



PRIMAVERA

**P6 User Guide
Version 17**

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Cloud or On-Premises Content

Within our documentation, some content might be specific for cloud deployments while other content is relevant for on-premises deployments. Any content that applies to only one of these deployments is labeled accordingly.

Please note that, at the moment, P6 EPPM 17 and P6 Professional 17 are available only as cloud deployments.

What's New in P6 EPPM

To learn about enhancements to P6 EPPM, please see the *What's New in P6 EPPM* document.

You can also use the *P6 EPPM Cumulative Feature Overview Tool* to identify the features that have been added since a specific release level.

About Oracle Primavera P6 Enterprise Project Portfolio Management

Oracle Primavera P6 Enterprise Project Portfolio Management (P6 EPPM) is a robust and easy-to-use integrated solution for globally prioritizing, planning, managing, and executing projects, programs, and portfolios. It optimizes role-specific functionality to satisfy each team member's needs, responsibilities, and skills. It provides a single solution for managing projects of any size, adapts to various levels of complexity within a project, and intelligently scales to meet the needs of various roles, functions, or skill levels in your organization and on your project team.

Thousands of companies rely on P6 EPPM to:

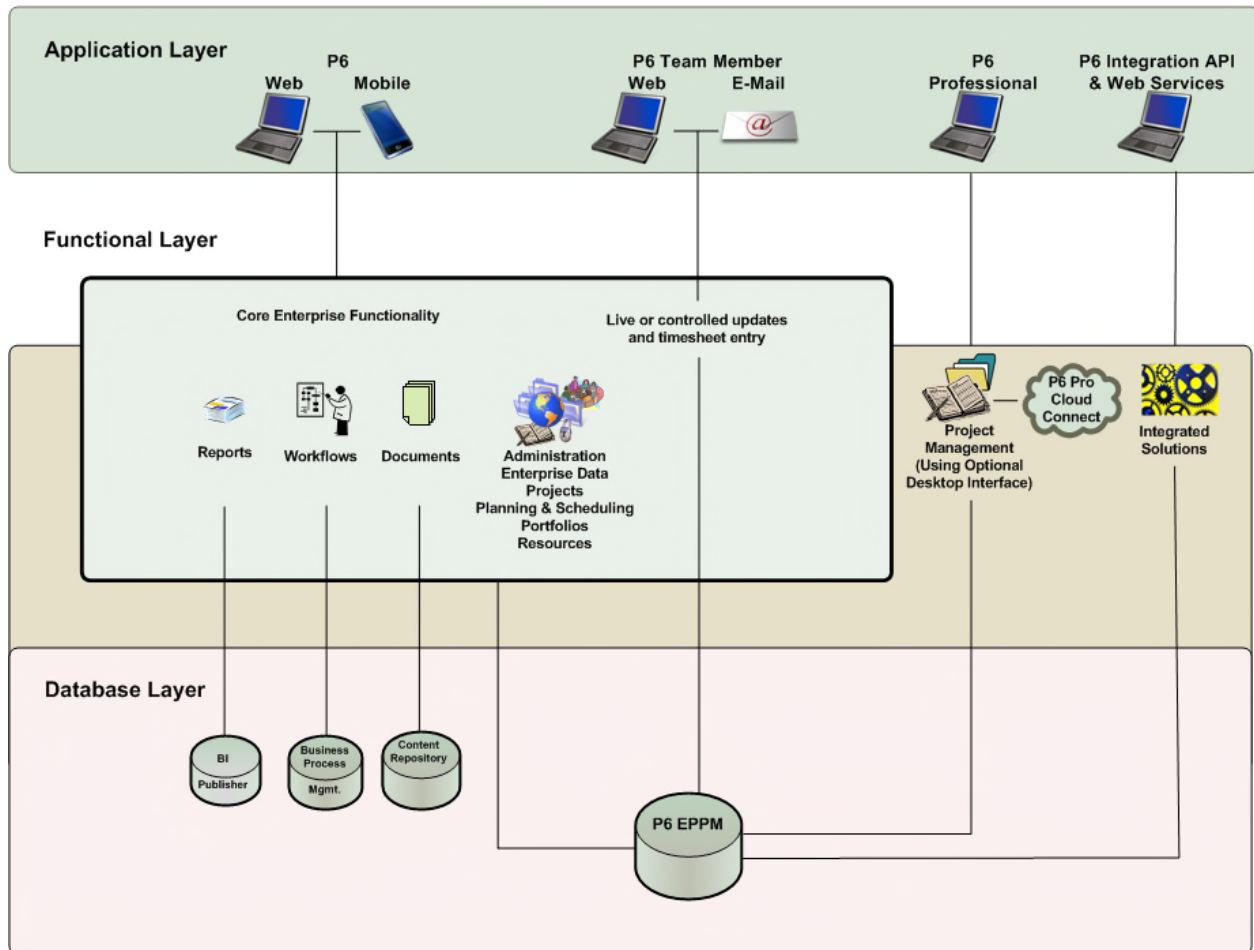
- ▶ Plan, schedule, and manage the right strategic mix of projects
- ▶ Make informed project, cost, and resource management decisions
- ▶ Enhance team collaboration and workflow productivity
- ▶ Maximize each project contributor's skills and responsibilities
- ▶ Track progress and optimize capacity for maximum profitability
- ▶ Deliver programs and projects on time and within budget
- ▶ Share data with human capital, financial management, and enterprise resource planning systems

Actual deployments require a variety of databases, servers, applications, and supporting technologies. P6 EPPM also integrates with many other optional solutions such as Primavera Contract Management, Oracle Prime, Primavera Unifier, Oracle Primavera Risk Analysis, Oracle PPM, and Primavera Earned Value Management.

Working with the Oracle Primavera P6 EPPM Suite

Depending on your organization's specific deployment, P6 EPPM generally consists of the applications, functions, and databases depicted below.

P6 EPPM



Applications:

P6: Most users will rely almost exclusively on the P6 web application running in a standard web browser. Simply termed P6, it is the primary interface for administering and managing projects.

P6 mobile: Allows team members to provide status on their tasks and to enter timesheets while working "on the go".

P6 Team Member Web: This web interface allows team members to provide status on their tasks and record time in timesheets using a web browser.

P6 Team Member Email Statusing Service: This method allows team members to provide status on their tasks using any HTML or plain text email application.

P6 Professional for EPPM: The P6 web application is the main interface for all project management functionality. You can also use the P6 Professional software to take advantage of its core project planning and scheduling functionality. The P6 Professional application and its features, including P6 Visualizer, run on Microsoft Windows. P6 Professional is also available for users who need to work on their projects in an offline mode.

P6 Professional Cloud Connect: Connects P6 Professional to an EPPM Oracle database on the cloud. P6 Integration API (in remote mode) is installed by default. Using this, P6 EPPM users working on a WAN environment can achieve performance levels comparable to compression server installation. This is optional for on premises users.

P6 Integration API: A Java-based application programming interface (API) enabling your P6 EPPM deployment to interface with other components and systems (on-premises).

