ORACLE

What's New in P6 and OPC 2023

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P6 2023 Enhancements

Subhead goes here

[Date]

P6 ORACLE®

On-Premise

Software & Database(s) Controlled & Maintained by you.

SaaS

Software & Database(s) Hosted & Maintained by Oracle.

All features are the same in both if you are using the latest version.

- IT Support Needed
- Hardware Setup Cost
- Security Measures (Internal Users & External)
- Manual Upgrades of New Versions & Patch Sets
- Maintain Connectivity
- Annual Upgrade Only

- No Maintenance Cost
- Dedicated Customer Success Manager (CSM)
- Mobile Apps for iOS & Android
- BI Publisher Reporting Engine
- 2 Releases a year
- Quarterly Critical Patch Updates

Consolidated Cloud Release Path
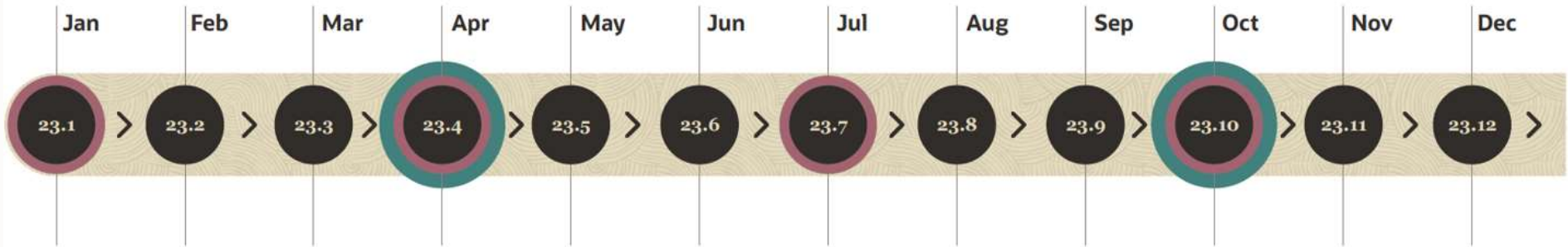
Oracle requires all Cloud Services customers to keep their environments current with versions that Oracle designates as Generally Available (GA). P6/Unifier environments must be updated to remain on or within 2 versions of the (GA) release to maintain Cloud Service version currency.

Oracle-Scheduled Updates:

If your environment is 3 versions behind the GA release, you'll be assigned an update window.
Oracle-scheduled updates will:
- Update all environments at the same time
- Typically occur on a weekday evening

Customer-Requested Updates:

Enter a Service Request (SR) requesting update *prior* to being 3 versions behind the GA release.
With requested updates, you can:
- Split non-production and production environments on different days for testing
- Request a weekend update for a production environment
- Schedule more frequent updates

Project Checker (Client & Web)

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Export to CPP & CPP Templates (Client & Web)

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Export to XER as a Scheduled Service (Web)

Configure Scheduled Services to run against a Project Code Value (Web)

- Configure services to run against a project code value in addition to an EPS or manual project selections

- For example, if there's a project code for Project Manager, each project manager can set up services to run against their projects automatically
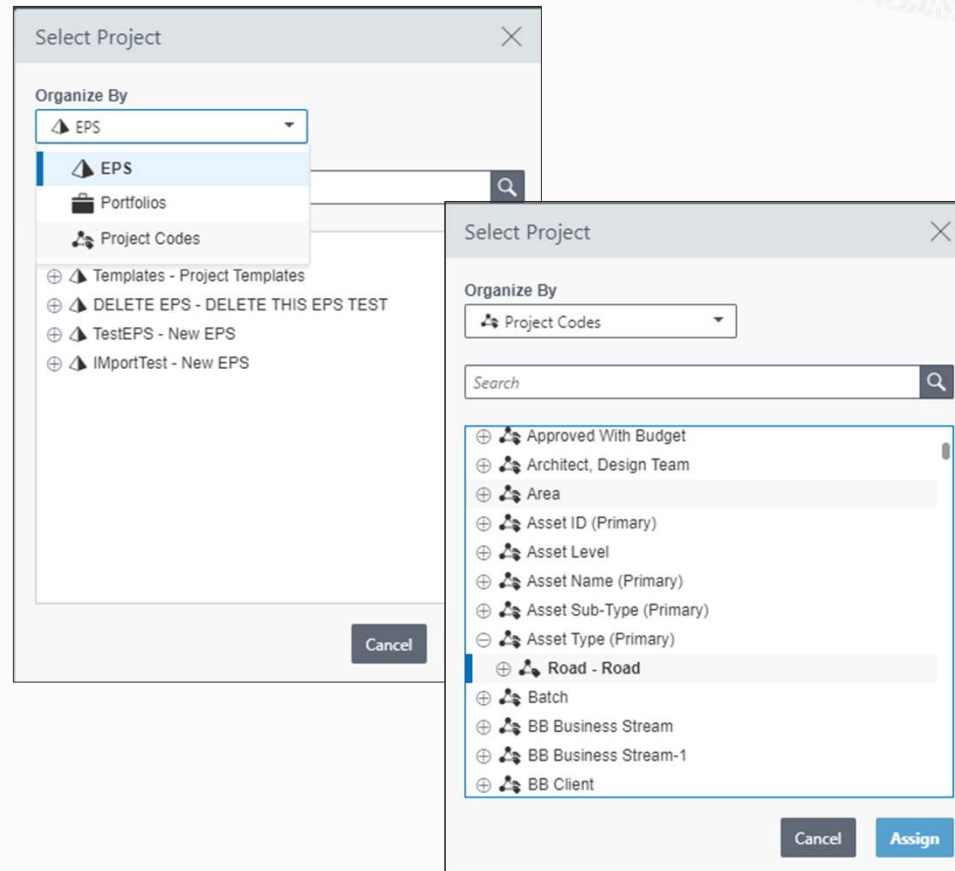
Color Coded Exception Time in Date Pickers (Web)

- Available when choosing activity and other dates

- Color coding for standard time, exception time, nonwork time, global exceptions, and global nonwork.

- Helps to ensure that invalid dates aren't selected.
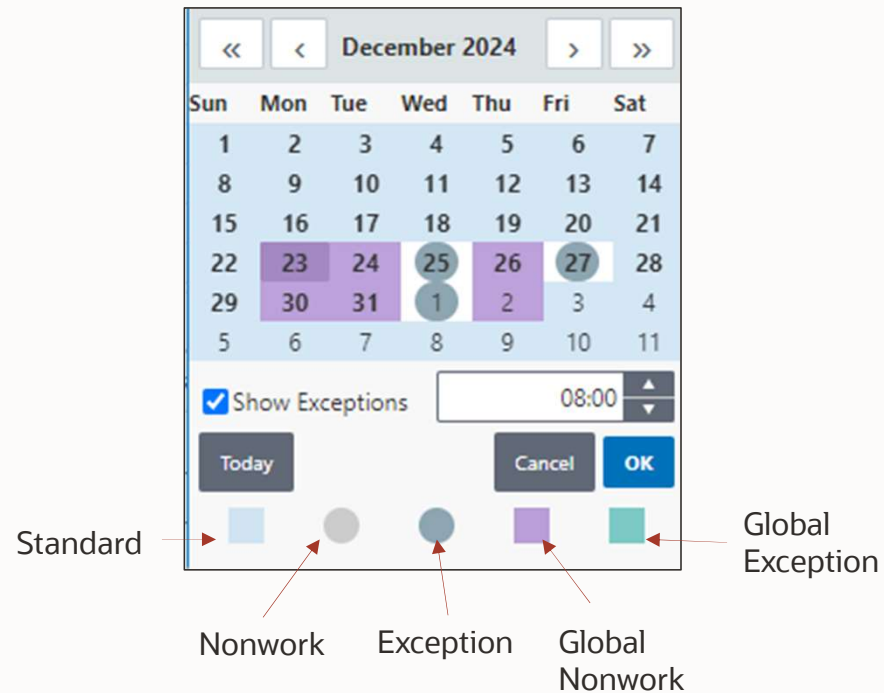
XER Import: UDF Import Options (Web)

- Control how UDFs are imported into your database when a match is found

- Standard options provided similar to other data types

- Useful when importing schedules from other companies

Alert users to out-of-sequence progress (Web & Team Member)

- New setting in Project Preferences in Web

- Will warn users when they update an activity in TM if the update puts the activity out of sequence

Visualizer: Draw Curtains (Client)
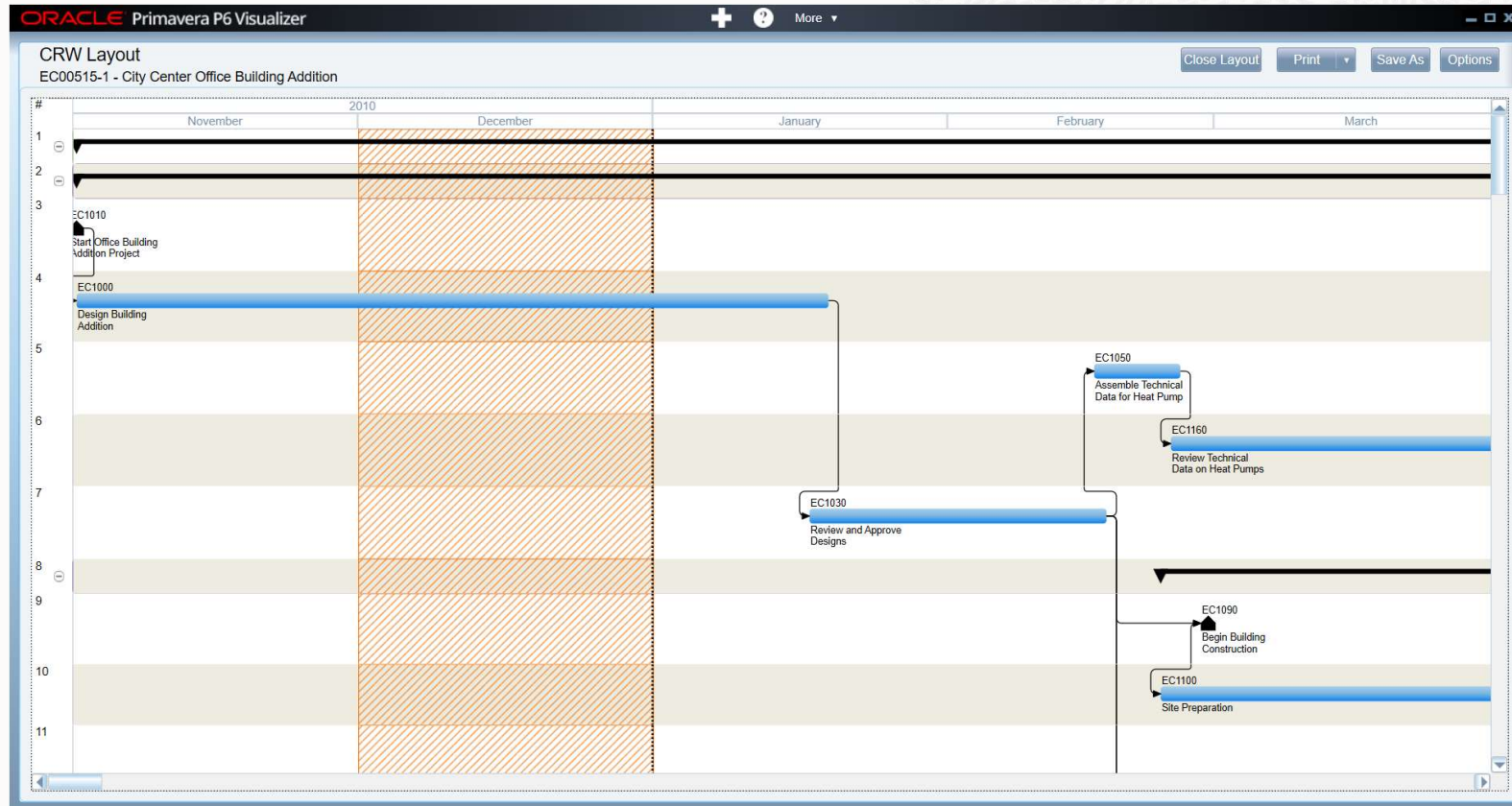
Exclude Inactive Resources when calculating Role Limits (Client & Web)

