PRIMAVERA

New Features in Primavera P6 EPPM 15.1

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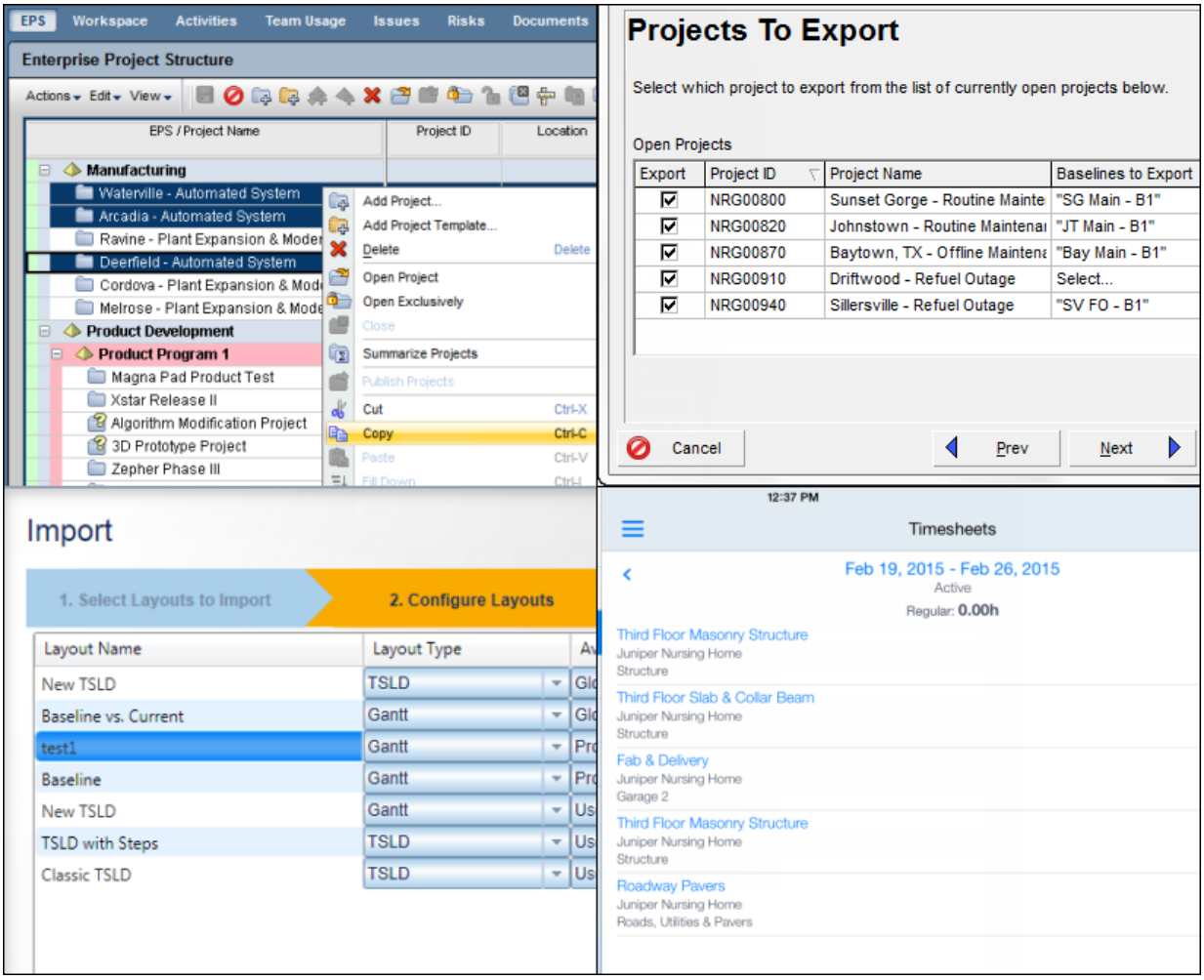
New Features in P6 EPPM 15.1

New features in P6 EPPM 15.1 include:

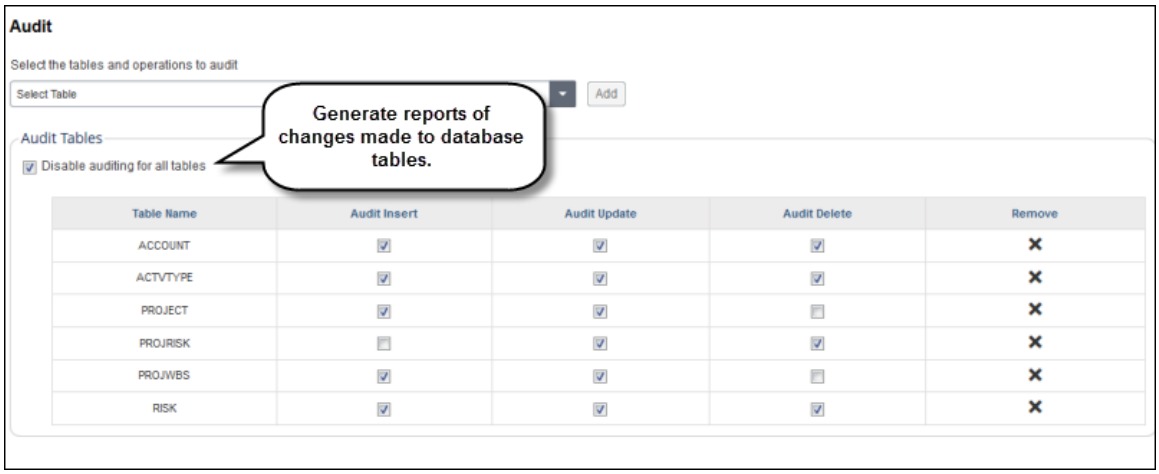
- Resource bucket planning.
- Import and export baselines for projects in XML format.
- Cut, copy, and paste multiple projects.
- Improved Gateway integration settings.
- Improved Unifier integration capabilities.
- Team Member task detail preferences.
- Timesheets capabilities in P6 Mobile.
- Separate modules for P6 Professional and Visualizer.



Usability

Key usability enhancements in P6 15.1 include:

- Resource bucket planning.
- Cut, copy, and paste multiple projects.
- Import and export baselines of projects in XML format.
- Improved auditing access for cloud customers.
- Customize columns in activity detail windows.
- Separate module access for P6 Professional and Visualizer.

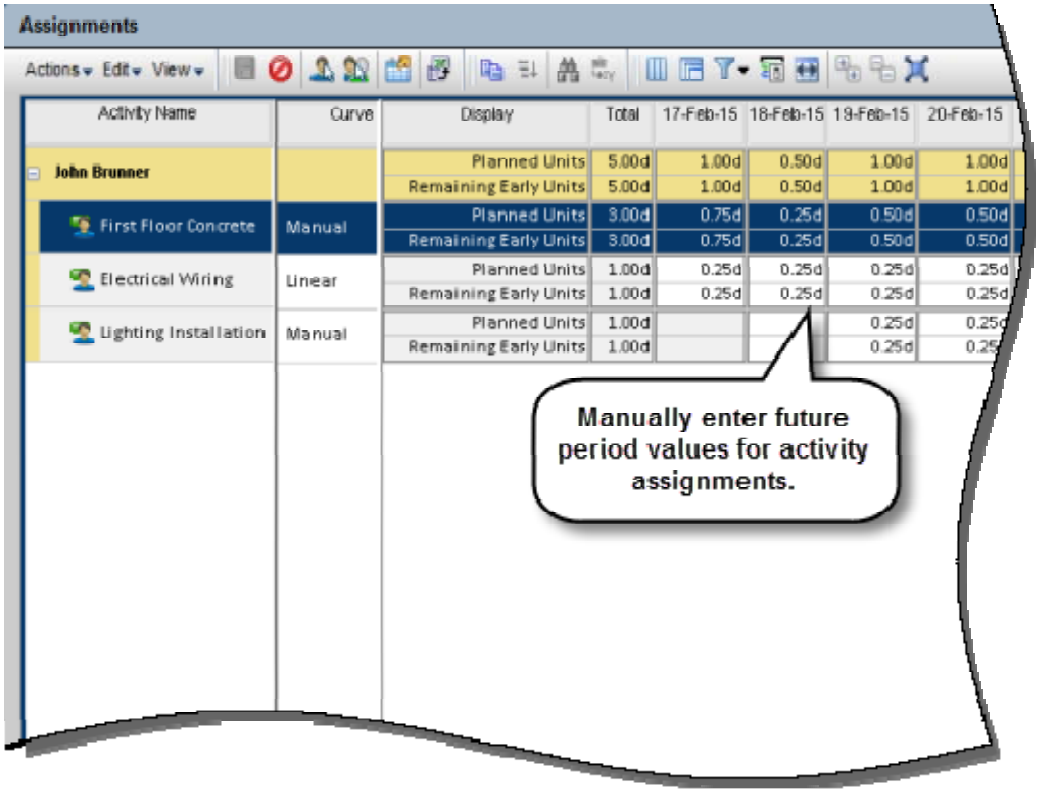


Resource Bucket Planning

Resource bucket planning -- which enables you to manually enter planned and remaining units for each future time period (bucket) in a resource assignment -- has been added to P6 15.1. Traditionally, resource assignment work is distributed linearly, or evenly, over the duration of an activity. With bucket planning, units are entered into buckets manually, reflecting different levels of effort for different time periods. This method may more accurately reflect the remaining duration of an activity, especially when changes to the project require the redistribution of a resource's planned units.

When using bucket planning, set the timescale and then enter Planned Units and Remaining Early Units for any time period after the Planned Start Date. Units entered in buckets in a higher timescale are spread proportionally across buckets in a lower timescale, according to the assigned resource curve. These buckets may then be edited manually to reflect variations in planned work. Buckets edited for activities with a curve distribution will change the curve to Manual, indicating the activity has future period values that have been manually adjusted. Add resource lag to the activity between the planned start of the activity and the planned start of the resource by entering "0" in the units field.

Users must have Add/Edit Activities Except Relationships and Edit Future Periods project security privileges enabled in P6 to perform resource bucket planning.

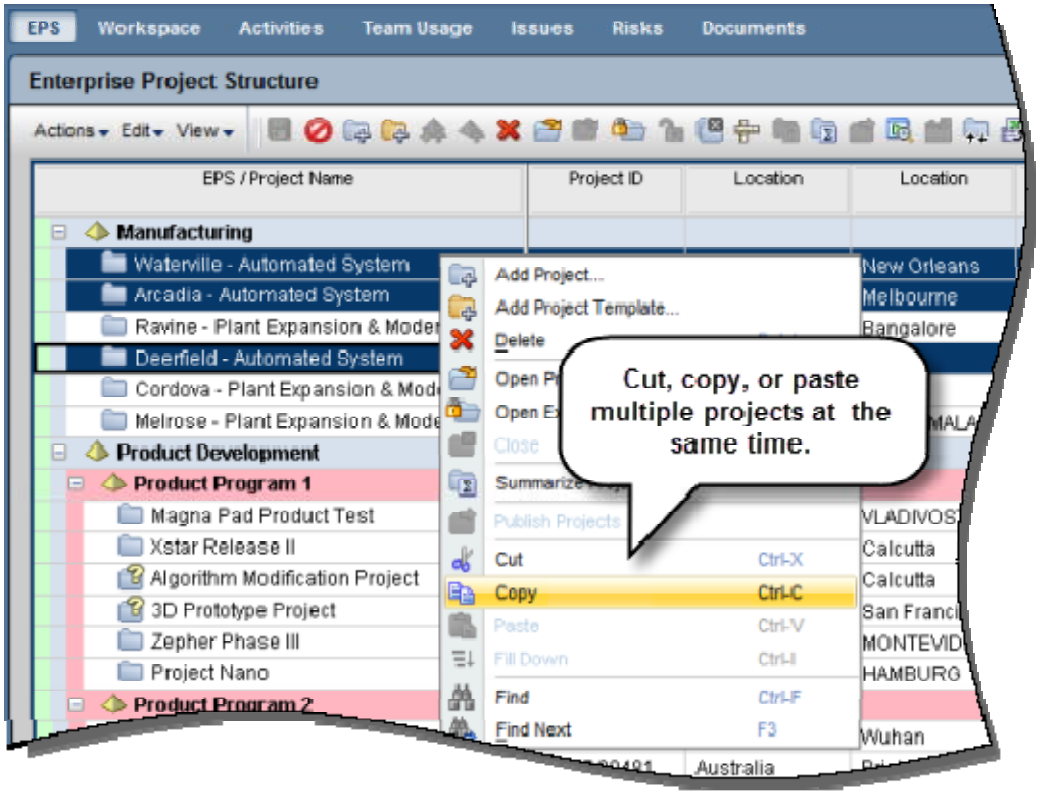


To access this feature:
Click the Assignments page on the Resources tab. Click the Usage Spreadsheet icon.