P6 EPPM Web Services : P6 EPPM Web Services is an integration technology that extends P6 business objects and functionality. Based on open standards including SOAP, XML and WSDL, P6 EPPM Web Services enables developers to leverage standard interfaces to create integrated software solutions that interoperate with a wide variety of enterprise software applications running on a diversity of hardware and operating system platforms.

Primavera Gateway: Primavera Gateway is a highly configurable application that integrates P6 EPPM with other products for increased risk and scope management.

Functionality (included with P6 EPPM):

Core Enterprise Functionality: Use P6 for all of the following core enterprise functionality:

- ▶ **Administration and Enterprise Data:** Administer user accounts, preferences, views, application settings, and enterprise data.
- ▶ **Project, Portfolio, and Resource Management:** P6 provides an extensive array of features designed to optimize all phases of Project Management, Resource Management, and Portfolio Management. It includes full support for activities, work breakdown structures, planning and scheduling, costs, resource administration and assignment, roles, teams, portfolio analysis, capacity planning, Return on Investment (ROI), and convenient dashboards for measuring performance at every level at any moment.
- ▶ **Documents:** P6 includes document management support with or without the optional document repository option. Use the optional document collaboration features to conduct document reviews with key stakeholders to keep projects moving or meet regulatory compliance.
- ▶ **Workflows:** The workflow engine bundled with P6 EPPM provides Business Process Modeling Notation (BPMN) compliant graphical notation that depicts the steps in your project initiation workflows. Use the integrated Workflows portlet to coordinate the sequence of tasks that flow between different process participants in a series of stages.
- ▶ **Reports:** Generate and view reports using your standard web browser running P6. Reports can be generated and routed via email, saved to a shared or local file, or printed to a traditional printer.

Planning and Scheduling: The P6 Professional component of the suite can be used standalone or connected to an EPPM database. It provides a robust set of features primarily for planners and schedulers, including Reflection Projects and a report designer. Use the P6 Visualizer feature to create and customize visual depictions of complex project schedule information, including Gantt charts with Grid data, Timescaled Logic Diagrams, and Schedule Comparison. Some functionality of P6 Professional is available only when connected to an EPPM database.

Time Reporting: P6 EPPM includes timesheet entry in P6 Team Member Web, P6 for Android, and P6 for iOS with review and approval support in P6.

Integrated Solutions: Build or deploy other systems and use the P6 Integration API (on-premises), P6 EPPM Web Services, or Primavera Gateway to integrate them with P6 EPPM. Integrate Risk and Scope functionality from Oracle Prime with P6 EPPM via Primavera Gateway. Leverage P6 EPPM's project planning and scheduling system against Primavera Unifier's cost control system via integration with Primavera Gateway.

Technology:

The P6 EPPM Database: The main database for all your P6 EPPM data. The EPPM database includes the P6 Extended Schema optimized for reporting.

BPM Workflow: The separate workflow engine bundled with P6 EPPM.

Oracle BI Publisher: The reporting tool that reports on the data that is exposed in the database reporting views.

The Content Repository: Use an Oracle content repository or any CMIS-compliant repository to host documents in a shared repository enabling collaborative functionality such as document check-in/check-out and versioning.

About P6

P6 is the main web application of the P6 EPPM solution. P6 provides enterprise-wide web access to features arranged into the following main sections:

- ▶ Dashboards
- ▶ Portfolios
- ▶ Projects
- ▶ Resources
- ▶ Reports
- ▶ Administration

P6 is a complete Enterprise Project Portfolio Management application with a powerful and efficient interface. It completely tracks projects, portfolios, and resources across their full life cycles, capturing all related costs, issues, risks, and performance metrics along the way. It also supports project templates, allowing you to reuse projects in full or in part. It is designed for organizations that need to manage multiple projects simultaneously and support multi-user access across job sites and throughout the entire organization.

The user interface provides structured menus where you can access a wide range of data views and features that enable you to manage your projects from initial concept review and approval through to completion. You can customize your own web pages, called dashboards, to create a custom view of the specific projects and categories of project data that are most relevant to your role in managing projects and resources. Project workspaces and workgroups extend the model of customizable, focused data views by enabling designated project members to create a uniform view of data that relates to one specific project or to a subset of activities within a project.

Users update progress on their tasks in a browser running P6, P6 Team Member Web, the P6 for Android and P6 for iOS mobile or tablet apps, or an email application that exchanges messages with the P6 server. P6 provides centralized resource administration, planning, and management, which includes resource timesheet approval and the ability to communicate with project resources who use P6 Team Member Web, P6 for Android, and P6 for iOS. Use P6 to match people with roles and proficiency levels, and then use that information to assign tasks effectively.

P6 includes robust reporting, workflow, email notifications, events, and document collaboration and review features. It is also the single source for all core administrative functions, including centralized enterprise data, user accounts, application settings, and security for all users in P6 EPPM.

About P6 Team Member

The P6 Team Member is designed for individual contributors, or team members, to record their statuses and report their time using timesheets. Team members can also use Email Statusing Service and P6 mobile to status their activities. P6 mobile allows access to P6 Team Member Web functionality. P6 Team Member Web, Email Statusing Service and the P6 mobile apps provide quick, convenient, and easy access to assigned activities using the platform or device that accommodates your line of work.

Your project manager uses P6 to create and update the project schedule and activity list. Depending on the project preferences the manager selected when creating the project in P6, the updates you make in the P6 Team Member Web, Email Statusing Service or P6 mobile will either apply immediately or require approval before they are applied to the project.

Work assignments in P6 Team Member are based on work distribution filters, or a team member being named as a resource assignment or an activity owner. As a team member, the P6 Team Member interfaces and the P6 mobile apps enable you to:

- ▶ View only your assigned activities.
- ▶ Provide status on your activities. The project manager customizes the status fields in your view. These fields can include time spent, time left, % complete, remaining duration, start date, and finish date.

Timesheets enable project team members to use the web to communicate timesheets and activity statuses directly to their organization's database, regardless of their location. This ensures that project managers are always working with the most up-to-date project information, making it easier to plan resources or resolve conflicts.

P6 Team Member Web

You can use P6 Team Member Web to:

- ▶ Modify your view to display your activity list by project and by current status, including Active, Due, Overdue, Starred, or Completed. You can refine your activity list even further by filtering on the basis of specific parameters, entering a term by which to filter, or providing a sort order for your list.
- ▶ Mark an activity with a star to signify its importance to you. You can view all your starred activities in one list when you select the Starred activity list view in the app menu.
- ▶ View a list of all your steps for an activity. Add, edit, or delete steps to more accurately reflect your work, if you are given the privileges by your project manager. You can enter the % complete to show progress and mark a step as complete when you finish a step.
- ▶ View the codes and UDFs associated with an activity for additional information about the activity. Update codes and UDFs if your project manager requires you to update activity status using these fields.
- ▶ View predecessor and successor activity related to an activity and contact resources associated with related activities.
- ▶ Communicate with the project manager or other team members through email.
- ▶ Communicate with the project manager about an activity by viewing and posting messages in the Discussion dialog box. All messages are saved with the selected activity.
- ▶ View and edit notebook topics associated with an activity to see or provide more information about the activity.
- ▶ View documents associated with an activity and contact resources associated with project documents.
- ▶ Enter up-to-the-minute information about your assignments and to record the time you spent working on each one, by submitting timesheets. Timesheets helps you to focus on the work at hand with a simple cross-project to-do list of your upcoming assignments.

