

Understanding Primavera P6 Database Settings by Paul E Harris

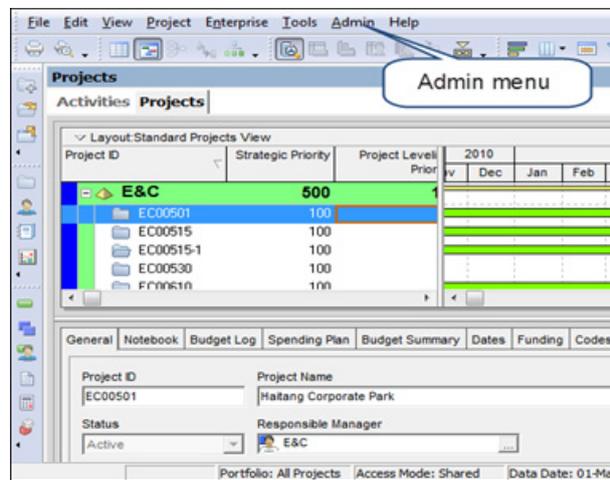
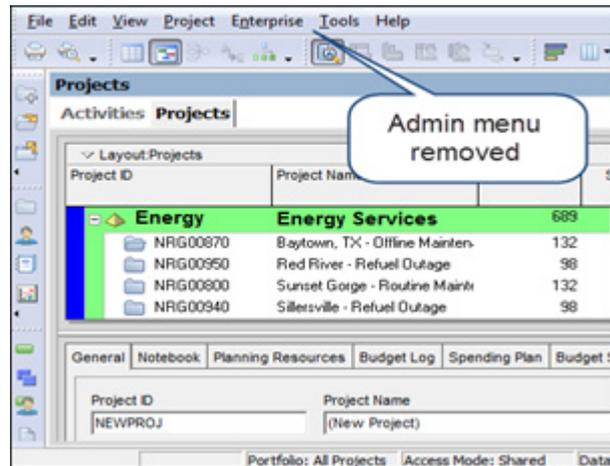
1 Introduction

When you have created a new P6 database the **Database Default Settings** are often not the best and it is my opinion that they should always reviewed and some changed.

2 Understanding Databases

Oracle Primavera P6 may open three types of databases:

- **EPPM**, Enterprise Portfolio Project Management. This type of database may be opened with either the PPM Windows Client or the EPPM Web Client and the administration of the database is only undertaken in the EPPM Web Client. Therefore, when you open an EPPM database with the Windows Client you will find the Admin menu and some Enterprise menu functions are removed and these functions are performed in the EPPM Web Client. This mode is also referred to as the **Optional Client**.
- **PM, Professional Project Management**. This database may only be opened with the PPM Windows client and the administration of the database is undertaken in the Windows Client using the **Admin** menu.
- There is also a **Stand Alone** load that does not have the ability to create users.



3 Understanding Database Options

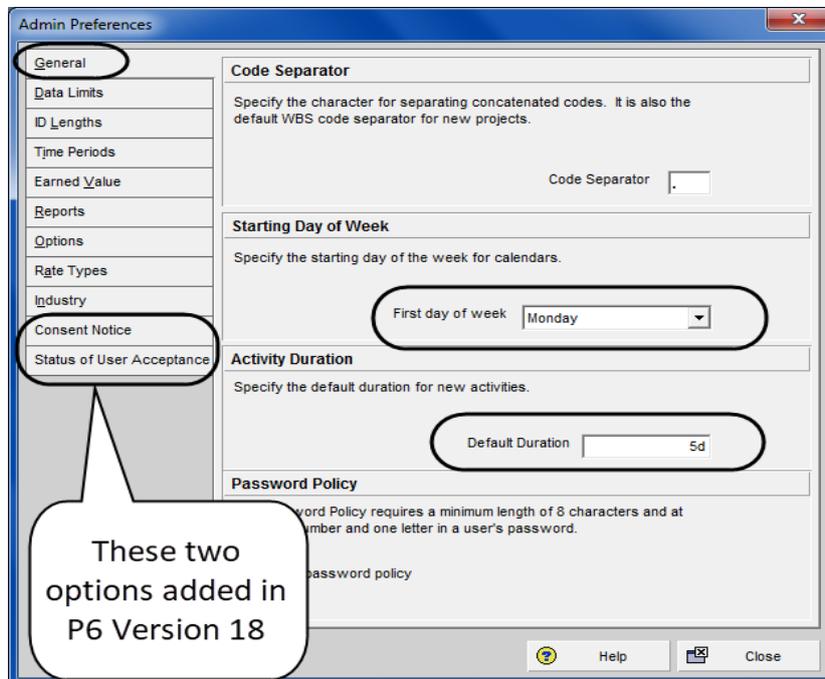
The database options affect all users and there are many default options in both an empty database and the demonstration database that will need to be adjusted for most organizations.

