Milestone
Project Management Solutions

Oracle's Primavera P6 EPPM Release 8.2

New Features and Enhancements

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Contents

P6 Team Member Enhancements

New P6 Team Member Web Application

P6 Team Member Web is a web application that enables team members to report status quickly and efficiently. Team members can view and update all work currently assigned to them, communicate with other team members through e-mail, and view predecessor and successor tasks. P6 Team Member Web is part of the P6 Team Member application suite, which is designed for project team members to status their activities in an easy to use interface that does not require them to learn P6. P6 Team Member Web runs on tablets as well as web browsers.

The following topics provide more details on how easy it is for team members to report status.

Working with Tasks

The task pane is your main work area. Use this area to view your assigned tasks. When you select a task in the tasks pane, all panels on the right, which include the progress panel, Steps panel, and Related Tasks panel, display information for the task. Use the progress panel to update your tasks to show progress.

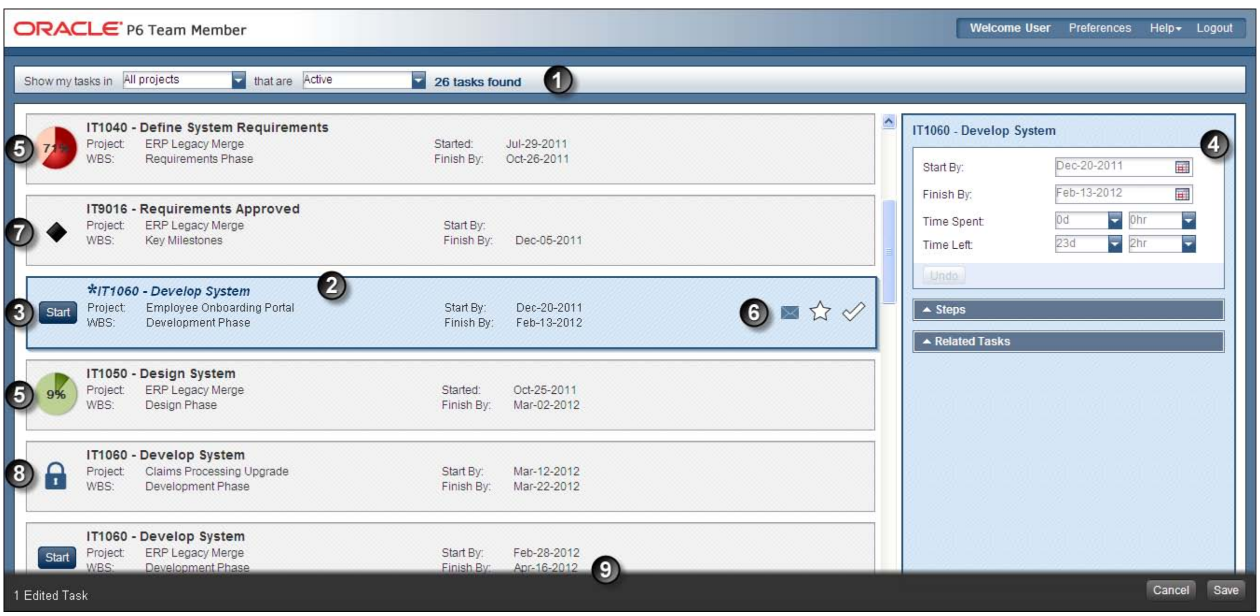

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Table of Screen Highlights

Item	Description
1	**Filters**: Use one or more of the filtering options to display only the tasks that you want to see in your view. ‣ The project filter enables you to limit the number of tasks in your view by displaying only the tasks for the selected projects. ‣ The view preferences enable you to view Active, Overdue, Completed, or Starred tasks.
2	**Task pane**: Select a task to review in the task pane and update the status of your task using the progress, steps, and related task panels. From this pane you can indicate you started the task, send an e-mail, mark the task as important by starring it, or mark the task complete. An italicized task heading with an asterisk (*) indicates a change has been made but not saved. **Note**: WBS (work breakdown structure) is a project management term used for the logical breakdown and arrangement of tasks in a project. The WBS path helps you to understand exactly where your task fits within the scope of the project.
3	**Start button**: Select the start button to indicate progress on the task has begun. Once you select start, the progress fields are editable. The start button is red when the task is overdue.
4	**Progress panel**: Use this area to communicate dates and time worked. The fields available in your view are set by your project manager.
5	**Progress indicator**: Provides a visual representation of your progress on the task. The indicators are color coded to allow you to view your progress at a glance. ‣ Green: The finish date for the task has not been reached. ‣ Red: The finish date for the task has been reached and the task is now overdue.
6	**E-mail**: Launches an e-mail in your e-mail application, providing task details from the tasks pane. Use this to send your project manager or another team member an e-mail. **Star Task**: Select the star to indicate that this task is important to you. For example, you can star all your high priority tasks. Or, you can star all tasks you are currently working on to make it easier to view your current workload. **Complete Task**: Select the check mark when you have finished work on the task.
7	**Milestone**: Indicates this task is a start or finish milestone. A milestone represents any significant event or goal in a project. Although milestones are considered a type of task, milestones have zero duration; at any given moment they are either achieved or not. Some examples of milestones in an office building addition project might include project definition complete, structure complete, and end bidding process. The milestone icon is red when the scheduled date has been reached and the milestone start or finish is now overdue.

