

ORACLE

What's New in P6 and OPC 2023

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P6 2023 Enhancements

Subhead goes here





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.

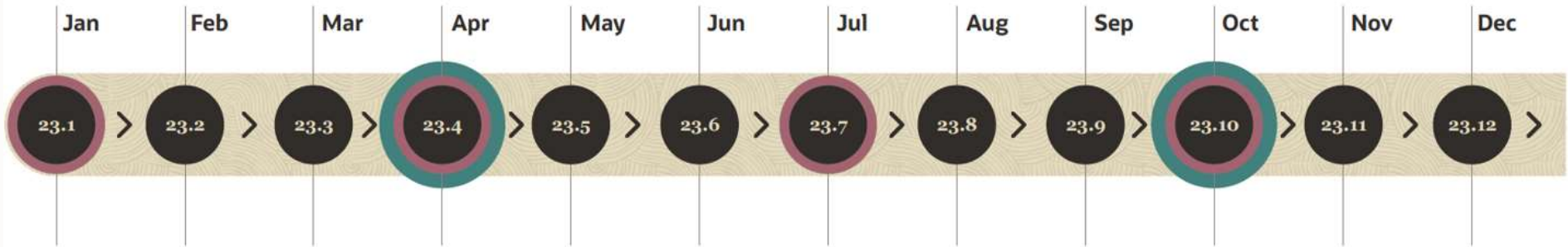
- IT Support Needed
- Hardware Setup Cost
- Security Measures (Internal Users & External)
- Manual Upgrades of New Versions & Patch Sets
- Maintain Connectivity
- Annual Upgrade Only

- 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



Bug Fixes Monthly Release
 CPU Release Quarterly Release
 Feature Release Semi-annual Release

Release number example
 Year (2023)
 Month (January)

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.

<p>Oracle-Scheduled Updates:</p> <p>If your environment is 3 versions behind the GA release, you'll be assigned an update window.</p> <p>Oracle-scheduled updates will:</p> <ul style="list-style-type: none"> • Update all environments at the same time • Typically occur on a weekday evening 	<p>Customer-Requested Updates:</p> <p>Enter a Service Request (SR) requesting update <i>prior</i> to being 3 versions behind the GA release.</p> <p>With requested updates, you can:</p> <ul style="list-style-type: none"> • Split non-production and production environments on different days for testing • Request a weekend update for a production environment • Schedule more frequent updates
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Project Checker (Client & Web)



Project Checker

Select Projects

Available Projects

Selected Projects

Options

Report

Run Report

Project Check Report generated for CRW Scope Project-

1,IT00112,IT00783,IT00829,IT00727,IT00800,IT00992,IT00731,IT00065,IT00351,IT00509,CORP00595,CORP00852,CORP00384,CORP00591,CORP00424,CORP00307,CORP00103,CORP00768,CORP00118,CORP00712,Level 1,Level 2,CRW Act Start Test,Loop test,EC00515-1,EC00530,EC00501,EC00610,EC00515,EC00620,EC00630,400124225,CRW Scope Project,P6 v20 to OPC,NEWPROJ,Update unit test-4,NRG00870,NRG00950,NRG00800,NRG00940,NRG00820,NRG00910,MFG00337,MFG00772,MFG00925,MFG00189,MFG00497,MFG00659,CM-2,Update unit test,Copy Test,Copy Test-1,planned start,planned start-1,Update unit test-1,Update unit test-2,PROD00914,PROD00111,PROD00228,PROD00516,PROD00752,PROD00266,PROD00414,PROD00481,PROD00883,PROD00499,Update unit test-3,S Curve,CM-1,Switch_VLSI_DP-4

Type	Important	Significant	Moderate	Low
Business Rule Checks	6	1	0	0
Foreign Key Checks	0	0	0	0
Unique Key Checks	0	0	0	0
Total	6	1	0	0

Click here to view all results

Expand All

Business Rules Check

- Project Data Date is before Project Planned Start Date [Show Sql](#) [Show Table](#) (35 occurrences)
- Not Started Resource Assignment has an Actual Finish Date [Show Sql](#) [Show Table](#) (6 occurrences)
- Not Started Resource Assignment Remaining Start Date is blank [Show Sql](#) [Show Table](#) (196 occurrences)
- Not Started Resource Assignment with Remaining Finish Date is blank [Show Sql](#) [Show Table](#) (323 occurrences)
- Milestone Activity has Actuals [Show Sql](#) [Show Table](#) (971 occurrences)
- Not Started Activity has Actual Finish Date [Show Sql](#) [Show Table](#) (1 occurrences)
- Not Started Activity Remaining Start Date is blank [Show Sql](#) [Show Table](#) (470 occurrences)

Foreign Key Checks

Unique Key Checks



Export to CPP & CPP Templates (Client & Web)

Export Format

Select the export format.

- Primavera PM - (XER) 23.12 or later
- Primavera Contractor - (XER) 6.1 or later
- Primavera P6 - (XML)
- Spreadsheet - (XLSX)
- Microsoft Project XML 2002/3
- UN/CEFACT Format 6 - (XML)
- IPMDAR Format
- CPP Format**

CPP Template

Template Name

Project

- Schedule
- Schedule Logic
- Schedule Resources
- Schedule EU
- Schedule Calendar Std
- Schedule Calendar Exception

DS04 - schedule

This data set should be populated with the project's contractor BL and FC IMS tool data for the entire span of the project (not the contract). Provide the contractor BL and FC IMS tool data by task. There should be alignment between the BL and FC IMSs.

Field Name	Locked	Field Mapping
PARSID	<input checked="" type="checkbox"/>	1
CPP_Status_Date	<input checked="" type="checkbox"/>	2024-01-12
Schedule_Type	<input checked="" type="checkbox"/>	Calculated Field
task_ID	<input checked="" type="checkbox"/>	Activity ID
type	<input checked="" type="checkbox"/>	Activity Type
description	<input type="checkbox"/>	Activity Name
subtype	<input type="checkbox"/>	
milestone_Level	<input type="checkbox"/>	
milestone_Level_description	<input type="checkbox"/>	
WBS_ID	<input type="checkbox"/>	WBS Path utilizing WBS code separator
justification_WBS	<input type="checkbox"/>	
CAM	<input type="checkbox"/>	Activity Owner / Project Owner
EVT	<input type="checkbox"/>	
justification_EVT	<input type="checkbox"/>	

Description

Ok Cancel



Export to XER as a Scheduled Service (Web)

Scheduled Services

Global Project

Add Run Service View Log Move Up Move Down

Apply Actuals

Service

- Publish
- Export Primavera XML
- Export Primavera XML
- Export Primavera XML
- Level
- Project Checker
- Export Primavera XML
- Schedule
- Publish
- Schedule
- Summarize

Export Primavera XER

Application Settings Enterprise Data **Scheduled Services** User Administration User Interface Views

Scheduled Services

Global Project

Add Run Service View Log Move Up Move Down Search

Name *	Service	Enabled	Status	Last Run	Next Run	Owner
All Projects	Publish	<input checked="" type="checkbox"/>	Completed	12-Jan-24 00:00 GMT...	13-Jan-24 00:00 GMT...	Brian Robbins
New Service	Export Primavera XML	<input checked="" type="checkbox"/>	Download File	11-Jan-24 17:00 GMT-0	12-Jan-24 17:00 GMT...	Enache Eduard
New Service - 1	Export Primavera XML	<input checked="" type="checkbox"/>	Download Zip	11-Jan-24 17:03 GMT-0	12-Jan-24 17:00 GMT...	Enache Eduard
New Service - 2	Project Checker	<input checked="" type="checkbox"/>	Download File	12-Jan-24 00:02 GMT...	13-Jan-24 00:00 GMT...	Brian Robbins
CRW XML export	Export Primavera XML	<input checked="" type="checkbox"/>	Download Zip	12-Jan-24 00:01 GMT...	13-Jan-24 00:00 GMT...	Chad Wattendorf
Test MtsHit	Schedule	<input checked="" type="checkbox"/>	Completed	12-Jan-24 15:00 GMT...	13-Jan-24 15:00 GMT...	Chad Barone
MtsHit	Publish	<input checked="" type="checkbox"/>	Completed	12-Jan-24 00:00 GMT...	13-Jan-24 00:00 GMT...	Michael Hifferty
XER Export	Export Primavera XER	<input checked="" type="checkbox"/>	Pending	12-Jan-24 00:00 GMT...	13-Jan-24 00:00 GMT...	Chad Wattendorf