This chapter will take you through the important ones that the author normally changes and these are edited using:

- **Admin, Admin Preferences..., General** tab in a PPM Professional database, as per the picture below, and
- **Administer, Application Settings, General** in an EPPM database, no pictures of the EPPM database will be displayed in this book, but these options are found under the Admin menu.

3.1 General

We will work through the **Admin Preferences** settings starting with the **General** tab:

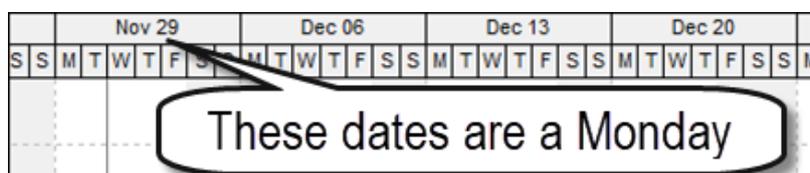


3.2 Code Separator

This is the default code separator used for all codes and WBS in a project but this may be changed for each project in the **Project Window, Setting** tab.

3.3 Start Day of Week

The **First day of week** is defaulted to Sunday. Many people prefer to see Monday because the calendar date in the weekly view is then Monday and is a workday, as per the picture below:

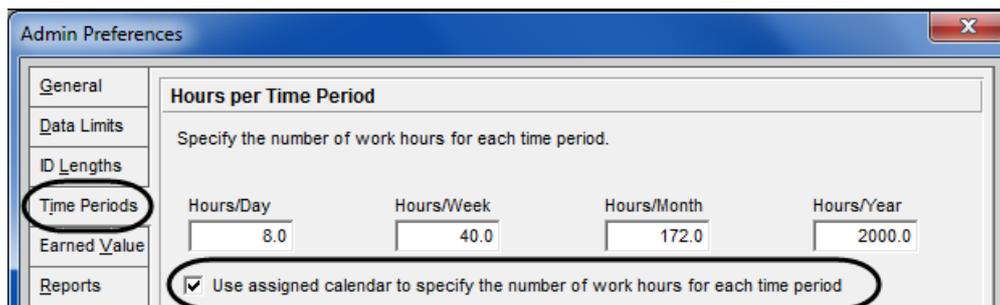


3.4 *Default Duration*

This is best set at 5 days because when reduced to 1 day a new activity bars becomes hard to see, because it becomes a very short bar.

3.5 *Time Periods, Hours per Time Period*

ALWAYS check the option **Use assigned calendar to specify the number of workhours for each time period.**



If you do not keep this box checked, then calendars will ignore their individual **Time Periods** settings, and durations in days and weeks etc. may be incorrect.

For example, in the picture above if the check box is UNCHECKED then calendars that do not have 8 hours per day or 5 days per week will have their durations in days, weeks and months incorrectly calculated and displayed.

NOTE: This was introduced in Version 7.

3.6 *Earned Value, Earned Value Calculation*

Like many descriptions in P6 this does not mean exactly what is the title suggests. These options decide which Baseline schedule values are read to:

- Calculate the **Earned Value** fields in the current schedule, and
- Which baseline dates are displayed as **Baseline** bars.
- A baseline has two sets of data for dates, costs and units that may be read and displayed as baseline data. An administrator must decide what data all current schedules will read and ensure users understand the setting:
- **Dates** – will a baseline display the:
 - **Planned Start** and **Planned Finish**, or
 - **Start** and **Finish**
- **Costs and Units** - will a baseline display the:
 - **Budget** (or **Planned** in some industry versions and the EPPM Web tool)
 - **At Completion**
- The **Planned Start**, **Planned Finish** and **Budget** or **Planned** may hold irrelevant data. See the Planned Dates section in any of my books.

- The **At Completion values with current dates** is the author's preferred option when resources are assigned.

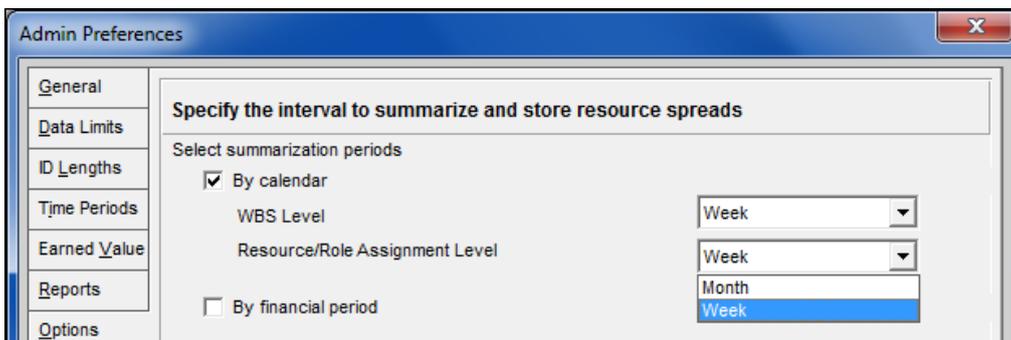


NOTE: These options apply to every user. Also, when you import a Baseline schedule from another database you should check what options the other database has selected. Not understanding how these options work may be a career shortening exercise!