Working with Related Tasks

Use the Related Tasks panel to view predecessor and successor tasks and communicate with the task owners.

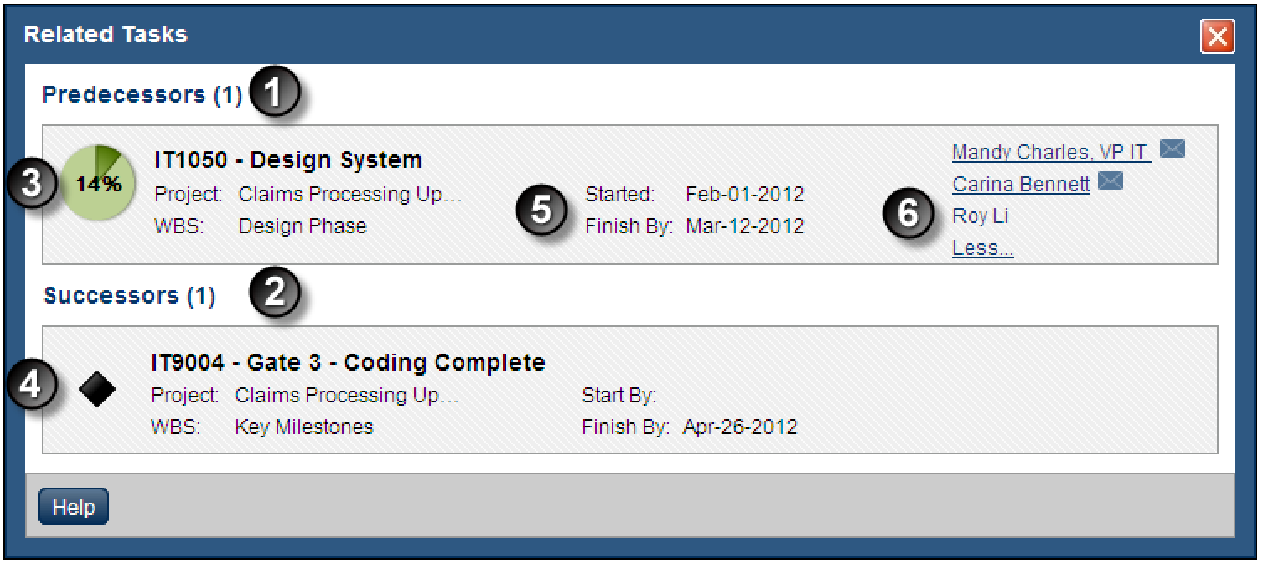

Table of Screen Elements

Item	Description
1	**Predecessors**: View progress on predecessor tasks to determine if you can begin your task on time.
2	**Successors**: View the tasks that have a dependency on you finishing your assigned task.
3	**Progress indicator**: Use the progress indicator to determine how much work has been done on a task. The color indicates the state of the task and the shading represents the percent complete. - Gray - Not started - Green - In progress - Red - Overdue
4	**Milestone**: The milestone ◆ icon indicates this is a start milestone if it is under Predecessors and a finish milestone if it is under Successors.

Item	Description
5	**Dates for Predecessors:** ▸ **Start By/Started and Finish By/Finished**: Use these dates along with the progress indicator to determine when the predecessor task will complete. ▸ **Start By**: Use the milestone date to determine when the milestone is scheduled to begin. **Dates for Successors:** ▸ **Start By/Started and Finish By/Finished**: Use these dates to determine when a successor task is scheduled to begin and end. ▸ **Finish By**: Use the milestone date to determine when the milestone is scheduled to be complete.
6	**Task owners**: View the name of the people responsible for the task. Send an e-mail to the task owner to communicate project status. For example, e-mail the owner of a predecessor task to request additional information on a task, or notify a task owner of a successor task of a potential issue that could delay the start of their assigned task. The e-mail feature is only available if the task owner has an e-mail address assigned in P6. The e-mail icon indicates an address is available for the task owner.

New E-mail Statusing Service and P6 Team Member for iPhone App Support for Activity Owners

Team members can now update activities that they are assigned to as activity owner. Prior to 8.2, team members could update only activities they were assigned to as resources.

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New P6 Team Member Applications Configuration Options

In P6, project managers can use the new Team Member Applications page on the Project Preferences dialog box to control which projects have status updates staged for approval, as well as which fields to display to team members when updating their status from the E-mail Statusing Service, P6 Team Member for iPhone app, and P6 Team Member Web. This gives project managers the control they need to ensure the integrity of the schedule and that best practices are being followed.

