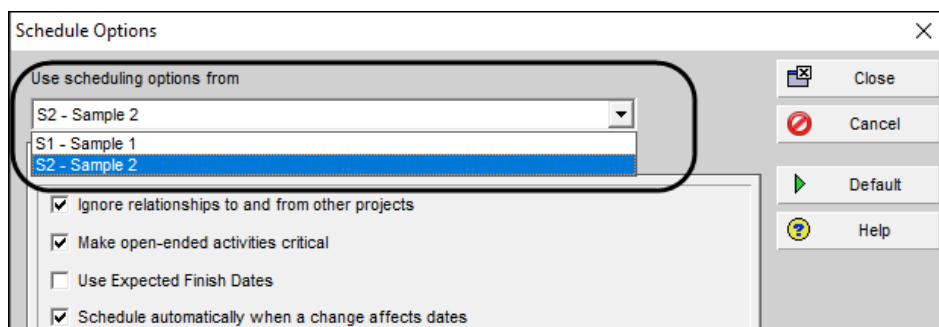
## 8 Multiple Project Scheduling Options Selection

In the P6 Version 19 and earlier when multiple projects were scheduled together and they had different **Scheduling Options**, which could happen when users change them from default or when you imported a project, then all the different **Scheduling Options** of all the projects being scheduled were changed to the **Default Project** on a permanent basis and changed projects would calculate differently from then on.

The Default Project may still be set by selecting **Project, Set Default Project**:



But now you may select which project **Scheduling Options** are used when scheduling multiple project in the **Scheduling Options** form which is opened by selecting **Tools, Schedule, Options**:





# What's New in Oracle Primavera P6 Version 20 PPM

What happens now?

- The **Default Project** is ignored,
- The **Scheduling Options** from the project selected in the **Scheduling Options** are used to calculate all the project, and
- The other project(s) **Scheduling Options** are changed permanently to the project selected the **Scheduling Options** form on a permanent basis.

Thus, the problem of **Scheduling Options** being changed when scheduling multiple projects has **NOT** been solved. You now have two options to mess up your Scheduling Options of projects when scheduling multiple projects with different options.

Again, I reiterate you should make all the **Scheduling Options** in one database the same when you schedule multiple projects and be careful when importing projects.

## 9 Lean Tasks may be imported using an XML file

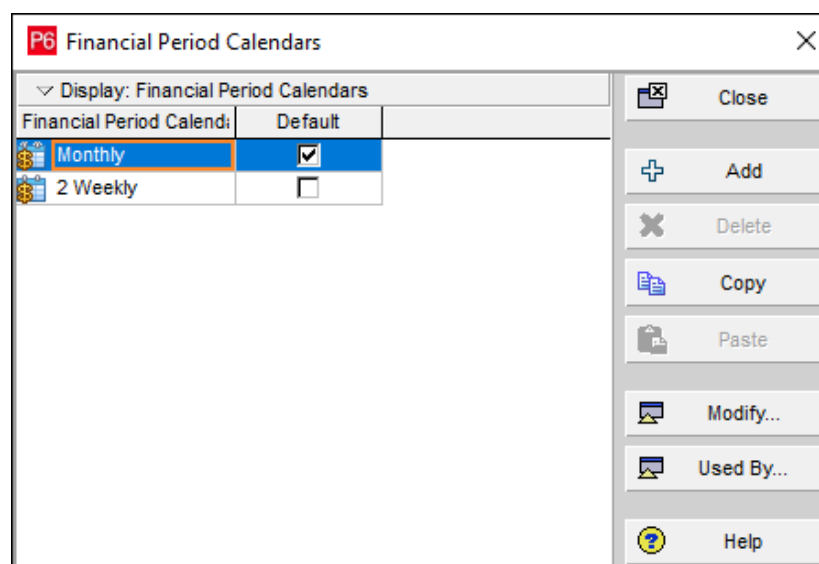
Primavera Cloud allows activities to be broken down into tasks. **Lean Tasks** are similar to the P6 **Steps** function but with more functionality such as allowing the assignment of tasks to subcontractors. Lean Tasks may have the following attributes:

- Assignment of a duration,
- May be made "Private" so other people do not see them,
- Tasks may have logic between them which are called "Handoffs",
- A Task's Float is called "Slack".
- The planning of Tasks is completed on a **Planning Board** that may be shared between team members. This is a tool designed for short term planning by the people completing the work.

When you are using an EEPM database you may Import Lean Tasks through an XML file from Primavera Cloud.