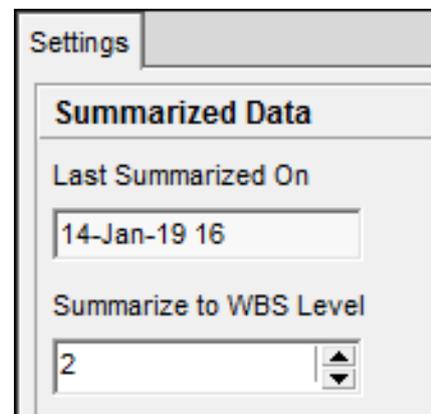
3.7 Options,- Specify the intervals to summarize and store resource spreads

The **Projects** and **Tracking** windows do not read the latest current schedule data. They read **Summarized Data** which is updated when a database is summarized, or the project is open.

- The level at which this data is stored in the database is set in this tab and weekly is usually the most suitable.



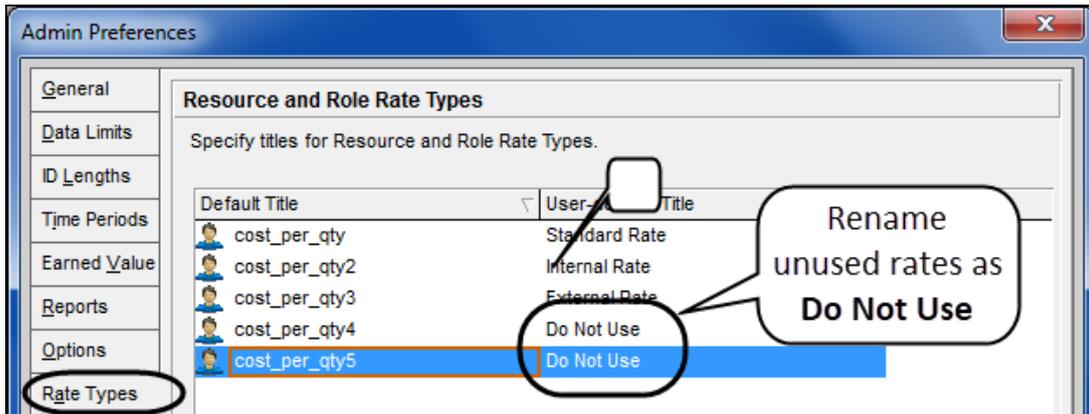
- A database is summarized using **Tools, Summarize**. Once summarized the data read in the **Projects** and **Tracking** windows will be correct at the time of summarization.
 - A database running from a server should be summarized every night by setting up a **Job Service** using the **Tools, Job Service** command.
 - A database running on a standalone database should be summarized using **Tools, Summarize** before any data is read in the **Projects** and **Tracking** windows.
- The WBS level that the data is summarized to (and when the data was last summarized) is set by the user per project in the **Project** window, **Settings** tab, **Summarized data**. This sets the level of detail available in the **Tracking** window.



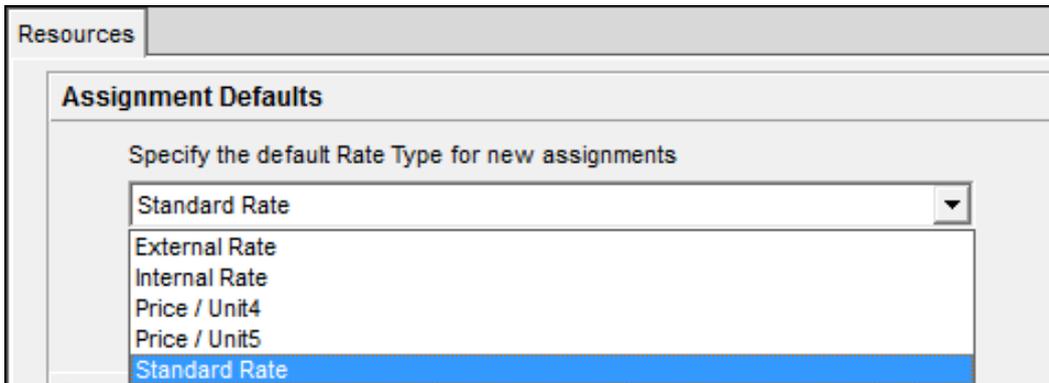
3.8 Admin, Rate Types, Resource and Role Rate Types