Cut, Copy, and Paste Multiple Projects

In P6 15.1, cut, copy, and paste multiple projects at the same time. This feature saves time when moving multiple projects between EPS nodes. Cutting projects moves them from one EPS node to another; copying projects creates new instances of each copied project. You can also cut, copy, and paste multiple project templates.

In the Copy Project Options dialog box, choose specific project, WBS, and activity data to copy to the new projects, as well as individual baselines. This feature runs as a background service in P6.

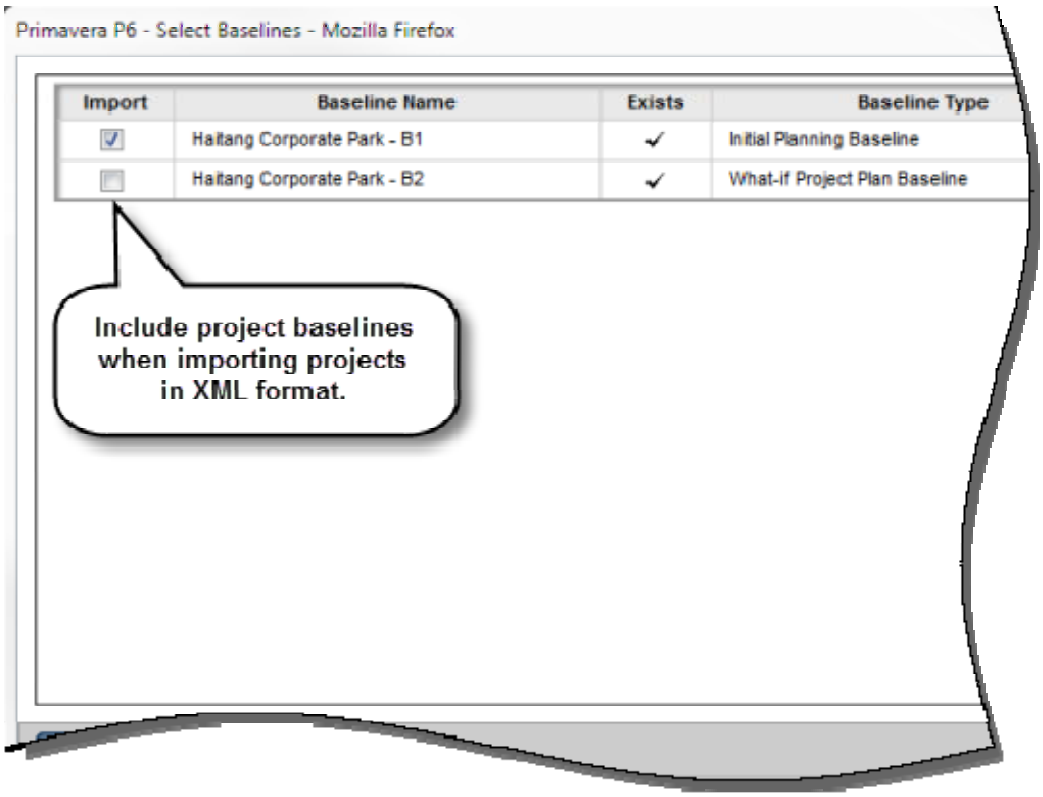


To access this feature:
On the EPS page, select multiple projects or a single EPS node, right-click and select Cut or Copy. Select a new EPS node, right-click, and select Paste.

Import and Export Baselines of Projects in XML Format

P6 15.1 adds the ability to include baselines when importing and exporting projects in XML format. Previously, you needed to restore a baseline to a project in order to import or export it. In P6 15.1, baseline information is included in the XML file.

A new field, Exists, has been added to the Select Baselines dialog box, notifying you if a baseline in XML already exists for the project being updated.

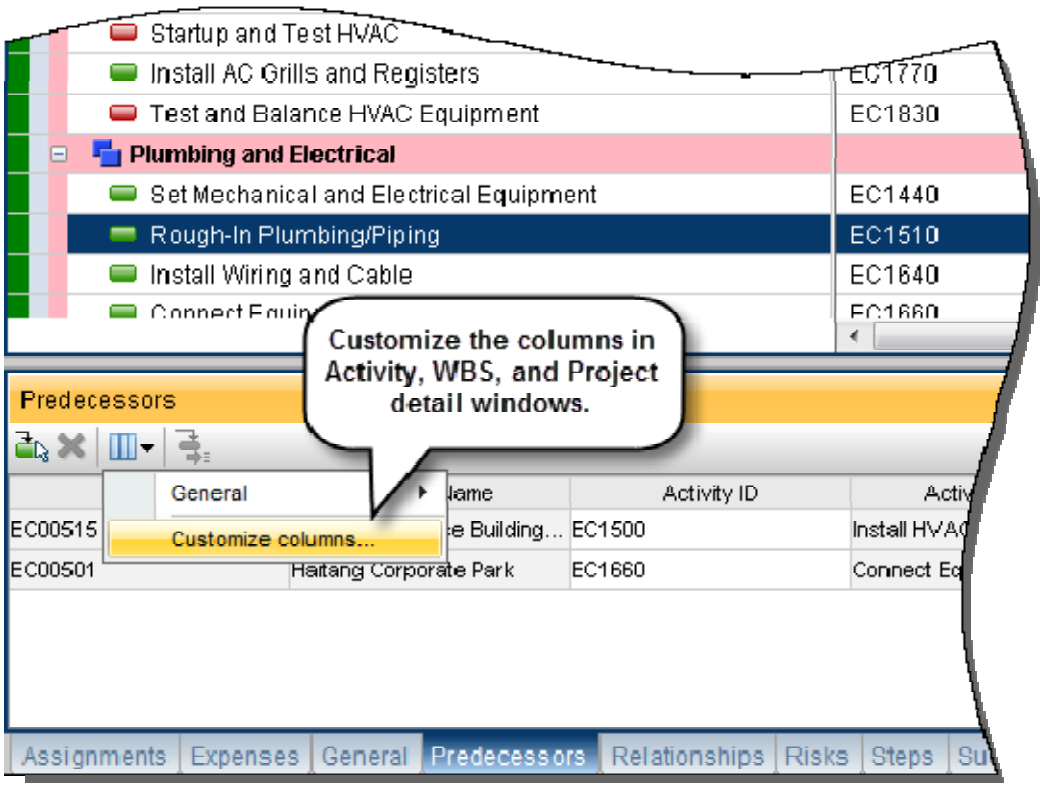


To access this feature:
On the File menu on the EPS page, click XML Project Import/Export.

Customize Columns in Detail Windows

P6 15.1 has added the ability to customize columns in several detail windows on the EPS and Activities page. In previous version of P6, only one column could be added at a time. This new feature saves time by displaying the Customize Columns dialog box, where you can add multiple columns in any order. The Customize Columns dialog box has been added to:

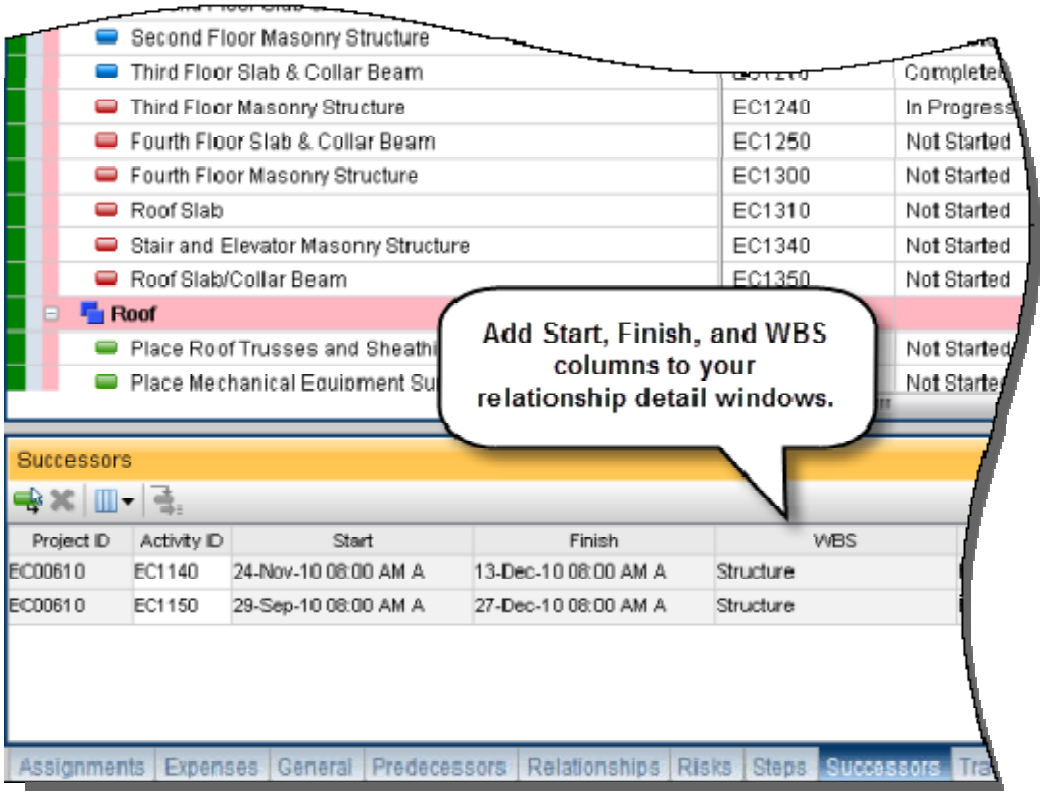
- **Activity detail windows:** Expenses, Issues, Predecessors, Successors, Relationships, Risks, Steps.
- **WBS detail windows:** General, Issues.
- **Project detail windows:** Risks, Issues.



To access this feature:
Click the Customize Columns icon in a detail window and select Customize Columns.

Additional Columns in the Relationship Detail Windows

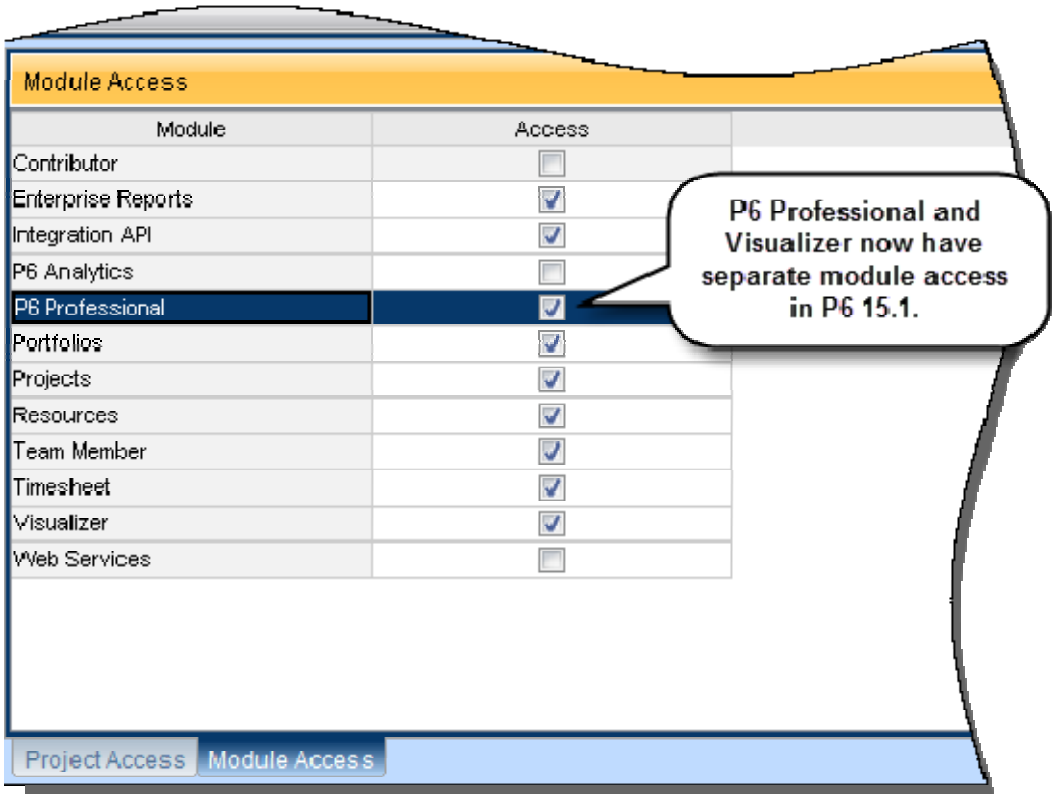
New columns have been added to the Predecessor, Successor, and Relationship detail windows in P6 15.1. Start, Finish, and WBS columns are now options in the Customize Columns menu. These read-only columns provide additional information about an activity's relationships and are especially useful in projects and activities with a large number of relationships.



To access this feature:
Click the Customize Columns icon in a relationship detail window, and select columns from the General list or Customize Columns dialog box.