Email Statusing Service

You can use Email Statusing Service to:

- ▶ Request a list of your current activities through email using the email account associated with your P6 user account. You can request a filtered list of activities by project; time frame; current status, including Active, Due, Overdue, Completed, or Starting; or by all the activities that you starred.
- ▶ Reply to the email you receive with your activity list, record your progress, and send your updates.

Project managers can use Email Statusing Service to:

- ▶ Send a Welcome email to new Email Statusing Service users, which includes the email address to the email Statusing Service, and instructions for requesting an activity list and updating the list through email.
- ▶ Send team members an email request for status updates. Project managers can customize the activity list sent to team members using the available filter options. Team members can provide status by replying to the email with their updates.

About P6 Mobile Apps

The P6 mobile apps are designed for individual contributors to record status on their tasks without the need to learn an enterprise project management application. The P6 mobile apps are P6 for iOS and P6 for Android. The apps provide quick, convenient, and easy access to assigned tasks using the platform or device that accommodates your line of work.

Your project manager uses P6 to create and update the project schedule and task list. Depending on the project preferences the manager selected when creating the project in P6, the updates you make in P6 mobile apps will either apply immediately or require approval before they are applied to the project.

Work assignments in the P6 mobile apps are based on work distribution filters, or an individual contributor being named as a resource assignment or an activity owner.

The P6 mobile apps enable you to:

- ▶ View only your assigned tasks.
- ▶ Provide status on your tasks. The project manager customizes the status fields in your view. These fields can include time spent, time left, % complete, remaining duration, start date, and finish date.
- ▶ Modify your view to group your task list by current status, including Active, Due, Overdue, Starred, or Completed; by project; and by time frame, including Today, This Week, Next Week.
- ▶ Filter your task view by Location, Project, WBS, and Status.
- ▶ Mark a task with a star to signify importance to you. You can view all your starred tasks in one list when you view your task list by the Starred option.
- ▶ Assign tasks to your task list.
- ▶ View a list of all your steps for a task. Add, edit, or delete steps to reflect your work more accurately, if you are given the privileges by your project manager. You can enter the % complete to show progress on a step.
- ▶ View the codes and UDFs associated with a task for additional information about the task. Update codes and UDFs if your project manager requires you to provide status using these fields.
- ▶ Communicate with the project manager about a task by viewing and posting messages using the Discussion feature. All messages are saved with the selected task.
- ▶ Communicate with the project manager or other team members through e-mail. If a picture helps illustrate your message, you can also take a picture with your device and attach it to your e-mail.
- ▶ Work with multiple tasks at one time. You can star or mark complete one or more tasks at a time.
- ▶ Attach a photo to a task, either by selecting an existing photo on your device or by taking a new photo if your device has a camera.
- ▶ View predecessors and successors to a task.
- ▶ View and download documents.
- ▶ Open and view timesheets and report and review actual time spent on tasks by day or by reporting period.
- ▶ See when you last submitted a timesheet and identify timesheets which require action.

- ▶ Configure reminders to submit timesheets.
- ▶ Add tasks or overhead time to timesheets.
- ▶ If your organization allows, you can enter overtime hours worked on tasks.
- ▶ Submit timesheets reflecting your work assignments on projects.

About Oracle WebCenter Content Core Capabilities

Integrated with P6, Oracle WebCenter Content Core Capabilities (WCCC) turns cluttered, often unstructured content into organized assets by making it easier to catalog, access, search, and reuse. All popular document formats such as HTML, XML, DOC, XLS, GIF, and PDF are supported.

Using P6 with WCCC, project participants can better manage their documents. Specific functions include:

- ▶ Upload new documents for storage in the unified WCCC database
- ▶ Categorize documents within folders for better organization
- ▶ Link projects, WBS elements, activities, and issues to documents
- ▶ Check in and check out documents (version control)
- ▶ Review documents

You can also extend WCCC to deliver content via Web sites, desktops, RSS feeds, mobile devices, and P6 EPPM Web Services.

About P6 Professional

P6 Professional is a separate component that integrates traditional project management with streamlined resource and cost management. It is ideal for planners and schedulers.

Note: If you decide to use P6 Professional and connect to a P6 EPPM database, you must still use P6 to administer user accounts, some enterprise data, and other settings.

P6 Professional connected to a P6 EPPM database includes a subset of the P6 features. P6 Professional also includes several of its own specialized features. As a primary example, P6 Professional includes the P6 Visualizer application for creating, viewing, and modifying Gantt charts, timescaled logic diagrams (TSLDs), and Schedule Comparisons. Gantt charts provide a graphical display of the project's schedule information in the order determined by grouping and sorting options. The Gantt chart shows each activity's duration, using the timescale specified, as a horizontal bar. A line connecting activity bars indicates a relationship. Gantt charts allocate a row for each activity. TSLDs allow more than one activity per row, which condenses the entire project plan and the paths of activities that drive the project schedule. TSLDs present a graphic depiction of activities and the overall logic of a project according to time. Schedule Comparisons allow you to compare selected data fields in a revised project and its corresponding original project or a revised project and a corresponding baseline.

P6 Professional is available for P6 EPPM users working in a Cloud environment.

P6 Professional is also available for users who need to work on their projects in an offline mode.

Note: Module access to P6 Visualizer is controlled separately from access to P6 Professional.

About Oracle BI Publisher and the OBIEE Platform

BI Publisher is integrated with the P6 EPPM Extended Schema to deliver on-demand web-based reporting through P6.

You have the option of expanding the capabilities of P6 EPPM using these components.

Oracle Business Intelligence Publisher: Oracle Business Intelligence Publisher (formerly XML Publisher) is an enterprise reporting solution allowing you to design, manage, and deliver highly formatted documents. Because it is built on open standards, your IT developers can create data models against practically any data source and use BI Publisher APIs to build custom applications leveraging existing data sources and infrastructure. BI Publisher users can design report layouts using familiar desktop tools, reducing the time and cost needed to develop and maintain reports. Extremely efficient and highly scalable, BI Publisher can generate documents with minimal impact to transactional systems. Using the convenient P6 web interface, reports can be viewed online or scheduled for delivery.

Oracle Business Intelligence Enterprise Edition (OBIEE): Expand your business intelligence capabilities with this optional foundation platform. OBIEE enables your organization to buy and plug in ready-to-run analytics packages or to build your own applications on one common BI architecture.

About Primavera Data Warehouse

In addition to the native enterprise reporting available now with P6 EPPM, the Primavera Data Warehouse provides a powerful data warehouse solution.