Primavera has five **Resource and Role Rate Types** which may be renamed in this tab. This allows each role or resource to be assigned up to 5 rates. For example, there could be an internal and external charge out rate for resources:

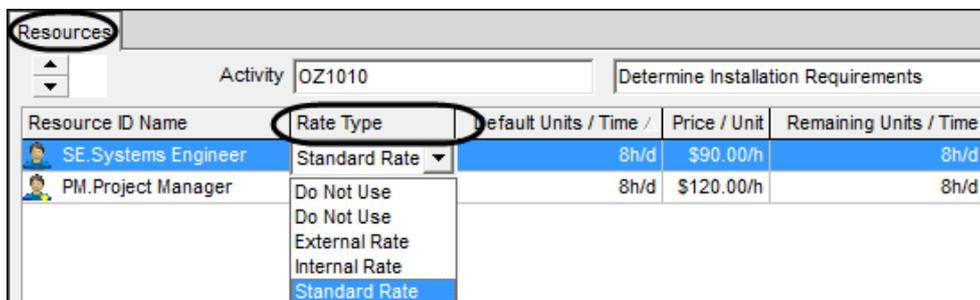
Most construction companies create a set of resources for each project with a rate for that project and only use the first Resource Rate. In this situation it is recommended that all the other four **Resource and Role Rate Types** are renamed **Do Not Use**.



When a project is created the **Default** rate is selected in the **Project** window, **Resources** tab, **Assignment Defaults** section:

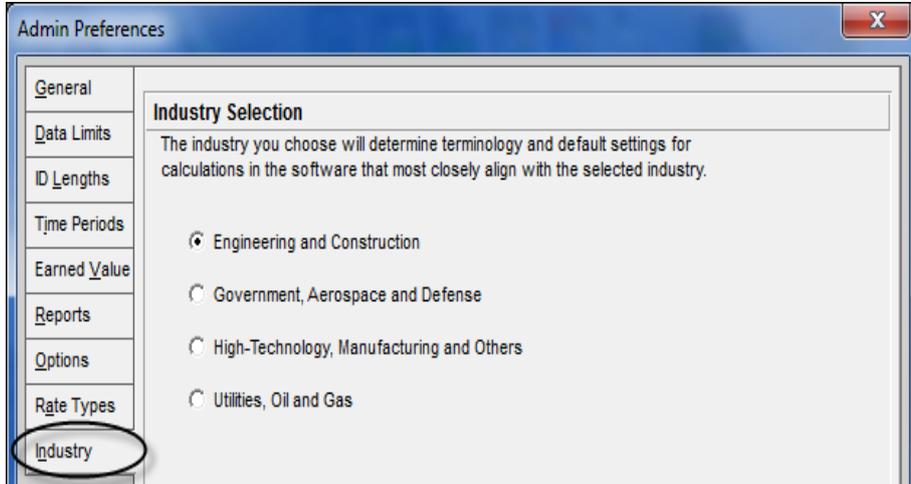


The rate used by resources assigned to an activity may be changed at any time in **Activities** window, **Resources** tab, **Rate Type** drop down box:



3.9 Admin, Preferences, Industry

The Industry type determines the terminology used in some fields and in earlier versions was set when the software was loaded. This now may be set in the P6 Professional by selecting **Admin, Admin Preferences..., Industry** tab:

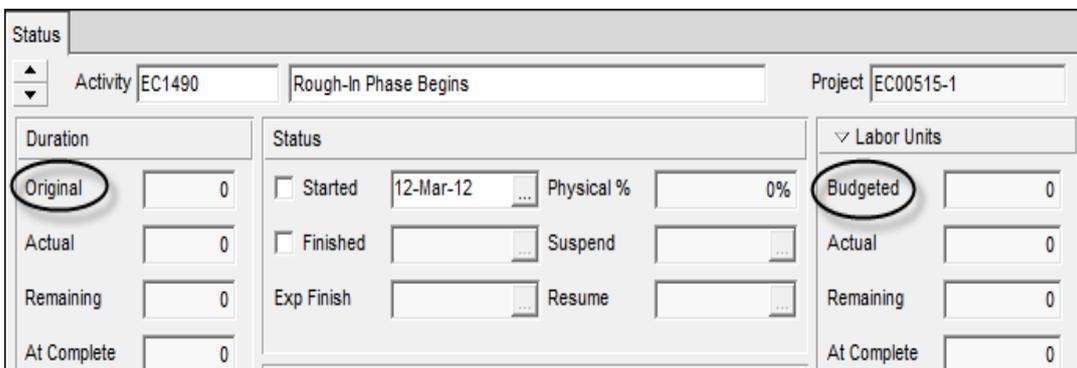


When an EPPM database is being used then the Industry is set with the Web Client in the **Administration, General, Industry Selection** drop down box.