Separate Module Access for P6 Professional and Visualizer

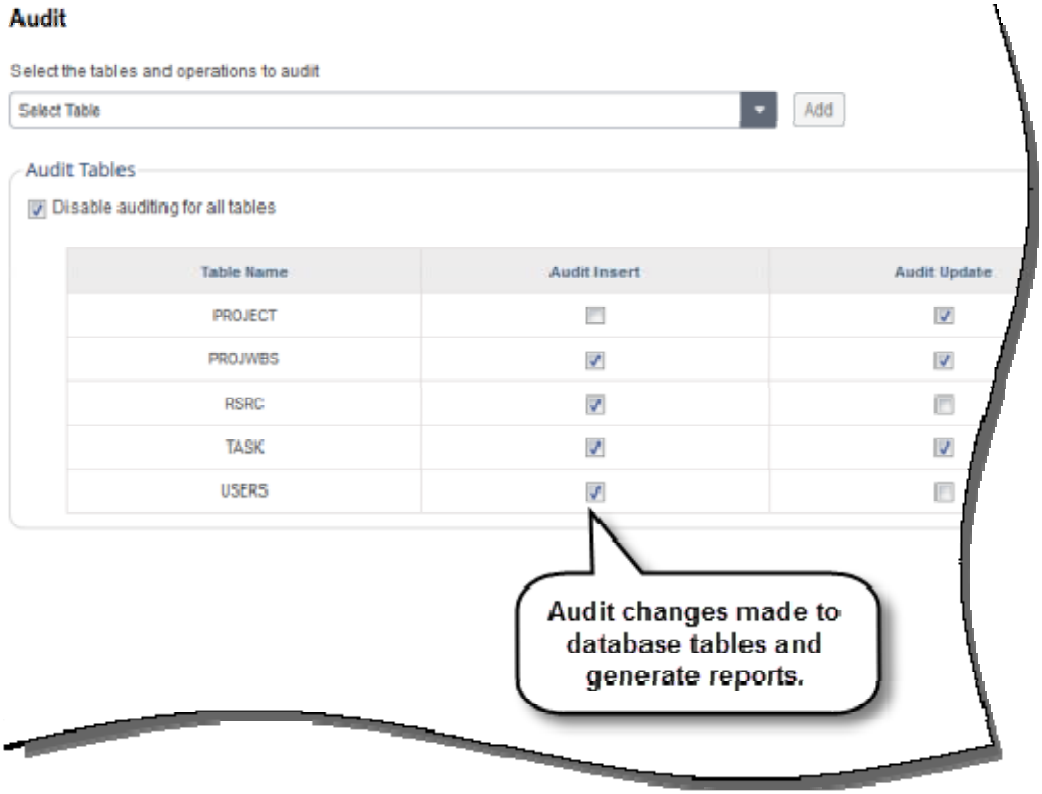
A new module, Visualizer, has been added to the Module Access section of the User Access page in P6 15.1. In previous versions, access to Visualizer was included with P6 Professional module access. This new feature enables separate access to both applications, which is useful if users are tasked with creating Gantt chart or Timescaled Logic Diagram reports in Visualizer but are not granted access to edit project data in P6 Professional.



To access this feature:
Open the User Access page on the Administer menu. On the Module Access tab of the Users page, select the P6 Professional or Visualizer checkboxes.

Improved Access to Auditing Data for Cloud Customers

P6 15.1 enables you to audit changes to the database directly within P6. This feature is especially useful for cloud customers, who lack access to the database to run queries. On the Application Settings page, select the database tables that you want to audit. Audit insertions, updates, and deletions for any of the selected database tables. Leverage the audited information to generate reports created by BI Publisher, and then view them on the Reports tab in P6.

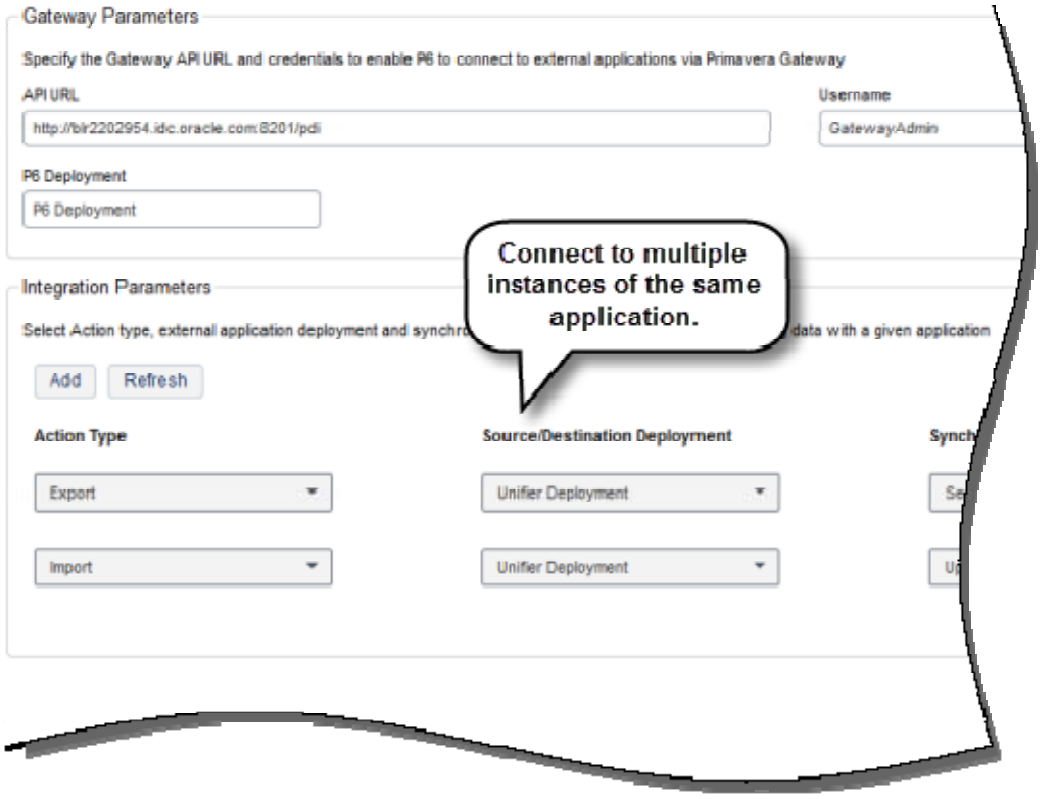


To access this page: Click Application Settings on the Administer menu, and then click Audit.

Improved Gateway Integration Settings

Gateway integration on the Application Settings page is improved in P6 15.1. Previously, an option existed to integrate with one instance of Unifier, Prime, and an ERP system. In P6 15.1, you can integrate multiple instances of each application -- a useful feature in industries where a company connects P6 to a different instance of an application for each of its customers.

After users connect to Gateway via the Gateway Parameters section, the Integration Parameters section populates its fields from the available list of deployments and synchronizations set up in Gateway. Select Import or Export for the Action Type; Deployment and Synchronization based on Gateway settings; and a custom Action Name that appears under Exchange Data on the Activities page.

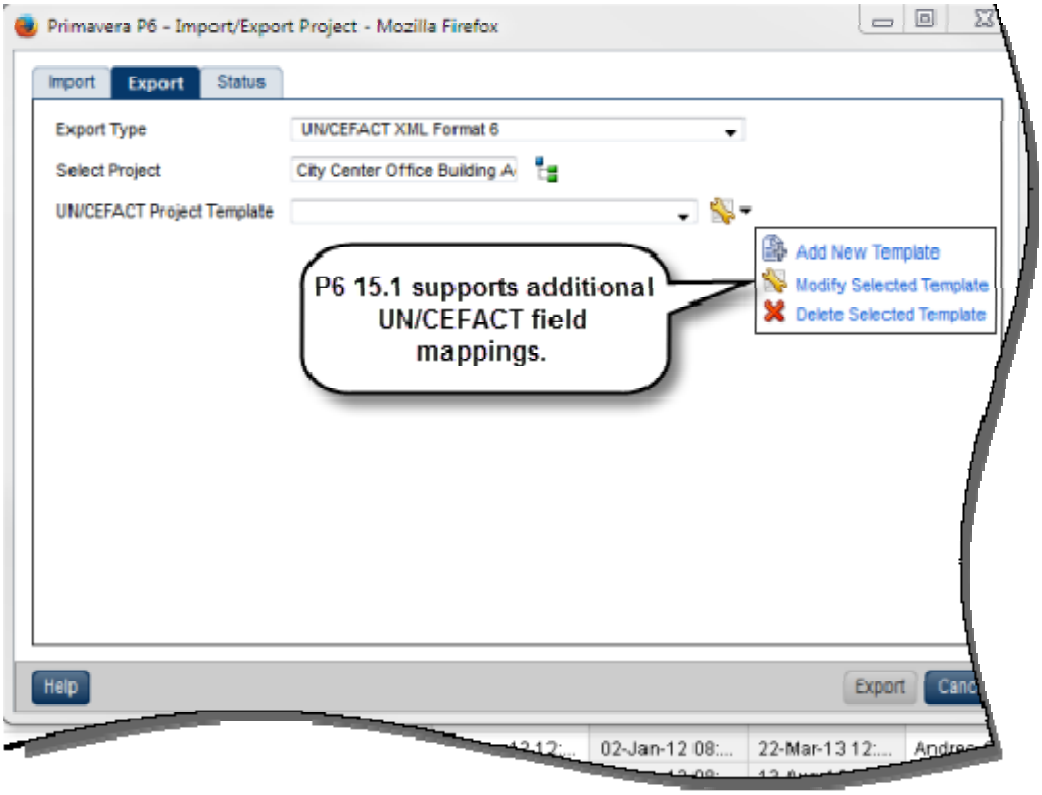


To access this feature:
Click Application Settings on the Administer menu and then open the Gateway page.

UN/CEFACT Improvements

P6 15.1 provides additional support for UN/CEFACT XML Format 6, which defines and contains integrated master schedule (IMS) data. The existing UN/CEFACT XML export has been enhanced to support all the fields in the D09B version of the XML schema. Project template support has also been added, which will allow users to choose the field mappings between a P6 field and a UN/CEFACT field.

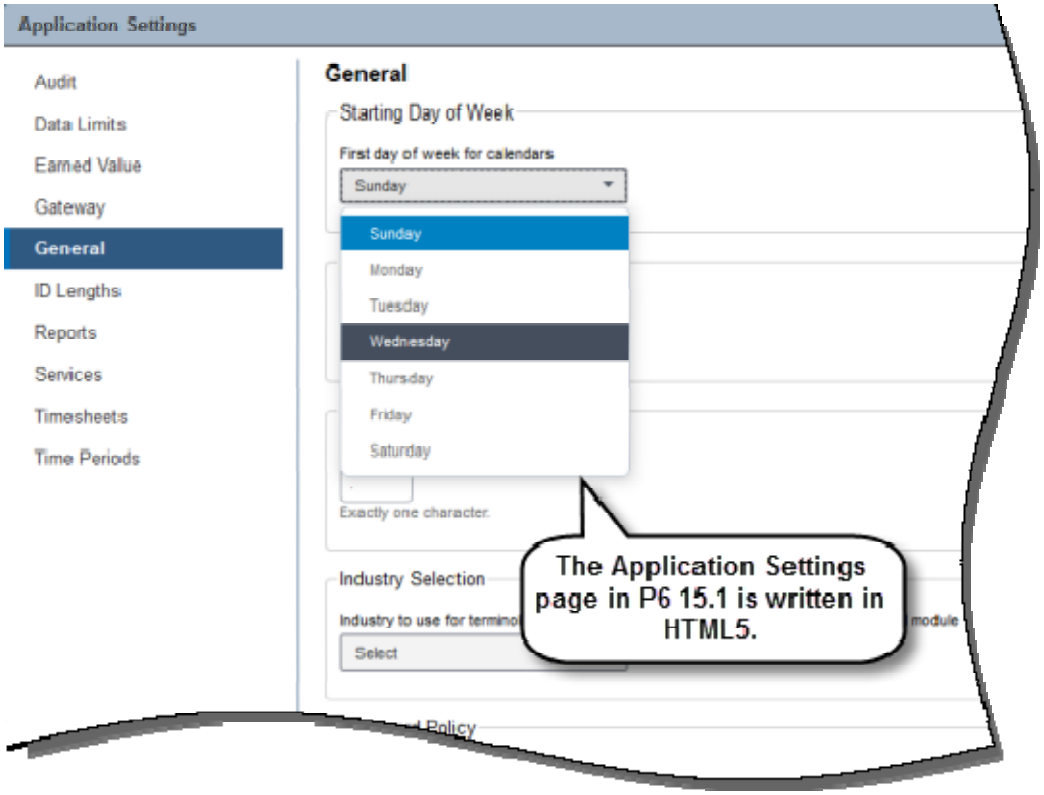
When creating or modifying a UN/CEFACT project template, choose contractor details, address information, and project and activity information. Optionally include WBS and OBS information in the exported file.