Download

Service Settings Project Settings Service Summary

Schedule Settings

Run Service: Daily

Start Time: 00:00 GMT-05:00

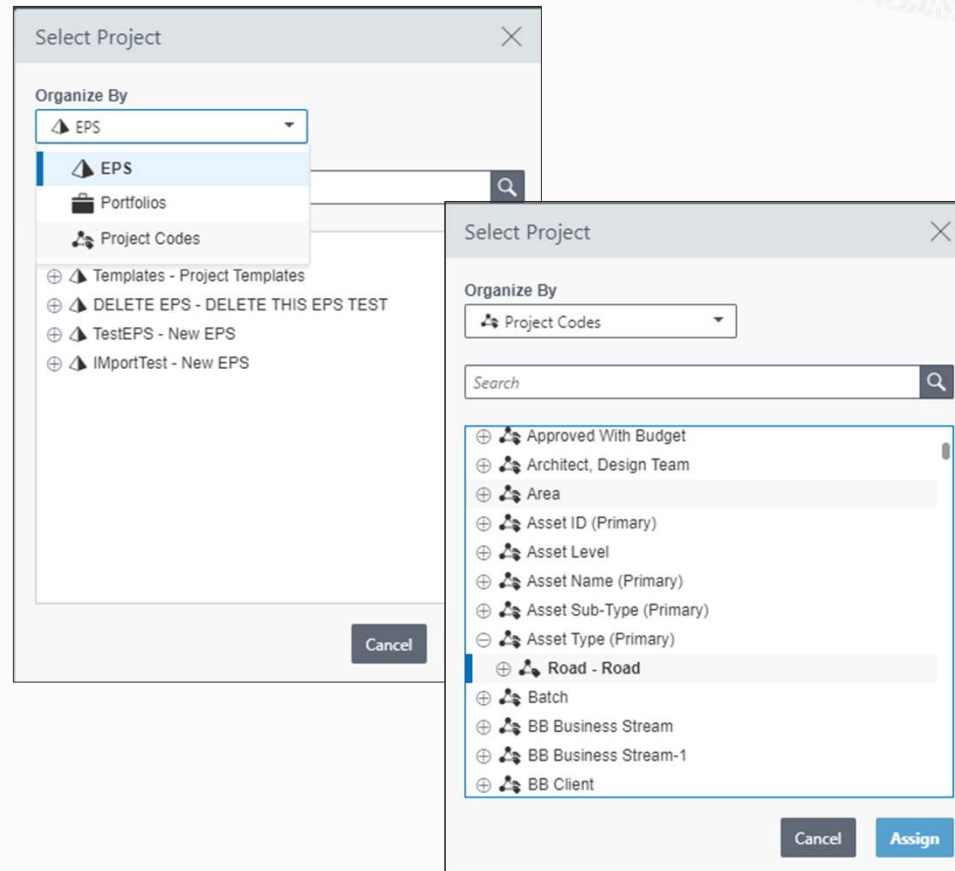
Server Location Settings

- Export to zip
- Add timestamp to file name



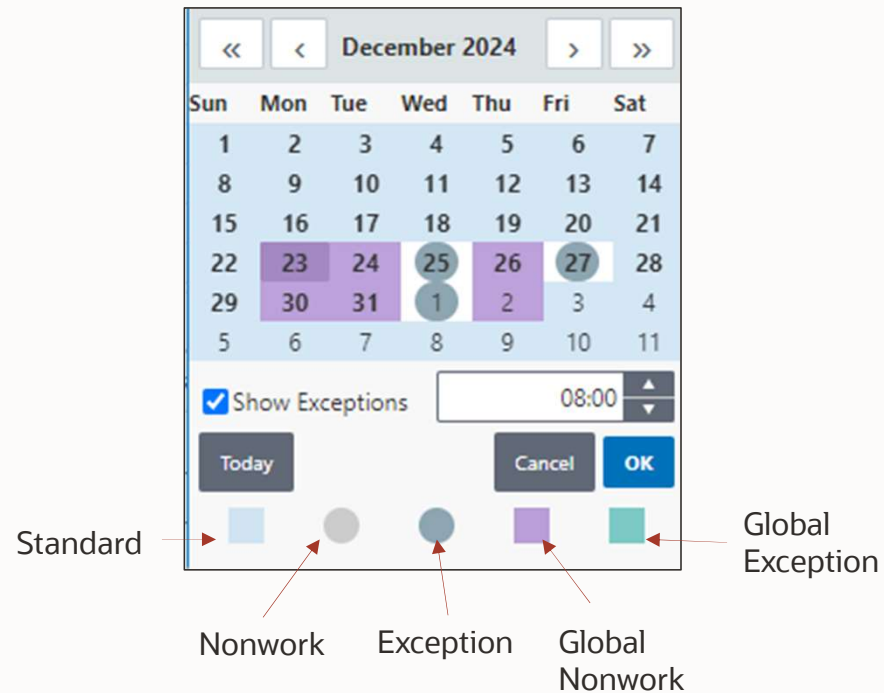
Configure Scheduled Services to run against a Project Code Value (Web)

- 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

Primavera Template - Default Import Template

Template Name *
Default Import Template

Basic

Global Data | Project Data

Global options are used when updating an existing project. Choose the action to take when duplicate objects are found during the import.

Name	Import Action
Funding Sources	Keep Existing
Global Activity Codes and Values	Keep Existing
Global Calendars	Keep Existing
Project Codes and Values	Keep Existing
Resource Calendars	Keep Existing
Resource Codes and Values	Keep Existing
Resource Curves	Keep Existing
Resources	Keep Existing
Responsible Manager	Keep Existing
Risk Categories, Thresholds, and Matrices	Keep Existing
Role Codes and Values	Keep Existing
Roles	Keep Existing
Shift Names	Keep Existing
User Defined Fields	Keep Existing

< Back Cancel Save As Save



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

Project Preferences for Project: EC00515-1-City Center Office Building Addition

General Analytics & Services Calculations Integrations **Team Member**

Status Updates **Activity Updates** Activity Assignments Status Reviews

Team Members can:

- Add and delete steps
- Update notebooks
- Status other resource assignments

Out Of Sequence

- Warn team members when their update might put the activity out-of-sequence

Select up to 25 codes and UDFs team members can update Select up to 5 step UDFs team member can update

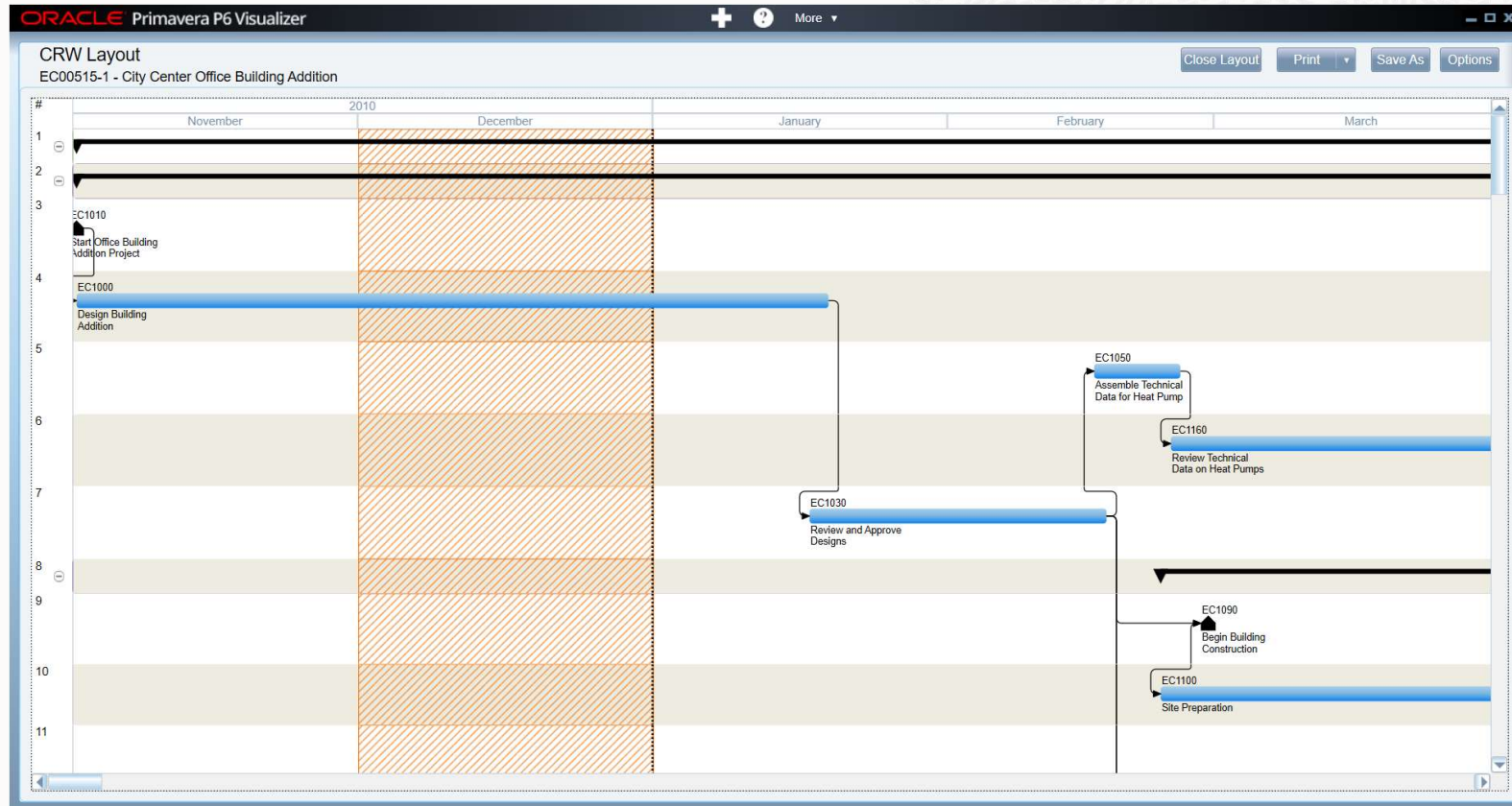
Note: Team members cannot update codes and UDFs using the Email statusing service Note: Team members cannot update UDFs using the Email statusing service

+ Add Code or UDF Read Only + Add Step UDF Read Only

Default **Inherit EPS Project Preferences** Cancel **Apply**

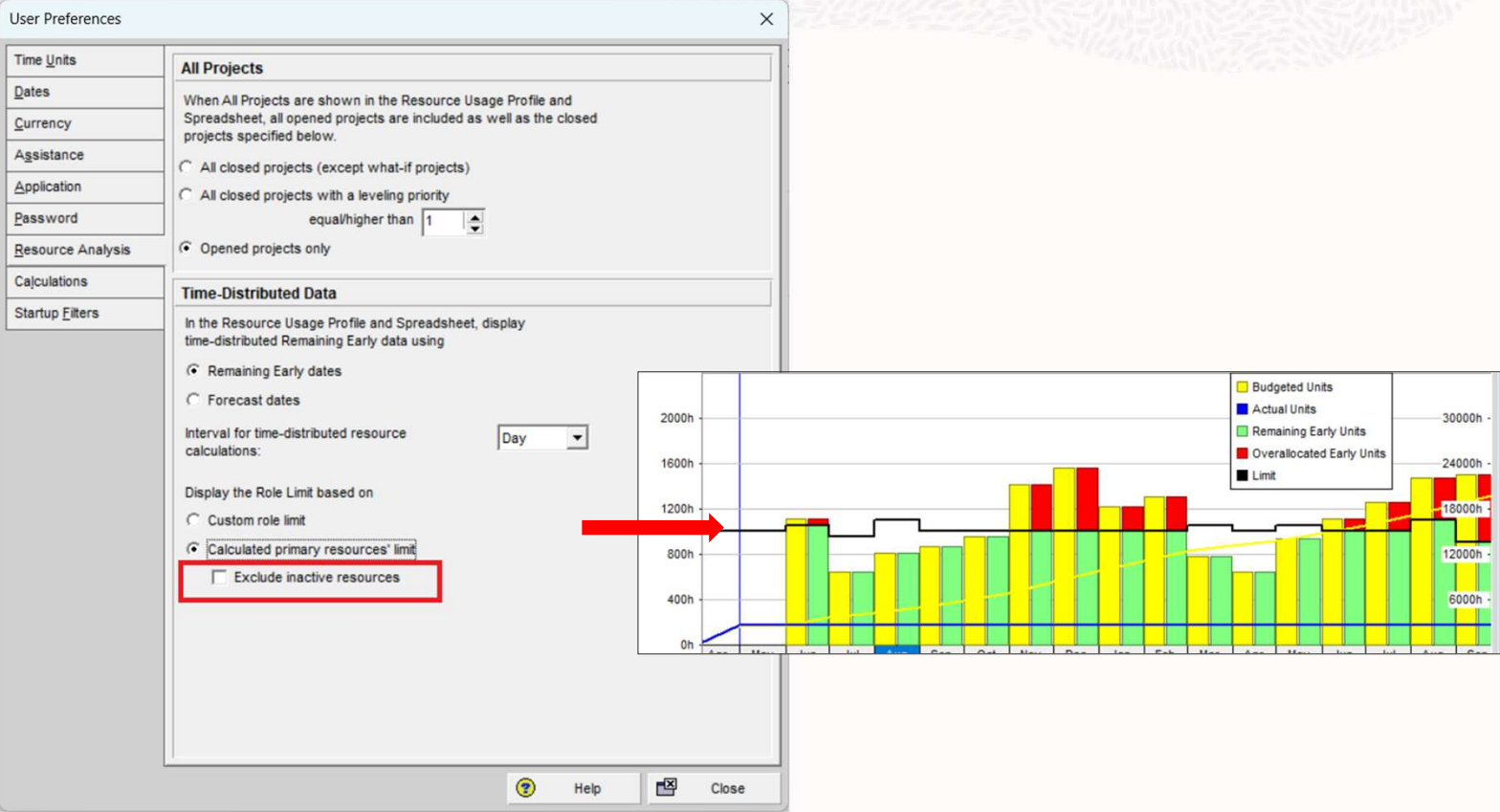


Visualizer: Draw Curtains (Client)



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



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

OPC Schedule & Resource Enhancements



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.