The Primavera Data Warehouse can collect and store data from P6 EPPM and Primavera Unifier. It contains a process called STARETL, which is the mechanism by which data is extracted, transformed, and loaded (ETL) from a P6 EPPM and Primavera Unifier database into the Primavera Data Warehouse. The Primavera Data Warehouse accumulates data over time with each run of the STARETL process.

The Primavera Data Warehouse separates data into facts and dimensions. Fact tables contain business facts or measures (for example, Actual Total Cost, Workflow Duration, and so on). Dimension tables contain descriptive attributes or fields (for example, Activity Name, Cost Breakdown Structure, and so on). As the Primavera Data Warehouse schema accumulates project and cash flow data, it provides baselines for tracking trends and for advanced business intelligence. It also provides key metrics on current data, which allow you to drill through root cause analysis.

You can connect the Primavera Data Warehouse to Oracle Business Intelligence (OBI) using Analytics.

About Analytics

Analytics provides an in-depth and comprehensive method for gathering, analyzing, sharing, and storing project performance, project history, resource assignments, and utilization data.

Analytics consists of a Repository Definition file (.rpd), a sample catalog containing sample analyses and dashboards, as well as a sample Primavera Data Warehouse. Primavera Analytics is built upon the industry leading Oracle Business Intelligence Suite. The Analytics Repository Definition file contains all of the information Oracle Business Intelligence needs to allow end users to create purposeful analysis based on data contained within the Primavera Data Warehouse. The Repository Definition file contains information such as how Oracle Business Intelligence connects to the Primavera Data Warehouse, how security is applied to each user, and how to join the Primavera Data Warehouse fact and dimension tables. The Analytics sample catalog, also built upon Oracle Business Intelligence, contains over 400 pre-built analysis and dashboards, organized in a catalog structure, used to help facilitate the capabilities available combining P6 EPPM and Primavera Unifier with Oracle Business Intelligence. The sample Primavera Data Warehouse can be restored and connected as the back-end for the sample Analytics catalog.

You can use Analytics to perform the following tasks:

- ▶ Perform root-cause analysis and employ management-by-exception.
- ▶ Gather critical insights into current and historical performance of all projects, programs, and portfolios.
- ▶ Make better decisions to eliminate project failure.
- ▶ Quickly visualize critical project performance in early stages from dashboards.
- ▶ Predict and identify cost trends early in project lifecycle to rescue troubled projects.
- ▶ Gain visibility into resource performance through s-curves in dashboards with interactive dashboards you can drill down to examine the root-cause problem.
- ▶ Show staffing needs by portfolio with early warning indicators for upcoming under-staffed project work.

About the Oracle Business Process Management Suite

The Oracle Business Process Management (BPM) Suite provides an integrated environment for developing, administering, and using business applications centered around business processes. BPM supports BPM and Business Process Execution Language (BPEL) standards from modeling and implementation to run-time and monitoring.

P6 integrates with BPM which lets you initiate and manage workflows. You can use a sample project initiation workflow for P6 sample database.

You can expand your investment in BPM to include workflows representing more stages of your application, program, project, or product development life cycle from design-time and implementation to run-time and application management.

The Oracle BPM Suite enables you to:

- ▶ Create and customize business processes, models, and standards using pre-defined components for web-based applications.
- ▶ Collaborate between process developers and process analysts.

- ▶ Expand business process management to include flexible, unstructured processes.
- ▶ Integrate your applications with Web Services.
- ▶ Add dynamic tasks and support approval routing using declarative patterns and rules-driven flow determination.

Unify different stages of your development life cycle by addressing end-to-end requirements for developing process-based applications. Oracle BPM unifies the design, implementation, run time, and monitoring stages based on a Service-Oriented Architecture (SOA) infrastructure. This allows different personas to participate through all stages of the workflow life-cycle.

About the P6 Integration API

The P6 Integration API is a Java-based Application Programming Interface (API) and server that enables developers to create application code aligned with P6 EPPM business rules in order to seamlessly access P6 EPPM data.

About P6 EPPM Web Services

P6 EPPM Web Services enables your organization to seamlessly integrate P6 EPPM functionality into other applications using open standards, languages, and protocols, including Extensible Markup Language (XML), Simple Object Access Protocol (SOAP), Service-Oriented Architecture (SOA), and Web Service Definition Language (WSDL). P6 EPPM Web Services enables your organization to share P6 EPPM data between applications independent of operating system or programming language. Use P6 EPPM Web Services when you need to extend or customize integrated functionality, for example, with BPM workflows, events, or forms-based applications.

Implementation Strategy

In This Section

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About Roles and Responsibilities

The following section describes the organizational roles as they typically apply to P6 EPPM. Roles can vary or overlap, depending on the organization and industry.

Network administrators

Network administrators configure an organization's network environment (local and wide area networks) for optimal performance with P6 EPPM. They install and maintain the server and client modules in P6 EPPM. They manage user access to project data and develop and maintain a comprehensive security policy to ensure that project data is protected from unauthorized access, theft, or damage.

Network administrators ensure that the hardware and software supporting P6 EPPM function reliably by:

- ▶ Setting up and maintaining the network to ensure reliable connections and the fastest possible data transfer;
- ▶ Creating and maintaining accurate lists of network resources and users so that each has a unique network identity.

Database administrators

Database administrators (DBAs) are responsible for setting up, managing, and assigning access rights for the P6 EPPM databases. They set and oversee rules governing the use of corporate databases, maintain data integrity, and set interoperability standards.

Database administrators ensure reliable access to the databases by:

- ▶ Installing, configuring, and upgrading database server software and related products as required;
- ▶ Creating and implementing the databases;
- ▶ Monitoring database performance and tuning as needed;
- ▶ Planning for growth and changes and establishing and maintaining backup and recovery policies and procedures.

Program managers

Program managers are responsible for strategic planning and ongoing performance analysis. They use P6 to identify and monitor problem areas in current projects and analyze past projects to apply lessons learned when planning future projects.

Program managers might be responsible for:

- ▶ Initiating, prioritizing, and budgeting projects;
- ▶ The profit/loss for a specific business unit;
- ▶ Funding and go/no-go decisions about projects.

Project managers and schedulers

Project managers and/or project schedulers are responsible for managing multiple small, repetitive projects or a single, complex project. They use P6 Professional and/or P6 to:

- ▶ Add projects to the database;
- ▶ Determine resource requirements for a project;
- ▶ Perform cross-project analysis;
- ▶ Perform baseline analysis;
- ▶ Manage projects to on-time and on-budget completion;
- ▶ Plan projects before they are funded.

They might also perform detailed financial analysis of projects, handle project billing, and integrate financial information within the company.

Crew foreman

Crew foremen manage the work for a project that might be a portion of a larger project. They are managers who produce work and manage a team, and they often use P6 and P6 Progress Reporter to prioritize short-term tasks or objectives, typically when the duration is less than the planning period of the project.

Crew members

Crews are trained in a specific skill required on a project. They work with their manager to develop activities and durations for incorporation into the schedule. Once activities are added to the schedule, crew members update them using P6 or P6 Progress Reporter to indicate the work they performed during designated accounting periods.