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

Application Settings Page Enhancement

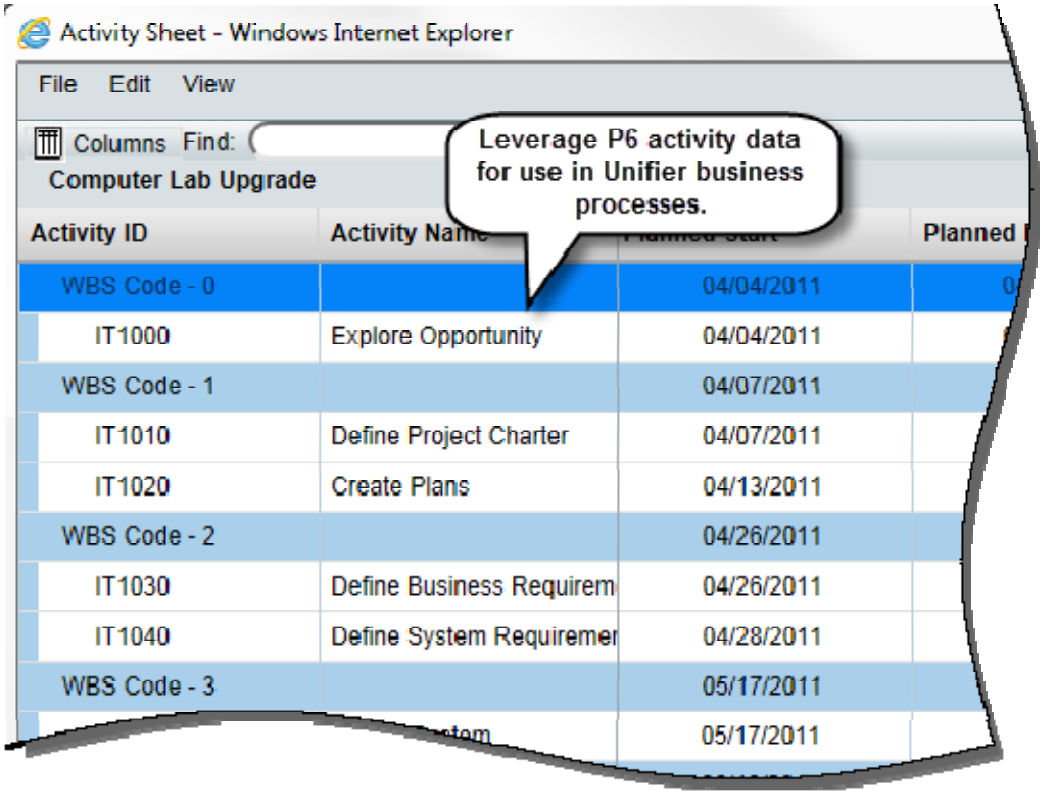
The Application Settings page in P6 15.1 is now written in an HTML5 light-weight framework without applets. The result is an improved user interface with faster page responsiveness.



To access this feature:
Click Application Settings on the Administer menu.

P6-Unifier Integration Enhancements

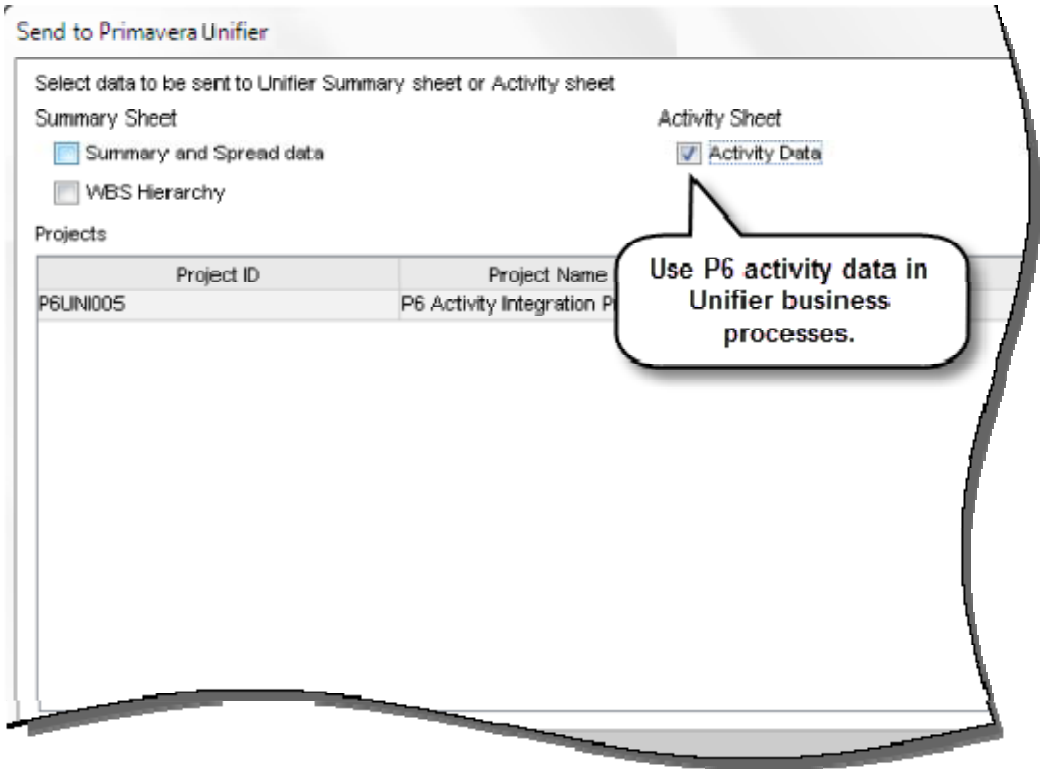
New integration functionality enables you to send activity information to Unifier and receive updated data, including dates, derived from Unifier business processes. This feature has many useful applications -- document management, for example. Set up a submittal approval business process in Unifier and populate fields with P6 activity data. Track progress using actual dates and % complete fields, then send the information back to P6 to update the status of activities.



Unifier Activity Sheet Integration

Unifier activity sheet integration has been added to P6 15.1. Send P6 activity data to Unifier activity sheets, which are used to populate fields in shells and business processes.

You cannot send baseline data when activity sheet integration is selected. The first time you exchange data via integration, the process must be initiated from Unifier.

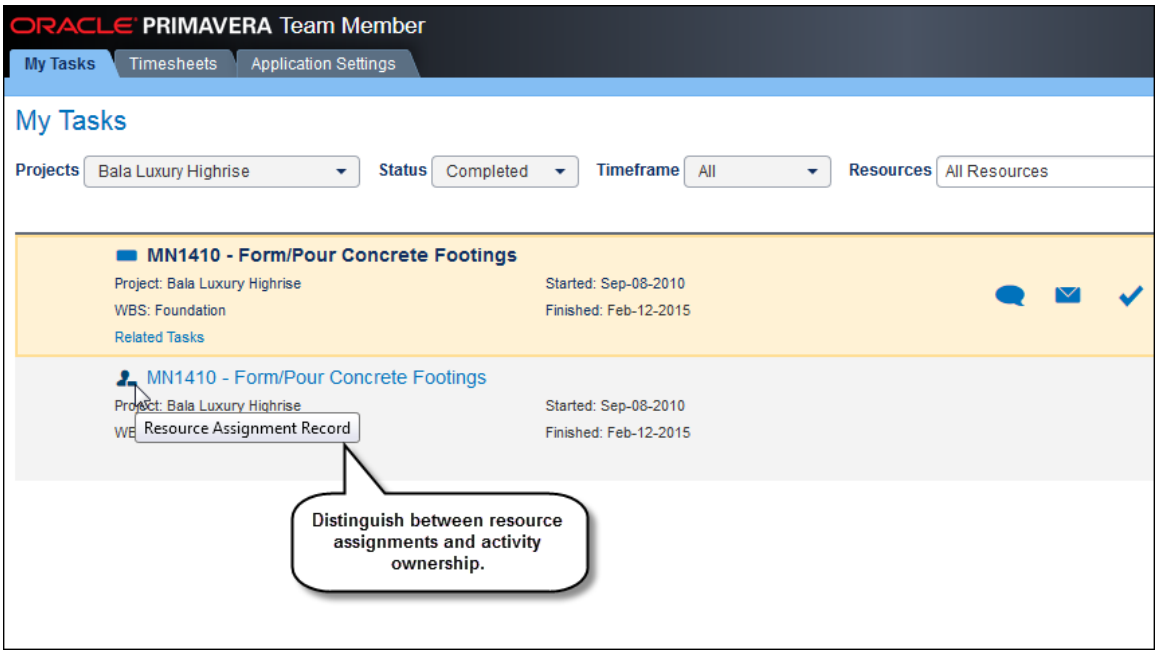


To access this feature:
On the Actions menu on the Activities page, click Exchange Data, Send to Primavera Unifier or Update from Primavera Unifier.

P6 Team Member

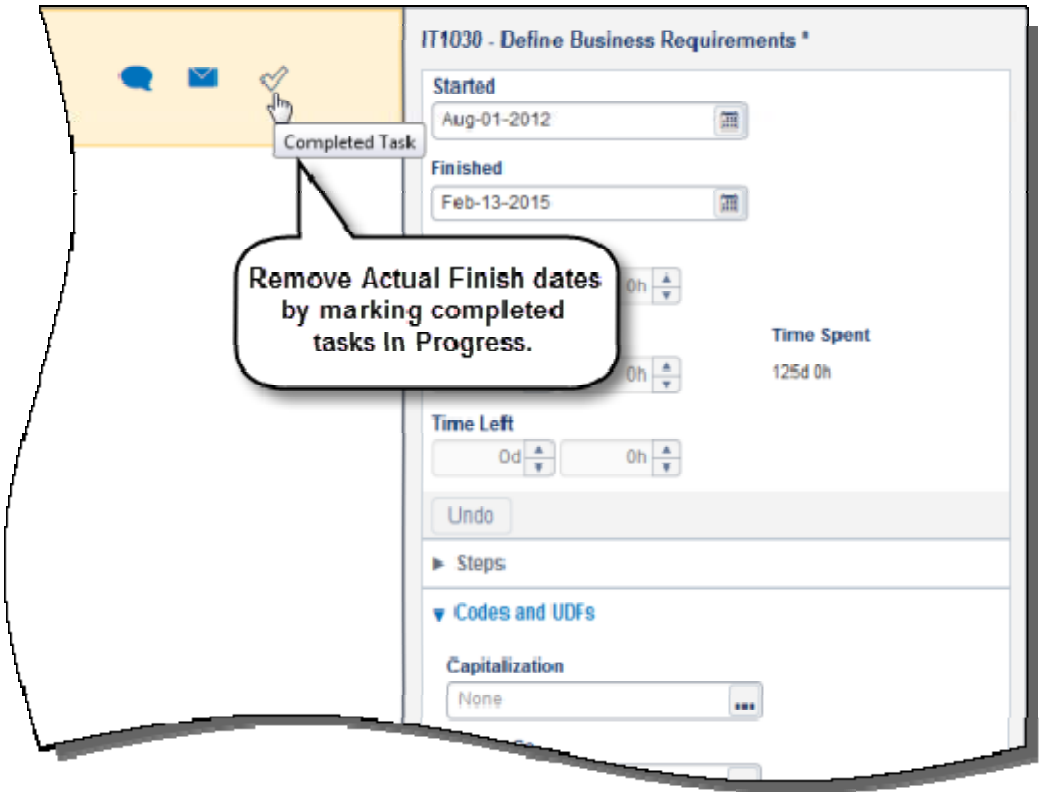
New features in P6 Team Member 15.1 include:

- Filter by resources more efficiently.
- Toggle task detail information.
- New duration units.
- Icons that indicate activity ownership or resource assignment.
- Mark a completed task back to in-progress.



Remove Actual Finish Dates

A new enhancement in Team Member 15.1 allows you to remove Actual Finish dates from completed tasks. In previous versions, marking a task complete would add an Actual Finish date to the task. The Finished field was editable but you could not continue to log additional time worked. In Team Member 15.1, click the check mark of a completed task to return it to an In Progress state. You can then edit the Finish By field and continue to record progress, contribute to discussions, update steps, and assign codes and UDFs.