## 10 Different Projects may have different Financial periods

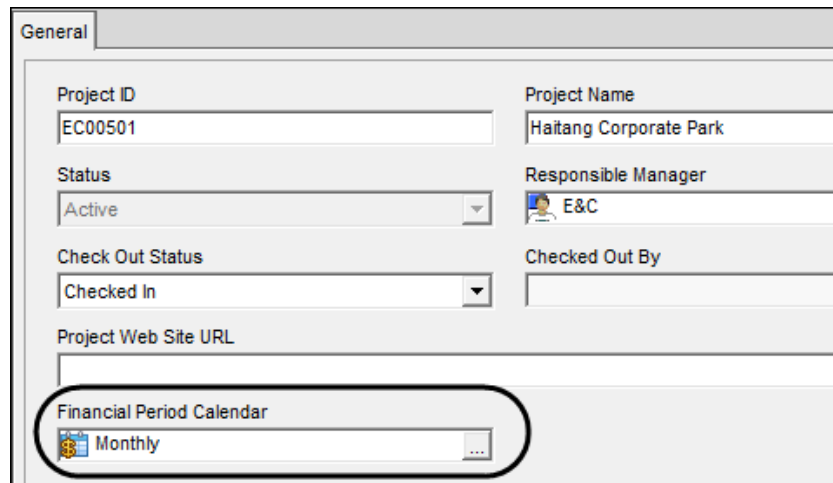
You may now assign different Financial Period to projects in P6 Version 20 by the use of **Financial Period Calendars**. When you select **Admin, Financial Period Calendars** you may create multiple **Financial Period Calendars** and each may have different Financial Periods:



# What's New in Oracle Primavera P6 Version 20 PPM

The **Financial Period Calendar** is assigned to a Project in:

- The **Projects Window, General** tab, or
- By displaying the **Financial Period Calendar** column:



The screenshot shows the 'General' tab of a project window. The 'Financial Period Calendar' field is highlighted with a red oval and shows 'Monthly'. Other fields include Project ID (EC00501), Project Name (Haitang Corporate Park), Status (Active), Responsible Manager (E&C), Check Out Status (Checked In), and Project Web Site URL.

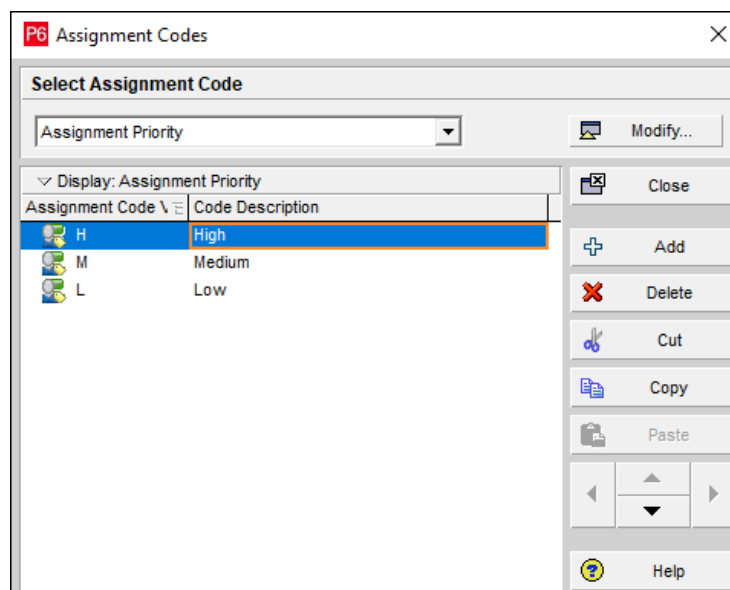
Note: This function did not work in the authors P6 Version 20.12.0.37740, but updates should fix this issue. As an interim you may change the **Default Financial Period Calendar** before creating a project.

## 11 Assignment Codes

There is a new function titled **Assignment Codes** allowing users to code up assignments so resource assignments may be Grouped or Filtered. This function could be used for:

- Assigning priority to resource assignments against tasks,
- When there is one generic resource in the database that is being supplied by multiple subcontractors and this could be used to identify the subcontractor,
- When there is one generic resource in the database and you require a specific skill or qualification for the resource then this could be identified with an **Assignment Code**.