- Applies when calculating Role Limits based on the limits of Primary Resources assigned to the role
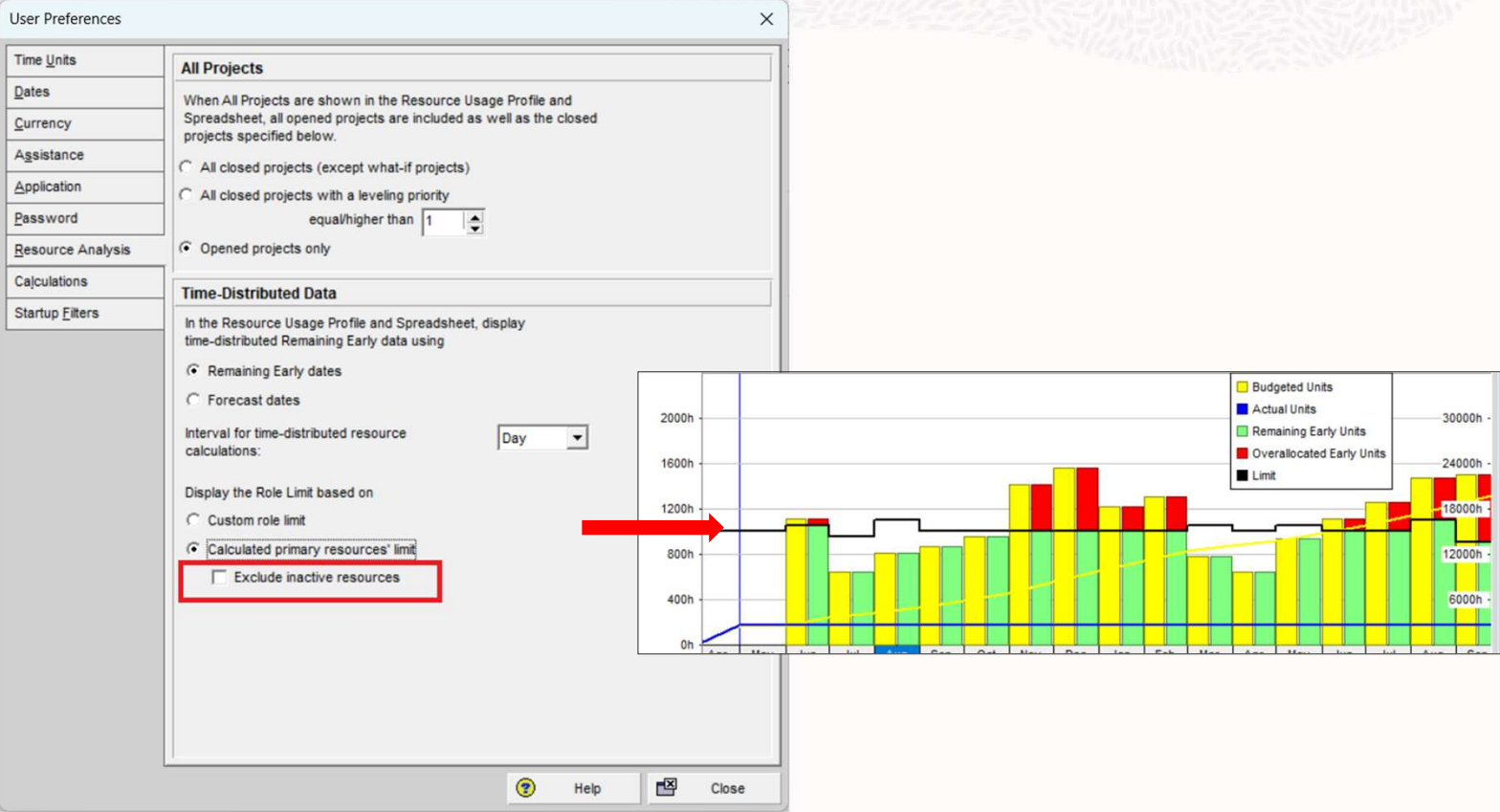
Additional P6 Enhancements

Client

- **Copy data from Excel to P6**
  Copy data in CSV format in Excel to P6 spreadsheet views.

- **Display Project Count in EPS view**
  See the count of projects rolled up to the EPS.

- **XLS Import – Allow for all privileged users**
  Currently only Project Superusers can import XLS files.

Web

- **Save EPS-level Project Preferences**
  Save edits and use as defaults for new projects.

- **Export Service – Option to not overwrite previous files**
  Provide an option to add a timestamp to the file name to make file names unique. Can be used to archive schedule versions.

- **CPP Export of multiple projects**
  CPP export enhanced to support exporting multiple projects at the same time.

- **Update Resource Rates when Currencies change**
  Option to update resource rates in the Base Currency when the resource currency exchange rate changes.

- **Import Options: Document Categories and Statuses**
  Greater control over how document categories and statuses are imported through XML and XER.

- **Team Usage: Codes and UDFs**
  Detail windows for Codes and UDFs to view codes and UDFs assigned to the resource, role, or project.

- **Usage Analysis for Currencies**
  Similar to capabilities added previous year for other dictionaries. Determine where currencies are being used.

Team Member/Mobile

- **Pending Status Update and Timesheet Reports**
  Generate reports that show which status updates or timesheets are pending review and who is responsible.

- **Display Project Codes and UDFs in My Activities & Mobile**
  Support displaying project codes and UDFs on the My Activities page.

- **Prevent TM users from seeing discussions or entering negative hours in Timesheets**
  New configuration options for TM administration.

- **Mobile: Edit subordinate resource Timesheets**
  As Resource Manager, edit the timesheets of your subordinate resources from the mobile app.

- **Fill Down on Status Reviewer**
  Support fill down for the Status Reviewer field on the Projects page.

- **Improved Search in Team Member Web**
  More flexible search criteria and options.

- **P6 for iOS uses default email client**
  Previously Apple Mail client had to be used.

OPC 2023 Enhancements

Subhead goes here

 [Date]

Oracle Primavera Cloud Features

Schedule
- ✓ Schedule Health Check
- ✓ Historical Baselines
- ✓ What-if Scenarios
- ✓ Schedule Comparison
- ✓ Visibility to Tasks
- ✓ Manage Programs

Tasks
- ✓ Digital/Virtual pull-planning
- ✓ Integrated with CPM Schedule
- ✓ Manage Constraints
- ✓ Real-time Analytics

Risk
- ✓ Qualitative
- ✓ Quantitative
- ✓ Program Risks
- ✓ Integrated with CPM Schedule

Support
- ✓ Client Success Manager
- ✓ In-App Help menu
- ✓ In-App Training Center
- ✓ Training Videos
- ✓ Online Resources
- ✓ OCS Setup SKU

Connect – Empower - Synchronize

[Nov 2023]

OPC Schedule & Resource Enhancements

                    [Date]

Manage WBS on Activities page

The Challenge:
- Users can't manage the WBS in Schedule Scenarios or Baselines. The same WBS is used for all versions of the schedule.

The Capability:
- Manage the WBS hierarchy and basic WBS metadata right in the Activities view.

The Benefit:
- Don't have to bounce between Activities and WBS pages. Each version of the schedule can have a unique WBS hierarchy. Fully leverage schedule scenarios for Time-Impact Analysis and What-if planning.

Merge different versions of schedules in any direction

The Challenge:
- Can't merge selected changes between the current schedule, scenarios, and baselines.

The Capability:
- Using Schedule Comparison, review the differences between two different versions of the schedule, choose the changes you want to merge and merge them.