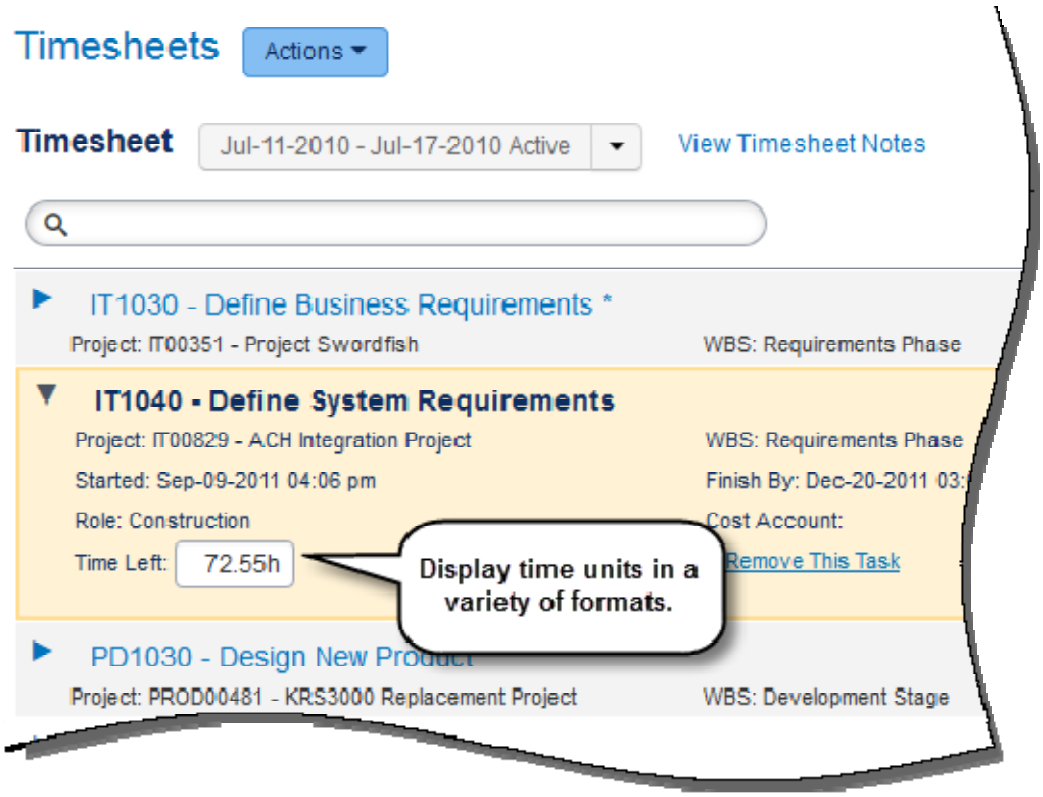


To access this feature:
In the My Tasks view, mark a completed task In progress by clear the Completed Task check mark.

New Duration Field Units

Additional unit and duration format options have been added to Team Member 15.1. Enter and view time in hours or days, as well as the previously existing Hours/Minutes and Days/Hours formats. This feature gives you the ability to status tasks in a variety of ways.

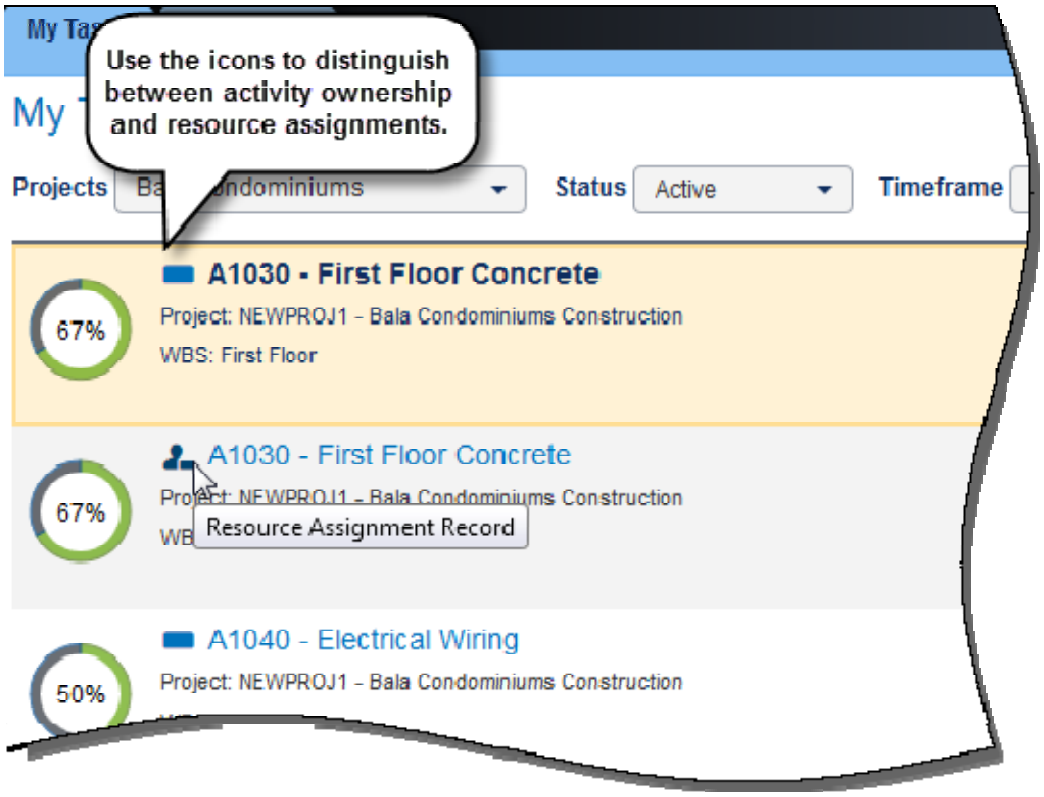
When selecting the Hours or Days format, specify the number of decimal places, between 0 and 2. Values entered for these formats are rounded according to the set number of decimal places.



To access this feature:
Click the User List in Team Member and select Preferences.

Distinguish Between Activity and Assignment Records

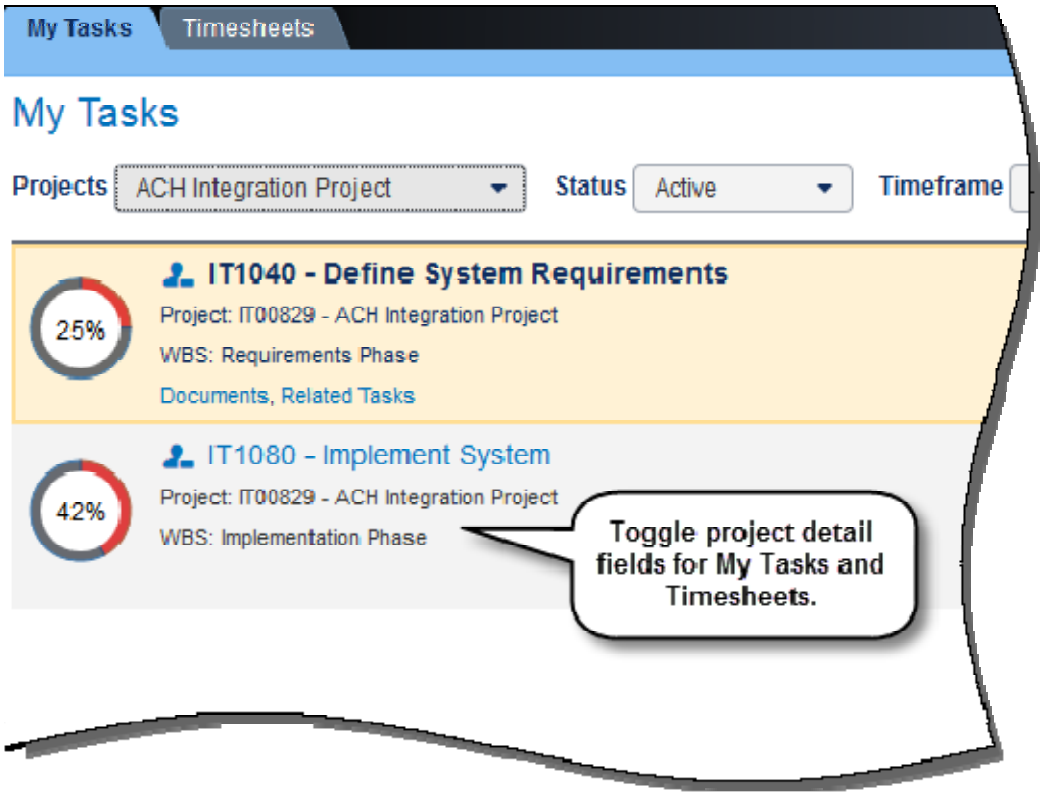
In Team Member, one user can be assigned to a task multiple times -- as a resource assignment, activity owner, or a primary resource -- causing the same task name to appear more than once in the application. To help distinguish between tasks, new indicator icons have been added to the Task Details. Place the mouse over the icon to see if the task is a Resource Assignment Record or Activity Owner Record. The Activity Owner Record icon is shown when the user is either an activity owner or a primary resource.



To access this feature:
In the My Tasks view, mouse over the icon for any task.

Toggle Project Name, ID, and WBS in Task Details

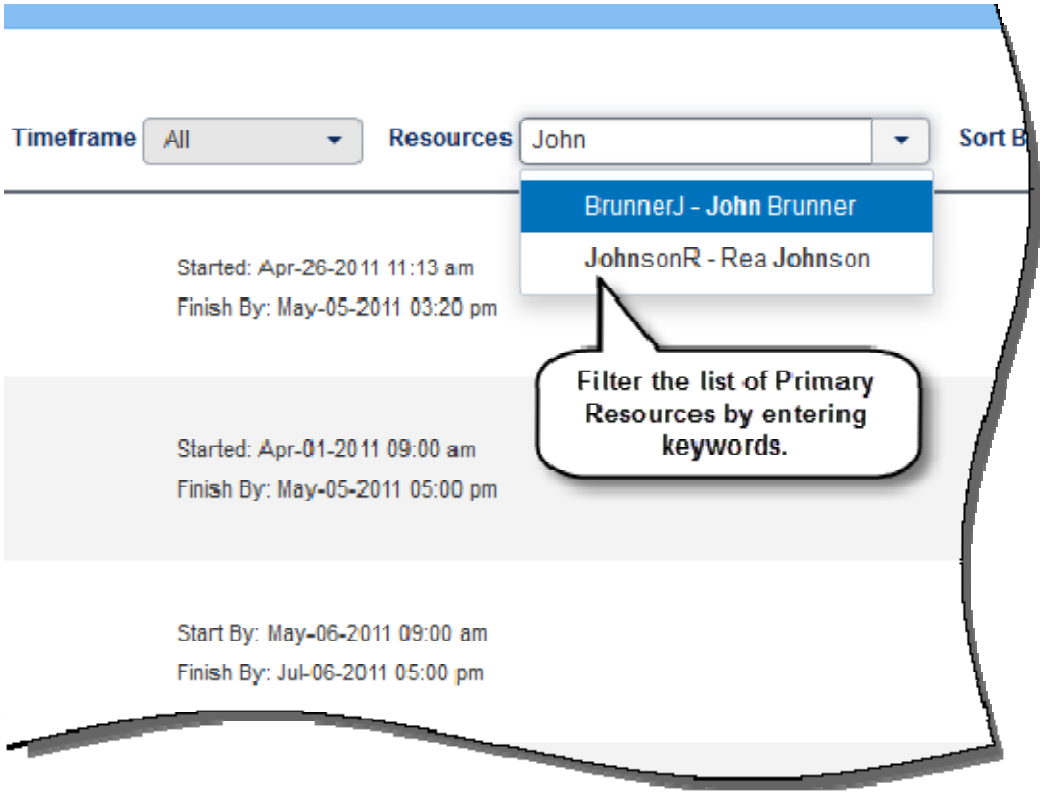
In Team Member 15.1, toggle the display of Project Name, Project ID, and Project WBS information for the Task Details found in the My Tasks view and Timesheets view. In the Preferences view, choose any combination of the fields to display. These preferences only apply to each user's instance of Team Member.



To access this feature:
Click the User List in Team Member and select Preferences.