**Assignment Codes** are created in the same way as other codes by selecting **Enterprise, Assignment Codes**:



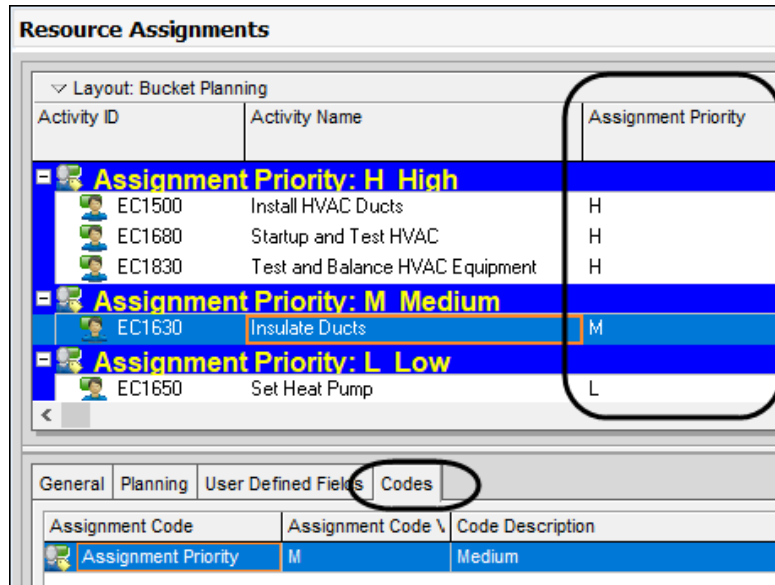
The screenshot shows the 'Assignment Codes' window. The window title is 'P6 Assignment Codes'. It has a 'Select Assignment Code' section with a dropdown menu for 'Assignment Priority' and a 'Modify...' button. Below this is a table with columns 'Assignment Code' and 'Code Description'. The table contains three rows: H (High), M (Medium), and L (Low). The 'H' row is selected. To the right of the table is a toolbar with buttons for Close, Add, Delete, Cut, Copy, Paste, and Help.

Assignment Code	Code Description
H	High
M	Medium
L	Low

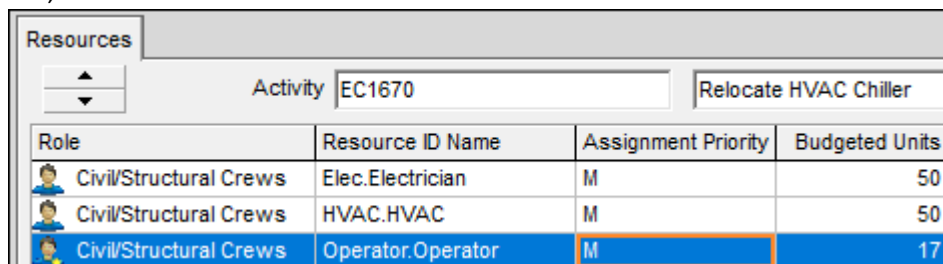
# What's New in Oracle Primavera P6 Version 20 PPM

Assignment Codes are assigned to Resource or Role Assignments in the:

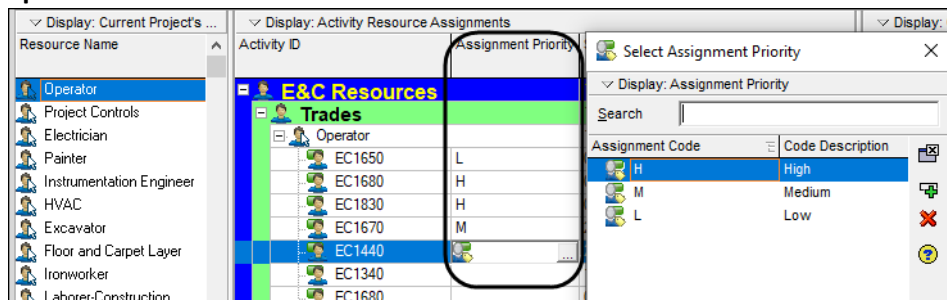
- Codes tab in the Resource Assignment window, or



- Displaying the Assignment Code column in the Activities window Details pane, Resources tab, or



- Displaying the Assignment Code column in center section of the Resource Usage Spreadsheet.