The Benefit:
- Run a Time Impact Analysis in a scenario, then merge to current schedule once approved. Import subcontractor status updates into a scenario, review and merge into current schedule. Merge approved scope changes into a baseline.
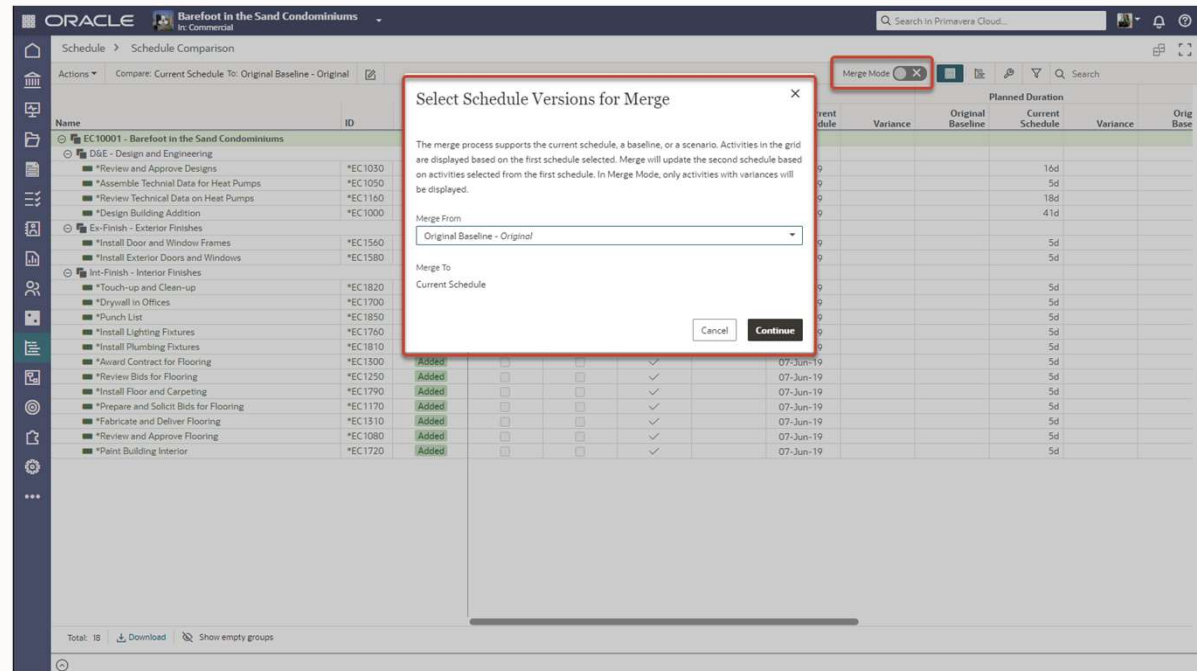
Video:
[Merge Mode video](#)

WBS Summary Activities

The Challenge:
- Users need ability to resource- and cost-load schedules at a higher level.

The Capability:
- The WBS Summary activity type summarizes all the activities in a WBS, similar to a WBS node.

The Benefit:
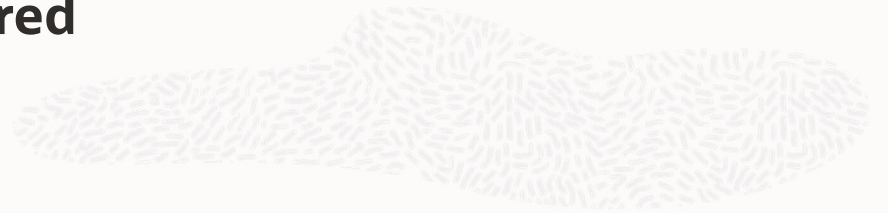- Manage resources and costs at a summary level so you don't have to resource- and cost-load every activity in the schedule.

Go to related activities when view is filtered

The Challenge:
- Can't view related activity information if an activity is filtered out of the view (for example in Relationships detail window).

The Capability:
- All activities are now hyperlinks; clicking the hyperlink will take you to the activity in the grid; if activity is filtered out of view it will be added to the grid.

The Benefit:
- Don't have to remove filters to view the details for related activities.
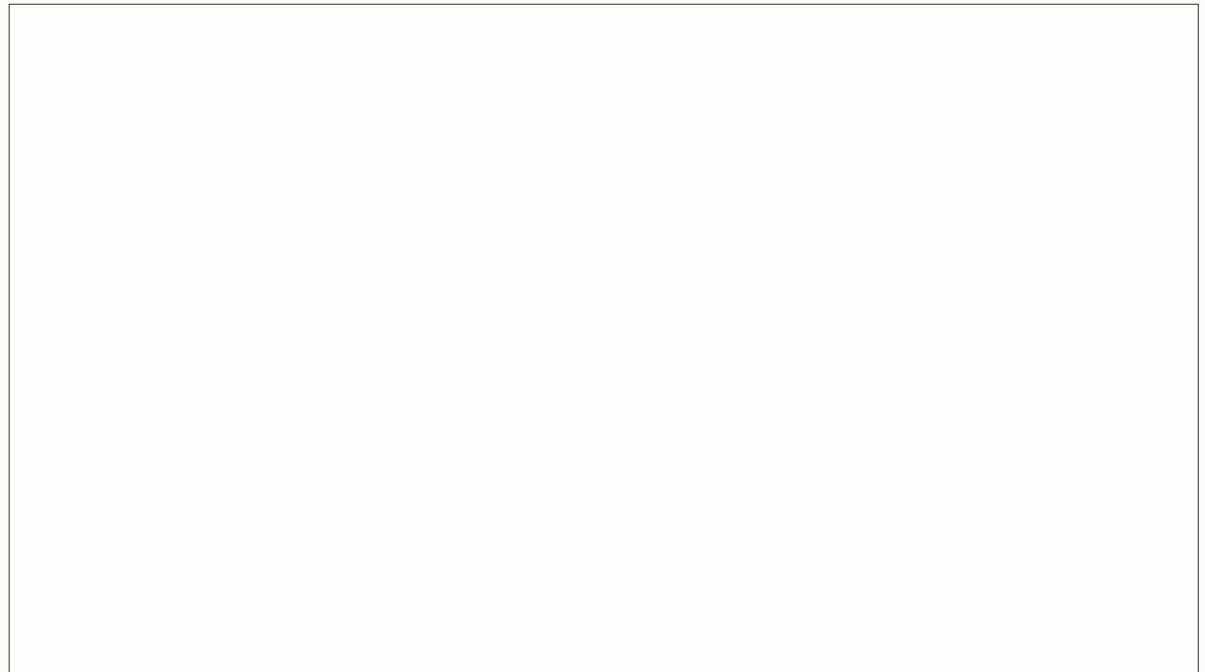
Enhanced Gantt Print Scaling Options

The Challenge:
- Users could not control the Gantt print output to fit the contents as well as they could in P6.

The Capability:
- Define the number of pages wide to fit the Gantt timescale on and zoom to a specific percentage.

The Benefit:
- Provides greater control over the print output, leading to more professional-looking Gantt print-outs.

"Collapse To" a grouping level
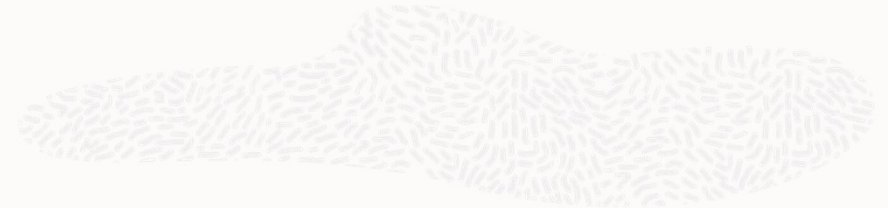
The Challenge:
- Takes too much time for users to expand/collapse individual grouping nodes when preparing the schedule for a printout or presentation.

The Capability:
- Expand/Collapse grouping nodes to a specific level. For example, collapse all WBS groupings to Level 3. State of this setting is saved with the view.

The Benefit:
- Save time when organizing the schedule, especially when preparing the view for printing or presentations.
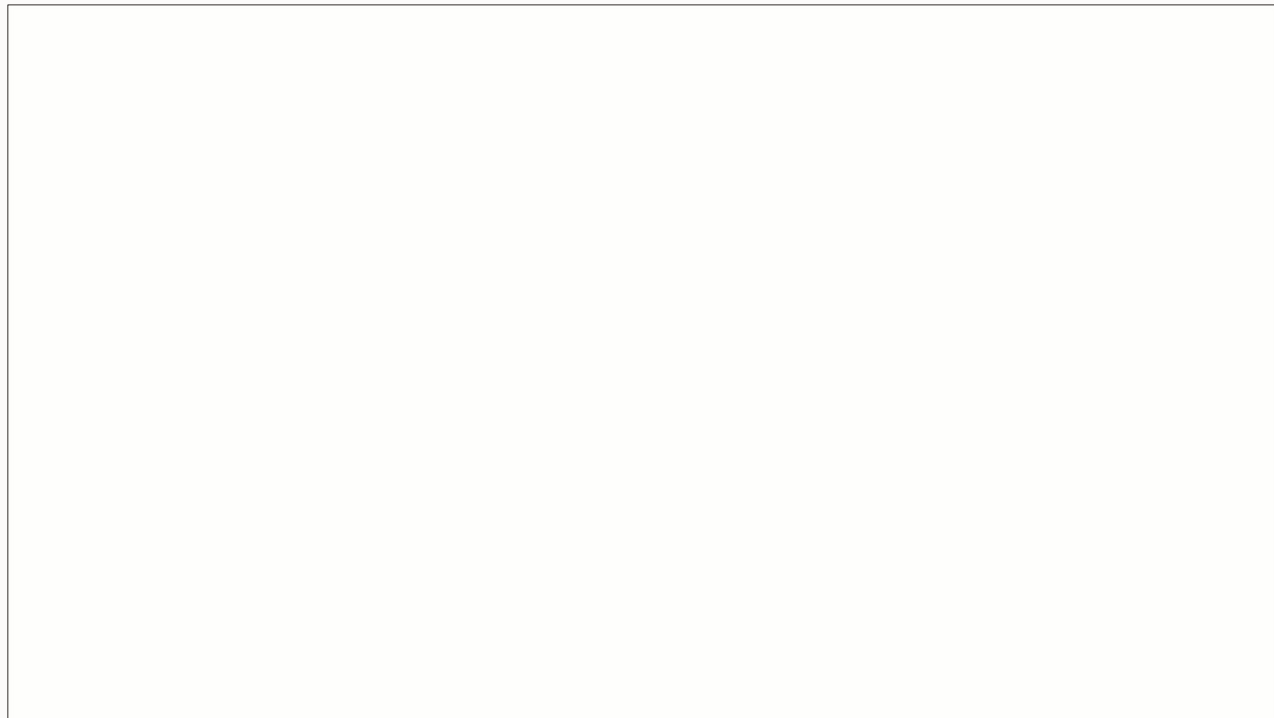
Add exception time to calendars in bulk
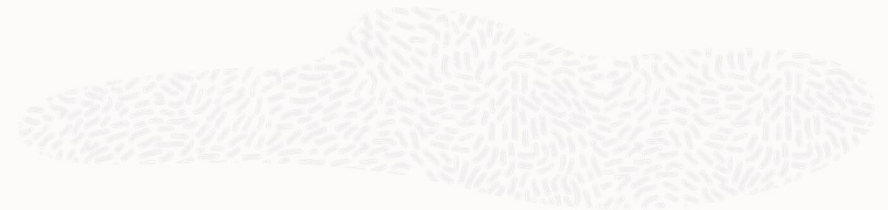
The Challenge:
- Exceptions have to be created individually which is inefficient when creating a range of exception dates.