Set Your Goals and Business Objectives

In most companies, though their scope and duration can vary, projects tend to have similar goals: improve quality, reduce costs, increase productivity and revenue, reduce delivery time, and streamline operations. Often, the ultimate goal is to gain a competitive advantage. Controlling these projects is becoming increasingly difficult, especially if they are planned and run by project teams that are distributed across multiple locations. Organizations need to ensure that each team stays on track with its projects without losing sight of company objectives.

Company-wide project management using P6 EPPM enables project teams to plan and control their work while providing a continuous, centralized understanding of progress and performance. To begin the process of implementing P6 EPPM, you might want to broaden your project management goals to focus on the multi-user, role-based environment.

Specific objectives could include:

- ▶ Providing the project office with access to dynamic status information that they can use to make timely decisions.
- ▶ Improving efficiency of resource use by properly allocating skilled labor, communicating methodologies, and forecasting resource needs more accurately.
- ▶ Improving productivity across the project team as a result of continuous collaboration.
- ▶ Improving communication with all project participants through the use of integrated, organizational-wide products that put project information on individual's desktops.
- ▶ Increasing accountability by making consistent, summarized project status information available to top management.
- ▶ Increasing quality and client satisfaction through the use and reuse of best practices.
- ▶ Enabling maintenance of performance data on completed projects to confirm estimating metrics, generate new or revise existing templates, and collect job cost data.
- ▶ Enabling maintenance of performance data on completed projects to confirm estimating metrics, and collect job cost data.
- ▶ Integrating with other business systems to provide a total information system.

These goals are specific to project management. You can include additional goals that are particular to your company or industry. For example, one specific objective for a construction company might be to complete the inspection process in a more timely manner. Use best practices from your industry as a guide to setting your goals.

Develop an Implementation Strategy

Implementing P6 EPPM successfully requires that an appropriate "culture" be established within your organization. Instead of having many independent projects with no ability to aggregate and control them, you can now have a consolidated, organized project information system.

Creating the culture requires an understanding of the data and how it flows, and the roles and responsibilities of individuals as project participants and managers. Your challenge will be to create an open environment in which all these participants share data and performance information.

You wouldn't think of allowing construction workers to work on a job site without designating a field manager to oversee the work, nor would you implement a new project without assigning a general contractor. The project management environment is best created by your own expert staff, who would perform an equivalent function—if you don't have such a person, you need one. Designate one person or a team of people to plan and coordinate the implementation. The responsibility of this team will be to develop an implementation strategy that includes helping participants understand the organizational project management approach. You might decide you need help with your implementation from Oracle Primavera Consulting or one of our business partners. Contact Oracle for more information.

While the implementation strategy will be specific to your organization, it will most likely include a needs assessment as one of the first steps. Even though you are already using project management software, take the opportunity to analyze and determine your company's business requirements, along with system requirements and the processes necessary to fulfill those requirements. You will also need to determine how to structure data to facilitate those processes. It is important to document the processes and procedures that you define. Assessing needs is discussed in more detail in **Assess Needs** (on page 36).

To ensure that data is flowing as planned, create a prototype. Use real project data to set up structures in a test database and run your processes through a typical work cycle. The prototype should include all modules of P6 EPPM you'll be using, along with any interfaces to external applications. Develop a plan that identifies all the possible scenarios to test. Include a method for collecting test data and a way to resolve issues. Use this step to make sure your system requirements are sufficient to meet the needs of all users.

A prototype can be followed by a pilot program, where you establish a small group of users to work with P6 in their environment. They can be introduced to the software using familiar project data while performing their daily work tasks. More than likely, the pilot users will identify flaws in the processes and have suggestions and questions. Make refinements and changes based on their feedback. You can also want to begin internal training programs at this time, using your pilot group of users. Ongoing performance monitoring should continue during this stage and adjustments made as necessary.

When the pilot program is satisfactory, a rollout of P6 EPPM to your entire company can begin. This step involves installing the client software on all necessary desktops and populating the database with project data. You should develop a rollout schedule and get the appropriate approvals. Be sure to include the lessons learned from the pilot testing. Communicate the rollout schedule to ensure its success.

Assess Needs

A needs assessment is a crucial step to a successful P6 EPPM implementation. It will provide the basis for the entire system design, how it will operate, and who will use it.

Assessing needs can range from an evaluation of the corporate culture to analyzing hardware/software requirements to reviewing existing processes and developing new ones. Most of your information will come from interviewing key personnel. Meet with representatives from all areas of the company who participate in the project management process, from the owners to the individuals doing the actual work. Ask questions about the tasks they need to perform and the project information they need to know to do their jobs effectively.

Determine corporate culture

As mentioned, understanding the corporate culture plays an important role in any major implementation. You need to know ahead of time whether your company is ready, willing and capable for the change. Evaluate your company's state of readiness for company-wide project management. For example:

- ▶ Does your organization have a clear understanding of project management?
- ▶ Are they familiar with computers and software?
- ▶ Are standard processes in place for managing projects?

If the answer to these questions is No, include a training program in your implementation plan. Depending on the degree of readiness, you might also need to address issues that involve preparing employees mentally for dealing with change.

Define hardware/software requirements

Review the system requirements necessary to run P6 EPPM. Then, conduct interviews with your Information Technology (IT) personnel, or those responsible for maintaining network integrity and new hardware/software installations to inquire about the current technical environment. Include questions, such as:

- ▶ Do you have servers or hardware in place? If so, what kind?
- ▶ How are remote locations managed?
- ▶ Do you have separate servers for development and production?
- ▶ Are you running Oracle or SQL server on one or more servers? If so, which version?
- ▶ Are you running any other database software?
- ▶ Do you have a LAN and/or WAN in place?
- ▶ Do you have mobile user requirements?

Answers to these types of questions will help you determine your hardware specifications. Be sure to identify items such as database server requirements, application server requirements, LAN requirements, and PC requirements. This step should be performed early in the process, since you might need to order new equipment or upgrade existing software before installing P6 EPPM.

Define integration requirements

While examining hardware requirements, review any integration requirements.

- ▶ Will you be interfacing with other software systems, such as ERP?
- ▶ Will custom integration to an existing financial system or asset management system be required?
- ▶ Do you have resources who are skilled to develop necessary interfaces or are consultants required?

If you are integrating P6 EPPM with third-party applications or legacy systems, you should identify interface points that provide continuous flow of data while minimizing data loss.

Define how data is structured

To manage projects successfully in P6 EPPM, you first need to set up data structures for your organization, projects, resources, and costs. You might also want to define special codes to help you organize and report on data more effectively. To structure data properly, review how you handle data currently along with how you want to handle it. For example:

- ▶ How do you group projects? How many levels of projects do you have?
- ▶ Are projects cross-departmental? Do they have multiple locations?
- ▶ What is your typical project scope, size, and cost?
- ▶ How many projects are you managing at one time?
- ▶ What is your organizational structure?

- ▶ How do you group resources? Are resources assigned to projects as groups or individuals? Are resources shared across projects?
- ▶ Do you track skills for each resource?
- ▶ Do you have a work breakdown structure already in place?
- ▶ Do you have a need for multiple calendars? Do resources need calendars?
- ▶ What types of reports do you use? How often are they produced?