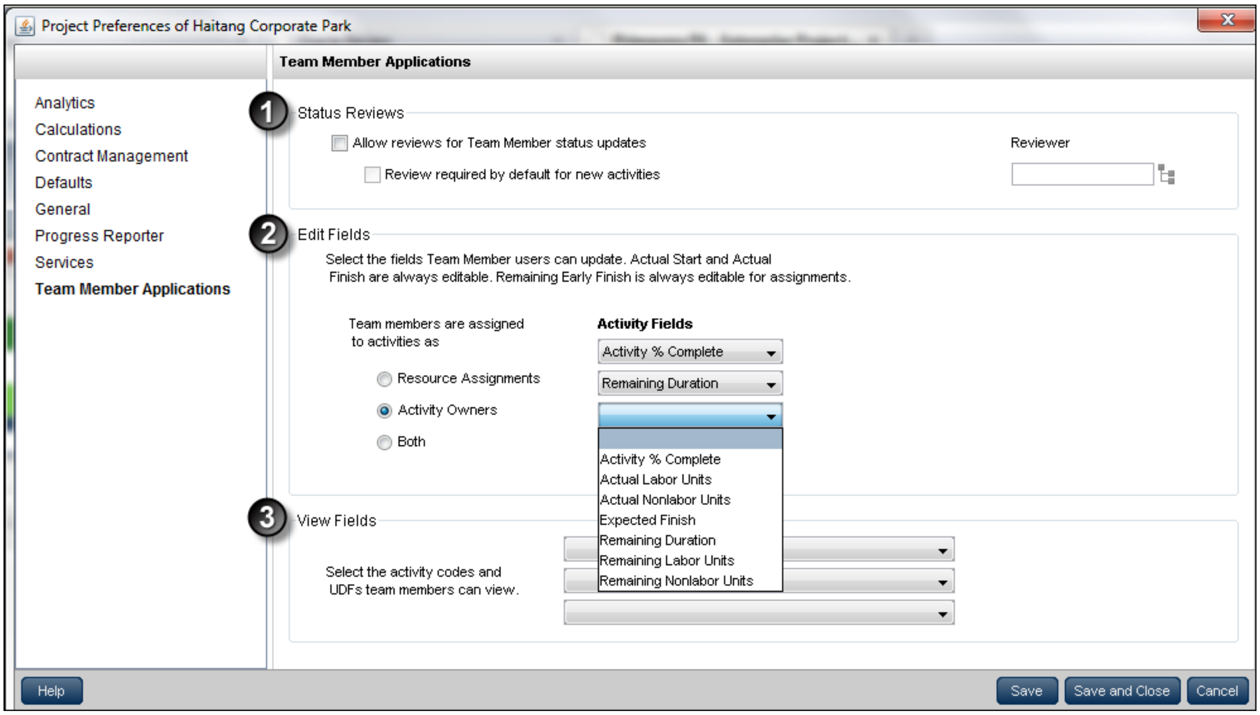


Table of Screen Highlights

Item	Description
1	**Status Reviews** section: Enables project managers to control whether to stage updates to a project for review or whether they update the project directly. Activities now include the new Review Required field, and WBSs include the new Reviewer field.
2	**Edit Fields** section: Enables project managers to configure which progress-related fields to display to team members. They can also control which activities a user can update.
3	**View Fields** section: Enables project managers to select the activity codes and user defined fields to display to team members, to provide context to their tasks.

New P6 Team Member Status Approval Process

In P6, project managers can use the Review Status Updates dialog box, accessible from the the Activities page or the Notifications panel, to view team member status updates before the updates are committed to the schedule. The new approval process for status changes enables them to view, update, and approve activity progress reported through the E-mail Statusing Service, P6 Team Member Web, and P6 Team Member for iPhone app to ensure the integrity of changes coming into the schedule.

The Review Status Updates dialog box displays all changes submitted from P6 Team Member applications that a project manager is responsible for reviewing. Depending on how project managers access this dialog box, it shows changes for all open projects and they can filter them by project, or it shows changes to all projects they are responsible for approving.