The Capability:
- Ranges of dates that need to be created as exception time can now be created as one exception.

The Benefit:
- Saves time when creating calendar exceptions.
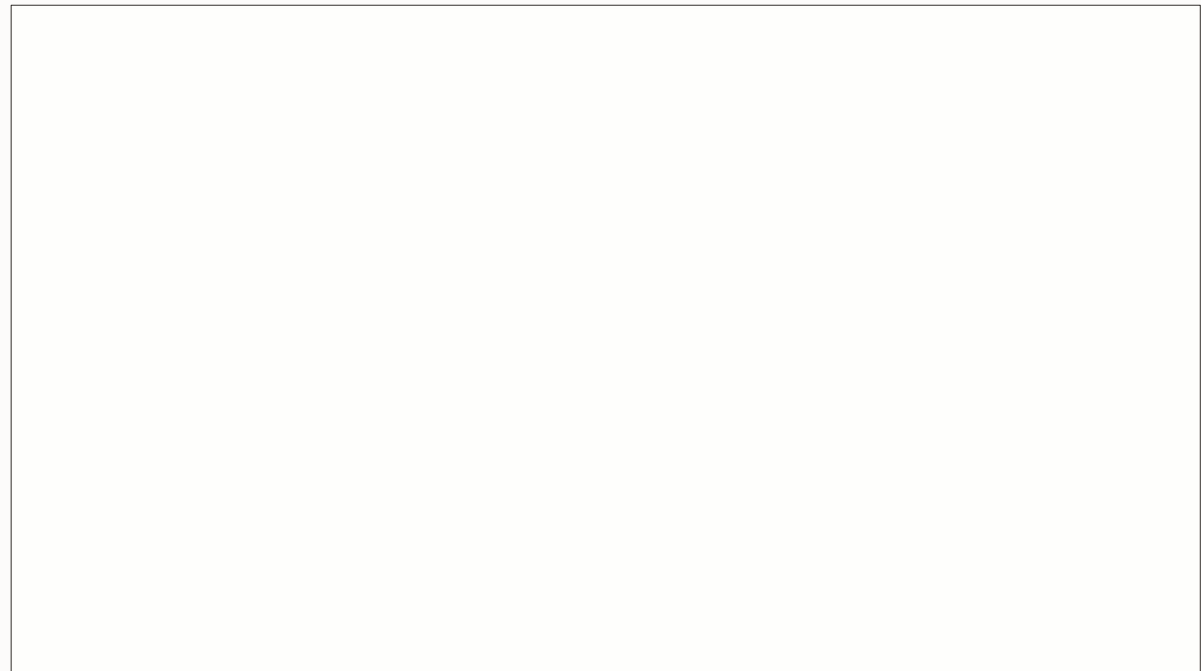
Assign resources to activities on Assignment List page

The Challenge:
- Can't create new assignments from the Assignment List page.

The Capability:
- Assign activities to resources & roles from the Assign Activities panel.

The Benefit:
- Provides a more resource- & role-centric view when creating resource assignments.
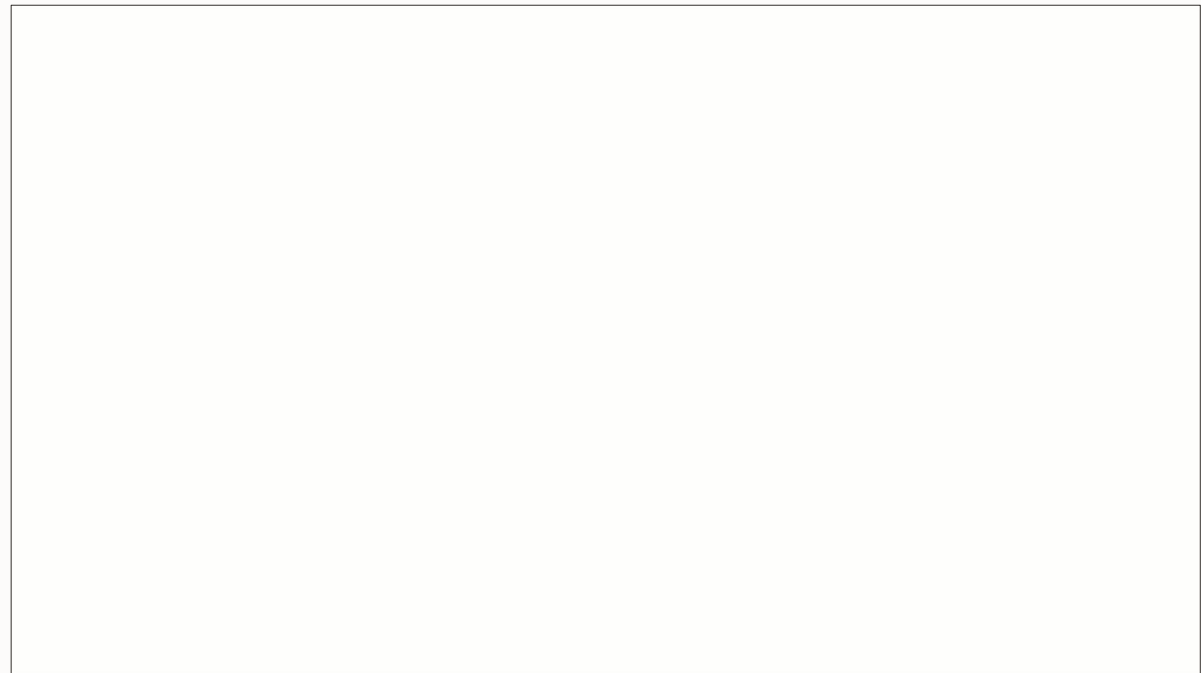
"Hide Empty Groups" toggle

The Challenge:
- Users frequently need to turn the "Hide if Empty" setting on and off but need to go into View Settings to do it.

The Capability:
- A "Hide Empty Groups" toggle has been added to the Activities and Schedule Comparison pages.

The Benefit:
- Save time by turning this toggle on and off as needed without having to go into View Settings.

Baseline Categories

The Challenge:
- No way to identify what a baseline represents besides the baseline name, and no way to standardize this terminology.

The Capability:
- The Baseline Categories dictionary is similar to Baseline Types in P6, and enables you to categorize baselines consistently across projects.

The Benefit:
- Categorize baselines to reference various stages of a project and standardize performance metrics across projects in your organization.

Additional Schedule & Resource Enhancements

- **Schedule Comparison now supports costs, codes, and configured fields**
- **Group by WBS hierarchy in Schedule Comparison**
- Activity Owner blank by default (previously defaulted to user who created activity)
- **Keep Predecessor and Success columns in sync in Relationships detail window**
- Cut/paste WBS on WBS page
- Baseline columns added to Projects page

- Add WBS from Project usability improvements
- Cancel Gantt Printing jobs
- **Baseline fields available in Configured Field formulas**
- "Not Started" filter for activities
- Assign multiple resources to an activity from Assignments detail window in Activities view

OPC <> P6 Import/Export Enhancements

 [Date]

P6 XER Import/Export

The Challenge:
- Customers are often contractually required to exchange data with other companies in XER format.

The Capability:
- Export OPC projects to P6 XER for import into P6; import P6 XER files into OPC.

The Benefit:
- Customers can meet their contractual obligations and use the import/export format they are most comfortable with.
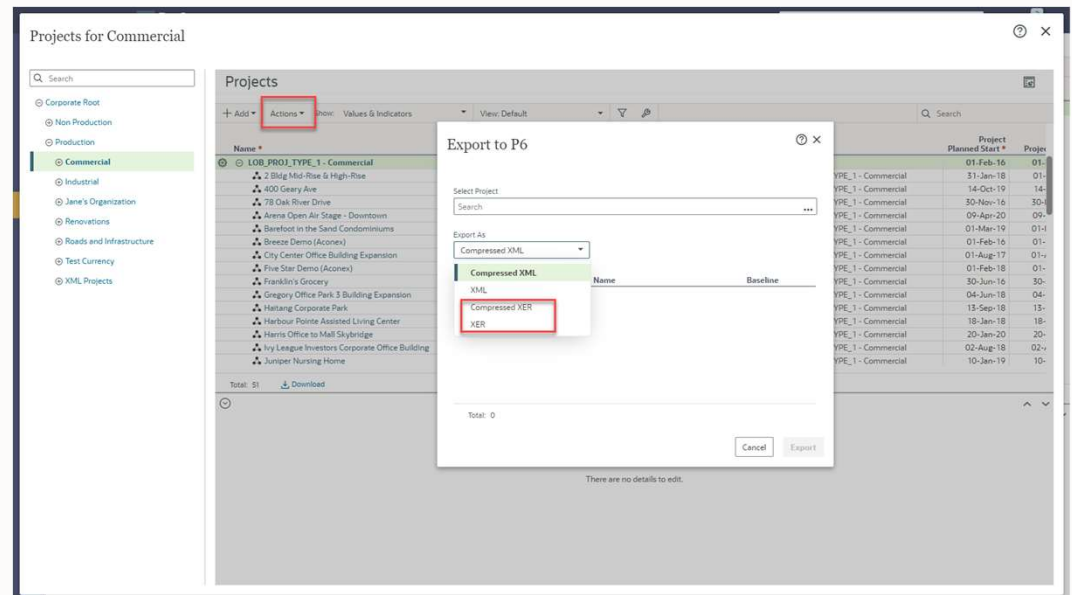
P6 XML: Export Scenarios

The Challenge:
- Can't include schedule scenarios when exporting a project to P6 XML.

The Capability:
- When exporting a project to XML, choose the scenarios you want to include with it. Import scenarios into P6 as baselines, or into OPC as baselines or scenarios.