When you answer these types of questions, you can define the necessary data structures, such as the project hierarchy, organizational breakdown structure, and the work breakdown structure.

Determine current procedures/processes

To define how data will flow in P6 EPPM, you need to understand how your business operates. Look at your current processes and procedures and modify them to suit your project management objectives. Making decisions early about process changes saves time and money. Answer the following types of questions when you analyze business processes.

- ▶ Do you have a project methodology in place? If so, is it working?
- ▶ What is the life cycle of a project?
- ▶ What are the determining factors in deciding if a project is go or no-go?
- ▶ How are decisions made regarding project selection and budgeting?
- ▶ Is your budgeting/planning process top-down or bottom-up oriented?
- ▶ How do you estimate and track costs?
- ▶ Do you have a Project Management Office or something similar?
- ▶ What time reporting mechanism do you use?
- ▶ How do you track and measure progress?
- ▶ How do project participants get work assignments?
- ▶ What is your process for communicating project information to others?
- ▶ What information do you require or expect from the project management process?
- ▶ Who controls security? What security is required for project information? Do you need to restrict data access on a group or individual basis?

Communicate the Plan

In successful P6 EPPM implementations, people accept the changes and use the new system. Any new system or business process means a change to the way people are currently doing their jobs. Employees who are affected by the change need to know what to expect. Top management also needs to know what is going on if they are to provide support and commitment.

Communicate the implementation plan early and repeat it often. Set expectations and manage them continuously, being careful to avoid disappointing, frustrating, or surprising people.

There are many ways to communicate the implementation plan. You could introduce the plan at a company meeting along with a demonstration of P6 EPPM to show how it will benefit the entire organization. Explain any changes to business processes that might occur and what it means to individuals. Define a timeframe so everyone knows when the changes will happen. Encourage people use the software and experiment hands-on to increase their comfort level when it comes time for them to make the change. Publicize commitment by ensuring that the implementation team has support and by providing training programs and seminars. Provide a method for all levels of the organization to address concerns, questions, and suggestions.

See the subjects in **Implementation Process** (on page 41) to learn about the data structures and how they fit together in P6 EPPM.

If you foster a challenging workplace that can develop individual careers along with open communication, those individuals will want to make the process successful.

Implementation Process

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Understanding Data Structures in P6 EPPM

P6 EPPM contains many data structures to support your project management needs and business processes. Well-defined structures make entering data faster and easier; they enable you to organize and summarize data more effectively. Review the following definitions to help you better understand the data structures in P6 EPPM.

Enterprise project structure (EPS)

The EPS is a hierarchy that represents the breakdown of projects in a company. Nodes at the highest, or root, level might represent divisions within your company, phases of projects, or other major groupings that meet the needs of your organization, while projects always represent the lowest level of the hierarchy. Every project in the organization must be included in the EPS.

Resource hierarchy

The resource hierarchy represents the people, materials, and/or equipment used to perform work on activities. The resource hierarchy includes the resources across all projects in the organization. Resources are assigned to activities in P6 EPPM and can be set up to report actual work hours. Resources are assigned to activities in P6 EPPM.

Role hierarchy

The role hierarchy represents the roles, or job titles, that exist in your organization and have some responsibility to complete project requirements. You can associate resources with roles. In the planning stages of a project, you can assign roles to activities to establish an initial project plan without committing individual resources to activities; then, before work on an activity begins, you can assign a resource that meets the defined role requirements. You are not required to define a role hierarchy.

Work breakdown structure (WBS)

The WBS is a hierarchical arrangement of the products and services produced during and by a project. In P6 EPPM, the project is the highest level of the WBS, while an individual activity required to create a product or service is the lowest level. Each project in the EPS has its own WBS.

Organizational breakdown structure (OBS)

The OBS is an outline of managers responsible for the projects in your company. There is one OBS for the entire organization. It is used to control access to projects and data.

Project, activity, and resource codes

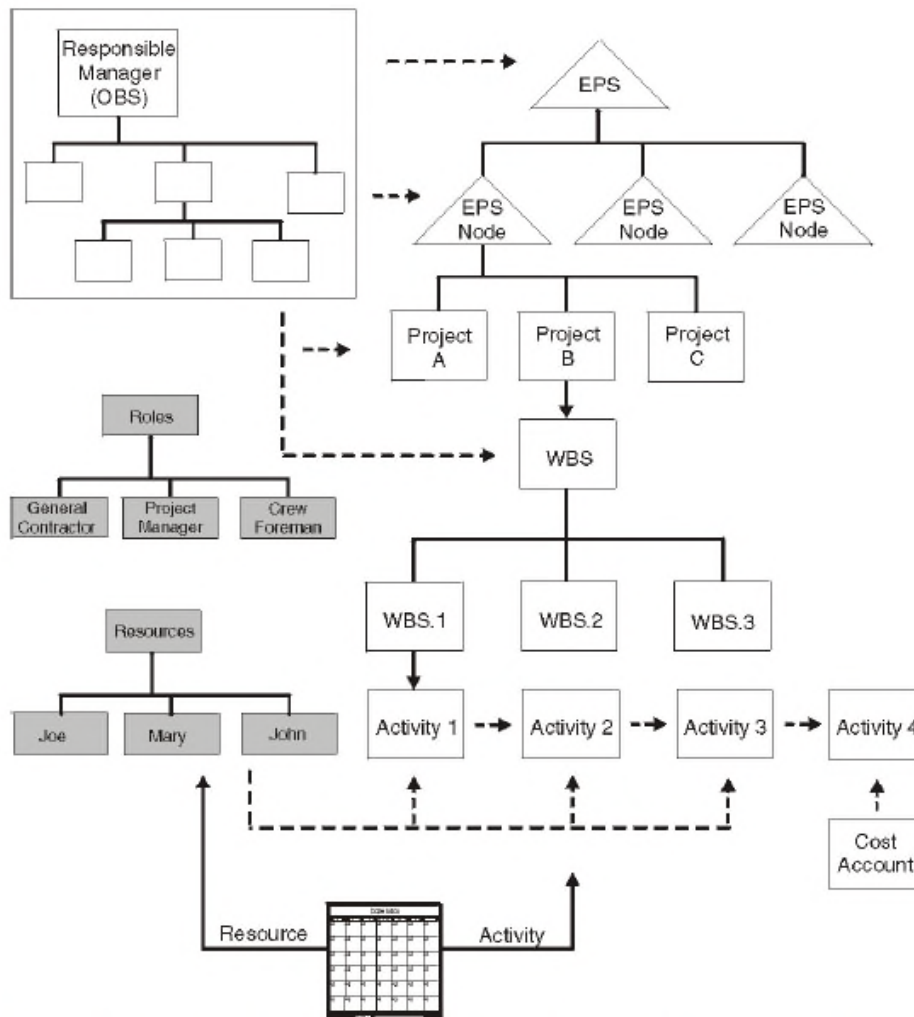
In addition to the EPS, WBS, and resource hierarchy, you can also create coding structures. Codes allow you to categorize projects, activities, and resources that have similar attributes; you can group, sort, filter, and aggregate data based on these codes.