Name	ID	Type	Activity Status	Start	Finish	Total Float
Haitang Corporate Park				08-03-15	08-05-22	0.00d
Design and Engineering				08-03-15	12-14-15	2 18.25d
Design Building Addition	EC1000	Activity Depe...	In Progress	08-03-15	10-05-15	0.00d
Assemble Technical Data for Heat Pump	EC1050	Activity Depe...	Not Started	11-05-15	11-16-15	2 18.25d
Review Technical Data on Heat Pumps	EC1160	Activity Depe...	Not Started	11-16-15	12-14-15	2 18.25d
Review and Approve Designs	EC1030	Activity Depe...	Not Started	10-05-15	11-05-15	0.00d
Start Office Building Addition Project	EC1010	Start Milestone	Completed	08-03-15		
Foundation				08-03-15	08-05-22	303.75d
Begin Building Construction	EC1090	Start Milestone	Not Started	11-05-15		0.00d
Site Preparation	EC1100	Activity Depe...	Not Started	11-05-15	12-24-15	0.00d
Excavation	EC1230	Activity Depe...	Not Started	12-24-15	01-21-16	0.00d
Install Underground Water Lines	EC1320	Activity Depe...	Not Started	01-21-16	02-11-16	0.00d
Install Underground Electric Conduit	EC1330	Activity Depe...	Not Started	01-21-16	02-04-16	5.00d
Form/Pour Concrete Footings	EC1340	Activity Depe...	Not Started	02-11-16	04-07-16	0.00d
Concrete Foundation Walls	EC1350	Activity Depe...	Not Started	04-07-16	05-10-16	0.00d
Backfill and Compact Walls	EC1370	Activity Depe...	Not Started	05-24-16	06-01-16	0.00d
Foundation Phase Complete	EC1380	Finish Milestone	Not Started		06-01-16	303.75d
Form and Pour Slab	EC1360	Activity Depe...	Not Started	05-10-16	05-24-16	0.00d
Install Underground Water Lines	A1000	Activity Depe...	Completed	08-03-15	08-18-15	
WBS Summary Activity	EC1880	WBS Su...	Not Started	08-01-22	08-05-22	
Structure				05-16-16	12-08-16	0.00d
Begin Structural Phase	EC1410	Activity Dependent	d	08-03-16		258.75d
Erect Structural Frame	EC1390	Resource Dependent	d	06-01-16	08-03-16	0.00d
Floor Decking	EC1420	Level of Effort	d	08-03-16	09-14-16	0.00d
Erect Stairwell and Elevator Walls	EC1460	Start Milestone	d	10-26-16	11-24-16	10.50d
Concrete First Floor	EC1430	Finish Milestone	d	09-14-16	10-26-16	0.00d
Concrete Basement Slab	EC1470	Finish Milestone	d	10-26-16	11-24-16	10.50d
Structure Complete	EC1540	Activity Dependent	d	10-26-16	12-08-16	0.00d
Concrete Second Floor	EC1480	Activity Dependent	d	10-26-16	12-08-16	0.00d
Pre-fab Structural Frame Components	EC1870	Activity Depe...	Not Started	05-16-16	05-23-16	6.50d



Merge different versions of schedules in any direction

The Challenge:

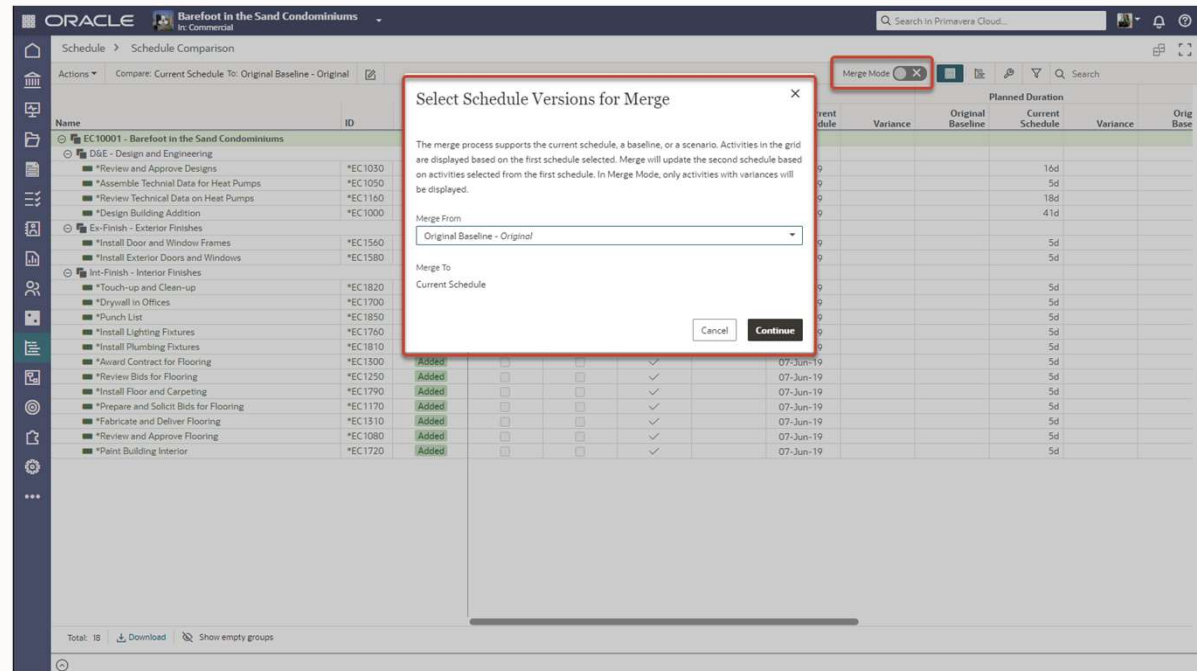
- Can't merge selected changes between the current schedule, scenarios, and baselines.

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.

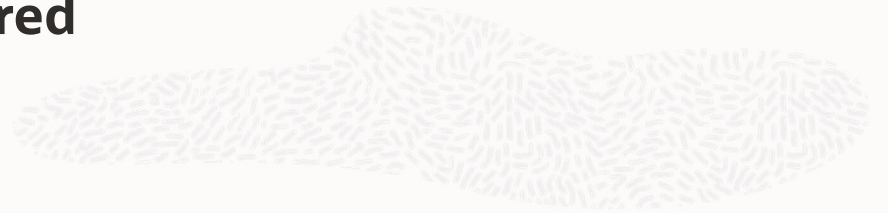
The Benefit:

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

Name	ID	Type	Activity Status	Start	Finish	Total Float
Haitang Corporate Park				08-03-15	08-05-22	0.00d
Design and Engineering				08-03-15	12-14-15	2 18.25d
Design Building Addition	EC1000	Activity Depe...	In Progress	08-03-15	10-05-15	0.00d
Assemble Technical Data for Heat Pump	EC1050	Activity Depe...	Not Started	11-05-15	11-16-15	2 18.25d
Review Technical Data on Heat Pumps	EC1160	Activity Depe...	Not Started	11-16-15	12-14-15	2 18.25d
Review and Approve Designs	EC1030	Activity Depe...	Not Started	10-05-15	11-05-15	0.00d
Start Office Building Addition Project	EC1010	Start Milestone	Completed	08-03-15	08-03-15	
Foundation				08-03-15	08-05-22	303.75d
Begin Building Construction	EC1090	Start Milestone	Not Started	11-05-15		0.00d
Site Preparation	EC1100	Activity Depe...	Not Started	11-05-15	12-24-15	0.00d
Excavation	EC1230	Activity Depe...	Not Started	12-24-15	01-21-16	0.00d
Install Underground Water Lines	EC1320	Activity Depe...	Not Started	01-21-16	02-11-16	0.00d
Install Underground Electric Conduit	EC1330	Activity Depe...	Not Started	02-11-16	02-04-16	5.00d
Form/Pour Concrete Footings	EC1340	Activity Depe...	Not Started	02-11-16	04-07-16	0.00d
Concrete Foundation Walls	EC1350	Activity Depe...	Not Started	04-07-16	05-10-16	0.00d
Backfill and Compact Walls	EC1370	Activity Depe...	Not Started	05-24-16	06-01-16	0.00d
Foundation Phase Complete	EC1380	Finish Milestone	Not Started		06-01-16	303.75d
Form and Pour Slab	EC1360	Activity Depe...	Not Started	05-10-16	05-24-16	0.00d
Install Underground Water Lines	A1000	Activity Depe...	Completed	08-03-15	08-18-15	
WBS Summary Activity	EC1880	WBS Su...	Not Started	08-01-22	08-05-22	
Structure				05-16-16	12-08-16	0.00d
Begin Structural Phase	EC1410	Activity Dependent	d	08-03-16		258.75d
Erect Structural Frame	EC1390	Resource Dependent	d	06-01-16	08-03-16	0.00d
Floor Decking	EC1420	Level of Effort	d	08-03-16	09-14-16	0.00d
Erect Stairwell and Elevator Walls	EC1460	Start Milestone	d	10-26-16	11-24-16	10.50d
Concrete First Floor	EC1430	Finish Milestone	d	09-14-16	10-26-16	0.00d
Concrete Basement Slab	EC1470	Finish Milestone	d	10-26-16	11-24-16	10.50d
Structure Complete	EC1540	Activity Dependent	d	10-26-16	12-08-16	0.00d
Concrete Second Floor	EC1480	Activity Dependent	d	10-26-16	12-08-16	0.00d
Pre-fab Structural Frame Components	EC1870	Activity Depe...	Not Started	05-16-16	05-23-16	6.50d



Go to related activities when view is filtered



The Challenge:

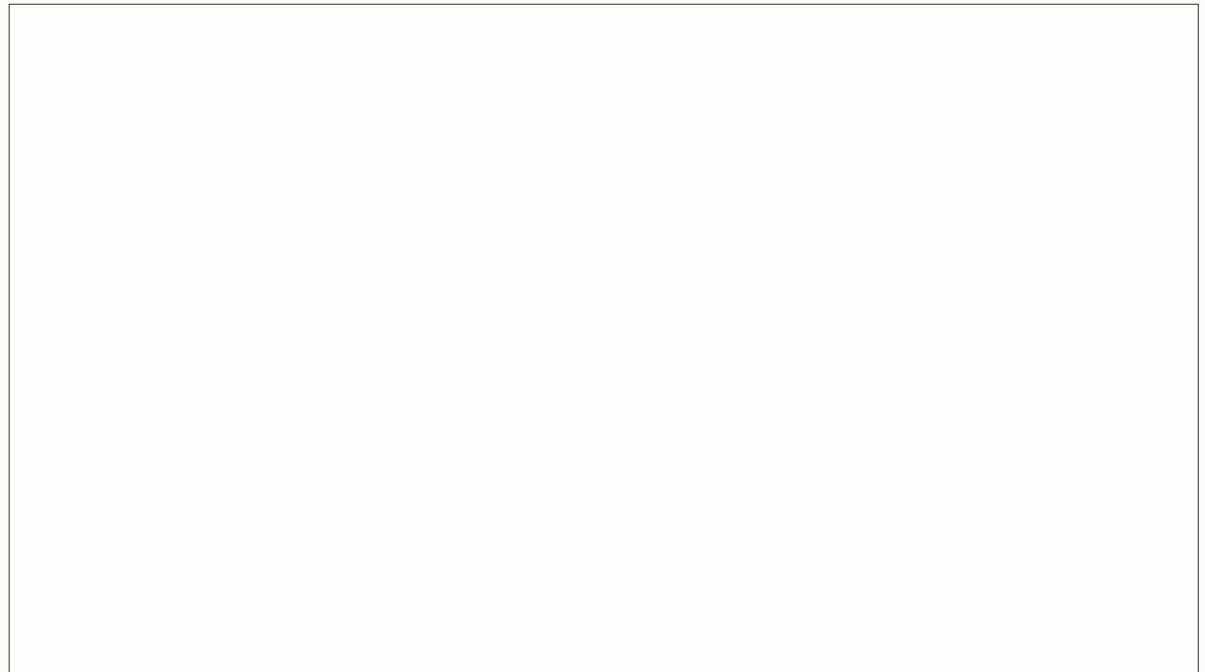
- Can't view related activity information if an activity is filtered out of the view (for example in Relationships detail window).