The Benefit:
- Share all the versions of the schedule that you want to share when exporting a project.
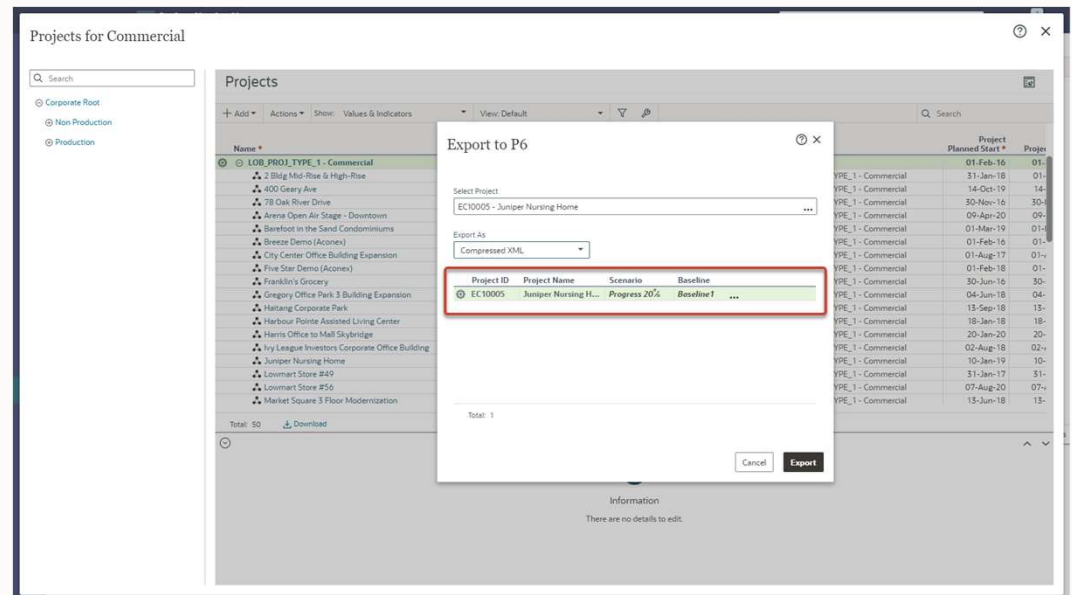
P6 XML: Export Baselines or Scenarios as Projects

The Challenge:
- Need to share a baseline or scenario schedule with another company but don't want to share the current schedule, for example a Time Impact Analysis done in a scenario.

The Capability:
- Export options to export a baseline or scenario by itself as a regular project; can be imported into P6 as a regular project, or into OPC as a project, baseline, or scenario.

The Benefit:
- Export just the version of the schedule that you want to share.
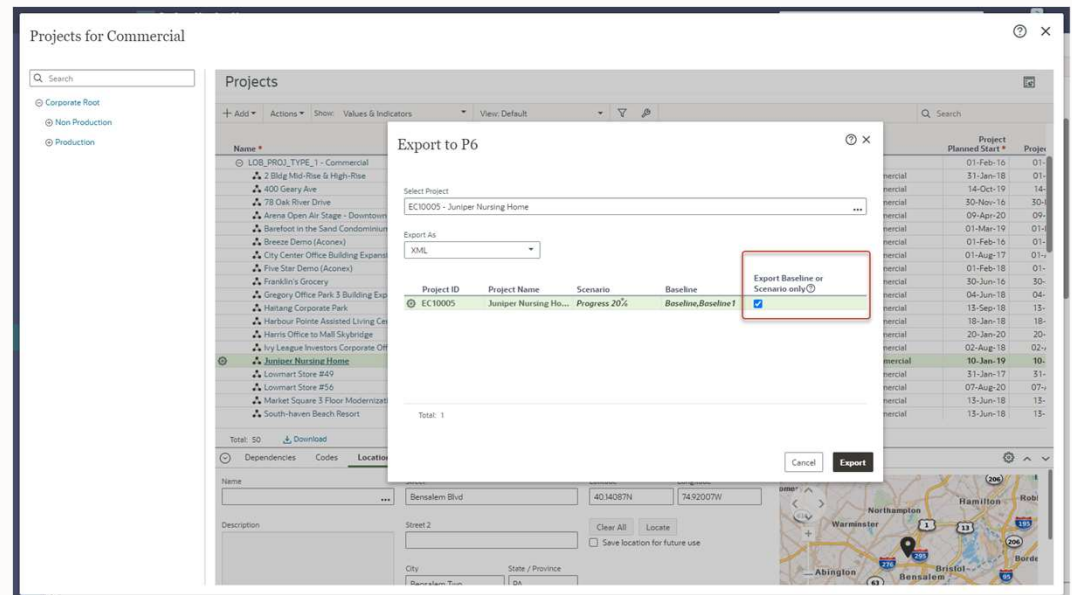
P6 XML: Import Flexibility

The Challenge:
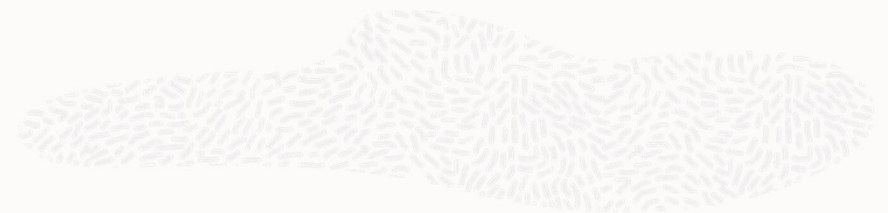- Need to be able to import a project schedule as a current schedule, scenario, or baseline.

The Capability:
- Import scenarios or baselines as current schedules, scenarios, or baselines. Import a current schedule as a scenario or baseline. Import a scenario or baseline into a different project.

The Benefit:
- Import flexibility enables users to import different versions of a schedule in whichever way is most appropriate, and supports larger processes such as Time Impact Analysis and collecting subcontractor status updates.
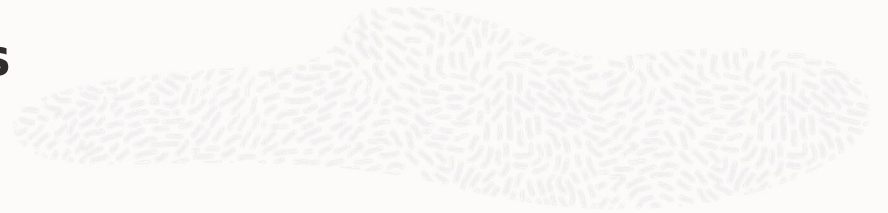
Video
[XML Import Flexibility video](#)

Additional Import/Export Enhancements

- XER: Import into OPC even when XER currency doesn't match OPC base currency
- XER: Support for additional languages when importing to reduce import errors
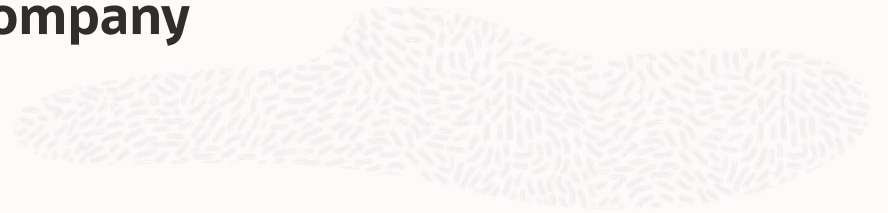
OPC Task Enhancements

 [Date]

Plan Tasks using Swimlanes by User or Company

Also available in Mobile

The Challenge:
- Field teams often plan tasks by person or company, but tasks can not be organized or planned this way in the Work Plan.

The Capability:
- Create Task Plans with Swim Lanes organized by User or Company. On the Work Plan page, move tasks from the hopper into the appropriate swimlane when planning work for the planning period.

The Benefit:
- Plan the field work similarly to how it's often planned out in the field. More easily identify workload distributions that are out of alignment.

Video
Swimlanes video

Work Plan Grouping Options

The Challenge:
- Can be a little difficult to find Tasks in the hopper on the left side of the Work Plan page.

The Capability:
- Group Tasks by Activity, Code, Company, or WBS in the Hopper.

The Benefit:
- Find the Tasks you want to plan more quickly and efficiently.

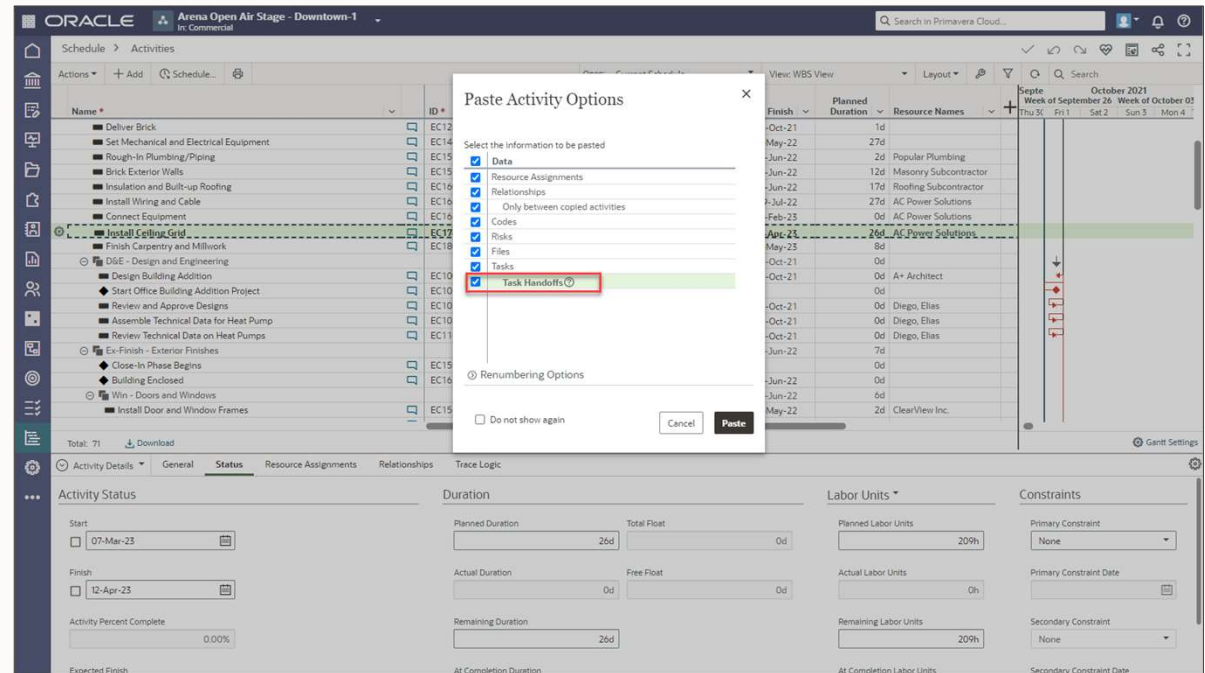# Copy Task Handoffs

The Challenge:
- When copying Tasks and Activities, and when adding a WBS from another project, Task Handoffs are not copied.