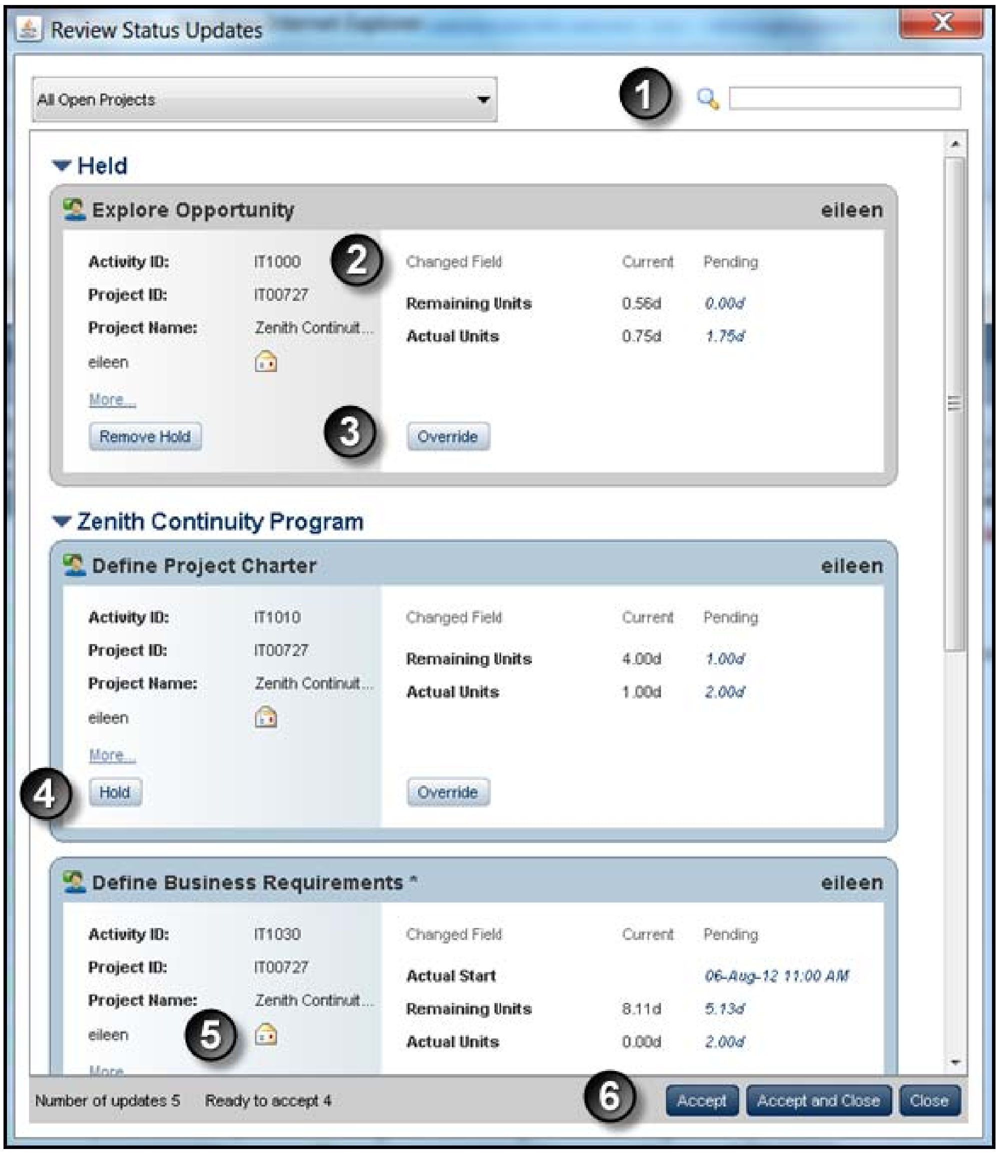
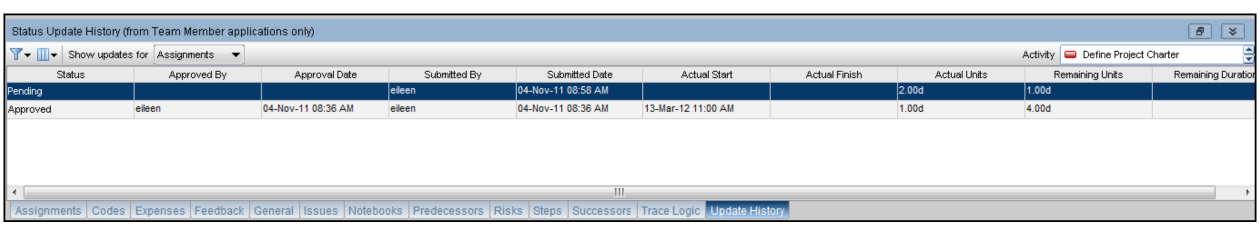


Table of Screen Highlights

Item	Description
1	**Search** field: Enables project managers to filter the status updates visible in the dialog box, based on any matching strings in the shaded portion of each activity displayed. For example, to view all status updates for a single resource, search on the resource's name.
2	**Changed Field** column: Lists the fields that team members updated. Both current and pending values are displayed to help project managers determine whether to accept the change.
3	**Override** button: Enables project managers to overwrite changes submitted by team members.
4	**Hold** button: Enables project managers to obtain more information about proposed changes before accepting the status update. Once project managers click Hold, the status update moves to the Held category at the top of the dialog box and the changes do not update the schedule. If a team member makes another update while the initial status update is in the held state, the data is updated and a message displays indicating a change was made. Project managers can select Remove Hold when the appropriate information is collected to have the changes update the schedule.
5	**E-mail** button: Enables project managers to send an e-mail to the user who updated the task.
6	**Accept** button: Enables project managers to approve all status updates that are not in a held state. If project managers applied a filter, using either a project filter or through a search, only the status updates in the filtered list are approved.

New Status Update History Detail Window

In P6, the Status Update History detail window is now available on the Activities page when you select an activity. This window displays all status changes made to the activity from P6 Team Member applications; you can also filter by activity, assignments, or steps. Displaying the history makes it easy for you to see all changes and troubleshoot any schedule problems.



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P6 Enhancements

New Exclusive Mode

You can now open one or more projects exclusively. This enables you to prevent others from updating a project while you run reports, schedule projects, level resources, or take other actions while ensuring the project data does not change. When you open a project exclusively, only you can edit it; other users have only read access.

