

# New User Setup in Oracle Primavera P6 PPM Professional

## 1 Introduction

When a new user is created in P6 Professional many of the default settings are not ideal and the user should consider changing some of the following settings to make the software easier to use:




- User Preferences and
- Menu Settings

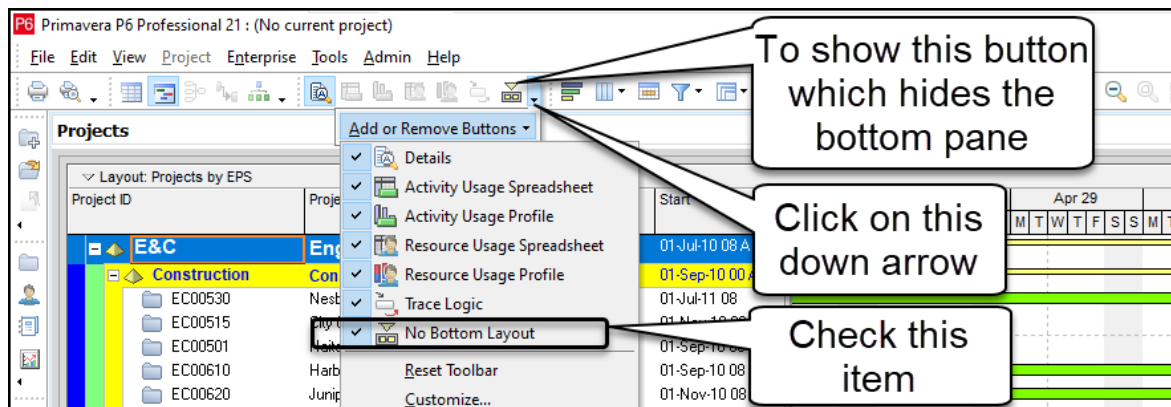
This paper outlines the changes a newly created user should consider making to their User Preferences and menu settings to make P6 simpler to use.



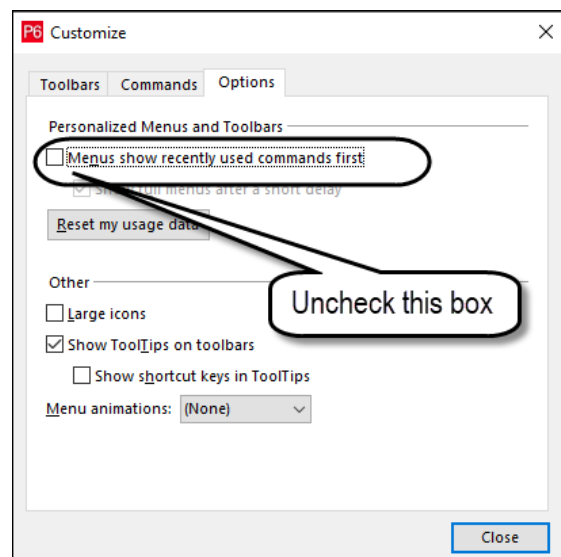
## 2 Menu Changes

The following menu changes are recommended:

1. Add the  button to the **Bottom Layout** toolbar and then use the  and  buttons on the **Bottom Layout** toolbar to hide and display the bottom pane **Projects Details** form.



2. To ensure you see the full menus each time you select menu then right click on a Toolbar and select **Customize...** to open the **Customize** form, select the **Options** tab and uncheck **Menu show recently used command first**, as per the picture:



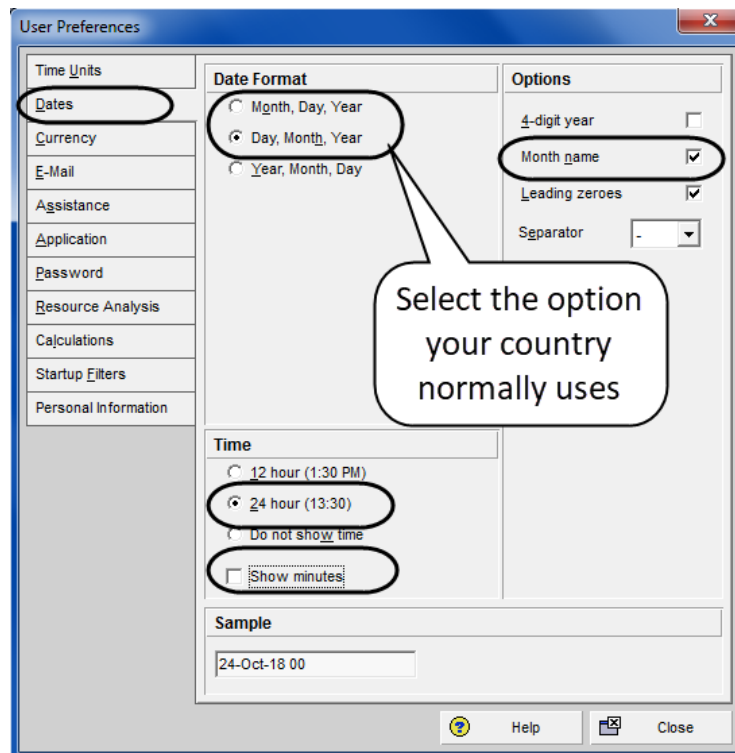
3. Move the blue arrow menu from the right hand side to the left hand side of the screen so it is closer to where you will use it to indent and outdent WBS Nodes and resources.