The following table displays the terminology:

| Industry Type | Terminology | Name of Project Comparison Tool |
|---------------------------------------------------|--------------------------------------------|---------------------------------|
| Engineering and Construction | Budgeted Units & Cost Original Duration | Claim Digger |
| Government, Aerospace, and Defense | Planned Units & Cost Planned Duration | Schedule Comparison |
| High-Technology, Manufacturing and Other Industry | Planned Units & Cost Planned Duration | Schedule Comparison |
| Utilities, Oil, and Gas | Budgeted Units & Cost Original Duration | Claim Digger |

Engineering and Construction:



Government, Aerospace, and Defense:

| | | | | | | | |
|-------------|---|-----------------------------------|-----------|-----------------------|----|-------------------|---|
| Status | | Activity EC1490 | | Rough-In Phase Begins | | Project EC00515-1 | |
| Duration | | Status | | Labor Units | | | |
| Planned | 0 | <input type="checkbox"/> Started | 12-Mar-12 | Physical % | 0% | Planned | 0 |
| Actual | 0 | <input type="checkbox"/> Finished | | Suspend | | Actual | 0 |
| Remaining | 0 | Exp Finish | | Resume | | Remaining | 0 |
| At Complete | 0 | | | | | At Complete | 0 |

If a different Industry Type is selected, then P6 has to be restarted to see the changes. The EPPM Web Client only uses Planned Units & Cost, Planned Duration and Schedule Comparison.

3.10 Admin, Consent Notices

Consent Notices were introduced in P6 Version 18 and alert users to any corporate policies designed to protect personally identifiable information that may be stored or transmitted when using P6.

Consent Notice

Consent Type

Add resources consent notice

Enable consent notice

Consent Notice Message

The company policy is not to add any personal information when creating a resource in the Resource window which includes personal email, phone or home address and age.

Modify Print Copy

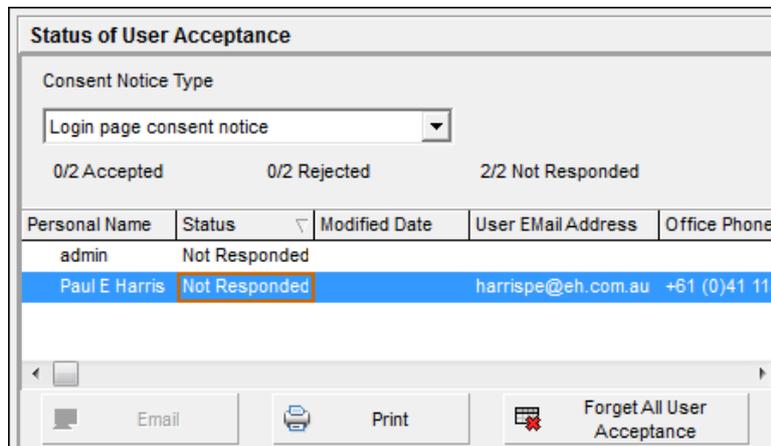
Preview

A Consent Notice is displayed when a user first operates one of the functions enabled as a Consent Notice. The user must accept the consent notice before being allowed to progress.

3.11 Admin, Status of User Acceptance

Status of User Acceptance shows how many Consent Notices have been displayed and accepted by users.

The **User Preferences, Personal Information** tab allows users to see the personal information entered by the administrator when the user was created.



| Personal Name | Status | Modified Date | User EMail Address | Office Phone |
|---------------|---------------|---------------|--------------------|--------------------|
| admin | Not Responded | | | |
| Paul E Harris | Not Responded | | harrispe@eh.com.au | +61 (0)41 118 7701 |

4 Admin, Categories

This menu is used to tailor the various categories which should align to your organization's project management procedures.

4.1 Notebook Topics

Notebook Topics are useful for recording information on a specific subject. It is unfortunate that they may not be displayed in columns in the **Projects** and **Activities** windows, thus it makes it difficult to share **Notebook Topics** with project team members who do not have P6 access.

You may wish to consider using **UDF** fields for recording information that you wish to share with people who do not have access to P6, so this data may be simply displayed in reports columns and printed out as required.

4.2 Units of Measurement

These are the units of measurement you use for Material Resources and should be tailored for the types of **Material Resources** your company uses.