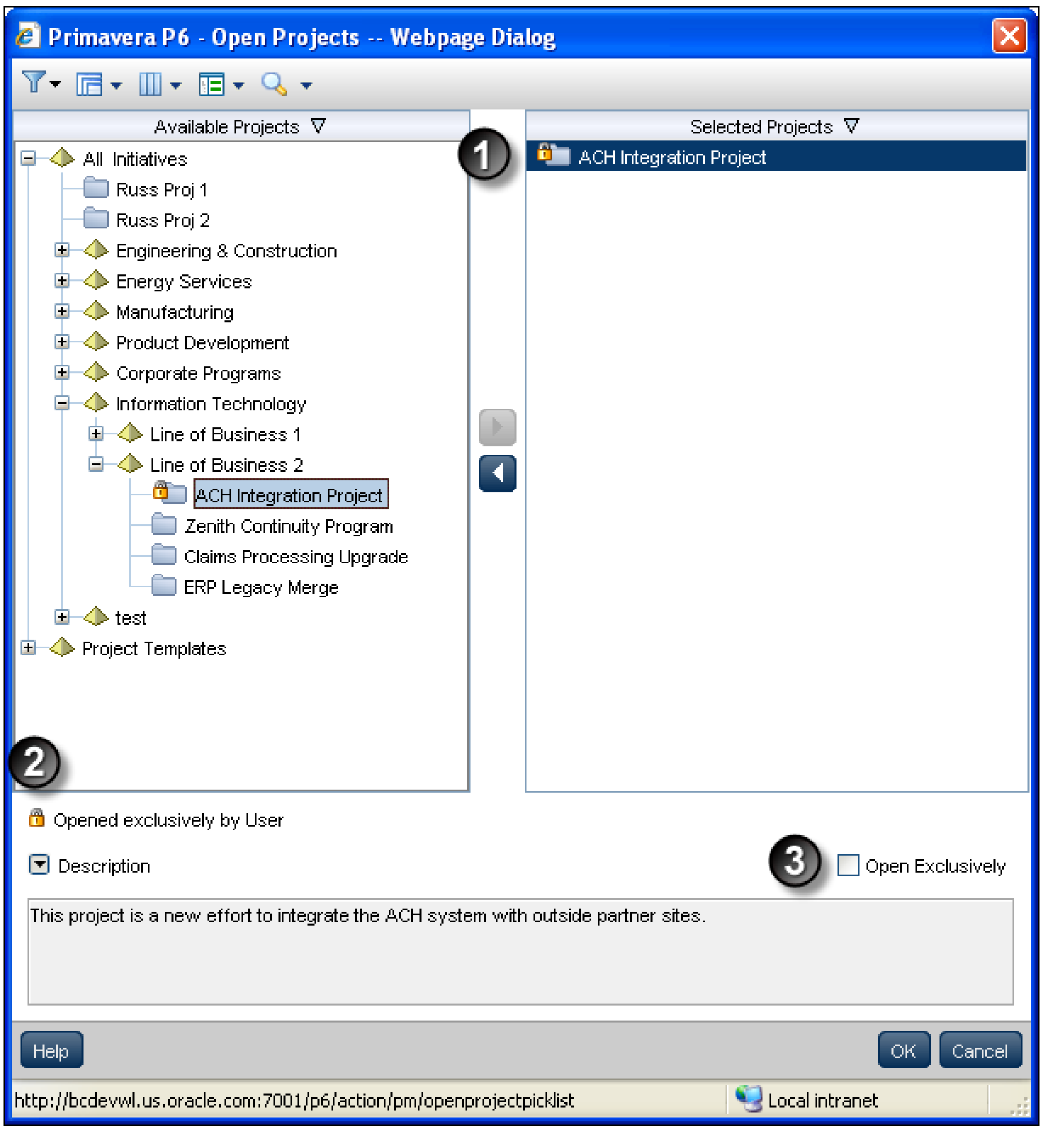

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Table of Screen Highlights

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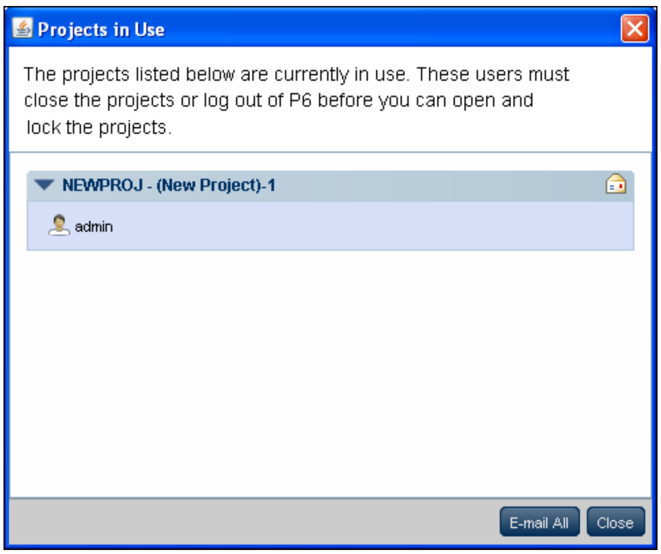
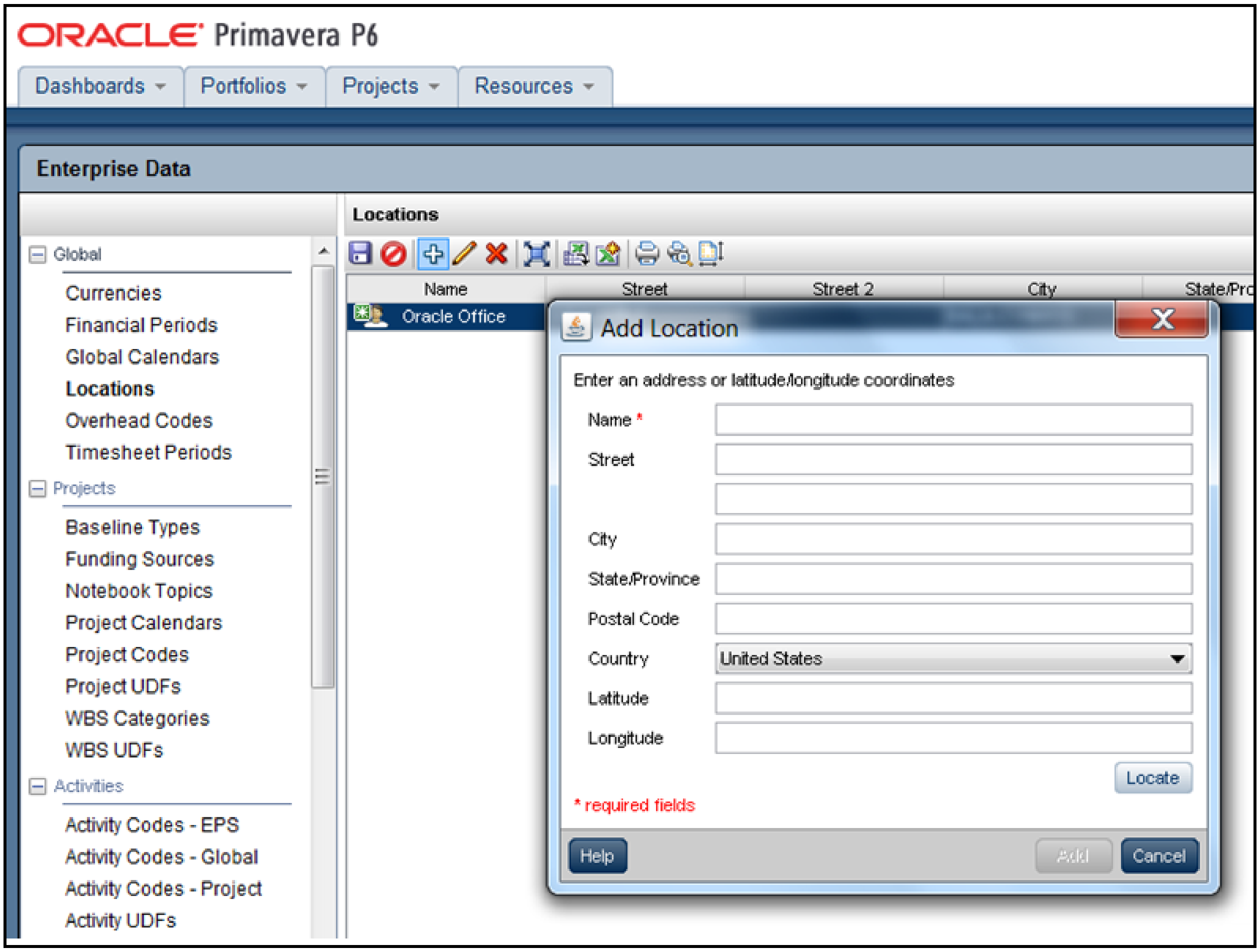
1	**Lock** icon: Indicates the project is currently opened in exclusive mode by a user.
2	**Opened exclusively by** message: Identifies who opened the project exclusively.
3	**Open Exclusively** option: Enables users with the required privilege to open selected projects for their exclusive use.

If you try to open a project exclusively, and other users already have it opened in non-exclusive mode, a dialog box appears listing who has it open. You can send an e-mail to those users to ask them to close it so you can open it exclusively.



New Location Data

New global enterprise data for locations enables you to create a list of locations, including the street address and the longitude and latitude. If you do not know the longitude and latitude, you can find them if you have a geolocation service connected to P6. You can also find an address based on the longitude and latitude. You can assign locations to projects, resources and activities, and you can report on data by location in P6 Analytics. You can also group, sort, and filter by location in various views. You can also import new locations into P6 from a Microsoft Excel (.xls) file.



Enhanced Microsoft Project Integration

Enhanced Microsoft Project Import

When importing a Microsoft Project XML file, you can now update an existing project. This enables you to manage projects in Microsoft Project and bring the changes into P6 to ensure the status of the project is reflected accurately in P6. You can control what types of global and project data to overwrite when importing.

New Import/Export Support for Microsoft Project 2010

You can now export P6 projects as Microsoft Project XML 2010 files, as well as import Microsoft Project 2010 files.

Enhanced Scaling Options when Printing

Three new scaling options are available when printing from the Activities, EPS, and Assignments pages.

