

**ORACLE® PRIMAVERA® P6**  
VERSION 8, 15 and 16 EPPM WEB ADMINISTRATORS GUIDE

**PAUL E. HARRIS**

**EASTWOOD HARRIS** PTY LTD.

### 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
- 14-16 P6 IMPLEMENTATION TEMPLATE & SECURITY PROFILES

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Welcome to the  
**Eastwood Harris Pty Ltd**  
**Oracle Primavera P6**  
**Version 8, 15 and 16**  
**EPPM Web**  
**Administrators Guide**  
training course  
“Enterprise Portfolio Project  
Management”

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### 1 - INTRODUCTION

- 1.1 - Readers/Student Prerequisites
- 1.2 - Objectives
- 1.3 - Understanding Enterprise Portfolio Project Management
- 1.4 - Understanding System Implementation and Administration
- 1.5 - Implementing Web Based Project Management Tools
- 1.6 - Additional Reading Material

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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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### 1.1 - Readers/Student Prerequisites

It is preferable that students have the following experience and knowledge:

- Understand project management processes,
- Understand the concepts of enterprise project management,
- Have completed a Primavera P6 training course, either the Web or Windows Client courses will be acceptable
- Have operated P6 as a scheduler for 6 months in a large organization with multiple projects and users.

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## 1.2 - Course Objectives

This course objectives are to teach participants:

- To demonstrate the structure of a P6 database,
- To demonstrate the tools available to access, set up and administer a P6 Database,
- Understand the steps that should be considered when implementing a P6 database,
- To outline the P6 functions that an Administrator should be familiar with to administer a P6 database using the Web Interface,
- Explain how to setup/configure a P6 Database using the Web interface,
- Explain how to administer a P6 Database using the Web interface.

Successful completion of the workshops is required to complete the course.

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## 1.5 - Implementing Web Based Project Management Tools

- Web based technologies often require specialist knowledge to implement to ensure the software will function as designed,
- The system configuration of both the hardware and software can also impact the speed of the system due to the number of different system combinations,
- This paper will not cover the technical side of implementation of software such as hardware selection and loading of the software,
- It is important that a prototype system is set up and tested to ensure that the software will provide the expected results before it is rolled out to the general community.

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## 1.3 - Enterprise Portfolio Project Management

- There are many definitions for the terms portfolio and programs,
- Some of these definitions have been defined differently by a number of organizations,
- In general, the term enterprise portfolio project management and/or program management is a process of managing multiple projects which employ multiple resources with one or multiple outcomes and objectives.

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## 1.6 - Additional Reading Material

Oracle Primavera published a number of pdf manuals with the software that have a significant amount of information which should be considered in addition to reading this book. They include some of the following documents:

- The P6 User's Guide
- P6 EPPM Post Installation Administrator's Guide
- P6 EPPM System Administrator's Guide

These may be downloaded from the Oracle website.

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## 1.4 - Understanding System Implementation and Administration

For a new system and implementation to be successful the following parameters must be met:

- The reasons for implementing a new system must be clearly understood and justified,
- There must be strong support from senior management,
- The implementation must be properly planned,
- It is important to write roles and responsibilities,
- It is important to write procedures,
- The level of training of new users must be consummate with the proposed level of support and the level of knowledge and experience of the users.

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## 1 - INTRODUCTION - SUMMARY

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## 3.16 - Closing a Project

There are two methods for closing a project:

- From the **Projects, Open Projects** menu, but you must leave one project open with this form,
- Selecting **Projects, EPS, Actions, Close All** will close all projects.

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## 3 - STARTING UP AND NAVIGATION - SUMMARY...

- 3.1 - Implementing Web Based Project Management Tools
- 3.2 - New Interface Features in Primavera P6 EPPM 16.1
- 3.3 - Increased Functionality in Activities Page Standard View
- 3.4 - Logging In
- 3.5 - Primavera P6 Architecture
- 3.6 - P6 Web Functionality Areas and Interface
- 3.7 - Viewing Project Data - Projects Tab
- 3.8 - Understanding the Projects Window
- 3.9 - Right-clicking with the Mouse
- 3.10 - Full Screen Mode Icon

Continued...

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## 3.17 - Pop-Up Windows

There are two types of popup windows you may be presented with:

- A web browser window when the browser requires the user to allow pop-ups or to load further software to operate, such as a Java script. These should normally be allowed, otherwise the software will not operate:
- P6 popups, which once you understand how the software operates you should disable by selecting the Do not show again option.

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## 3 - STARTING UP AND NAVIGATION - SUMMARY

- 3.11 - Multiple Browser Windows and Tabs
- 3.12 - Search Function
- 3.13 - Accessing Help
- 3.14 - Find and Replace Option
- 3.15 - Global Search and Replace
- 3.16 - Closing a Project
- 3.17 - Popup Windows
- 3.18 - Closing Down.

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## 3.18 - Closing Down

- Select **Logout** from the top right hand side of the screen to close down the application.

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## 3.16- Workshop 1 - Introduction to the P6 Interface

- The objective of this workshop is to familiarize yourself with the P6 menu. The best way to become familiar is to spend time exploring all the menu options in your own time.