Filter by Resource More Efficiently

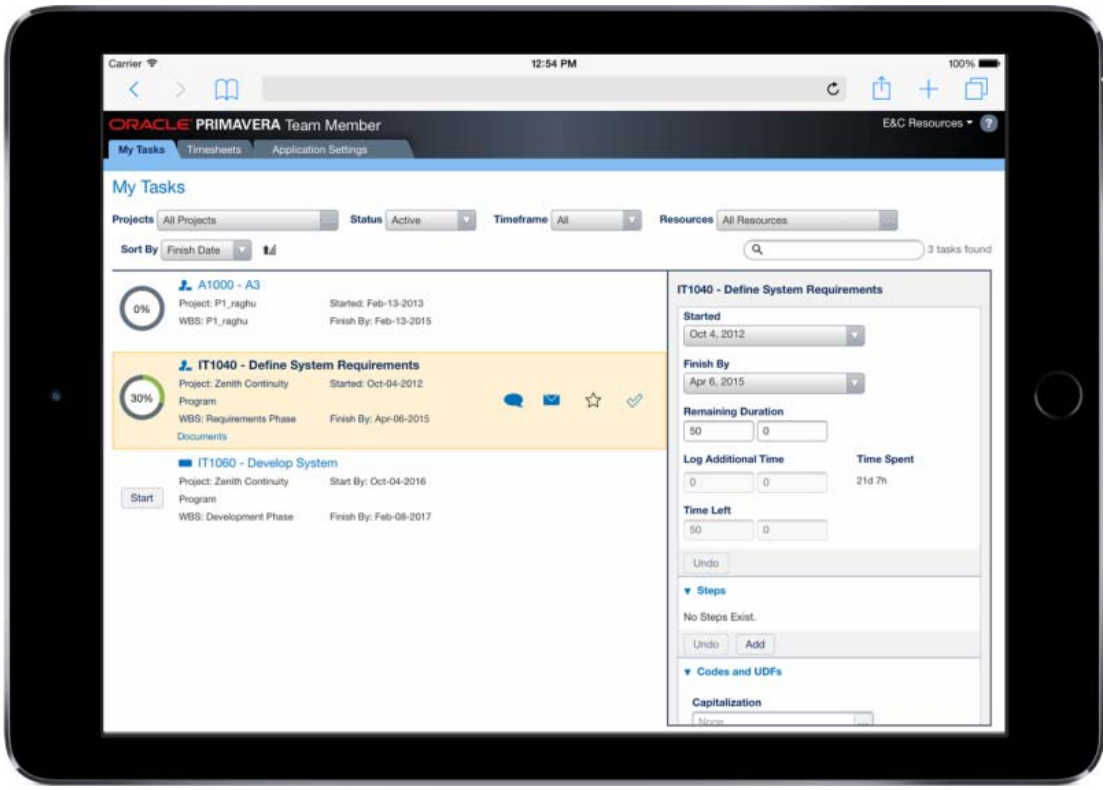
Team Member 15.1 has added the ability to filter the list of primary resources by entering text in the Resources filter. This feature makes selecting a primary resource quicker and easier, especially when the list of primary resources is large. Click the Resources list and enter text to filter the results as you type. To select multiple resources, Ctrl+Click names in the filtered list.



To access this feature:
In the My Tasks view, type text in the Resources list.

Touch-Enabled Usability

Team Member 15.1 includes usability enhancements for touch screen devices. With your same credentials from Team Member Web, use your device to log into P6 Team Member. The same features and functionality from Team Member Web have been optimized for use on touch screen devices.

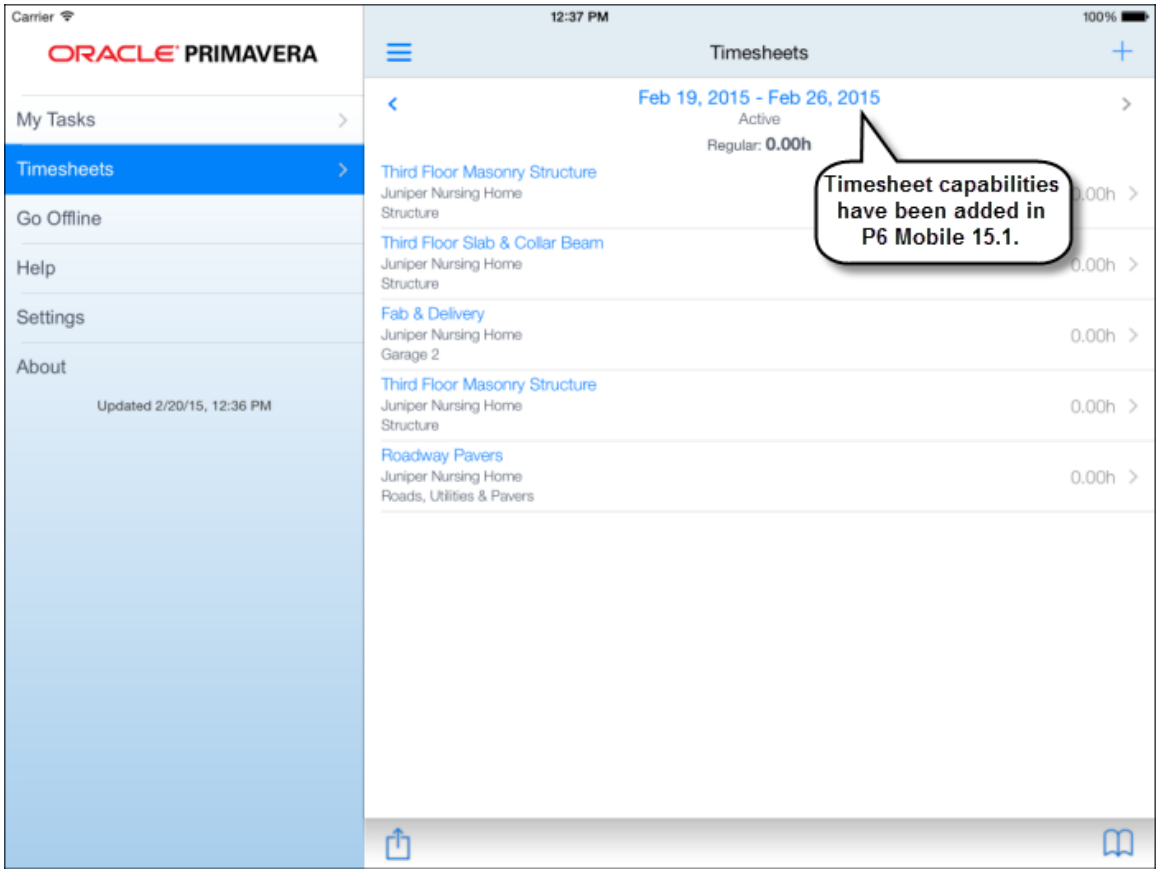


To access this feature:
Log into Team Member Web from a web-enabled touch screen device.

P6 Mobile

New features implemented in P6 Mobile 15.1 include:

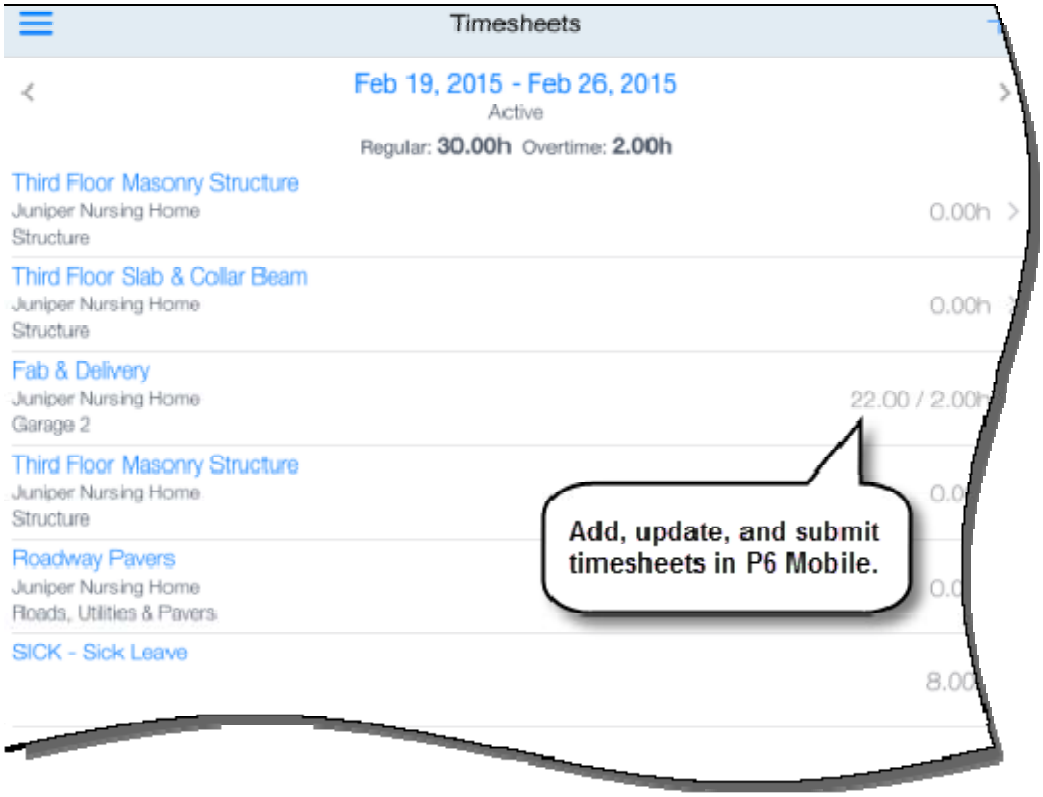
- Timesheet capabilities.
- Update notebook topics.
- Distinguish between activity owner and resource assignments.
- Remove actual finish dates.
- Show a task's start dates.



Timesheets View

The new Timesheets view in P6 Mobile 15.1 enables you to update work on tasks and submit timesheets for approval. Among the features: view the status of available timesheet periods; display assigned tasks and totals at the timesheet level; add existing tasks to a timesheet; add overhead time to a task; mark tasks as completed or in progress; and contribute to discussions. You can also save and submit timesheets for approval in P6.

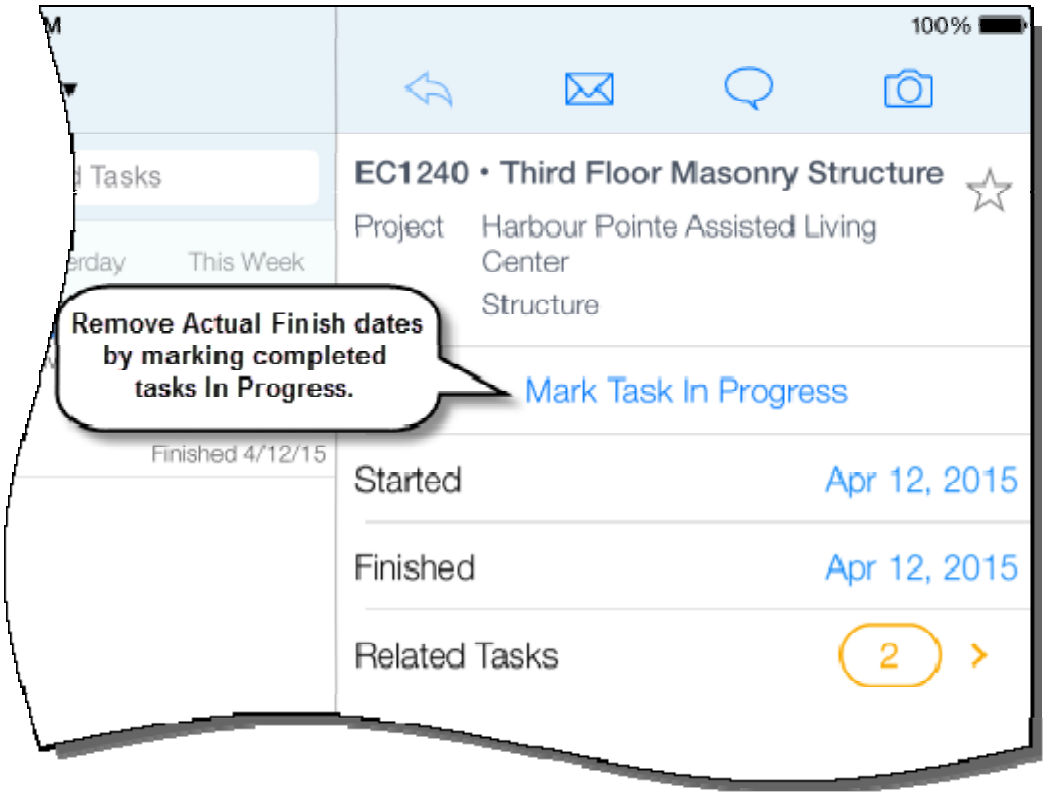
To access the Timesheets module in P6 Mobile 15.1, you must have Timesheet Module or Team Member Module access privileges granted in P6.



To access this feature: In P6 Mobile, tap the Timesheets view in the Navigation pane.

Remove Actual Finish Dates

An enhancement in P6 Mobile 15.1 allows you to remove Actual Finish dates from completed tasks. Tap Mark Task In Progress in the Task Details pane to return it to an In Progress state. You can then edit the Finish By field and continue to record progress, contribute to discussions, update steps, and assign codes and UDFs.



To access this feature: In the My Tasks view, tap Mark Task In Progress in the Task Details pane.