The Capability:
- Provide an option to copy Task Handoffs when running these processes.

The Benefit:
- Don't have to recreate Task Handoffs after copying activities, tasks, or WBSes.

Link OPC Task Constraints to Aconex Packages

The Challenge:
- Can't track the status of an Aconex package that's impacting a Task Constraint in OPC without logging into Aconex.

The Capability:
- Link OPC Task Constraints to Aconex Packages from within OPC, and view the package status in OPC.

The Benefit:
- Don't have to bounce between OPC and Aconex when trying to determine the status of packages that are impacting field work.
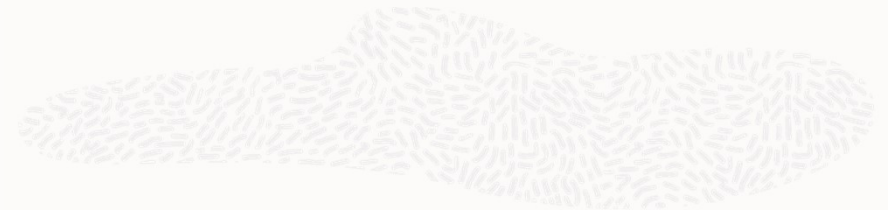

Video
Link ACX Packages to OPC Task Constraints video

Additional Task Enhancements

- Attach Files to Tasks on Task List page (web and mobile)
- Task Configured Fields support Formulas
- New Planning Period control
- Task Names on Activities page are now hyperlinks that take you to Task List page
- Pages in Task App navigation re-ordered

OPC Risk Enhancements

 [Date]

Risk Analysis Scatter Plot
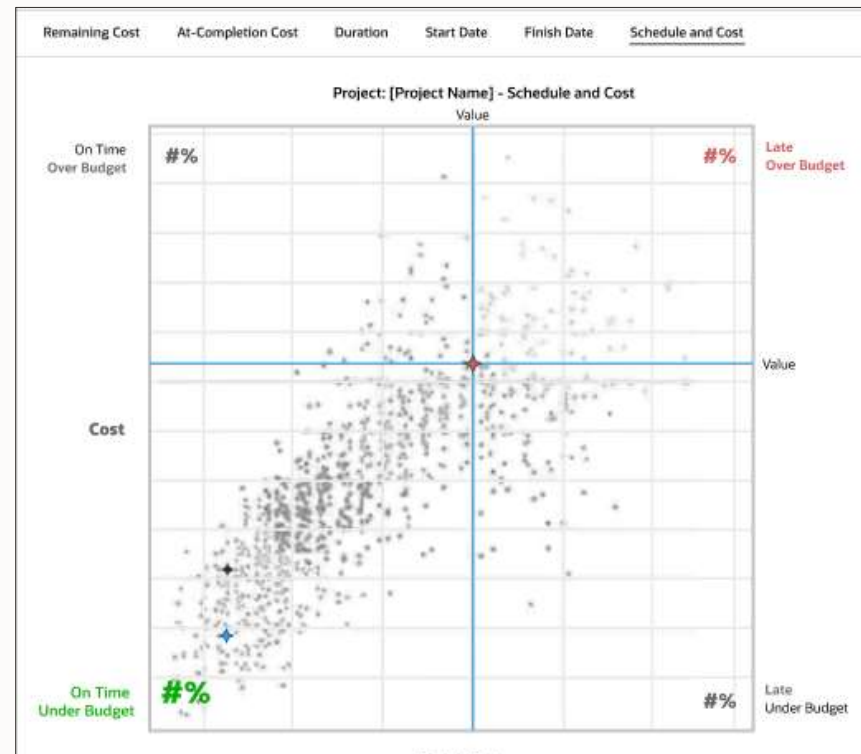
The Challenge:
- Can't graphically view the probability of the project finishing on time and budget, and can't set targets.

The Capability:
- Set date and cost targets, or enter confidence levels, and view the likelihood of achieving those targets based on Risk Analysis iterations.

The Benefit:
- Set realistic cost and date targets and track the project's progress against them.

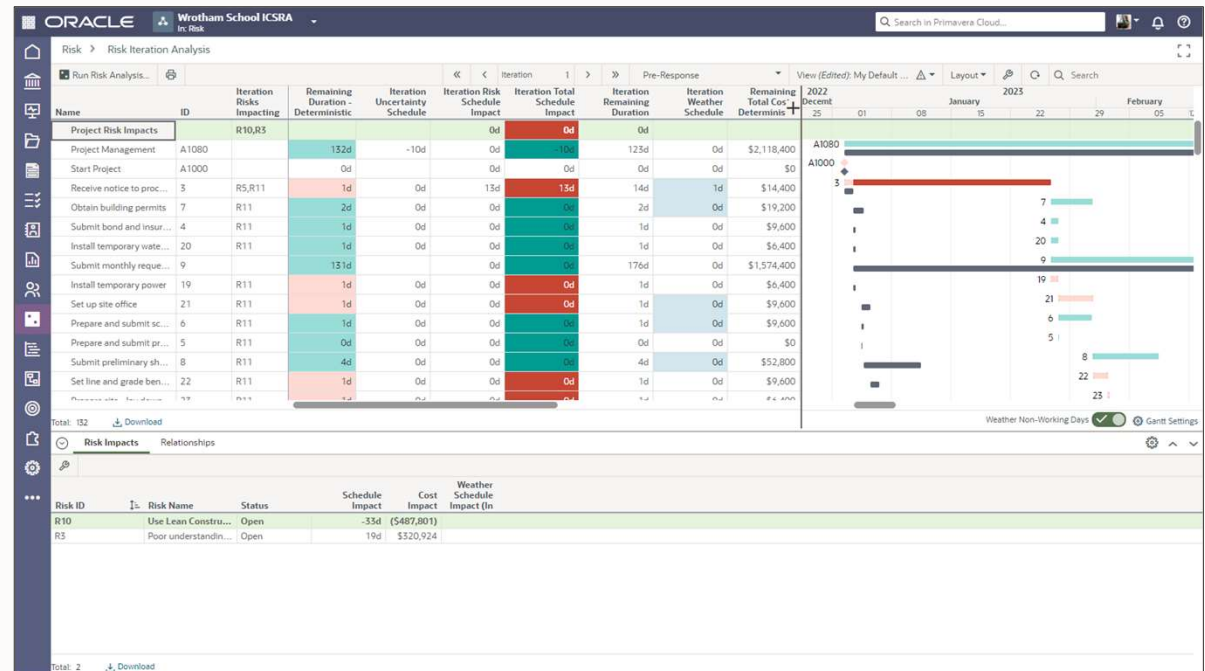# Risk Analysis – View Costs in Risk Iteration Analysis

The Challenge:
- Risk Analysis was enhanced to include schedule costs, but costs were not reflected in Risk Iteration Analysis.

The Capability:
- Risk impact on schedule costs are now available in Risk Iteration Analysis.

The Benefit:
- See per Risk Analysis iteration how costs are being calculated.

Risk Analysis – Schedule costs added to Mean Impact chart
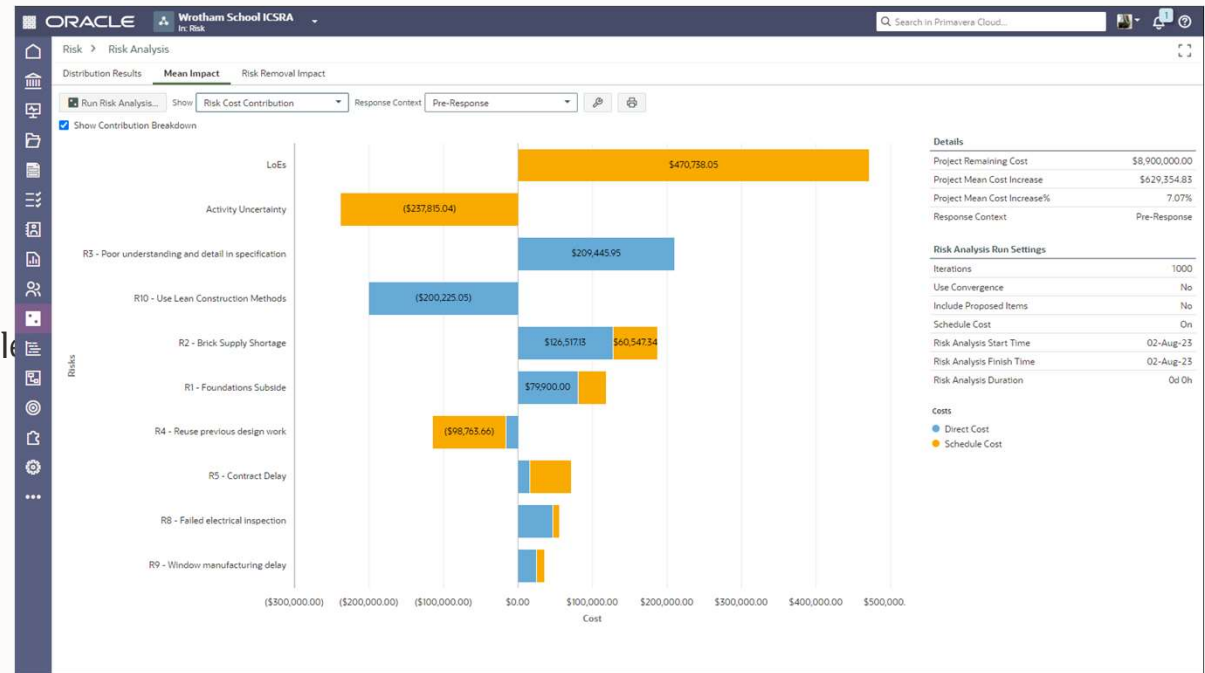
The Challenge:
- Schedule costs were not integrated with Risk Analysis; could not see how risks were impacting schedule cost increases.

The Capability:
- Mean Impact chart on the Risk Analysis page now includes how risks are impacting schedule costs.

The Benefit:
- Integrated cost & schedule Risk Analysis for more holistic risk impact analysis.

# Weather Risks added to Mean Impact chart

The Challenge:
- Can't accurately what is driving a project duration without factoring in Weather Risks.

The Capability:
- Weather Risks are now included in the Mean Impact chart alongside Threats and Opportunities.