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:

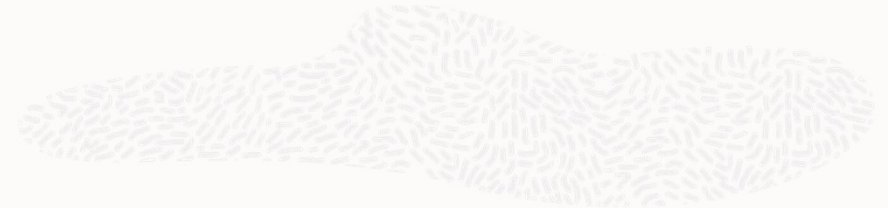
- Provides greater control over the print output, leading to more professional-looking Gantt print-outs.

The screenshot displays the 'Print Options' dialog box. On the left, a Gantt chart is visible, showing a project schedule with tasks such as 'Site Center Office Building Construction' and 'Building 1'. The 'Settings' panel on the right allows for customization of the print output. Key settings include:

- Paper Size:** Letter (8.5in x 11in)
- Orientation:** Landscape (selected)
- Margins:** Top (0.5in), Left (0.5in), Right (0.5in), Bottom (0.5in)
- Show Watermark:** Unchecked
- Pages:** All (selected), 1 to 6
- Scaling:** Fit to 1 page wide (selected), Zoom to 53.6%
- Page Layout:** Over, then down (selected), Down, then over



“Collapse To” a grouping level



The Challenge:

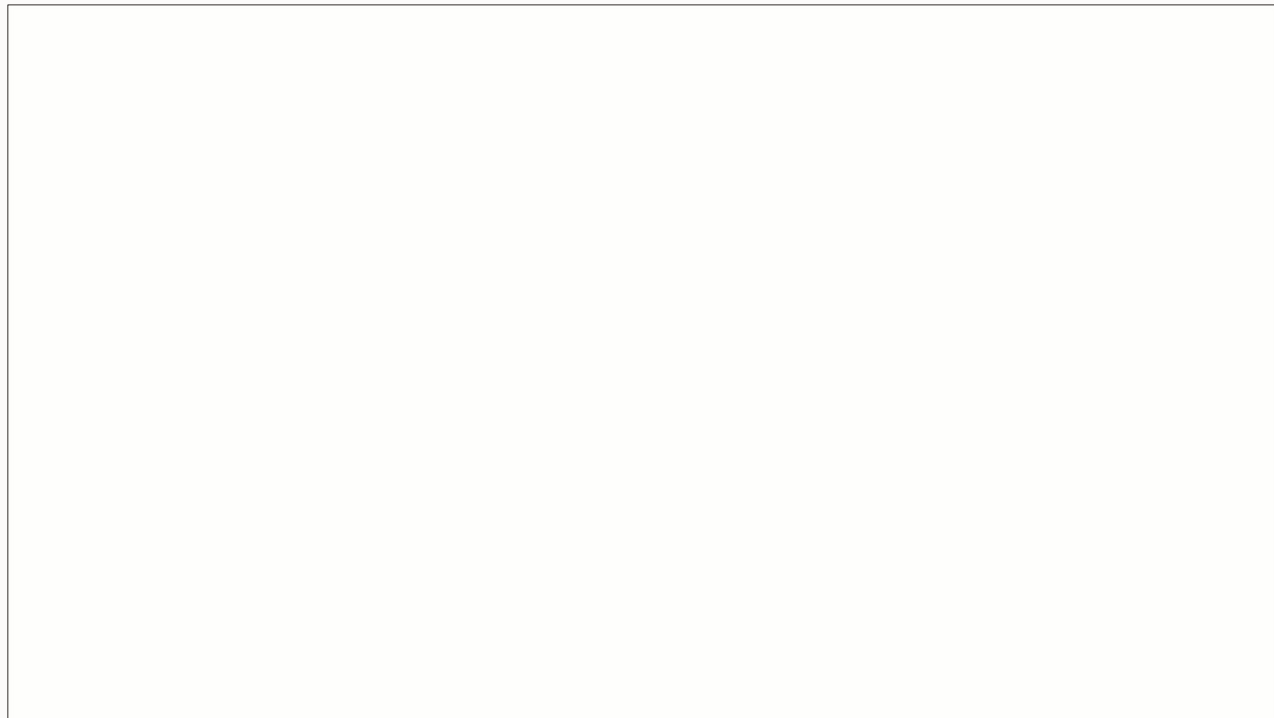
- Takes too much time for users to expand/collapse individual grouping nodes when preparing the schedule for a printout or presentation.

The Capability:

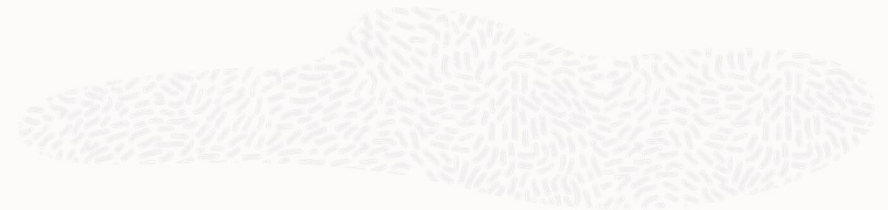
- Expand/Collapse grouping nodes to a specific level. For example, collapse all WBS groupings to Level 3. State of this setting is saved with the view.

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:

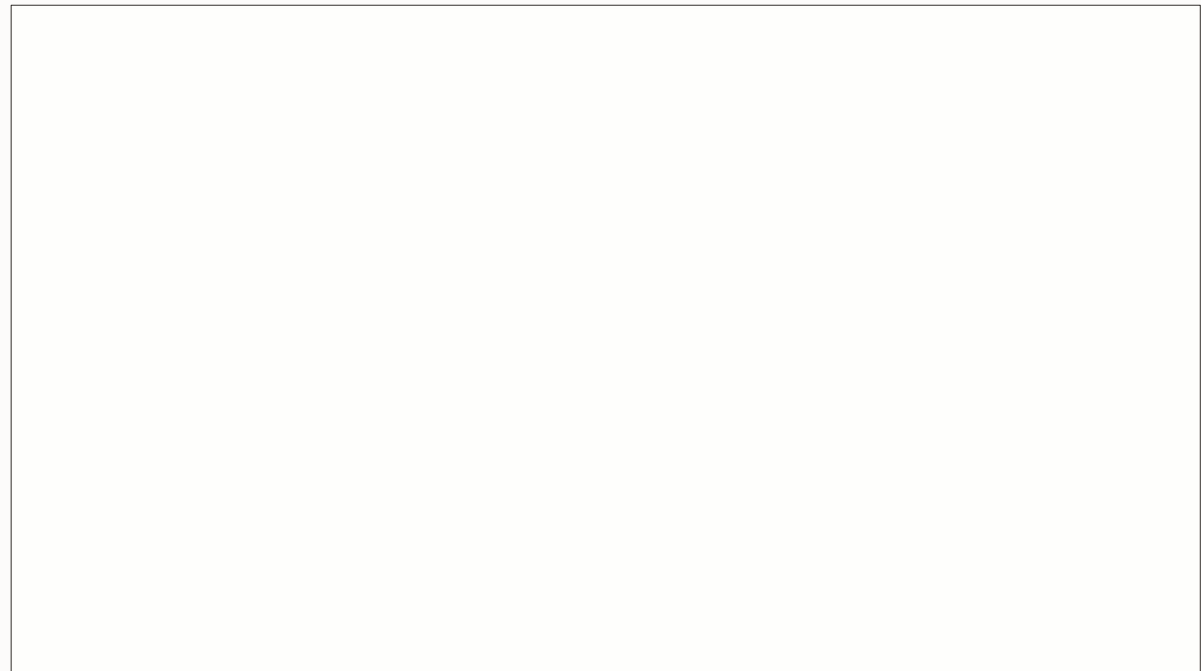
- Exceptions have to be created individually which is inefficient when creating a range of exception dates.

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:

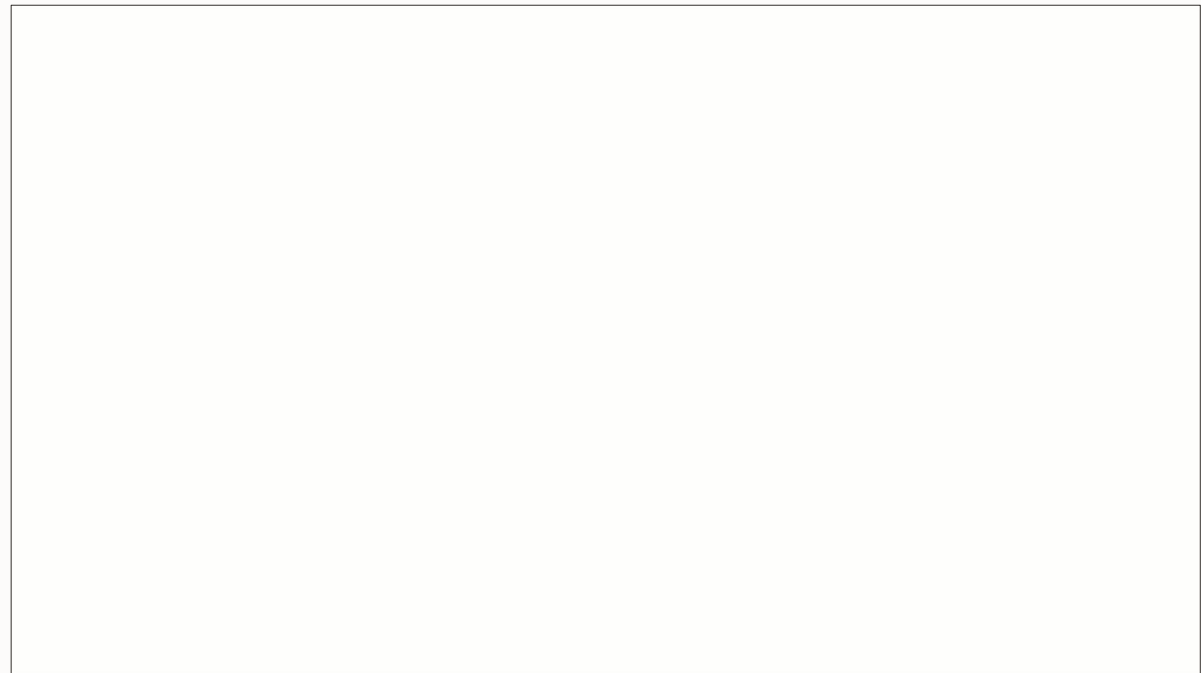
- Can't create new assignments from the Assignment List page.

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 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.