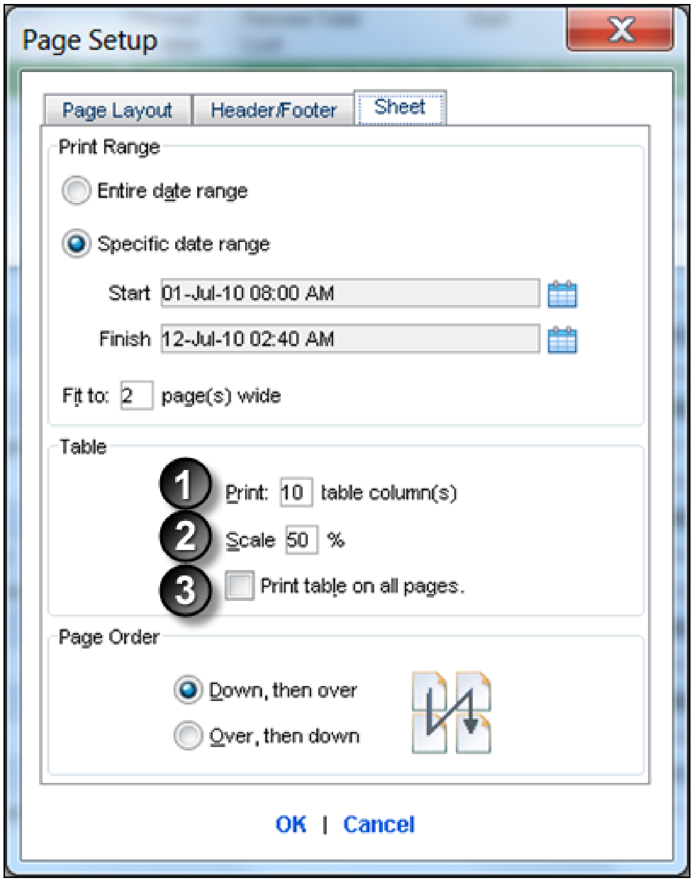


Table of Screen Highlights

Item	Description
1	**Print table column(s)** field: Enables you to set how many columns in the table you want to print. In previous versions, if you were printing numerous columns, they were all squeezed to fit onto the first page. This new field defaults to the number of columns displayed, but you can lower the number of columns to improve the output.
2	**Scale** field: Enables you to specify a specific percentage of the page to fill with the table. For example, if set to 50%, the table scales to fill 50% of the width of the printable area of the page; if the Gantt chart is displayed, the chart fills the rest. This greatly improves the output, especially when printing on non-traditional paper sizes.

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Item	Description
3	**Print table on all pages** option: Enables you to include the table on all pages. If you select this option, the table appears on all pages. This is useful when the Gantt chart spans multiple pages in the printout.

Enhanced Event Functionality

Creating or updating User Defined Field (UDF) values now trigger events.

When a change triggers an event, the P6 Event Notification system sends the event message to a user configured message queue. You can use the events in a client application to trigger subsequent actions. You could, for example, launch an external workflow based on the existence of a specific event.

Enhanced Trending

The following enhancements have been added to help you manage historical data:

- Project history now supports dates and durations.
- Historical data now includes activity-level and WBS-level data.

Use P6 to configure how you want historical data stored in P6 Analytics. In addition to project level data, you can choose to capture data at the WBS and/or activity level. You can then specify a time interval to store the data, including month, week, quarter, year, or financial period.

General Usability Enhancements

Each release we continuously improve the usability of P6 EPPM. The items below are the top usability requests included in this release:

New Resource Creation From Users

You can now use the new Create Resource from Selected User action on the Users page to create and assign a resource to an existing user in one step. This can significantly reduce the time and effort required to set up resources.

Enhanced Copy User Support

The following information is now copied when copying existing users, which makes it easier for administrators to manage users:

- Toolbars for Activities, EPS, and Assignments views
- Global user preferences
- Assigned user interface views

New "Is Under" Filtering Support

When filtering in the Activities, EPS, and Resource Assignments pages, you can now select an item in a hierarchy and filter on that item and everything under it. For example, you might want to see only projects that are in the Northeast region. You can select EPS is Under Northeast region and only projects under that EPS and its children appear.

New Dissolve Activities Support

When you delete an activity, a chain of logical activities might be broken. You can use the new Dissolve option to delete the activity but join the predecessors and successors and create the appropriate relationships between them. The dissolve option is available from the right click menu, Actions menu, and the toolbar of the Activities view when you select a single activity that has both predecessors and successors.

New Column Search

When customizing columns on the Activities, EPS, and Assignments pages, you can now use search to easily find the columns you need.

New Cut/Copy/Paste WBS Support

You can now cut, copy, and paste WBS elements on the Activities page. This helps project managers create projects quickly and efficiently.

New Copy Issue Forms Support

When you copy projects, create templates, or create projects from templates, issue forms are also copied.

Additional Fields in Predecessor/Successor Tabs

Additional fields are now available in the Predecessor and Successor tabs of the Activities page to help project managers better analyze their project schedule. The new fields are Driving, Critical, Total Float, Free Float, Early Start, Early Finish, Late Start, and Late Finish.

Project Name Column Available in the Add Activity Dialog Box in P6 Progress Reporter

When adding activities to a timesheet, you can now display the project name as a column. Exposing the project name makes it easier for team members to find tasks they want to add.

Installation and Configuration Enhancements

The new P6 EPPM Universal Installer is now available for all of your P6 EPPM applications, other than P6 Professional. There is no longer a separate installation tool for each application, which makes it much easier to set up and customize your installation. The new installer installs the following:

- P6 (including help, User Productivity Kit content, and Oracle Configuration Management (OCM)).
- P6 Progress Reporter and its help.
- P6 Integration API and P6 EPPM Web Services.

- P6 Team Member components, including P6 Team Member Web and its help, E-mail Statusing Service, and supporting elements for the P6 Team Member for iPhone app. The installer does not install the P6 Team Member for iPhone app itself.