### 3 User Preferences

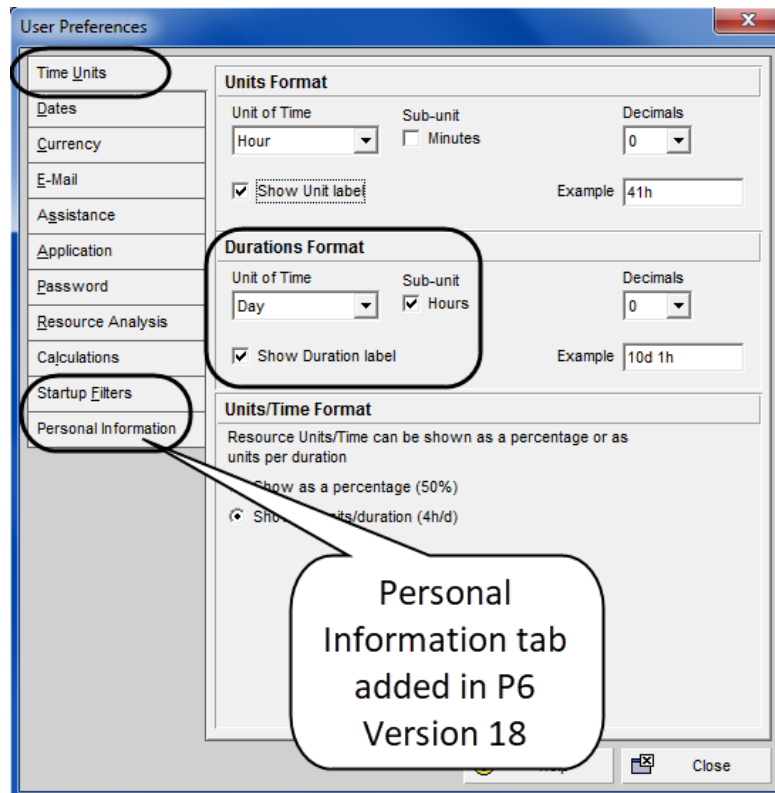
Open the **User Preferences** form by selecting **Edit, User Preferences...**

1. Select the method you wish to display the date from the **Dates** tab and set your options as per below. People in the US would wish to use the **Month, Day, Year** option, but ensure you show the time in 24 hour format and do not select **Show minutes**:

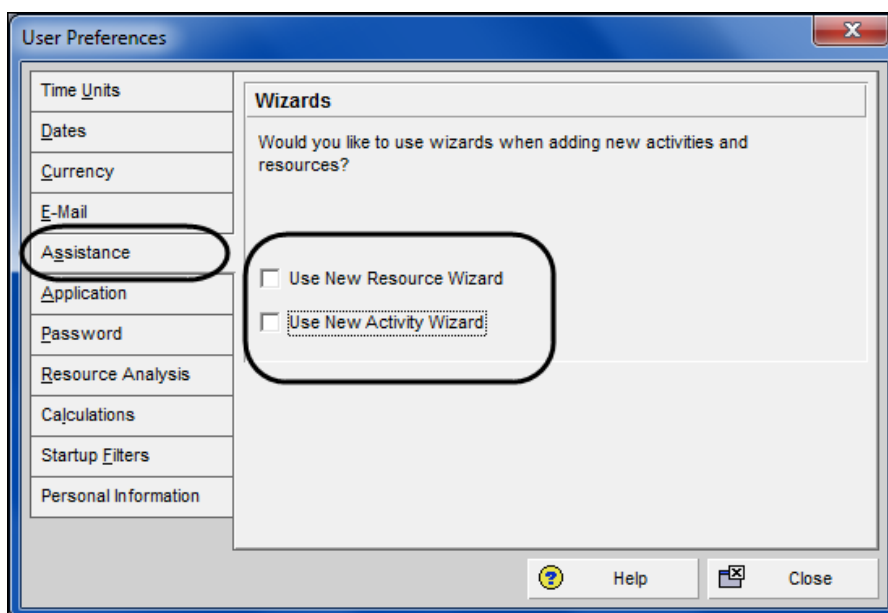


**NOTE:** It is strongly recommended that the time is always displayed as per the picture above so the user knows the time when Actual Start, Actual Finish and Constraints are applied because the software will often select 00:00, first minute of a day.