Name	ID	Start	Finish	Planned Duration	Remaining Duration
Barefoot in the Sand Condominiums	EC10001	05-Jun-23	31-Jul-23	41d	41d
Design and Engineering	D&E	05-Jun-23	31-Jul-23	41d	41d
Design Building Addition	EC1000	05-Jun-23	31-Jul-23	41d	41d
Review and Approve Designs	EC1030	05-Jun-23	26-Jun-23	16d	16d
Assemble Technical Data for Heat Pumps	EC1050	05-Jun-23	09-Jun-23	5d	5d
Review Technical Data on Heat Pumps	EC1160	05-Jun-23	28-Jun-23	18d	18d
Foundation	Found				
Structure	Structure				
Mechanicals/Electrical Systems	Mechanicals			0d	0d
HVAC	HVAC				
Elevator	Lifts				
Exterior Finishes	Ex-Finish	05-Jun-23	09-Jun-23	5d	5d
Install Door and Window Frames	EC1540	05-Jun-23	09-Jun-23	5d	5d
Install Exterior Doors and Windows	EC1580	05-Jun-23	09-Jun-23	5d	5d
Interior Finishes	Int-Finish	05-Jun-23	09-Jun-23	5d	5d
Review and Approve Flooring	EC1080	05-Jun-23	09-Jun-23	5d	5d
Prepare and Solicit Bids for Flooring	EC1170	05-Jun-23	09-Jun-23	5d	5d
Review Bids for Flooring	EC1250	05-Jun-23	09-Jun-23	5d	5d
Award Contract for Flooring	EC1300	05-Jun-23	09-Jun-23	5d	5d
Fabricate and Deliver Flooring	EC1310	05-Jun-23	09-Jun-23	5d	5d
Drywall in Offices	EC1700	05-Jun-23	09-Jun-23	5d	5d



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.

Summary & Settings for Commercial

Workspace

Search

Details

○ Dictionaries

○ Analysis Views

Baseline Categories

Calendars

CBS

Codes

Cost Categories

Currencies

Curve Profiles

Custom Log Types

Evaluation Categories

Locations

Measures

Reasons

Reporting Cycles

Risk Matrix Templates

Risk Threshold Templates

Rules of Credit

Strategy Types

Units of Measure

○ Defaults & Options

News Feed

User Groups

Baseline Categories

+ Add Assign...

Search

Name *	Owning Workspace	Sharing Method
Contract Baselines	Commercial - Commercial	Manual
What-if Baselines	Commercial - Commercial	Manual
Reference Only	Commercial - Commercial	Manual

Total: 3 Download



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



P6 XER Import/Export

The Challenge:

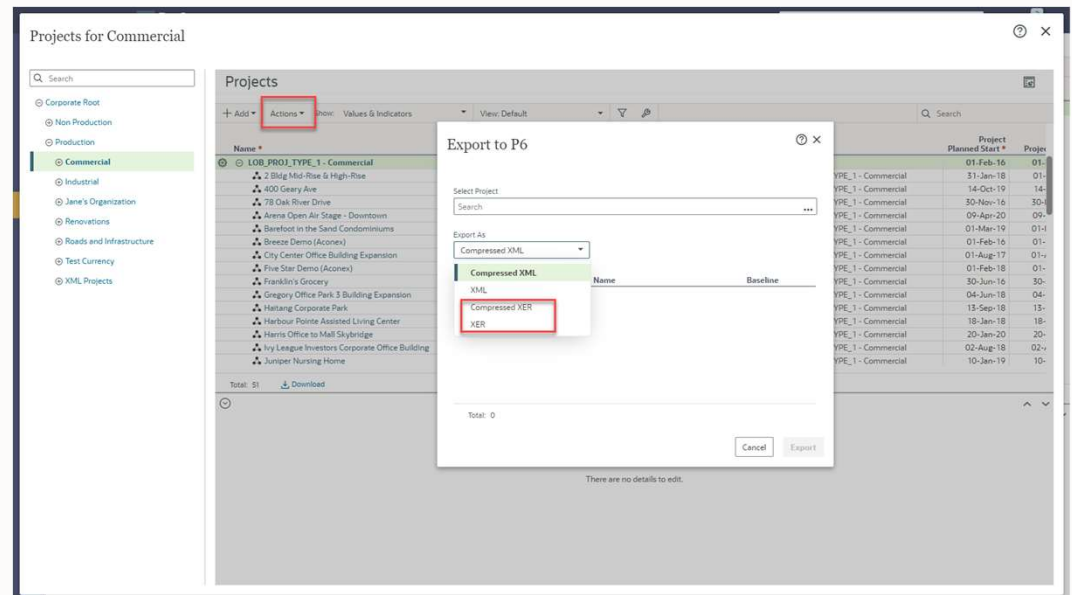
- Customers are often contractually required to exchange data with other companies in XER format.

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:

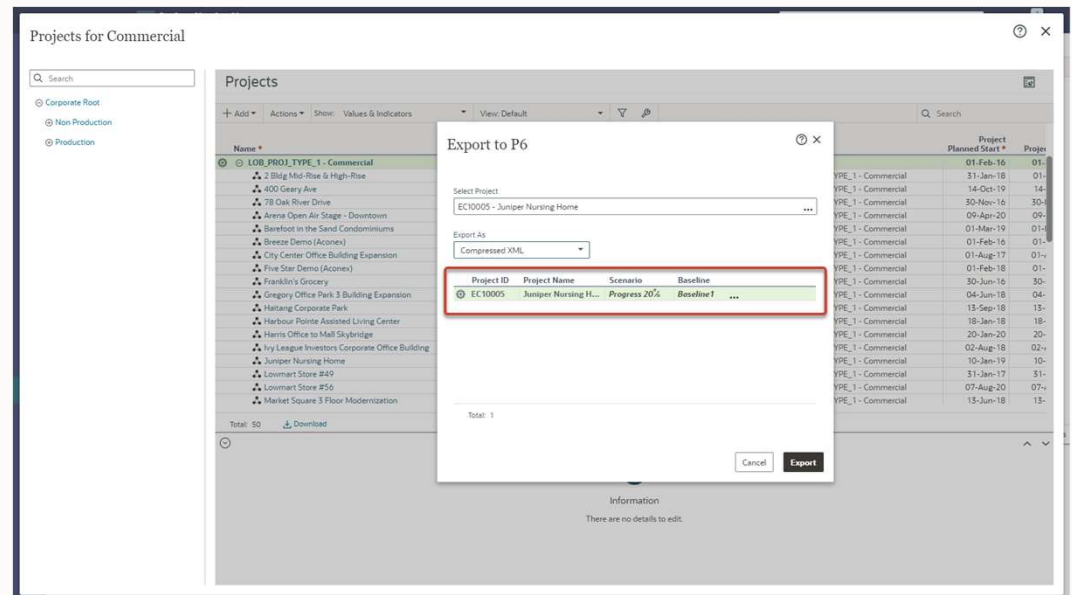
- Can't include schedule scenarios when exporting a project to P6 XML.

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:

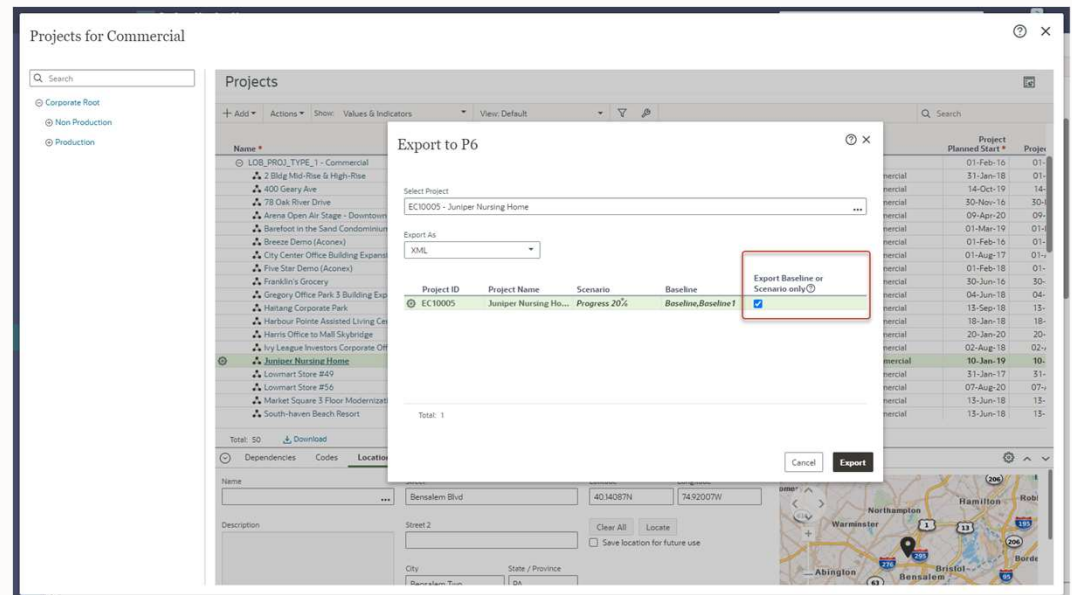
- Need to share a baseline or scenario schedule with another company but don't want to share the current schedule, for example a Time Impact Analysis done in a scenario.

The Capability:

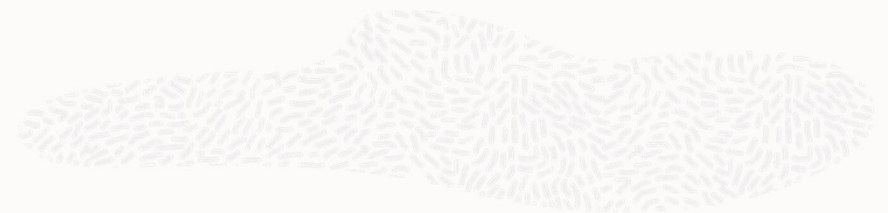
- Export options to export a baseline or scenario by itself as a regular project; can be imported into P6 as a regular project, or into OPC as a project, baseline, or scenario.

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.

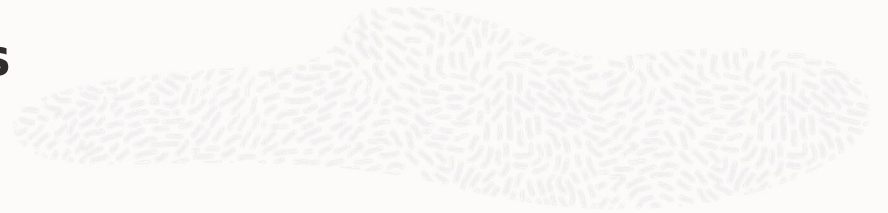
Video

[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

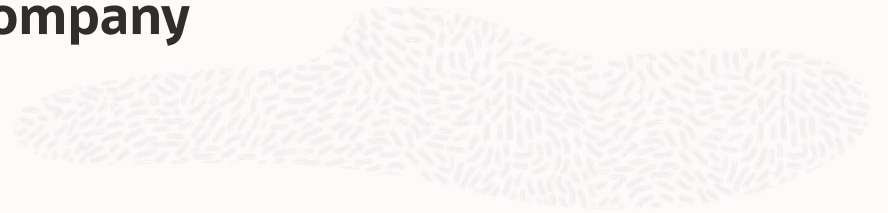


OPC Task Enhancements



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.