NOTE: The default P6 load usually does not have any metric units and must be added.

5 Admin, Currencies

The **Admin, Currencies** form is used to edit currencies. When you are only using one currency it is advised that all the other currencies are deleted to avoid users selecting the incorrect currency.

The **Base** currency check box does not operate as expected and you will have to edit the **Currency ID, Currency name** and **Currency Symbol** in the first line to suit your countries currency and in turn making it the **Default Currency**.

The **Exchange Rate** is a simple method of calculating the cost in a different currency and it is not possible to vary this over time.

The user selects which currency to see all their project costs using the **Edit, User Preferences, Currency** tab.

NOTE: This is a dangerous function when multiple currencies are in use, as a user may hide the currency symbol and no one will know what currency the cost are displayed in! It is possible to have two **Currencies** with the same symbol and if a user selects a different currency then all costs displayed by the user will be converted to a different value. This option must be carefully monitored and if you do not need multiple currencies then it is suggested that you should delete them all, to avoid any possible problems. If you are using multiple currencies, then make sure that all currencies have a different sign so there is no confusion.

6 Admin, Financial Periods

This is where the **Financial Periods** associated with **Storing Period Performance** are created.

Financial Periods have to be used when it is important to have data that reflects how much work was completed or costs spent in each period and not just averaged over the periods to date.

Using **Financial Periods** creates more accurate S-Curves.

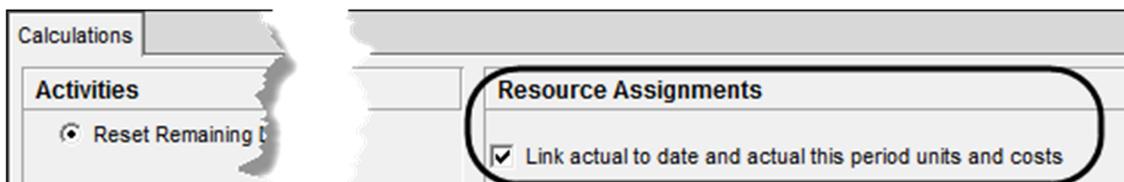
Using **Financial Periods** requires a high level of discipline in the project team and are difficult to use:

Financial Periods are created in **Admin, Financial Periods**,

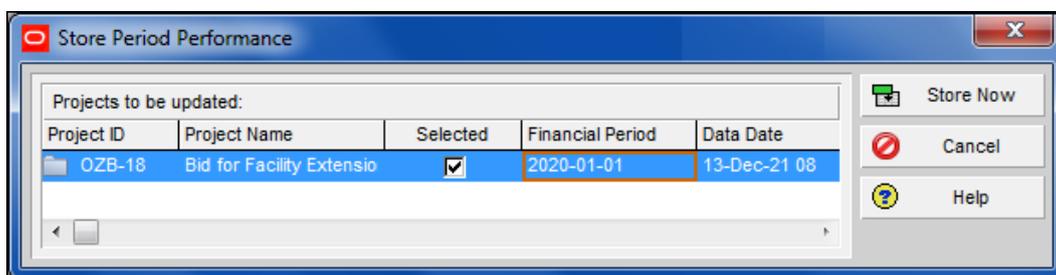
They are set in a round number of months or weeks,

All projects in a database have the same Financial Periods,

- The Projects, Calculations tab Link actual to date and actual this period units and costs must be checked for the Financial Periods to operate. This may be unchecked to manually fix up past errors, but must be rechecked before storing performance,



- Period performance is stored using Tools, Store Period Performance:



- Many resource windows and reports have the option of **Display Actuals using Financial Period data**.