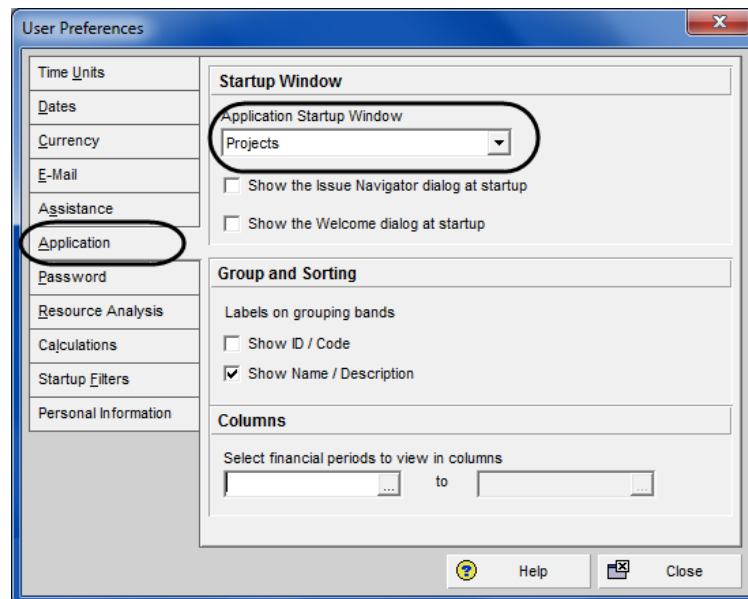
2. Select the **Time Units** tab and set your options as shown below:



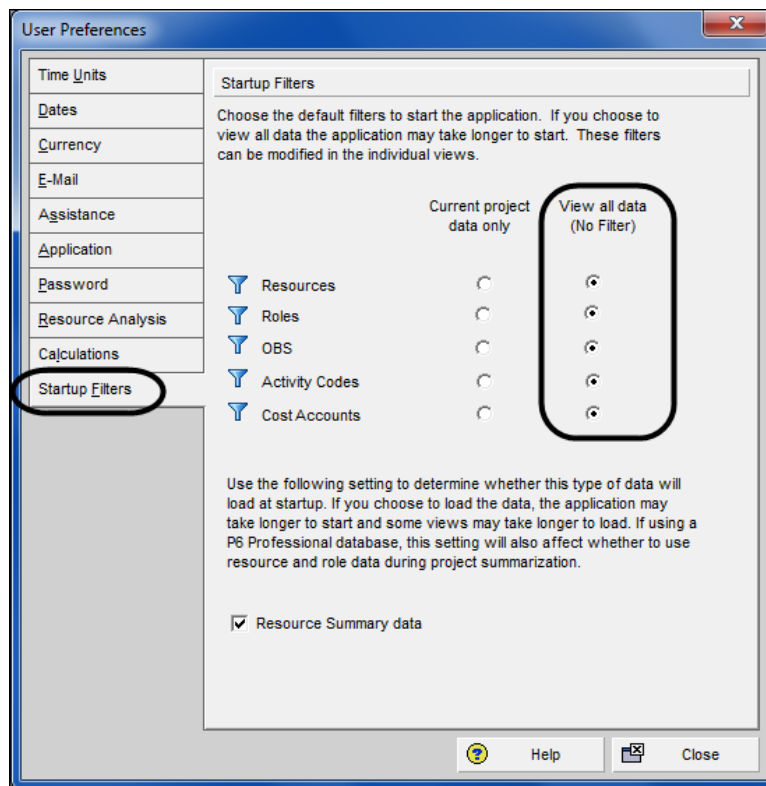
3. In the **Currency** tab it is worth unchecking **Show decimal digits** to make the display of cashflow and cost columns narrower.
4. Select the **Assistance** tab and uncheck both **Wizards** as shown below because these make it slower to add activities and resources:



5. Select the **Application** tab and select the **Application Startup Window** as **Projects**. This will ensure the database opens at the **Project Window** each time you start up Primavera.



6. Select the **Startup Filters** and check **View all data (No Filter)** as this will ensure that when you open one of the windows you will see all the database data and not a blank screen.



7. Close the **User Preferences** form.



## 4 Other Comments

There are other settings that may be tweaked such as turning on the **Calculations, Dissolve Activities, Retain Lag** option in later version of P6, but I have covered the main ones that I feel should be sorted out in this paper.

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