The screenshot displays the Oracle Primavera Work Plan interface for a project named "Juniper Nursing Home". The interface is organized into several sections:

- Header:** Includes the Oracle logo, project name, and a search bar.
- Navigation:** A left sidebar contains icons for home, tasks, and other project management functions.
- Task Hopper:** A vertical list on the left side of the main view, titled "Organize By: Activity", which is highlighted with a red box. The options listed are: Activity, Codes, Company, WBS, and None. Below this list, a scrollable list of tasks is visible, including items like "EC1080 - Revi...", "EC1090 - Revi...", "EC1100 - Site...", "EC1170 - Prep...", "EC1180 - Prep...", "EC1050 - Asse...", "EC1160 - Revi...", "EC1220 - Revi...", "EC1250 - Revi...", "EC1260 - Awar...", "EC1190 - Prep...", "EC1280 - Deliv...", "EC1900 - Awe...", "EC1240 - Revi...", "EC1310 - Fabri...", "EC1270 - Awar...", "EC1230 - Exca...", and "EC1290 - Fabri...".
- Main View:** A Gantt chart showing a timeline from "Week of May 01" to "Week of May 22". Tasks are represented as horizontal bars with labels such as "No Activity", "EC1100 - Site Preparation", "EC1250 - Review Bids for Flooring", "EC1260 - Awe...", "EC1190 - Prepare and Solicit Bids for Heat Pump", "EC1300 - Award Contract for Flooring", "EC1240 - Review Bids for Heat Pump", "EC1310 - Fabricate and Deliver Flooring", "EC1270 - Award Cont", and "EC1230 - Exca".
- Right Panel:** A "Task Summary" section showing a list of weeks and the number of tasks due. The weeks listed are: Dec 11 - 17 (Last week, 0 Tasks Due), Dec 18 - 24 (This week, 0 Tasks Due), Dec 25 - 31 (Next week, 0 Tasks Due), Jan 1 - 7 (+2 weeks, 0 Tasks Due), Jan 8 - 14 (+3 weeks, 0 Tasks Due), Jan 15 - 21 (+4 weeks, 0 Tasks Due), Jan 22 - 28 (+5 weeks, 0 Tasks Due), and Jan 29 - Feb 4 (+6 weeks, 0 Tasks Due).



Copy Task Handoffs

The Challenge:

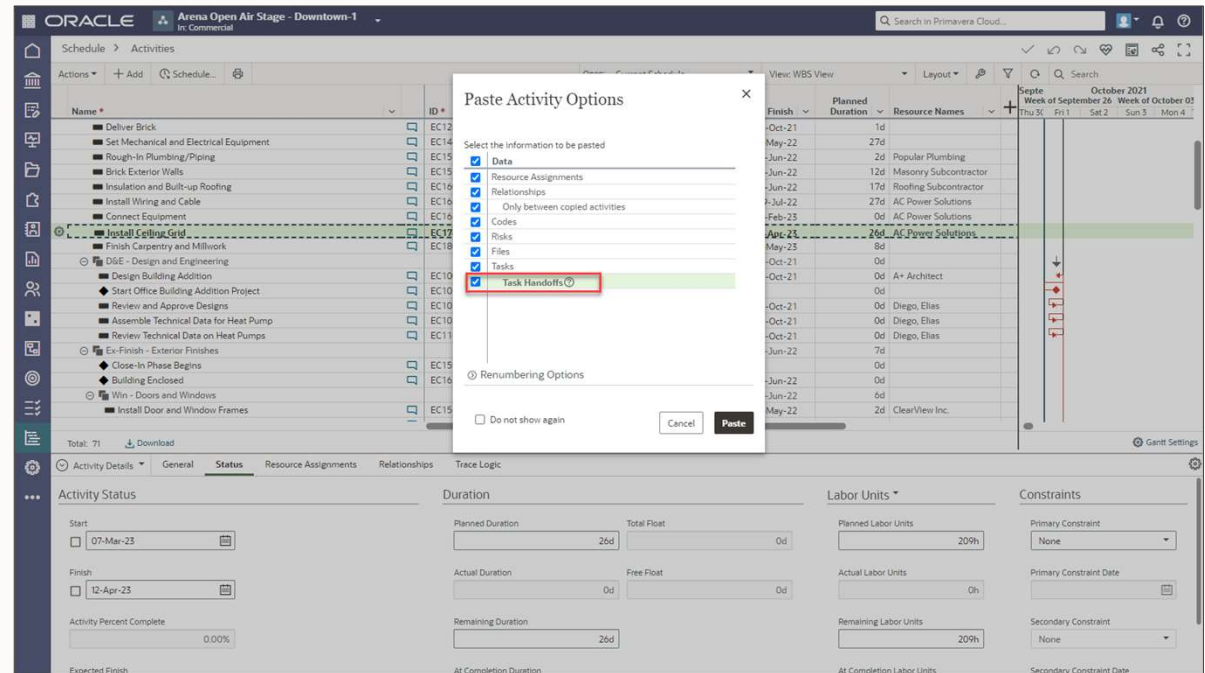
- When copying Tasks and Activities, and when adding a WBS from another project, Task Handoffs are not copied.

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.

Package Title	Package No.	Package Type	Revision	State	Aconex Project
BasicPackage 90	BSC-00095	Basic	r1	Open	OPC Integration
Basic Package 80 - Architectural Requirements	BSC-00085	Basic	r1	Open	OPC Integration

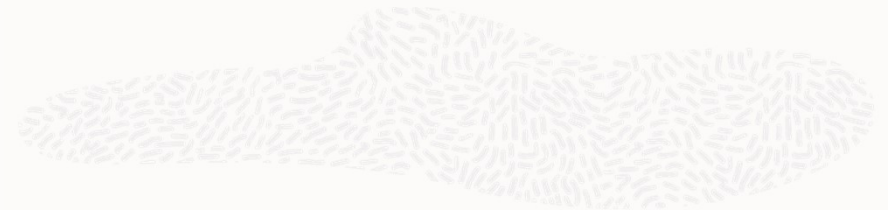
Video

[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



Risk Analysis Scatter Plot



The Challenge:

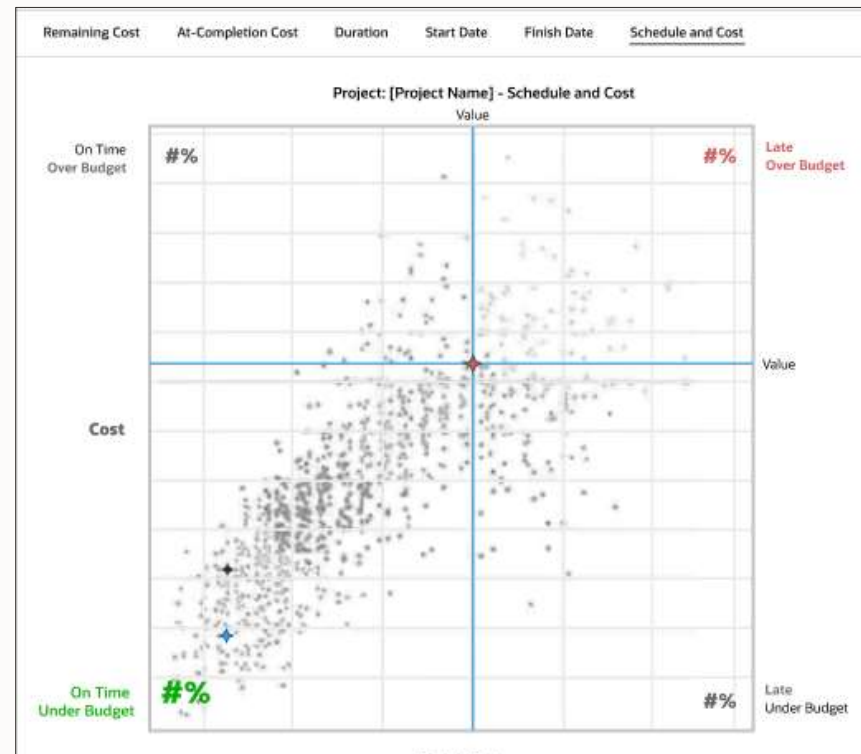
- Can't graphically view the probability of the project finishing on time and budget, and can't set targets.

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:

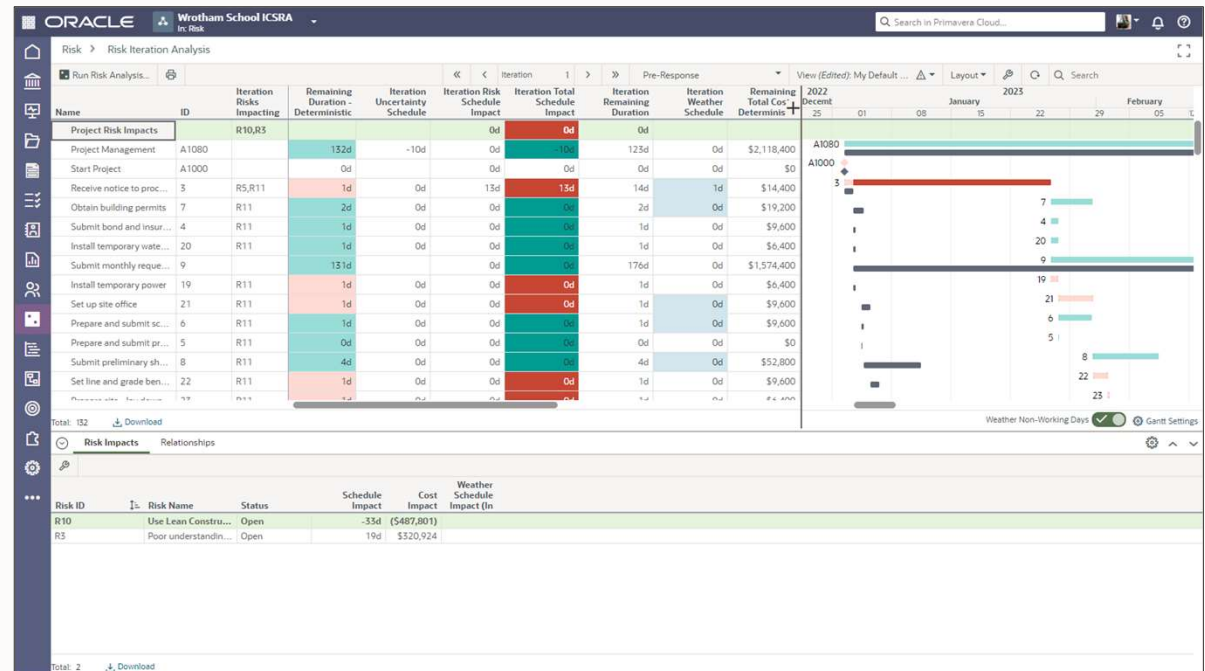
- Risk Analysis was enhanced to include schedule costs, but costs were not reflected in Risk Iteration Analysis.