7 Users, Security Profiles and Organizational Breakdown Structure

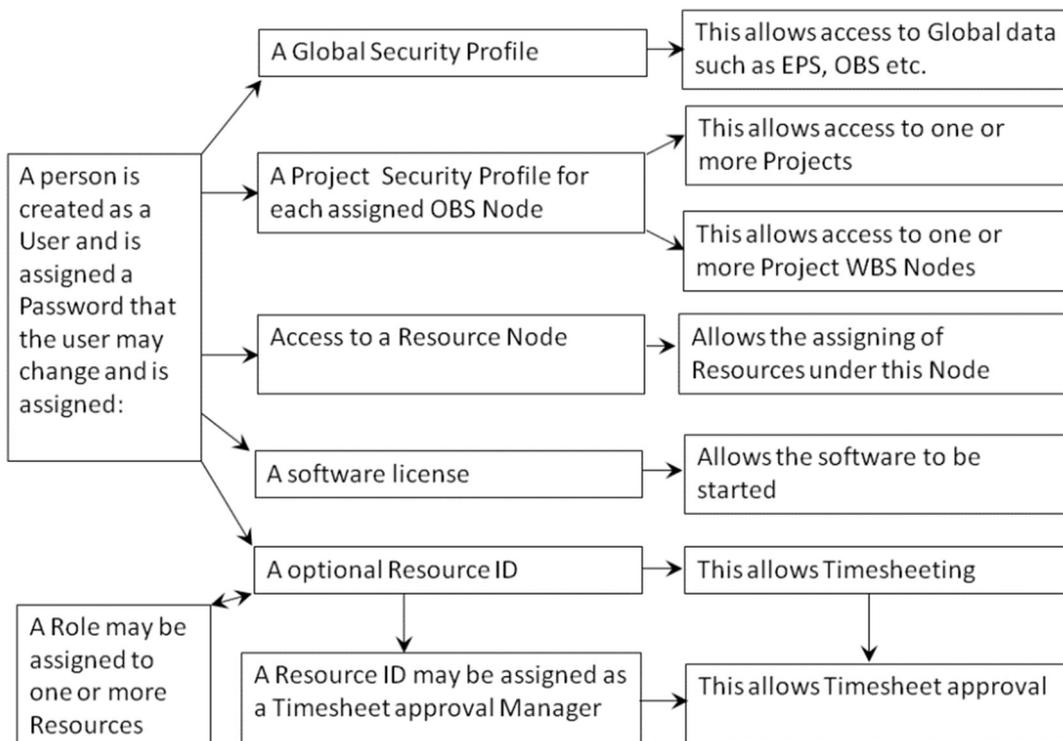
This section is intended to introduce this topic. Please refer to my other books, or the Primavera Administration Manual for full details.

The full picture and processes for creating users and assigning access are:

- The **EPS** is created, allowing projects to be created under each EPS Node. This often mirrors the company's network drive hierarchy.
- The **OBS** is created and acts as a security gateway for users to access projects. This may not need to represent your company's OBS and often this is set up to mirror the EPS.

A user is created by selecting **Admin, Users...** and each user is assigned:

- A **Global Security Profile** which allows access to Global data, such as EPS, OBS, etc.
- A **Project Security Profile** for each assigned OBS Node, which allows access to one or more EPS Nodes, Projects, or WBS Nodes within a project.
- Access to all or one **Resource Node** is. The user may only see and assign resources from this node but may see any resources and their associated costs once they are assigned to activities by another user.
- Access to a software license, allowing the user to login and start the software.
- The user may be assigned to a resource in the **Resource Window**, thus allowing timesheets to be used.
- One or more **Resources** may be assigned to one or more **Roles**.



8 Date and Time Display

The date and time display set in the **User Preferences** may be different for each user and are applied to any project that a user opens.

The user's date and time display are used in every window and report that the user displays.

When a company requires all project schedules to look the same, then the required format should be documented and communicated in corporate procedures.

9 Units Display

The **Time Units** set in the **User Preferences** may be different for each user and are applied to any project that a user opens.

This function allows different users to show different units, e.g. it allows one user to show hours and another to show days for the same project and layout.

When a company requires all project schedules to look the same, then the required format should be documented and communicated in corporate procedures.

10 Printouts and Reports Header and Footers

The header and footers are part of the **Activity Layout** that a user has applied to a project.

Unfortunately, when a user opens a different project the Layout from the last project will still be used to display project data in the **Activity** window. As a result, it is very simple for a user to print a report for one customer with the header and footer, including logos, of another customer.

To prevent this happening, procedures and check lists should be used when your database has multiple customer projects.

11 Project Codes

Project Codes are assigned to projects and enable projects to be Grouped and Sorted under an alternative structure to the EPS.

For example, when an EPS represents the physical location of offices by country, state/county and city, the Project Codes enables projects to be given tags, such as Reason for the Project, Safety, Compliance, New Product, and Increase Production. The Projects may be grouped or filtered under these headings.

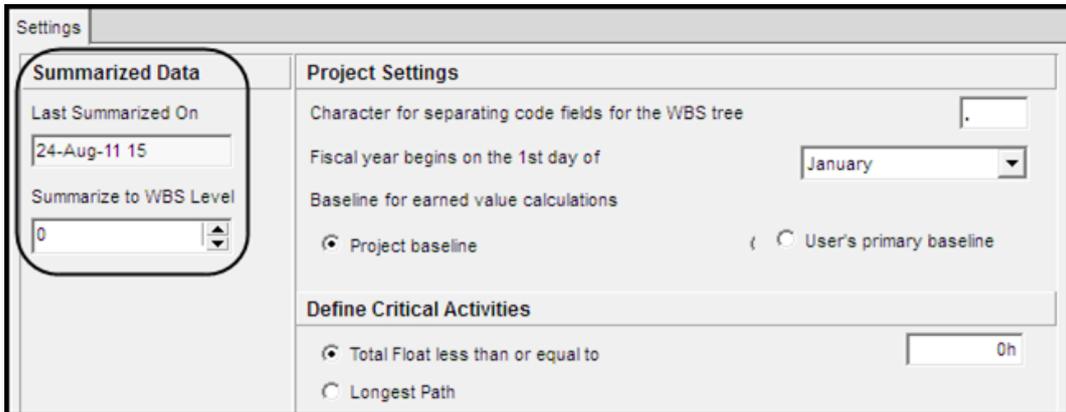
Therefore, project codes are used to Group, Sort and filter Projects in a similar way that Activity Codes are used to Group and Sort Activities.

