

ORACLE® PRIMAVERA® P6
VERSION 8 & 15 EPPM WEB ADMINISTRATORS GUIDE

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EASTWOOD HARRIS PTY LTD.

Welcome to the
Eastwood Harris Pty Ltd
Oracle Primavera P6
Version 8 and 15
EPPM Web
Administrators Guide
training course
"Enterprise Portfolio Project
Management"

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IMPORTANT POINTS FOR INSTRUCTOR

- See notes below.
- Plus changes made in Oct 14 are listed below.

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Administration

- Evacuation
- Facilities, timings and meals
- Mobile phones & Emails
- Introductions:
 - Your name,
 - The types of projects you are involved in,
 - Your experience in scheduling software and
 - What you seek from this course,
- Course attendance sheet,
- Course conduct.

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Course Agenda

- 1 INTRODUCTION
- 2 REVIEW OF THE P6 WEB INTERFACE
- 3 STARTING UP AND NAVIGATION
- 4 PLANNING IMPLEMENTATION
- 5 KEY MASTER DATA CONFIGURATION - EPS & WBS
- 6 CALENDARS
- 7 ROLES AND RESOURCES
- 8 CONFIGURING APPLICATION SETTINGS AND ENTERPRISE DATA
- 9 SECURITY & ACCESS CONFIGURATION
- 10 USER CONFIGURED ITEMS
- 11 OPERATIONAL SUPPORT
- 12 REPORTING
- 13 DATA IMPORT AND EXPORT TOOLS
- 14 P6 IMPLEMENTATION PLAN TEMPLATE

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1 - INTRODUCTION

- Readers/Student Prerequisites
- Objectives
- Understanding Enterprise Portfolio Project Management
- Understanding System Implementation and Administration
- Implementing Web Based Project Management Tools
- Additional Reading Material

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4 - PLANNING IMPLEMENTATION

- 4.1 Defining Operational Requirements
- 4.2 Defining and Documenting Roles and Responsibilities for Operations
- 4.3 Defining Master Data
- 4.4 Additional/Add-on Software
- 4.5 Reporting
- 4.6 Procedures & Operational Support
- 4.7 Workshop 2- Planning P6 Implementation

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4.1 Defining Operational Requirements

It is important to define the operational requirements before buying licenses, installing the software and configuring databases.

- How many databases are required and the purpose of each database?
- How many users are likely to be using the system, their physical location and the internet connectivity at that location? What interface will the users require?
- What other corporate software, databases or systems will Primavera P6 have to interface with and how will the interfaces work?

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4.2 Defining and Documenting Roles and Responsibilities

Clearly defined roles and responsibilities of people within the organization are an important process in the implementation of software like Primavera P6.

- System Owner
- IT Support
- Database Administrator
- Project Managers
- Lead Planners
- Project Planners
- Subcontractor Planners

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4.3 Defining Master Data

Master Data is data held in the database that is usually shared over multiple projects and is usually managed by the Database administrator:

- Enterprise Project Structure (EPS)
- Project IDs and EPS IDs
- Project Codes
- Calendars
- Database Default Calendar
- WBS Standardization
- WBS Categories
- Activity Codes
- User Definable Fields
- Roles and Resources
- Resource Teams & Role Teams
- Resource Codes
- Expenses
- Currencies
- Financial Periods
- Risks
- Issues
- Documents
- Security & Access

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4.4 Additional/Add-on Software....

The EPPM database may be integrated with the following Oracle software, which was outlined in Chapter 2:

- P6 Progress Reporter
- P6 Team Member
- E-mail Statusing Service
- P6 Mobile Apps
- Primavera Prime
- Primavera Unifier

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4.4 Additional/Add-on Software

Many companies integrate a P6 database with other corporate systems such as:

- Oracle eBusiness
- SAP
- Maximo
- MIMS
- Pronto
- Other ERP Systems
- PRISM G2
- Acumen Fuse

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5 - KEY MASTER DATA CONFIGURATION – EPS & WBS

- 5.1 Introduction to Master Data
- 5.2 EPS - Enterprise Project Structure
- 5.3 Projects
- 5.4 Primavera Project WBS
- 5.5 Workshop 3 – EPS

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5.1 Introduction to Master Data

Master Data is tables of data that include the EPS, Projects, Calendars, WBS Nodes, Activities, Activity Codes, User Defined Fields, Resources and Roles.

The Master Data has a special significance to a database:

- Unlike many of the other database application settings they are regularly updated and evolve over time,
- Users assign these elements to projects,
- They are frequently used for Grouping, Sorting, Filtering, and Reporting projects and portfolios.