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:

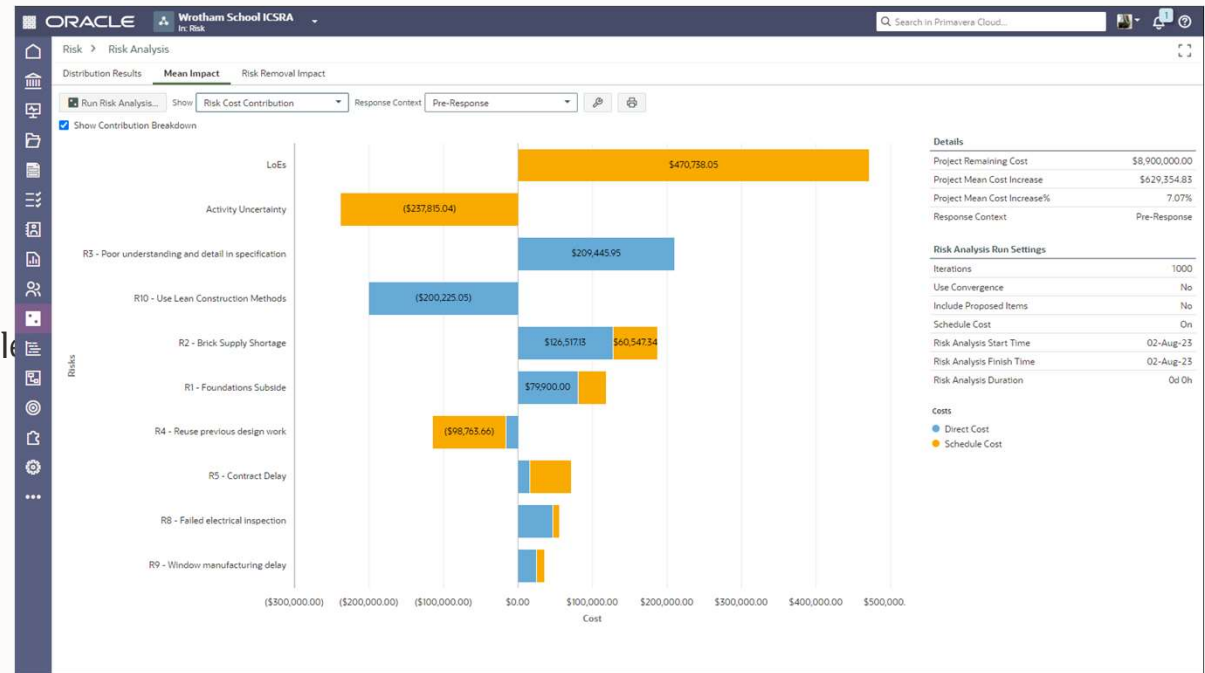
- Schedule costs were not integrated with Risk Analysis; could not see how risks were impacting schedule cost increases.

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:

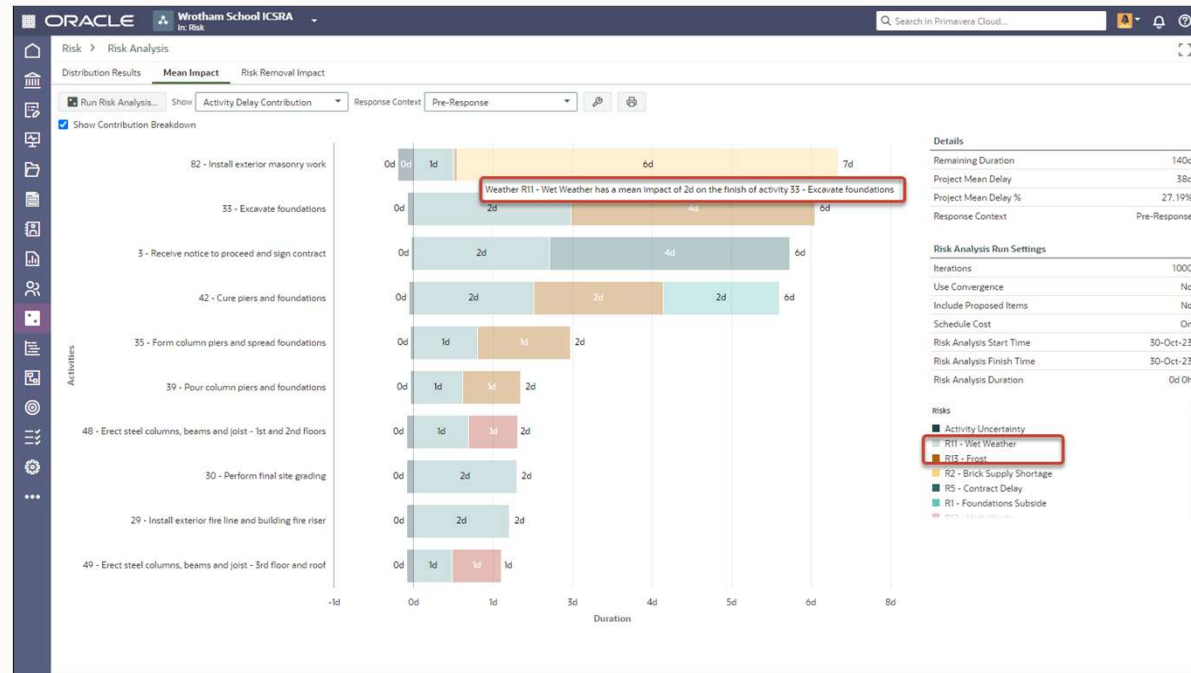
- Can't accurately what is driving a project duration without factoring in Weather Risks.

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 Analysis 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



Redesigned Home page

The Challenge:

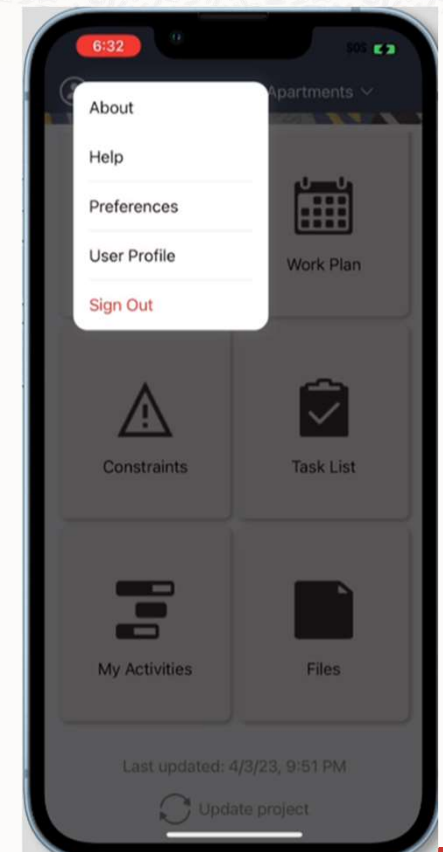
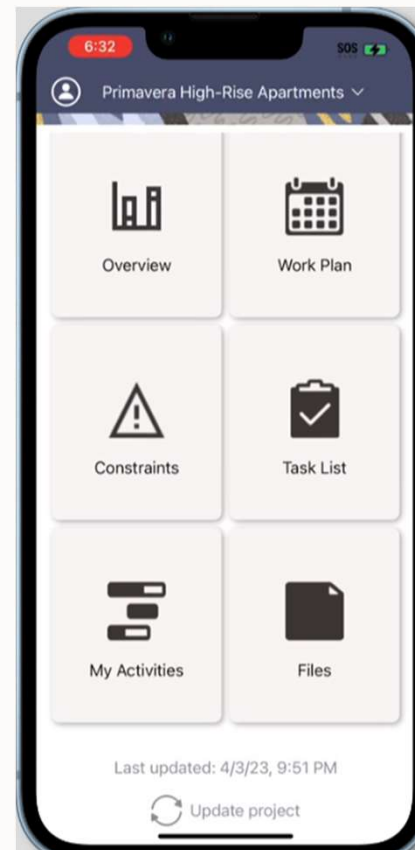
- Mobile app navigation not as intuitive as it could be.

The Capability:

- Left-hand navigation replaced by tiles on the Home page; additional options available by tapping the user icon.

The Benefit:

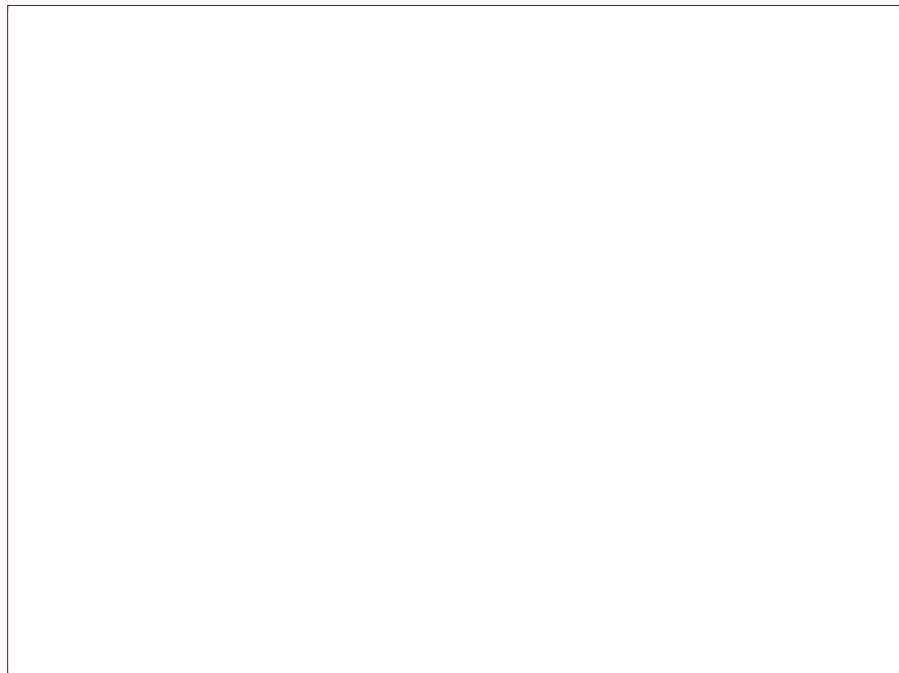
- Easier and more intuitive navigation more in line with current mobile app standards.



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.

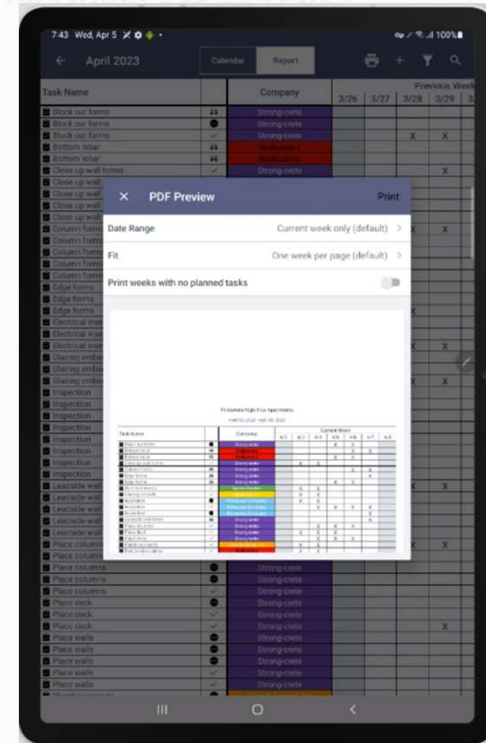


The Capability:

- 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:

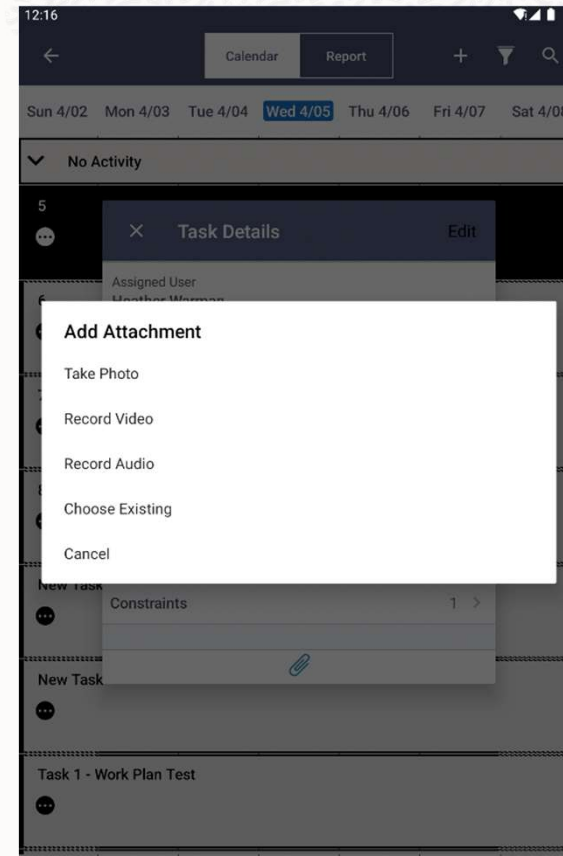
- Can't attach photos and files to tasks while working out in the field.