12 Summarizing Projects

The data displayed in the **Projects** and **Tracking Windows**, such as Durations, Dates, etc., may be incorrect unless the projects have been **Summarized** by selecting **Tools, Summarize**.

You will notice that the data displayed against a project in the Projects window may change when a project is opened and then at this point in time the latest data from the project is read, but when the project is closed this data is read from a **Summary Data** table in the database which is only updated when a database is **Summarized**.

The **Settings** tab in the **Project Window** specifies to what level the data is summarized and indicates when it was last summarized.



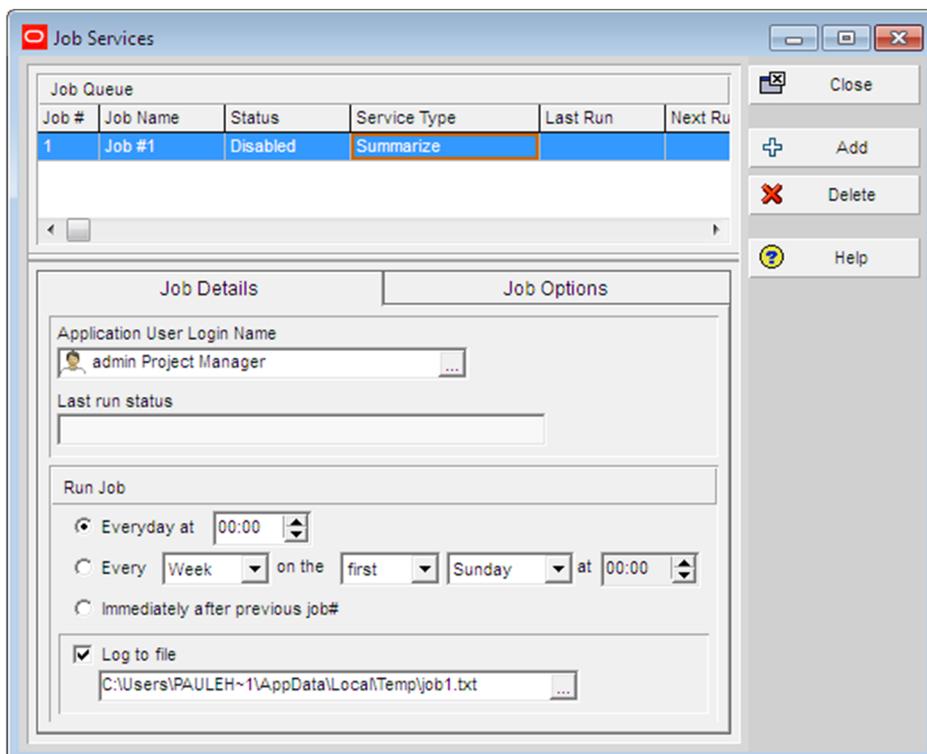
A large database takes a significant amount of time to summarize and may be summarized at night automatically using **Job Services**.

It is good practice to set up a **Job Service** to **Summarize** a database every night.

NOTE: In the picture above, selecting **Summarize to WBS Level** is set to zero so all levels of the WBS will be summarized.

13 Job Services

A **Job Services** may be set up in a PPM database by selecting **Tools, Job Services...** to open the **Job Services** form, which can perform the following functions on one or more selected projects or EPS Nodes:





Select **Administer, Global Scheduled Services** in the Web for setting up a Job Service in an EPPM database. The following functions are available:

- **Apply Actuals** to projects when timesheets are used.
- **Batch Reports.** In the **Reports Window** a **Batch** may be created by selecting **Tools, Reports, Batch Reports...** to open the **Batch Reports** form. This creates one or more reports simultaneously. A Batch may be run on a regular basis using a job service.
- **Export** one or more projects on a regular basis.
- **Schedule** one or more projects on a regular basis.
- **Summarize** projects. This must be set up to run nightly for all databases so the data in the projects window is correct.

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20 June 2020