The Benefit:
- Determine which risks and activities, now including weather risks, that have the greatest average impact on project duration and cost.
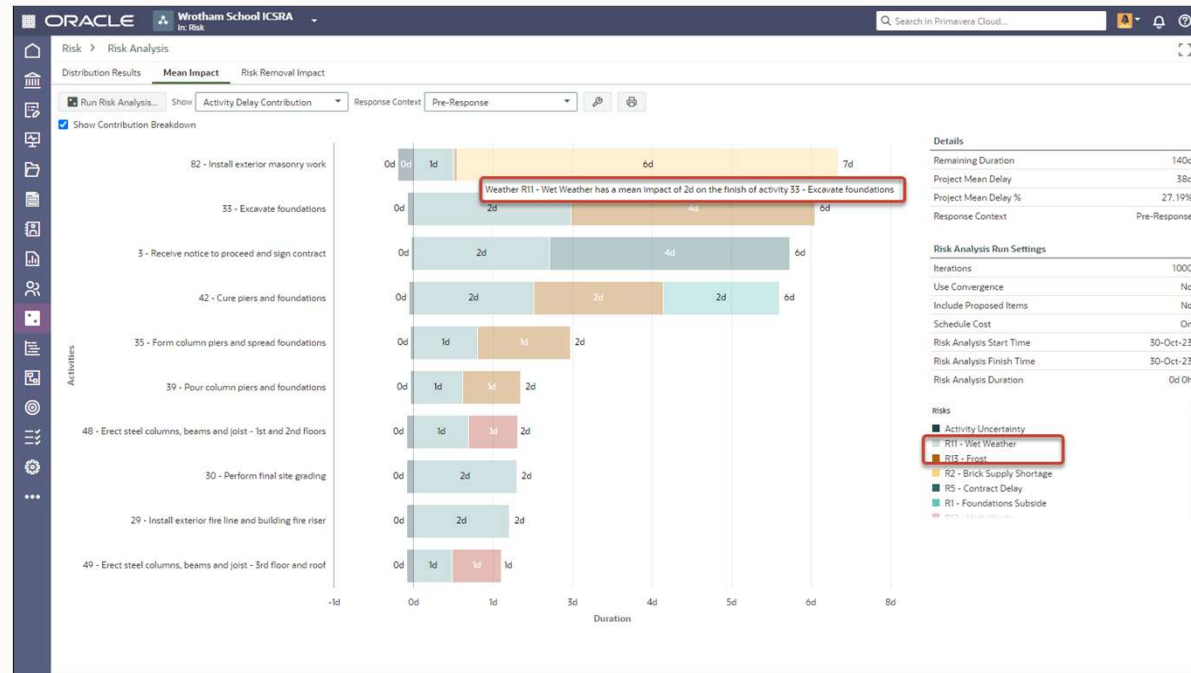
Additional Risk Enhancements

- Fill Down in Risk Register
- View Risk Exposure Start and Finish dates on the Risk Register page
- Risk data synchronized with activity data when scheduling
- "Retried" status for Risk Analyis jobs
- Resource Assignment data added to Risk Iteration Analysis
- Pre- and Post-Response data cleared when a new Risk Analysis is run
- Risk Cost Contribution chart now has an "Other" bar to capture costs not caused by risk or uncertainty.

- Risk Iteration Analysis page supports grouping
- Exclude risks from Risk Removal Impact calculations during Risk Analysis runs
- View the Start, Finish, and Duration of the most recent Risk Analysis run on the Risk Analysis page

OPC Mobile Enhancements

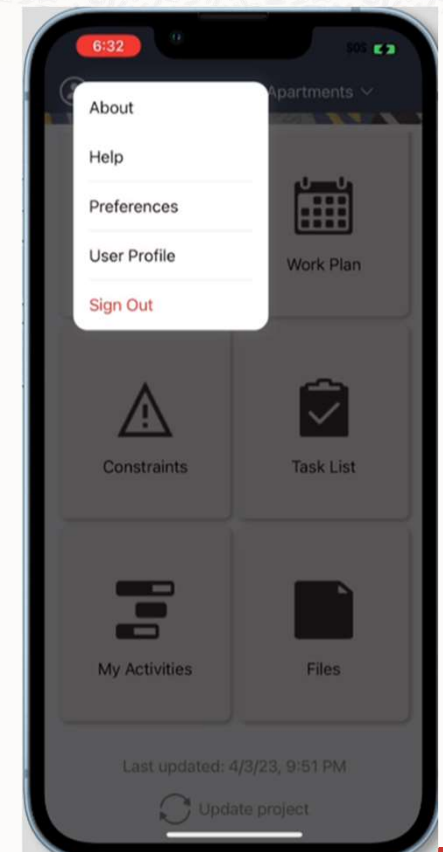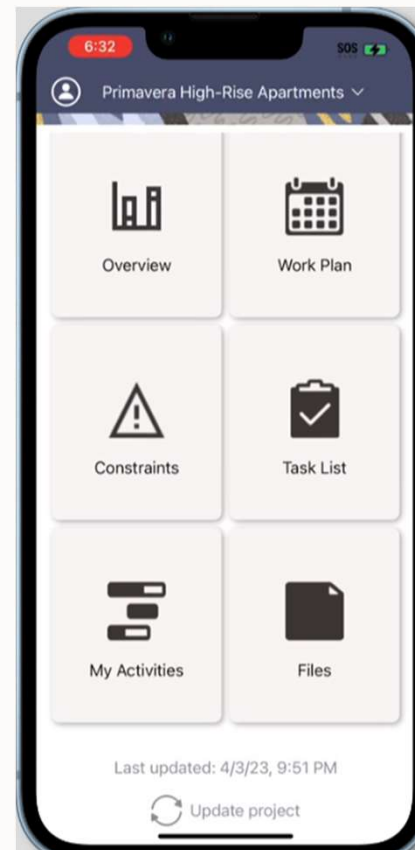   [Date]

Redesigned Home page

The Challenge:
- Mobile app navigation not as intuitive as it could be.

The Capability:
- Left-hand navigation replaced by tiles on the Home page; additional options available by tapping the user icon.
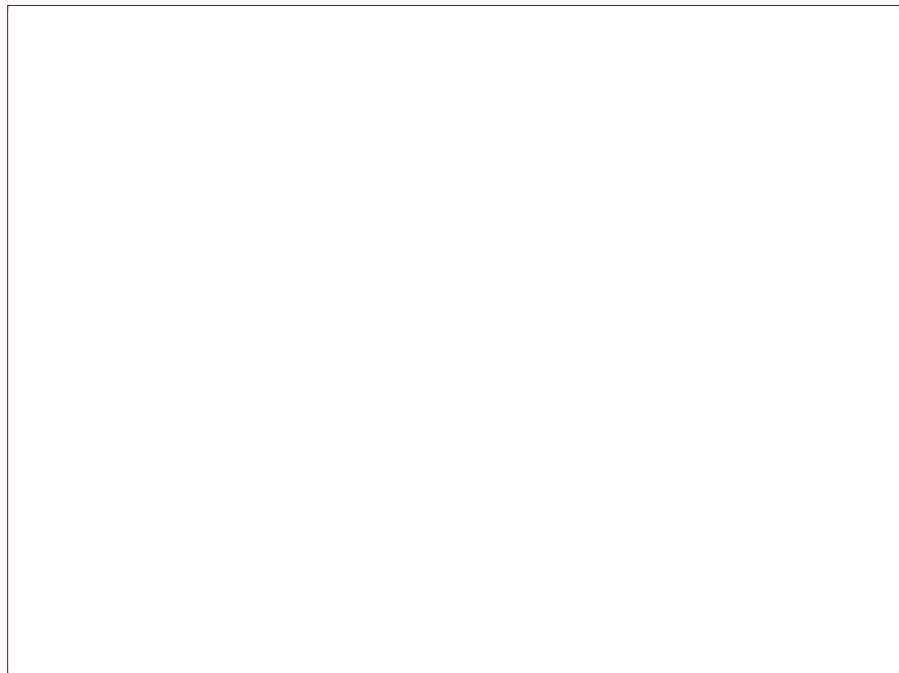
The Benefit:
- Easier and more intuitive navigation more in line with current mobile app standards.

View and print entire Planning Period in Work Plan Report

The Challenge:
- Can only view and print the current week from the Work Plan Report in the mobile app. Don't have flexible printing options.

The Capability:
- Display and print the entire Planning Period (x number of weeks). Set the range of time to print and choose page fit options.

The Benefit:
- Don't have to go to the web version of OPC to view and print this information.
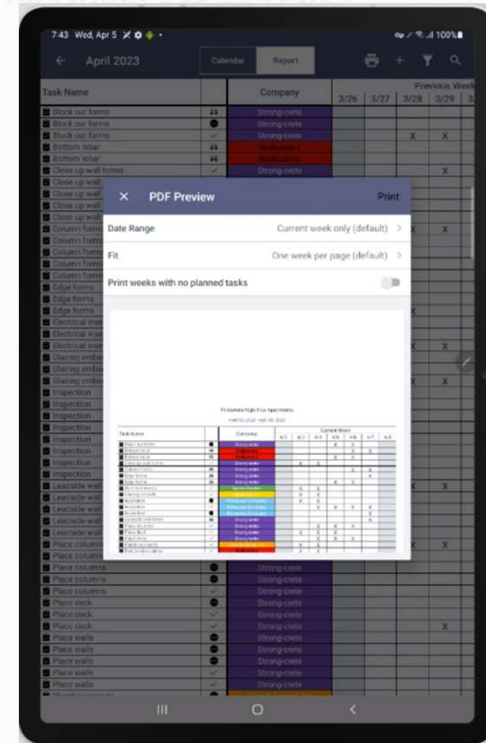
Attach Files to Tasks from the Work Plan

The Challenge:
- Can't attach photos and files to tasks while working out in the field.

The Capability:
- Attach photos, videos, and audio files to tasks right from the Work Plan page.