Calendars

Calendars define standard workdays and the available number of hours in each day, along with holidays, vacations, and other nonworktime. You can create global, project-specific, and resource-specific calendars. Calendars are assigned to activities and/or resources; they determine start and end dates during scheduling and resource leveling.

Connecting Data Structures

The following diagram illustrates how the data structures relate to each other in P6 EPPM.



The EPS categorizes work in your company. Projects belong to EPS nodes. Each project has its own WBS that further breaks down the work in that project. Activities are the lowest level of the WBS. Additional structures include resources, roles, calendars, and cost accounts, which are assigned to activities. The OBS represents the responsible managers in your company and can be assigned at the EPS, project, and/or WBS level.

Structuring Projects

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Process Overview: Structuring Data in P6 EPPM

The hierarchical structuring of data serves as the foundation before the addition of actual project data. The following sequence is suggested for setting up the main structures:

 1	 2	 3	 4	 5
Set up the EPS— the hierarchical structure that identifies company-wide projects and enables organization and management of those projects.	Set up the OBS— the hierarchical arrangement (by actual individuals or by roles) of your company's management structure.	Set up Resources— your organization's hierarchical resource structure; these resources will later be assigned to activities.	Set up Roles— a hierarchy based on your organization's recognized job functions; resources will later be assigned to these roles. (Optional)	Set up the WBS— the hierarchical arrangement of the sub-projects, task groups, products, and services produced during and by each project.

Administrators, working with program managers and project managers, structure the EPS and OBS hierarchies. An EPS can consist of multiple root nodes, which enable particular types of projects to be grouped together, such as project templates or high-risk projects. An EPS can consist of multiple root nodes, which enable particular types of projects to be grouped together, such as high-risk projects. Within each root node, you can further break down an EPS into multiple EPS nodes to categorize the types of projects.

The WBS acts as a continuation of the EPS for the individual projects in the enterprise. A WBS provides organization and control of project and activity information through a hierarchy of WBS elements. When you create projects, P6 EPPM automatically creates a WBS element at the same hierarchy level and with the same name as the project. The P6 EPPM enables you to set anticipated project dates, budgets, and spending plans for a WBS at a high level to indicate when the work should occur and how much its planned budget and monthly spending should be. You can use the pre-established budget amounts and funding information you set for WBS elements for their project and activity counterparts.

Setting Up the Organizational Breakdown Structure

About the OBS

The organizational breakdown structure (OBS) is a hierarchical way to represent the managers responsible for the projects in your enterprise. You can associate the responsible managers with their areas of the enterprise project structure (EPS) with either an EPS node or a project. When you associate a responsible manager with an EPS node, any projects you add to that branch of the EPS are assigned that manager element by default. An OBS supports large projects that involve several project managers with different areas of responsibility.

To access a project, a user must have access permissions for an OBS element within the project. You can then assign users to OBS elements. When you assign users to OBS elements, users get access privileges to projects and EPS nodes where they have OBS access. These access privileges are not passed down to child OBS elements. If some users need access to multiple OBS elements, you must assign those users to all of the OBS elements they need to access. The type of access granted to a user is determined by the project security profile assigned to the user.

Creating an OBS

Create an organizational breakdown structure (OBS) to hierarchically represent the managers responsible for your projects. You must have the appropriate privileges to create an OBS.

To create a new OBS:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **User Administration**.
- 3) On the User Administration page, click **OBS**.
- 4) On the **OBS** page:
 - a. Click **+ Add**.

Note: The OBS is automatically added as a child of another OBS.

- b. Move the OBS to the correct location in the list and hierarchical position by clicking **⚙️ Row Actions** and selecting **^ Move Item Up** and **∨ Move Item Down** arrows.
 - c. In the **OBS Name** field, double-click and type a unique name.
 - d. Click the **Users** detail window.
- 5) In the **Users** detail window, remove or assign users to the OBS.
 - ▶ To remove a user from the OBS, select a user, click **⚙️ Row Actions** and click **Delete**.
 - ▶ To assign users to the OBS, click **Assign....**
- 6) In the **Select Users** dialog box:
 - a. Select a **Project Security Profile**.
 - b. Select users and click **Select**.
 - c. When you are finished assigning users, click **Close**.
- 7) On the **OBS** page, click **Save**.

Tips

- ▶ When you set up enterprise project structure (EPS) nodes, a root OBS is automatically assigned to the root EPS.
- ▶ When you create a new project, the default responsible manager is automatically assigned so that an OBS element is available for each work breakdown structure (WBS) element added to the project.

Assigning Users to an OBS

Except for a project owner or a Contributor user, a user must have permission to access an organizational breakdown structure (OBS) to access a project assigned to that OBS. If you have appropriate privileges, you can assign users to OBS elements using their login names.

Note: Users assigned to an OBS that is assigned to the root EPS have access to all nodes beneath the root.

To assign users to an OBS:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **User Administration**.
- 3) On the User Administration page, click **OBS**.
- 4) On the **OBS** page, select an OBS and click the **Users** detail window.
- 5) In the **Users** detail window, click **Assign....**
- 6) In the **Select Users** dialog box:
 - a. Select a **Project Security Profile** with which you want to assign users.
 - b. Select one or more users and click **Select**.
 - c. Select additional Project Security Profiles and assign additional users as necessary.
 - d. Click **Close** when finished.
- 7) On the **OBS** page, click **Save**.

Tip:

You can also select multiple OBS elements in the OBS page then assign multiple users to them simultaneously by selecting **Assign User** in the Users detail window.

Defining Resources and Roles

About Roles

Roles represent personnel job titles or skills needed to execute projects. Architect, general laborer, quality assurance tester, and engineer are all examples of possible roles. You can create a standard set of roles that you then assign to labor and non-labor resources and activities for all projects in the organization. You can establish an unlimited number of roles and organize them in a hierarchy for easier management and assignment. The set of roles you assign to an activity defines the activity's skill requirements. You can also define multiple price per unit rates and unit per time limits for each role to accurately plan future costs and allocation.

You can assign one or more roles to individual resources. When you assign roles to a resource, you also indicate their proficiency in that role and identify which role is their primary role. A primary role is the main role the resource is currently performing. The proficiency level describes the resource's skill level in that role. For example, Joe is a resource and fills the role of both software engineer and manager. He has been a software engineer for 20 years and is *1 - Master* in that role; however, his primary role is manager, which he has been for 5 years and his proficiency level is *3- Skilled*.

Assign roles to activities as you would resources during project schedule and cost planning. When your plans are finalized, you can replace roles with resources, based on each activity's role and skill requirements.

Creating Roles

Create a standard set of roles that you can assign to labor and nonlabor resources and activities.