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## 7 - CREATING ROLES AND RESOURCES - SUMMARY

- 7.0 - Understanding Resources and Roles
- 7.1 - Creating Roles
- 7.2 - Creating Resources and the Resources Window
- 7.3 - Roles & Resource Teams
- 7.4 - Workshop 5 – Adding Roles & Resources to the Database.

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## 8.1 – Administer Menu

- The Admin menu is available in the P6 Professional Client. When the Web Client is installed and the P6 Professional Client is used, then the Admin menu is no longer available and all administration functions must be accessed through the Web module when using the Professional Client,
- The Web Client **Administer** menu is where the Admin commands are located and these are all very similar to the Professional Client.

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## 7.4 - Workshop 5 – Adding Roles & Resources to the Database

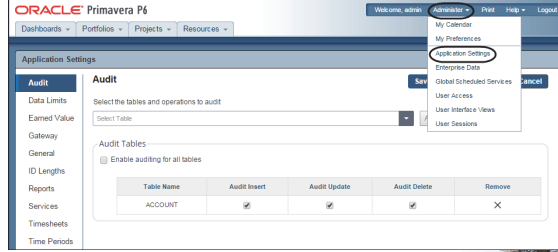
- In this workshop you will create some GoldCraft Roles and Resources and these must be added to the database.

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## 8.2 – Application Settings

This is where some database parameters are created and edited:



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## 8 – CONFIGURING APPLICATION SETTINGS & ENTERPRISE DATA

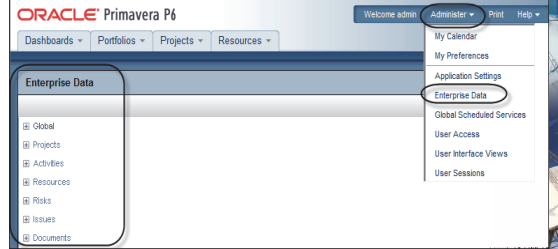
- 8.1 – Administer Menu
- 8.2 – Application Settings
- 8.3 – Enterprise Data
- 8.4 - Miscellaneous Defaults
- 8.5 – Things to Avoid When Setting Up Master Data
- 8.6 – Workshop 6 – Configuring Administer Settings.

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## 8.3 – Enterprise Data

- This is where Global Codes, Calendars and other database fields are created and edited



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## 13 – DATA IMPORT AND EXPORT TOOLS

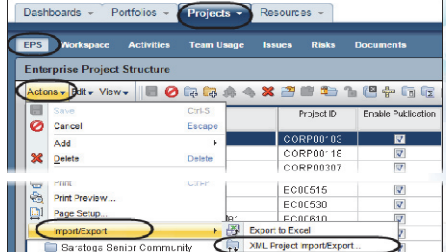
- 13.1 – Importing and Exporting Project Data with P6 Web
- 13.2 – Excel Data Import and Export with P6 Web
- 13.3 – XML Data Import and Export with P6 Web
- 13.4 – Importing and Exporting Data with P6 Professional
- 13.5 – Excel Import and Export Professional Tool
- 13.6 – Check List for Import/Export to MS Project.

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## 13.3 - XML Data Import and Export with P6 Web

- Primavera XML is a format introduced with Primavera Version 6.0 which can be used to exchange data from one primavera database to another primavera database.



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## 13.1 - Importing and Exporting Project Data with P6 Web

P6 Web Client is able to import and/or export data to and from the following file types:

- Excel
- Primavera XML
- Microsoft Project XML
- UN/CEFACT XML

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## 13.4 - Importing and Exporting Data with P6 Professional

- There are several Primavera proprietary file formats that the Professional tool will manage:
- XER
- PLF
- ANP
- ERP
- XML
- PCF
- VLF.

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## 13.2 - Excel Data Import and Export with P6 Web

- The Primavera Web tool will **Export** and **Import** a list of **Project Activities** to and from **Excel**,
- This function is far less powerful than the P6 Professional tool,
- You will need to be in the P6 **Activities** view to access the appropriate menu,
- The function will export and import the visible column data,
- The **Create Import Template** will create a blank spreadsheet with appropriate headers which may be populated and imported.

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## 13.5 - Excel Import and Export Professional Tool

- Primavera has a built-in tool for importing to and exporting from Excel the following data when the user is assigned a Superuser security profile:
- Activities
- Relationships
- Resources
- Resources Assignments, and
- Expenses.


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### 13.6 - Check List for Importing from and Exporting to Microsoft Project

- There are many differences in the ways that P6 and MSP calculate and understanding them always helps in understanding why an imported schedule calculates differently,
- The table at Page 228 of the manual details the main points of difference.


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**Thank you for attending**

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### 13 – DATA IMPORT AND EXPORT TOOLS - SUMMARY

- 13.1 – Importing and Exporting Project Data with P6 Web
- 13.2 – Excel Data Import and Export with P6 Web
- 13.3 – XML Data Import and Export with P6 Web
- 13.4 – Importing and Exporting Data with P6 Professional
- 13.5 – Excel Import and Export Professional Tool
- 13.6 – Check List for Import/Export to MS Project.

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### Database Cleanup at end of course, if required:

Please could you delete all:

- User Filters
- User Layouts
- The resources created but NOT your Resource node
- Your projects.

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