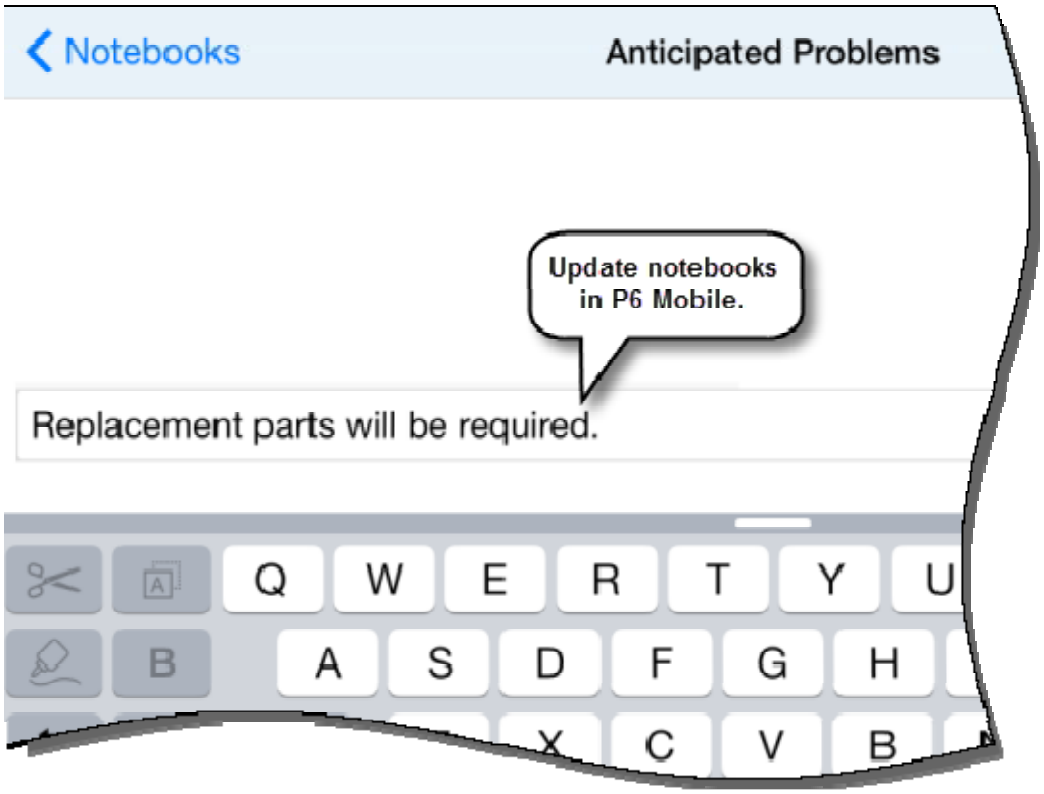
Display Primary Resource Information in Task Details

In P6 Mobile 15.1, one user can be assigned to a task multiple times -- as a resource assignment, activity owner, or a primary resource -- causing the same task name to appear more than once in the application. To help distinguish between tasks, new indicator icons have been added to Task Details. The icon, found to the left of the task name, indicates whether the task is a resource assignment record or activity owner record. The Activity Owner Record icon is shown when the user is either an activity owner or a primary resource.

To access this feature: In P6 Mobile, open the My Tasks view.

Update Notebook Topics

P6 Mobile 15.1 allows you to update notebook details from the My Tasks view. Tap Notebooks in a task's details view to view a list of notebooks associated with the task. This feature is only available to users who have the Team members can update notebooks option checked in the Project Preferences dialog box in P6.

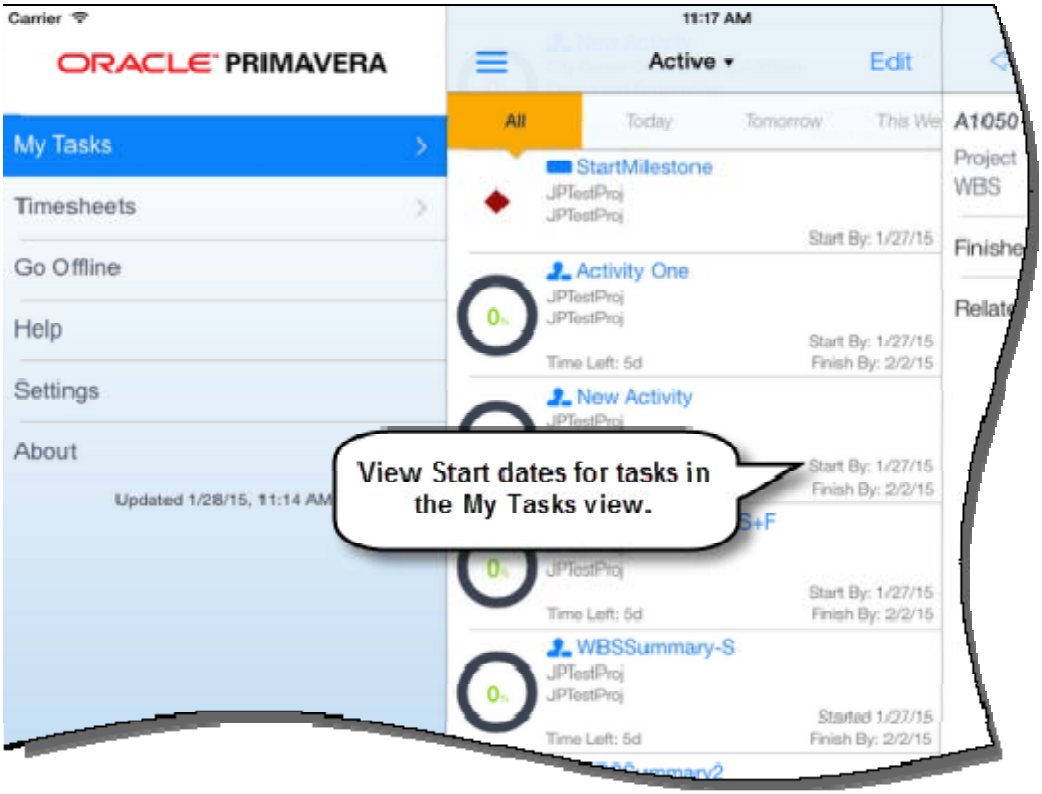


To access this feature: In the My Tasks View, tap a task and then tap Notebooks.

Show Task Start Date

In P6 Mobile 15.1, you can now view a task's Start date -- critical information when status requires strict adherence to project dates.

The Start date is visible for each task in the My Tasks view. Tasks that are Not Started display the task's Start By date. Tasks that are In Progress or Completed show the task's Started date.

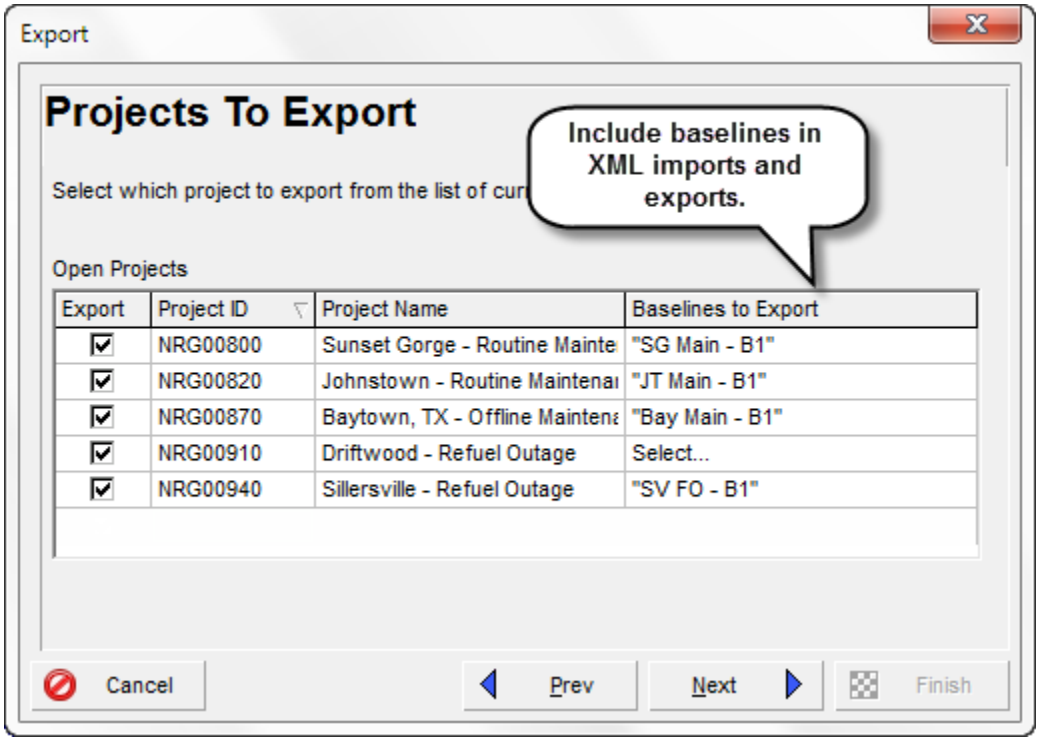


To access this feature:
In P6 Mobile, open the My Tasks view.

P6 Professional

Key new features in P6 Professional 15.1 include:

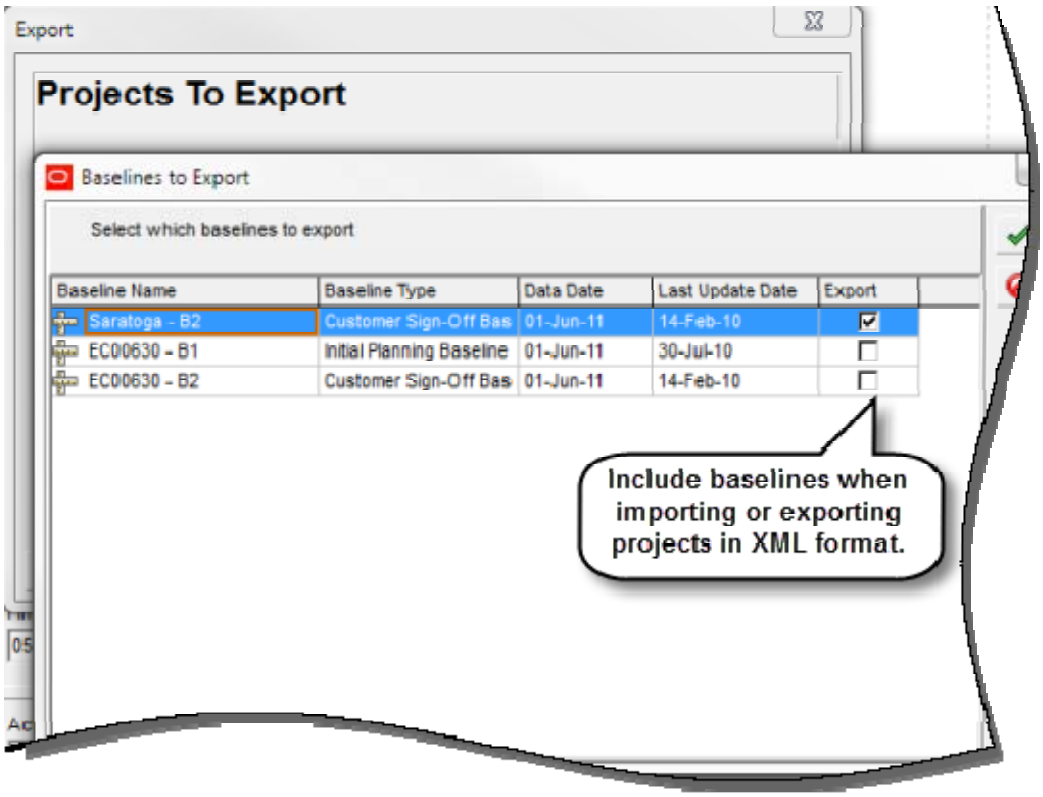
- Import and export baselines of projects in XML format.
- Enterprise features when connecting to an EPPM database.
- Enhanced Unifier integration.
- Separate module access for P6 Professional and Visualizer.



Import and Export Baselines of Projects in XML Format

The ability to include baselines when importing and exporting projects in Primavera XML format has been added to P6 Professional 15.1. Previously, you needed to restore a baseline to a project in order to import or export it. In P6 Professional 15.1, baseline information is included in the XML file.

A new field, Exists, is included in the Baselines to Import dialog box, notifying you if an imported baseline already exists in the project being updated.