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:

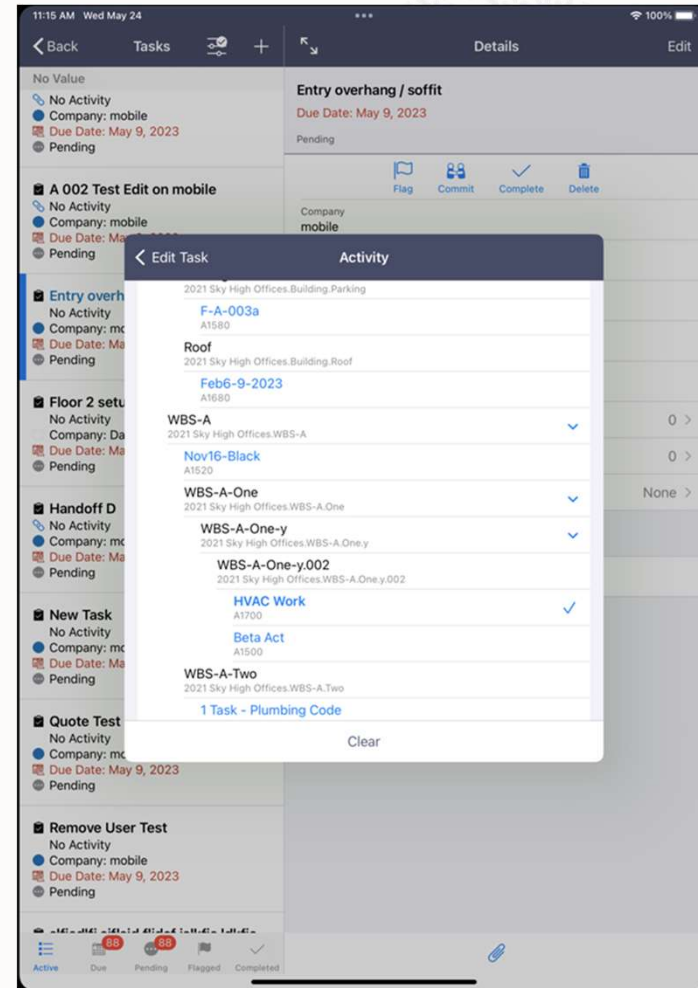
- Hierarchical lists, such as the WBS or Codes, were displayed in a flat list, making it more difficult to find the correct item to filter by or assign.

The Capability:

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

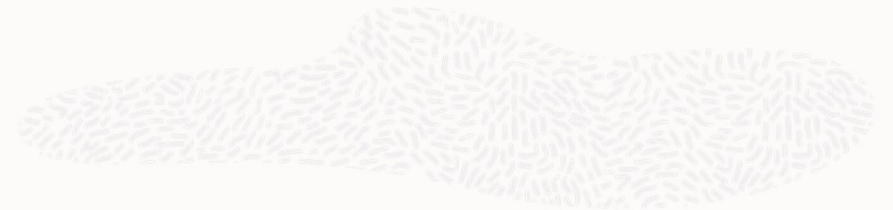
The Benefit:

- 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



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.

The screenshot shows a web application window titled 'Workspaces'. It features a table with columns for Name, ID, Description, Production, and System. A context menu is open over the row with ID '123', showing options like 'Expand All', 'Collapse All', 'Move to Another Workspace', 'Move Up', 'Move Down', 'Move Left', 'Move Right', 'Delete', 'Export Configuration Data...', and 'Import Configuration Data...'. The 'Move to Another Workspace' option is highlighted.

Name	ID *	Description	Production	System
Corporate Root	CorpRoot		<input type="checkbox"/>	<input type="checkbox"/>
Non Production	NON_PROD		<input type="checkbox"/>	<input type="checkbox"/>
/NewWS-20.11.3\	/NewWS-20.11.3\		<input type="checkbox"/>	<input type="checkbox"/>
100WS	100WS		<input type="checkbox"/>	<input type="checkbox"/>
100CHWS1	100CHWS1		<input type="checkbox"/>	<input type="checkbox"/>
100CHWS1.1	100CHWS1.1		<input type="checkbox"/>	<input type="checkbox"/>
100CHWS2	100CHWS2		<input type="checkbox"/>	<input type="checkbox"/>
123	123		<input type="checkbox"/>	<input type="checkbox"/>
1ntegWS	1ntegWS		<input type="checkbox"/>	<input type="checkbox"/>
1MSPCodesLdt	1MSPCodesLdt		<input type="checkbox"/>	<input type="checkbox"/>
21.7_WS-1	21.7_WS-1		<input type="checkbox"/>	<input type="checkbox"/>
21.7_WS-2	21.7_WS-2		<input type="checkbox"/>	<input type="checkbox"/>
Import/Export Log				
Non-Admin Project-1	Non-Admin Project-1			
Project-5	Project-5			

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).

Add Workspaces [X]

Name * ID *

Parent Workspaces * ... Copy from Another Workspaces ...

Workspace Currency * ... Exchange Rate (1 USD =)

Description

Cancel Add



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.

The screenshot displays the 'Summary & Settings for Commercial' window, specifically the 'Activity' configuration page. The 'Configured Fields' tab is active, showing a table of configured fields. A red box highlights the 'Budget Increase' field configuration.

Column Label *	View Column Name *	Data Type *	Type	Summary Calculation *	Field Length
Activity Note	ACTIVITY_NOTE	Text	Manual	None	255
Budget Increase	Budget Increase	Cost	Formula	None	
Temporary Cost	Temporary	Cost	Manual	Sum	

Below the table, the 'Formula' tab is selected, showing the formula editor. The formula is: `object.Activity_plannedTotalCost * @.10`



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.

Summary & Settings for Commercial

Activity

Column Label *	View Column Name *	Data Type *	Type	Summary Calculation *	Field Length
Activity Note	ACTIVITY_NOTE	Text	Manual	None	255
Budget Increase	Budget Increase	Cost	Formula	None	
Temporary Cost	Temporary	Cost	Manual	Sum	

Total: 3 | Download

Formula Localization

Field: AREA | Insert Field | Validate Formula | [] | < > | B | //Else | Return

object.Activity_plannedTotalCost * @.18



Provide Public API and Gateway access to selected users

The Challenge:

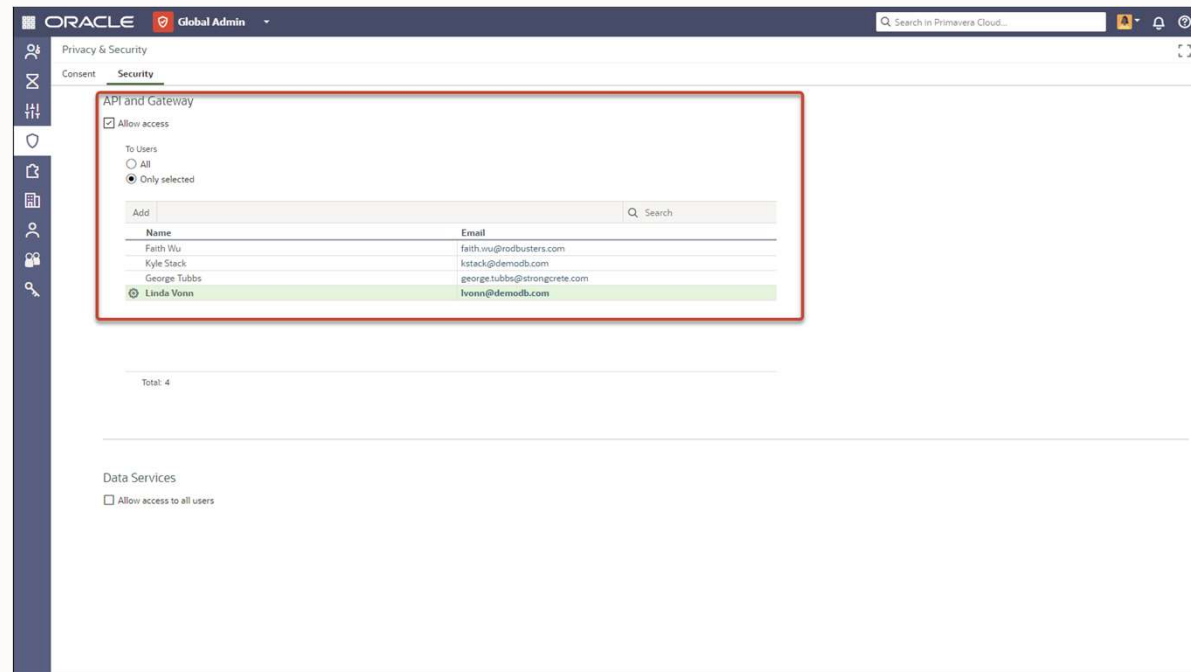
- Access to the Public API & Gateway was all or nothing. If the API & Gateway were enabled in general, all users could access it.

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.



The screenshot shows the Oracle Global Admin console interface. The main content area is titled "API and Gateway" and is highlighted with a red border. It contains the following elements:

- Allow access
- To Users
 - All
 - Only selected
- An "Add" button and a search input field.
- A table with the following data:

Name	Email
Faith Wu	faithwu@rodbusters.com
Kyle Stack	kstack@demodb.com
George Tubbs	george.tubbs@strongtire.com
Linda Vonn	lvonn@demodb.com
- A "Total: 4" indicator.
- A "Data Services" section with an unchecked checkbox "Allow access to all users".



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.

Name	Company	Phone	Restricted User	Tasks	Progress	Portfolio	Schedule	Mobile	Associated Resource	Global Permission Sets	Application Administrator	Max St Only
Andy (Sub Technician)	Strongcrete Inc.		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			View Only (System)	<input type="checkbox"/>	
Castdev Admin	CEGBU Inc		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		M - M		<input checked="" type="checkbox"/>	
Curriculumdb Admin	CEGBU Inc		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		AnneRes - AnneRes	View Only (System)	<input type="checkbox"/>	
Dave (Electric Foreman Lead Foreman)	Sparky Electric, Inc.		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		R52 - New Resource		<input checked="" type="checkbox"/>	
Dave Pane	Clearview Inc.		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	
Faith Wu	Rodbusters Inc.		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Standard User	<input type="checkbox"/>	
George Tubbs (Project Leader)	Strongcrete Inc.		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	
Harry King	Dontburn Fire Protection Inc.		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	
Jake Walton	CEGBU Inc		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			PS-GL All Global Privil...	<input type="checkbox"/>	
Josh (Paint Foreman) Lead Foreman	Dandy Painting Inc.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			View Only (System)	<input type="checkbox"/>	
Josh McDaniel	Sparky Electric, Inc.		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			View Only (System)	<input type="checkbox"/>	
Kyle Stack	CEGBU Inc		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			PS-GL All Global Privil...	<input type="checkbox"/>	
Linda Vonn	CEGBU Inc		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Standard User	<input type="checkbox"/>	
Lucy Troubridge (Lead Foreman)	Clearview Inc.		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Administrator (System)	<input type="checkbox"/>	
Mark Maltby	CEGBU Inc		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			PS-GL All Global Privil...	<input type="checkbox"/>	
Kacie Robbison	enable 7x		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			PS-GL All Global Privil...	<input type="checkbox"/>	



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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