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5.2 EPS - Enterprise Project Structure

We will look at:

- Viewing only the EPS Nodes
- Adding New EPS Nodes
- Reordering and Moving EPS Nodes
- Deleting an EPS Node

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5.3 Projects

We will look at:

- Creating a Project
- Creating a Blank Project or Copying a Project
- Copy an Existing Project or EPS Node
- Creating a New Project from a Template
- Creating a New Template
- Deleting a Project

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5.4 Primavera Project WBS

We will look at:

- Viewing and Navigating the WBS
- Creating and Deleting a WBS Node
- WBS Node Separator
- Activity Window Work Breakdown Structure Lower Pane Details

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5.5 Workshop 3 – EPS

- Assume that you are an employee in a building construction company called GoldCraft that is implementing Primavera P6 EPPM. The Operational Requirements, Roles and Responsibilities have been defined and you must start entering them.
- Remember to press F11 at any time to go in and out of the Full screen mode.

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6 - DEFINING CALENDARS

- 6.1 Database Default Calendar
- 6.2 Accessing Global, Resource and Project Calendars
- 6.3 The Project Default Project Calendar
- 6.4 Creating Calendars
- 6.5 Creating a New Project Calendar
- 6.6 Calendar Calculations
- 6.7 Administer, My Calendar
- 6.8 Promote, Copy, Rename and Delete a Calendar
- 6.9 Base Calendars
- 6.1 Adjusting Calendar Working Hours
- 6.11 Calendars and Activity Types
- 6.12 Calendars for Calculating Project, WBS and Other Summary Durations
- 6.13 Tips for Mixed Calendar Schedules
- 6.14 Workshop 4 – Calendars

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Calendars Categories

Primavera has three categories for calendars:

- **Global** – These calendars are available to all Projects and Resources,
- **Project** – These calendars are only available to the projects they are created in. These may only be created for a project when that project is open,
- **Resource** – There are now two types of resource calendars: **Personal**, new to Primavera Version 8.1, and **Shared**, which is the same as the earlier Resource calendar:
 - A **Personal** calendar is created for a specific individual resource,
 - A **Shared** Resource calendar may be assigned to one or more Resources, which in turn may be assigned to an activity in any project.

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6.1 - Database Default Calendar

- The **Database Default Calendar** is selected in the **Administer, Enterprise Data, Global, Global Calendars Enterprise, Calendars...** window,
- This controls the Working time displayed for all projects and all Views:

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6.2 - Accessing Global and Project Calendars

To copy, edit and delete calendars:

- Global Calendars may be accessed from the **Administer, Enterprise Data, Global, Global Calendars...** window,
- Project Calendars may be accessed from the **Administer, Enterprise Data, Projects, Project Calendars...** window.

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6.3.1 - Understanding the Project Default Project Calendar

- A project is assigned a **Default Project Calendar** which may be either a **Global** or **Project** calendar:
 - All new activities are assigned the project **Default Project Calendar** when they are created,
 - Unlike in Microsoft Project, changing the **Default Project Calendar** will **NOT** affect the calendar assigned to any tasks,
 - The **Default Project Calendar** may be selected for calculating leads and lags in the **Schedule Project, Options** form.

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6.3.2 - Assigning a Default Project Calendar

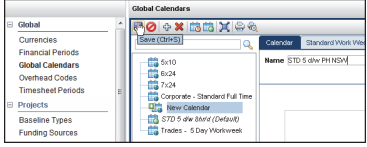
- To assign or change the **Default Project Calendar** a project must be open:
 - Navigate to the **EPS** window and highlight the project,
 - Select **Actions, Set Project Preferences** to display **Project Preferences** form,
 - Select the **Defaults** option from the left of the **Project Preferences** form,
 - Click on the **Calendar** icon to open the **Select Calendar** form:

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6.4 - Creating a New Global Calendar

- You can create a new **Global Calendar** by copying an existing Global or Resource Calendar,
- To create a new calendar:
 - Select **Administer, Enterprise Data, Global, Global Calendars**,
 - Then click on the + icon to create a new calendar,
 - Select an existing **Global** or **Resource** calendar to copy,
 - Assign a name and click on the **Save** icon:



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6.5 - Creating a New Project Calendar

- A project must be active to create a **Project Calendar**,
- You **MAY** create a new **Project Calendar** by copying an existing Global, Resource or Project Calendar,
- To create a new calendar select **Administer, Enterprise Data, Global, Project Calendar**,
- Follow the same process as the Global Calendar.




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6.5.1 - Shared Resource Calendar

- A **Resource** or a **Global** calendar may be assigned to one or more resources,
- This is different from the philosophy of Microsoft Project, P3 and SureTrak, where each resource has its own calendar based on a project calendar and many resources are not able to share one calendar,
- These calendars are created in a similar method to the Global and Project calendars.