The Benefit:
- Provide supplementary information about task progress while out in the field.
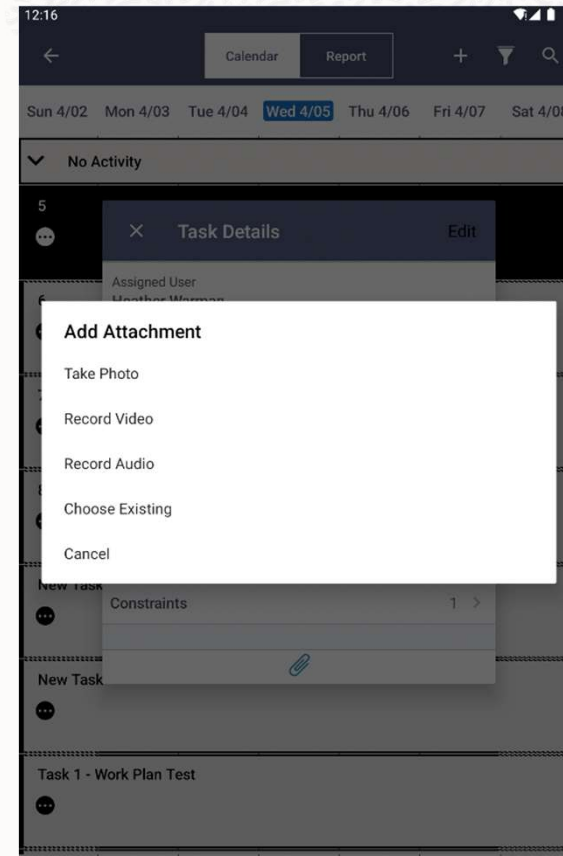
Hierarchical Pick Lists

The Challenge:
- Hierarchical lists, such as the WBS or Codes, were displayed in a flat list, making it more difficult to find the correct item to filter by or assign.

The Capability:
- Hierarchical lists are now displayed by hierarchy when filtering by or selecting them.

The Benefit:
- View hierarchical lists as they were intended so that you can find the hierarchical item you need more easily.
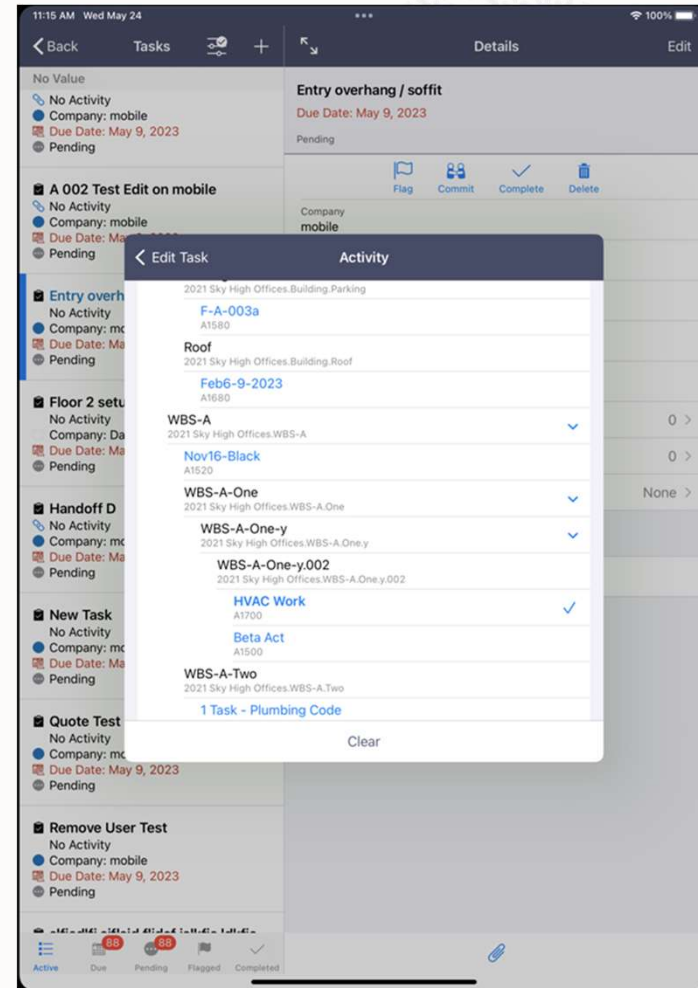
Additional Mobile Enhancements

- Image/File annotation capabilities on Android
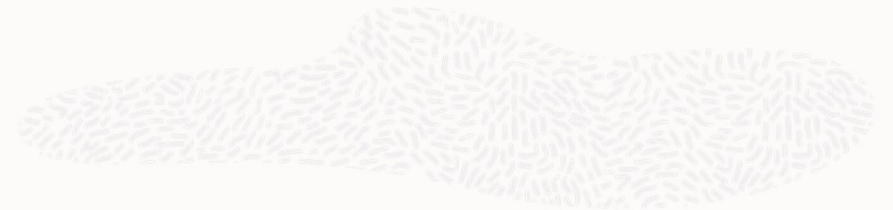
OPC Platform & Admin Enhancements

 [Date]

Move Workspaces

The Challenge:
- Workspace hierarchy is inflexible; can't move a workspace once data exists in it. Things change and workspace hierarchy needs to reflect that.

The Capability:
- Move a workspace under a different workspace parent; options to move or copy workspace-level dictionary data.

The Benefit:
- Reflect changes to your organization or project management processes in the workspace hierarchy when needed.

Video:
[Move Workspaces video](#)

Add Hyperlinks to Text Fields

The Challenge:
- Can't provide links to other areas of OPC or to external sites when wanting to provide additional information.

The Capability:
- Add hyperlinks in any text field in grids/tables and in Discussions.

The Benefit:
- Provide additional or supporting information wherever it is needed.

Video
Hyperlinks in Text Fields video

Workspace Currency

The Challenge:
- Portfolios could only be managed in the Base Currency; Projects could not be easily segmented by currency

The Capability:
- Assign a currency to NEW workspaces; child workspaces inherit by default; portfolios use WS currency, projects use it by default

The Benefit:
- Portfolios can be managed in the WS currency, and portfolio costs can be viewed in WS or Base. Project costs can be viewed in Project, Base, or WS currency on many screens (but not all).

Cost Configured Field (UDF) Multi-currency

The Challenge:
- Configured Field costs were only available in the Base Currency; other cost fields supported Project and Workspace currencies too.

The Capability:
- Support Base, Workspace, and Project Currencies for Cost Configured Fields.

The Benefit:
- No mismatch of currencies when viewing Configured Field costs along with costs stored in system fields.

Restricted Configured Fields

The Challenge:

- Customers have no way to provide a user with the ability to see Configured Fields but not be able to edit them. Editing controlled by object privileges.

The Capability:

- Any Configured Field can be marked as Restricted for Portfolio, Program, and Project Configured Fields. Only privileged users can edit Restricted Configured Fields, but all users can view them.

The Benefit:

- Users can see important Configured Field data, but who can edit that data can now be controlled.

Provide Public API and Gateway access to selected users
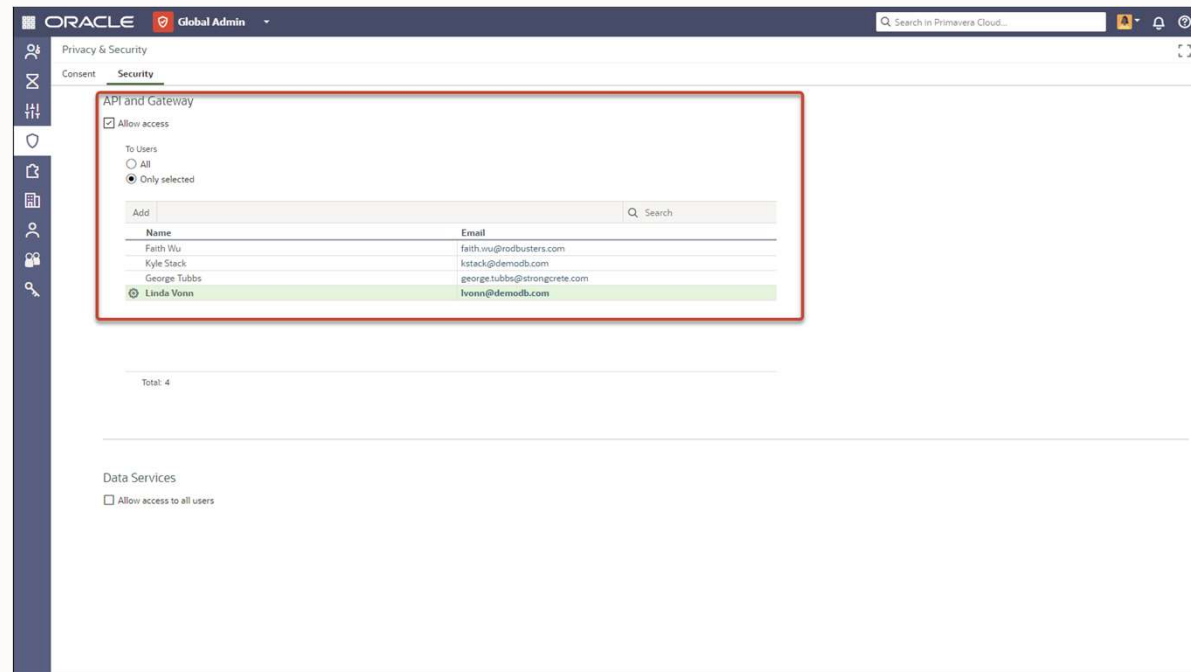
The Challenge:
- Access to the Public API & Gateway was all or nothing. If the API & Gateway were enabled in general, all users could access it.

The Capability:
- A new option has been added in Global Admin to specify who has access to use API and Gateway. Select the option to allow all users or select which users can have access.

The Benefit:
- Greater control over who can move data in and out of OPC through the API or Gateway.

License columns added to Users page

The Challenge:
- Admins couldn't easily see or update the licenses enabled for all users in one place.

The Capability:
- Columns representing each OPC license have been added to the Users page for viewing, editing, and downloading.

The Benefit:
- Can save a lot of time when updating assigned licenses for multiple users at once, or when validating existing licenses.

Additional Platform Enhancements

- **Rolling date filters in Reports**
- Discussion notification links take you directly to the object being discussed (e.g., an activity)
- Program Image/Logo
- Define scale for Dashboard charts
- Read/Unread status kept in sync for Notifications and Inbox
- Timeframe filter added to Manage Services
- Enhanced Printing added to Projects page
- **Share reports to child workspaces**
- Retain folder structure when downloading files

- **Assign any user from any company as an App Admin**
- User Type now an available column on Users page
- Any Company available in the Lobby is now available in OPC (for example, companies created in Aconex can be used in OPC).
- When running multiple Primavera applications, when one times out it no longer causes the others to time out

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