The Universal Installer also launches the configuration utility that:

- Deploys all P6 EPPM applications in WebLogic, and creates a managed server.
- Installs, upgrades, and configures your database (Oracle or Microsoft SQL Server).
- Configures BPM 10g or 11g, BI Publisher, and a content repository (Oracle Universal Content Management or Microsoft SharePoint) with P6 EPPM. The Universal Installer does not actually install these other components; you should install them before using the Universal Installer to configure them to work with P6 EPPM.

Technical and Performance Enhancements

Performance Improvements

P6 EPPM performance is improved on all 3 tiers:

- For the database, SQL optimizations improve query speed and reduce overall database load.
- For the application server, loop reduction and short-circuit logic improve transaction time and reduce application server CPU use.
- On the client (browser) side, the size of serialized objects used by applets is reduced, and the number of round trip calls is reduced, which improves performance under high latency.

These changes increase the number of objects that can be displayed in a reasonable amount of time in a number of views, including the Activity, EPS, Assignments, OBS, and User Administration views, as well as in various portlets. As a general rule, a P6 view that previously took 35 seconds to load now takes 7 seconds.

Enhanced LDAP Provisioning

When provisioning users from LDAP, you can choose to copy the settings of an existing user to new users. This can significantly reduce the time and effort required to set up new LDAP users in P6 EPPM.

Enhanced Language Support

P6, P6 Professional, P6 Progress Reporter, and P6 Team Member Web applications now support Italian.

Enhanced Enterprise Manager Integration

P6 now collects the following metrics for display in Enterprise Manager:

- P6 services data; these services correspond to the services you set in the P6 Administrator application:
  - All Service Summary
  - Apply Actuals
  - Leveler
  - PX

    - Recalc Cost
    - Schedule Check
    - Scheduler
    - Send to Fusion
    - Store Period Performance
    - Summarizer
- Connection pool data:
    - Long-Running SQL Connection Pool Information
    - Long-Running SQL Connection Pool Performance
    - Regular SQL Connection Pool Information
    - Regular SQL Connection Pool Performance
    - Transactional SQL Connection Pool Information
    - Transactional SQL Connection Pool Performance

Enhanced Supported Configurations

P6 EPPM now supports:

- Internet Explorer 9
- OBIEE 11g (11.1.1.5.0)

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What's New in P6 Professional

P6 Professional Enhancements

P6 Professional Modes

In P6 EPPM R8.1, the P6 Optional Client enabled you to take advantage of certain features, but did not support working in "offline" mode to edit an EPPM database, then incorporate your changes.

For this release, P6 Professional is included with P6 EPPM, and enables you to:

- Check out a P6 EPPM project and work with it while not connected to the P6 EPPM database, and then check in your changes.
- Connect to the P6 EPPM database and take advantage of P6 Professional features, including:
  - Using reflection projects
  - Managing future period bucket planning
  - Editing past period actuals spreads
  - Importing Contract Management data

Enhanced Microsoft Project Integration

Enhanced Microsoft Project Import

When importing a Microsoft Project XML file, you can now update an existing project. This enables you to manage projects in Microsoft Project and bring the changes into P6 Professional to ensure the status of the project is reflected accurately in P6 Professional. You can control what types of global and project data to overwrite when importing.

New Import/Export Support for Microsoft Project 2010

You can now export P6 Professional projects as Microsoft Project XML 2010 files as well as import Microsoft Project 2010 files.

New Line Numbering Feature

You can use the new add line numbers option for each row in the Activities view, when displaying an Activity Table, Gantt Chart, or Activity Usage Spreadsheet. Line numbers appear to the left of each row in a separate column. Numbering is sequential, starting with the number 1 (one). Rows are automatically renumbered during data manipulation, such as when rows are added, deleted or when group data is expanded or collapsed. The line numbering also displays in printouts of views in the Activities window where you applied line numbers.

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Installation and Configuration Enhancements

You can now use a single P6 Professional installer to create your P6 Professional environment in one process. You can then connect P6 Professional to a P6 EPPM database or a P6 Professional database.

Timescaled Logic Diagram Enhancements

New Filtering

You can now save filters with Timescaled Logic Diagram templates. You can apply additional filters within the Timescaled Logic Diagram application to enable you to more easily manipulate data.

New Sight Lines

You can now display vertical sight lines for each timescale line. Sight lines are background lines that aid visual orientation. You can customize the interval frequency based on the selected date interval. For example, if you select the date interval **Month**, an interval frequency of 3 means that a sight line displays once every 3 months at the beginning of the month. You can choose line thickness, color, and styles for each sight line.

Enhanced Activity Code Color Coding

You can now assign colors for activity code values in P6 Professional to be used in Timescaled Logic Diagrams. You can then modify these colors while working with diagrams; these modifications do not affect the color codings in P6 Professional.

Enhanced Templates

You can now save Timescaled Logic Diagram templates to the P6 EPPM database, so you can easily share them among users. You can share them as user or global templates. You can also export and import the templates to further enhance sharing. This enables you to send a template to another user, and that user can then import it into their system and use it. This saves time and helps promote consistency across an organization.

Enhanced Grouping

You can now group activities by User Defined Field (UDF), in addition to project, WBS Path, and activity code grouping.

Performance Enhancements

The Timescaled Logic Diagram now loads data faster after you launch it from P6 Professional.

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