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

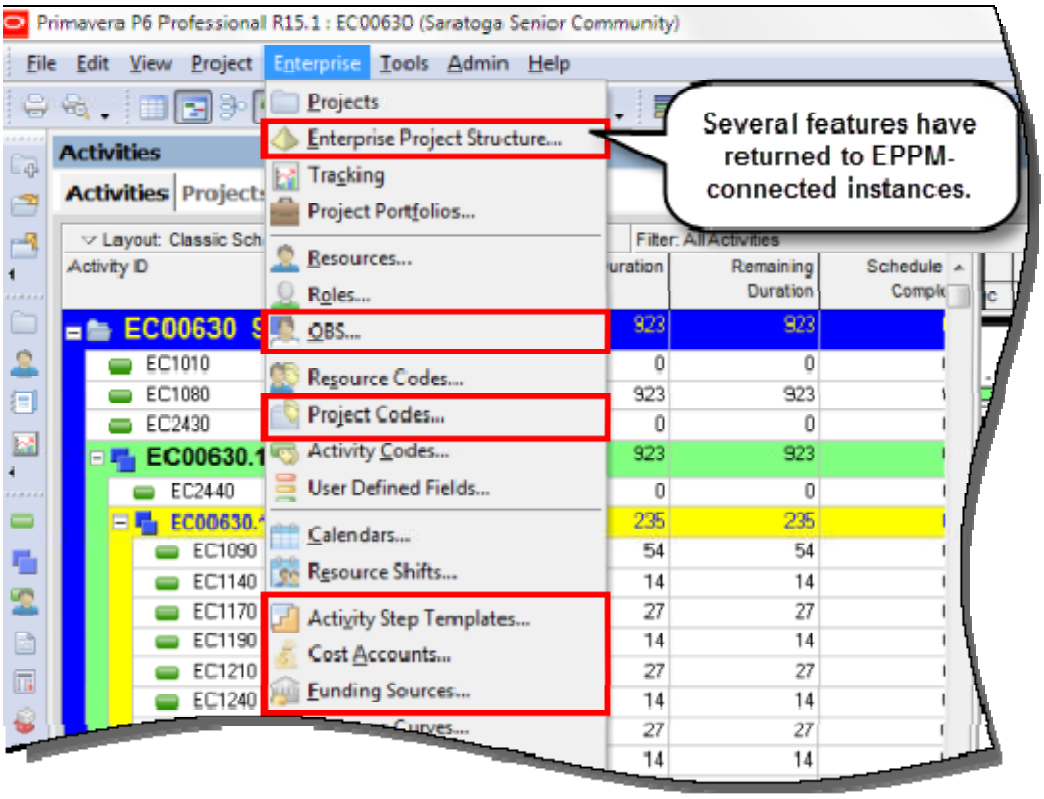
Enterprise Features When Connected to an EPPM Database

Several features have been re-enabled in P6 Professional 15.1 when connected to an EPPM database. In previous versions of P6 Professional, these features were disabled with the expectation that they would be administered in the P6 Web application.

The following features have been re-enabled in P6 Professional when connected to an EPPM database:

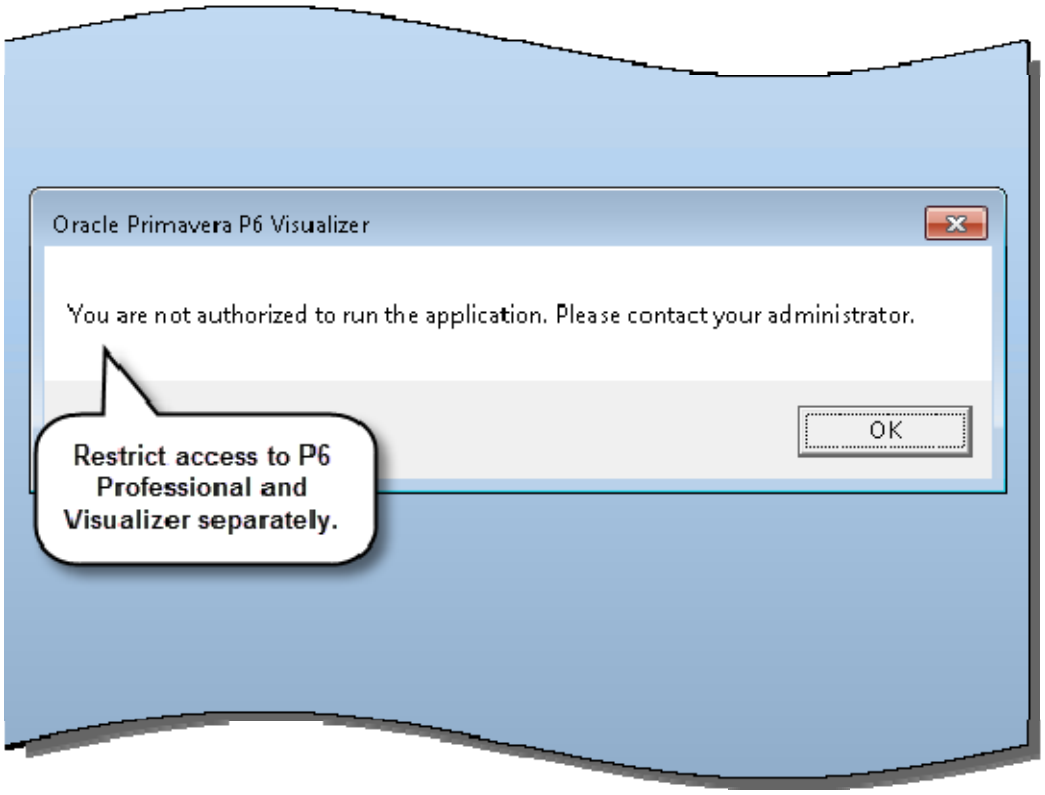
- EPS
- OBS
- Project codes
- Activity step templates
- Cost accounts
- Funding sources

These features continue to be available for P6 Professional instances that are connected to Professional databases or installed in Standalone mode.



Separate Module Access for P6 Professional and Visualizer

A new module, Visualizer, has been added to the Module Access section of the User Access page in P6 15.1. In previous versions, access to Visualizer was included with the P6 Professional module access. This new feature enables project managers to allow separate access to both applications. This is useful if, for example, a user tasked with creating Gantt chart or Timescaled Logic Diagram reports in Visualizer might not require access to P6 Professional. Conversely, some users may be given P6 Professional access but not the privilege to work in Visualizer.

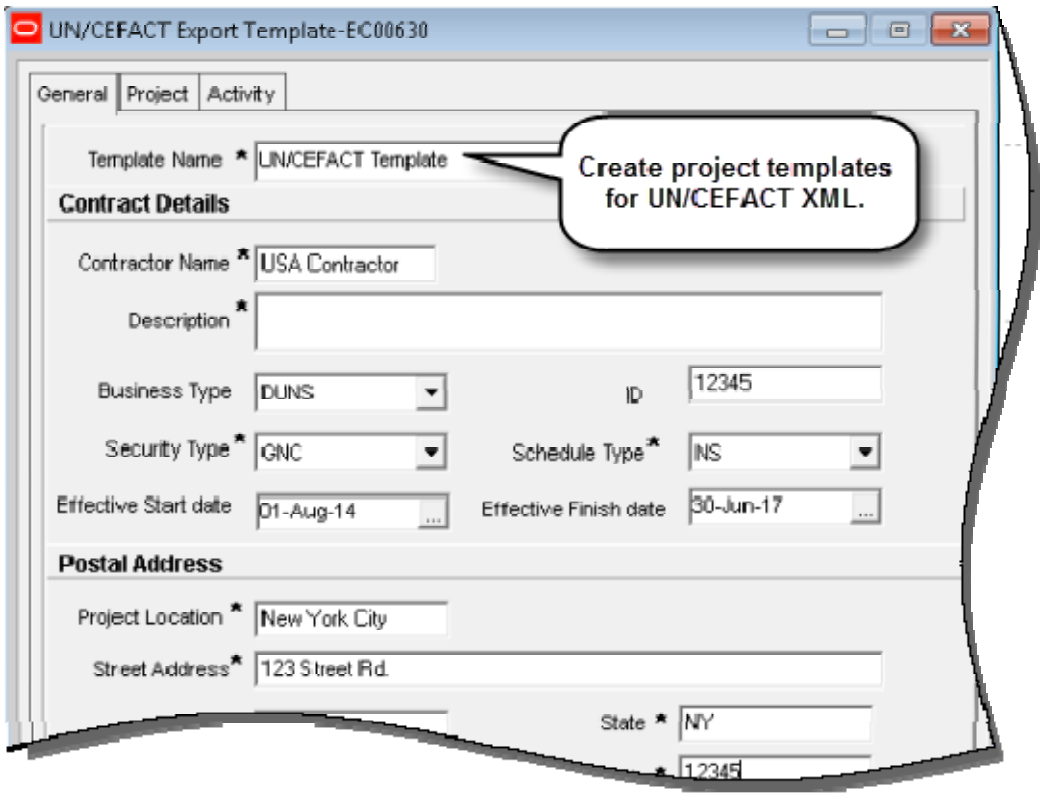


To access this feature:
Open P6 Professional or Visualizer. Access will vary depending on the Module privileges granted in P6 Web.

UN/CEFACT Improvements

P6 Professional 15.1 provides additional support for UN/CEFACT XML Format 6, which defines and contains integrated master schedule (IMS) data. The existing UN/CEFACT XML export has been enhanced to support all the fields in the D09B version of the XML schema. Project template support has also been added, which will allow users to choose the field mappings between a P6 field and a UN/CEFACT field.

When creating or modifying a UN/CEFACT project template, choose contractor details, address information, and project and activity information. You may also include WBS and OBS information in the exported file.



To access this feature:
On the File menu, click Export. In the Export dialog box, select UN/CEFACT Format 6 - (XML).

Unifier Integration

Additional Unifier integration functionality has been implemented in P6 Professional 15.1. Send activity data, including user-defined fields, to Unifier activity sheets, which are used to populate data fields in Unifier shells and business processes. Fields changed as a result of these processes -- such as Actual dates or % Complete -- are updated in the activity sheets and then can be sent back to P6 Professional.

This feature has many useful applications -- document management, for example. Set up a submittal approval business process in Unifier and populate fields with P6 activity data. Track progress using actual dates and % complete fields, then send this information back to P6 to update the status of activities.

In P6 Professional, select an instance of a connected Unifier Deployment, specify the appropriate integration actions, and send activity data to Unifier. After leveraging the activity data in Unifier business processes, pull the updated information back into P6 Professional. You cannot send or receive baselines when exchanging activity data.

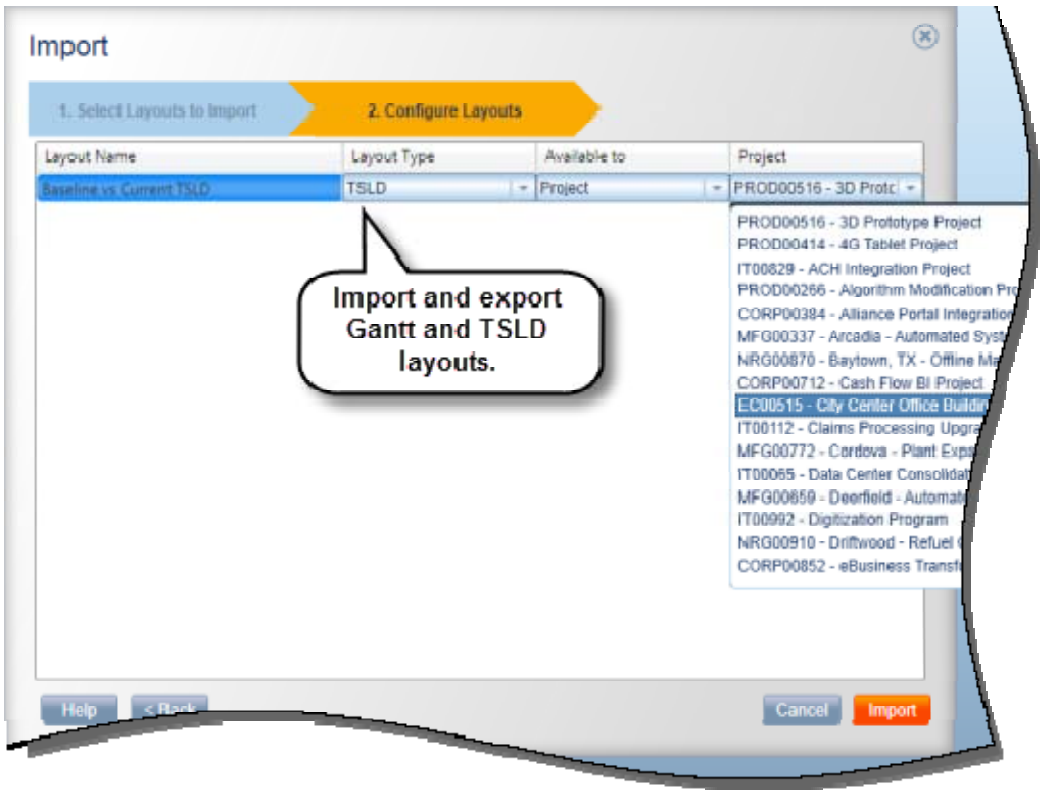
Note: You must initiate activity sheet integration from Unifier on the first integration, and can exchange information from P6 Professional or Unifier on any subsequent integrations.

To access this feature:
On the Actions menu on the Activities page, click Exchange Data, Send to Primavera Unifier or Update from Primavera Unifier.

Import and Export Visualizer Layouts

P6 Visualizer 15.1 has added the ability to import and export layouts. This feature is useful if you need to share one or more layouts with other Visualizer users. Visualizer layouts are exported/imported using the Visualizer layout file type, .vlf. Visualizer can also import Primavera layout files with the .plf file type. After exporting a layout, import it into Visualizer as a timescaled logic diagram or Gantt layout, and choose to make it a global, project, or user-specific.

Also, Visualizer 15.1 introduces a 64-bit installation, which can handle a greater number of projects as well as larger individual projects.



To access this feature:
In Visualizer, click the More list and select Manage to export layouts or Import to import layouts.