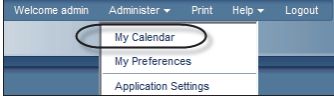


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6.7 - Administer, My Calendar

- When a user is created as a resource in a database then the user may be assigned to the resource and edit their own calendar,
- This option works in the same way as editing any other calendar,
- A resource calendar will be used to calculate activity durations when an activity is assigned an **Activity Type of Resource Dependent**,
- The **Administer, My Calendar** menu option is not seen when a user is not associated with a resource:

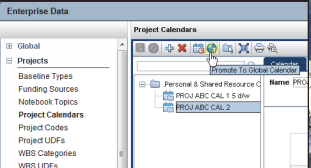


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6.8.1 - Promoting a Project Calendar to Global

- A **Project Calendar** may be promoted to become a **Global Calendar**:
 - Open the project that the calendar currently resides in,
 - Select **Administer, Enterprise Data, Global, Project Calendars**,
 - Select the relevant **Project Calendar**,
 - Then click on the **Promote** icon and click on Yes to confirm,
 - Click on the **Save** icon.

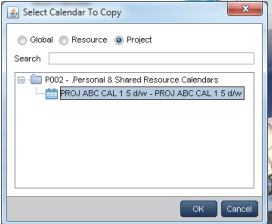


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6.8.2 - Copy a Calendar from One Project to Another

- Open the project that the calendar currently resides in,
- Select **Administer, Enterprise Data, Global, Project Calendar**,
- Then click on the icon to display the **Select Calendar To Copy** form,
- Select the **Project** radio button,
- Select the calendar to copy,
- Click OK,
- Assign a name,
- Click on **Save**.

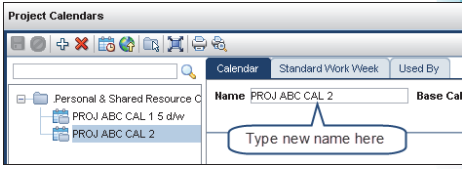


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6.8.3 - Renaming a Calendar


- To rename a calendar:
 - Select **Administer, Enterprise Data, Global, Global, Project** or **Resource Calendar**
 - Select the calendar to be renamed,
 - Type to new name into the name field,
 - Click on the **Save** icon.




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6.8.4 - Deleting a Calendar

- To delete a calendar:
 - Select **Administer, Enterprise Data, Global, Global, Project** or **Resource Calendar**
 - Select the calendar to be deleted,
 - Click on the  icon and click on **Yes** to confirm,
 - Click on the **Save** icon.




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6.9.1 - Understanding Base Calendars

- When creating a new Project or Resource calendar, a Global Calendar may be selected from the drop down box and this function will link the calendar holidays from the selected Global Calendar into the displayed calendar,
- In the Client this function is called **Inherit Holidays and Exceptions from a Global Calendar**,
- It is suggested that this option never be used so each calendar is created as standalone without inheriting holidays from another calendar, and therefore will not change if another calendar has holidays changed.




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6.8.2 - Remove a Base Calendar from a Calendar

- To remove a Base Calendar from an existing you will have to delete the text from the box.




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6.10 - Adjusting Calendar Working Hours

- It is strongly recommended that the working hours per day are all the same and have the same start and finish time; otherwise, one-day activities may span two days and two-day activities may span three days, etc,
- The instructor will demonstrate how to adjust the calendar working hours.



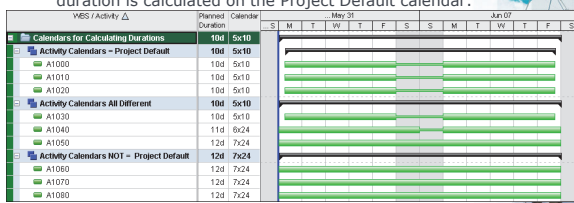
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6.11 - Calendars for Calculating Summary Durations

- The summary duration of bands are calculated by:
 - When all the activities in a band share the same calendar then the summary duration is calculated on the calendar of the activities in the band, and
 - When activity calendars for the are different the summary duration is calculated on the Project Default calendar:

Calendar	Duration
Activity Calendars - Project Default	10d 5x10
A1000	10d 5x10
A1010	10d 5x10
A1020	10d 5x10
Activity Calendars All Different	10d 5x10
A1030	10d 5x10
A1040	11d 8x24
A1050	12d 7x24
Activity Calendars NOT - Project Default	12d 7x24
A1060	12d 7x24
A1070	12d 7x24
A1080	12d 7x24



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