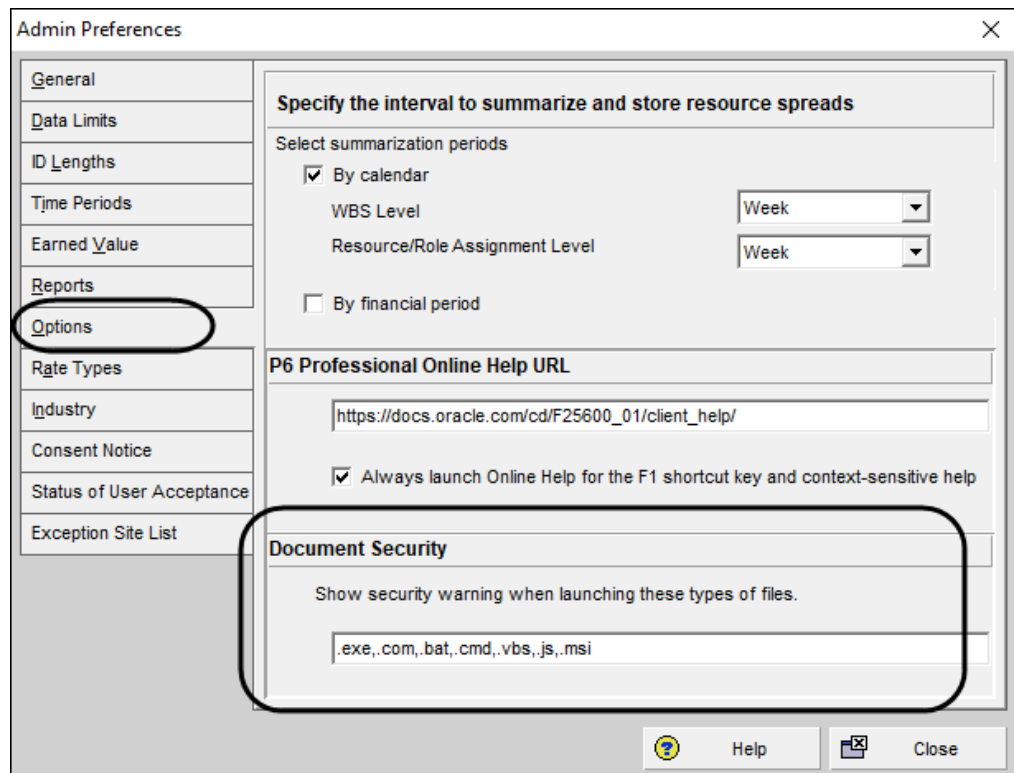




# What's New in Oracle Primavera P6 Version 20 PPM

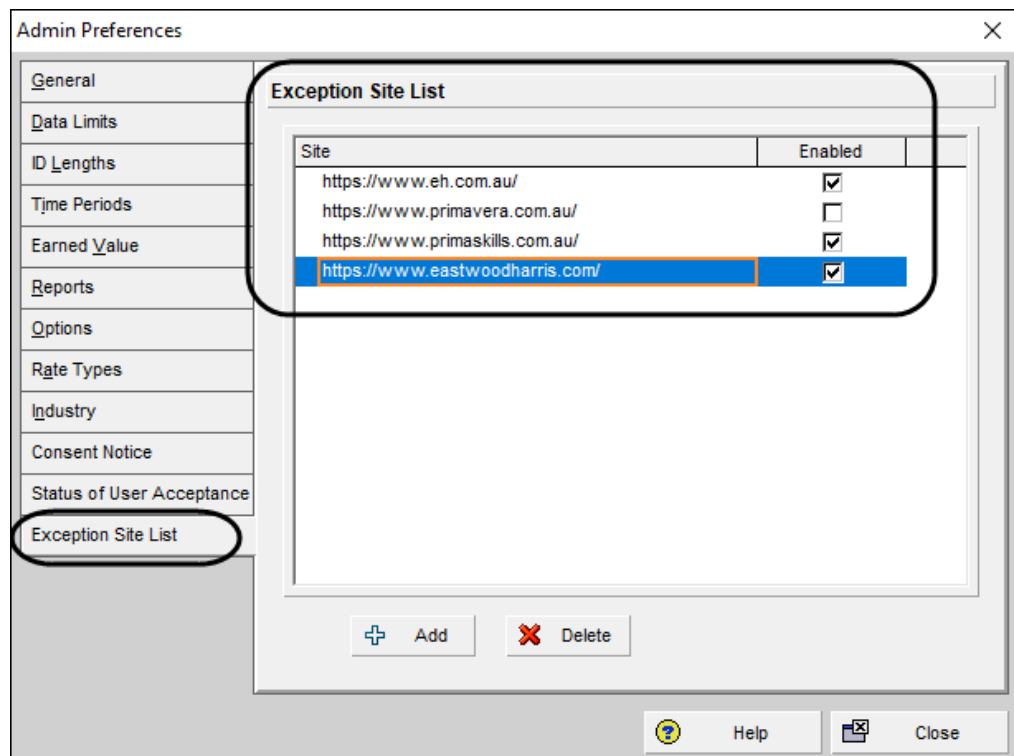
## 13.7 Uploading of Harmful Files

You may prevent people from uploading harmful files in the **Admin Preferences, Options, Document Security**:



## 13.8 Exception Site List

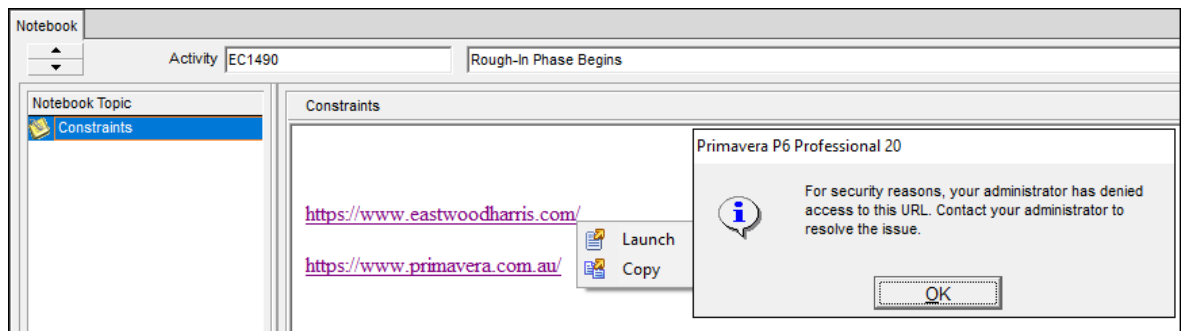
A list of web sites may be added to **Admin Preferences, Options, Exception Site List**:



The URLs may then be added to Notebook Topics and UDFs and permitted URLs may be launched from P6 by clicking on the URL and selecting Launch.

# What's New in Oracle Primavera P6 Version 20 PPM

URLs not listed or not permitted may not be launched but may be copied and pasted into a browser. The picture below demonstrates what happens when a URL that has not been enabled has been selected for Launching:

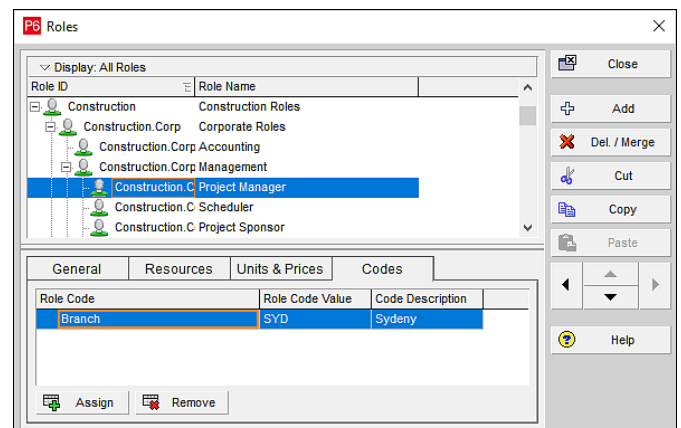
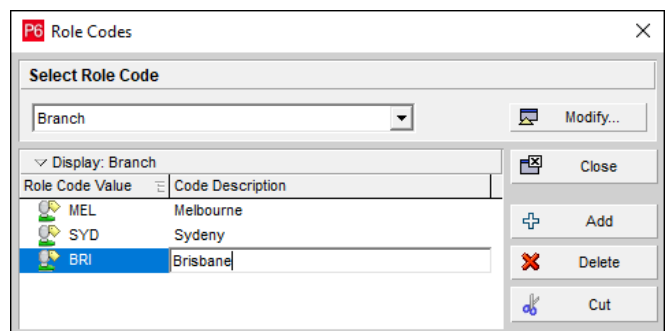


## 13.9 Role Codes

P6 Version 20 introduced Role Codes allowing Roles to be assigned Code in the same way as Resources and Activities.

This would be useful to assign attributes such as location or office and may be used to group or filter roles.

- **Role Codes** are created in the **Role Codes** form by selecting **Role Codes** are, **Role Codes**:
- **Role Codes** are assigned to Roles in the **Roles** form



Paul E Harris  
Director Eastwood Harris Pty Ltd  
14 January 2021  
Updated 17 Feb 2021 with Role Codes  
www.eh.com.au