To create roles:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.
- 3) On the Administration page, click the **Roles** tab.
- 4) On the **Roles** tab:
 - a. Click **+Add**, or click an existing role and click **⚙️Row Actions** then select **Add Child Role** to add a role in a hierarchy.
 - b. In the **ID** field, click and type a unique identifier for the new role.
 - c. In the **Name** field, click and type a role name.
 - d. In the **Description** field, click and type a description of the role's responsibilities
 - e. To create or modify a hierarchy of roles, click **⚙️Row Actions** and select **Move Up**, **Move Down**, **Move Left**, or **Move Right** to position the new row.
- 5) Click the **Prices** detail window, configure the rate type fields.
- 6) Click the **Limits** detail window.
- 7) In the **Limits** detail window:
 - a. Click **+Add** to define the units/time for the role over time.
 - b. In the **Effective Date** field, double-click and select the effective date on the calendar.
 - c. In the **Max Units/Time** field, double-click and type the maximum work units per time for this role.
- 8) Click **Save**.

Tip

Click **Select Columns** to select any additional fields that you want in the table. Then, enter data in the additional fields you added.

Assigning a Resource to a Role

The set of roles you assign to a resource describes the resource's skill capabilities. These role assignments make it easy to assign resources to activities according to role. You can also assign roles to activities directly when you are unsure of the actual resources available to work on the activities. You can later replace the roles with the applicable resources.

To assign a role to a resource from the Roles tab:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.
- 3) On the Administration page, click the **Roles** tab.
- 4) On the **Roles** tab:
 - a. Click the name of the role.
 - b. Click the **Resources** detail window.
- 5) In the **Resources** detail window, click **Assign....**
 - a. In the **Select Resource** dialog box, choose a resource and click **Select**.
- 6) In the **Resources** detail window:
 - a. To change the proficiency level for that resource, double-click the **Proficiency** field and select a level.
 - b. If this is the primary role for the resource, select the **Primary Role** option for the resource.
- 7) Click **Save**.

Tips

- ▶ You can assign more than one resource to a role.
- ▶ You can also assign a role to a resource from the **Resources** tab. Use this method if you want to view all roles assigned to a single resource.

Assigning a Role Team to a Role

Using role teams can simplify resource planning. You can do this from either the Roles tab or the Role Teams tab in the Resource Administration area. Use this method if you want to view all role teams assigned to a particular role.

To assign a role to a role team:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.
- 3) On the Administration page, click the **Roles** tab.
- 4) On the **Roles** tab:
 - a. Click the role you are assigning to a role team.
 - b. Click the **Role Teams** detail window.
- 5) In the **Role Teams** detail window, click **Assign....**
- 6) In the **Select Role Team** dialog box:
 - a. Expand either the **Global** or **User** category, choose a role team, and click **Select**.

- 7) Click **Save**.

Tips

You can also assign a role to a role team from the Role Teams tab. Use this method if you want to view all roles assigned to a particular role team.

Assigning Rates to Roles

Use this procedure to assign rates to the roles you created. Assigning rates to roles enables you to more accurately determine total resource (and activity) costs. You can assign up to five rate types depending on number of rate types set up by your administrator.

To assign role rates:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.
- 3) On the Administration page, click the **Roles** tab.
- 4) On the **Roles** tab:
 - a. Click a role.
 - b. Click the **Prices** detail window.
- 5) In the **Prices** detail window, click in the appropriate price fields and enter an amount. The default time period is price per hour unless you specify another time period.
- 6) On the **Roles** tab, click **Save**.

Assigning Work Limits to Roles

Assign role work limits to define the maximum amount of work units the selected role can perform in a single work period.

To assign limits to a role:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.
- 3) On the Administration page, click the **Roles** tab.
- 4) On the **Roles** tab:
 - a. Click a role.
 - b. Click the **Limits** detail window.
- 5) In the **Limits** detail window:
 - a. Click **+ Add**.
 - b. In the **Effective Date** field, double-click to open the calendar and choose a date and time to start the Max/Unit limit.
 - c. In the **Max Units/Time** field, double-click and type the maximum work units per time for this role. Enter these values as units per duration or as a percentage, depending on your choice in the Time Unit Format area on the Global tab of the My Preferences page.
- 6) Click **Save**.

About Role Teams

A role team is a collection of roles that are often needed on the same project or the same activities. Role teams are useful when you want to categorize and view allocation for related roles. Role teams allow you to categorize and group roles so you can readily find data relating to a particular role. A role can be assigned to more than one role team. When working with tabs and pages that display role data, you can choose to organize the hierarchy by role team. You can view team data such as total team units or individual unit values. If you have the required security privilege, you can create global role teams. All users that have access rights to view resource data can create user role teams.

Creating Role Teams

Use this procedure to create role teams. Role teams let you categorize roles so you can view and analyze data that relates to a specific group that interests you. When working with tabs and pages that display role data, you can choose to organize the hierarchy by role team, then choose to view team data, such as total units for the team, or individual unit values for each team member.

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.
- 3) On the Administration page, click the **Role Teams** tab.
- 4) On the **Role Teams** tab:
 - a. Click either **Global** or **User**.
 - b. Click **+Add**.
 - c. In the **Name** field, click and type a role name.
 - d. Click **Save**.
- 5) Assign roles to the role team.

Assigning a Role to a Role Team

Perform these steps to assign a role to a role team. You can assign a role to a role team from the **Role Teams** tab or the **Roles** tab. Use this method if you want to view all roles assigned to a particular role team.

To assign a role to a role team:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.
- 3) On the Administration page, click the **Role Teams** tab.
- 4) On the **Role Teams** tab:
 - a. Expand either the **Global** or **User** category, and click the role team for which you are assigning a role.
 - b. Click the **Roles** detail window.
- 5) In the **Roles** detail window, click **Assign....**
- 6) In the **Select Role** dialog box:

- a. Choose a role and click **Select**.
Press **Shift+click** or **Ctrl+click** to select multiple roles.
 - b. Click **Close**.
- 7) Click **Save**.

Tips

To view all role teams assigned to a particular role, assign a role team to a role from the **Roles** tab.

About Resources

A resource is any quantifiable item in limited supply and of sufficient value to justify tracking and assigning to specific activities for a project. Resources include general or specialized labor, non-labor items such as equipment, and material items such as bricks.

Resources perform roles, if defined. Resources are indirectly assigned to activities by first planning the role required. It is also possible to directly assign resources to activities. For example, Chris, a level 2 contractor with the confirmed skills and status, is directly assigned to activity 01. However, a technician level 4 role is assigned to activity 02. The project will proceed while management determines the best available resource to fulfill this role.

Adding Resources

Perform these steps to add resources to the resource pool. Resources include the personnel and equipment that perform work on activities across all projects. Resources are generally reused between activities and/or projects. Resources can be distinguished as either labor, material, or nonlabor. Labor and nonlabor resources are always time-based, and material resources, such as consumable items, use a unit of measure you can specify.

To add a resource:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.
- 3) On the Administration page, click the **Resources** tab.
- 4) On the **Resources** tab:
 - a. Click **+Add** and select **Sibling Resource** or **Child Resource**.
 - b. In the **Resource ID** field, type an ID for the new resource.
- 5) In the **General** detail window:
 - a. Type a **Resource Name** for the resource.
 - b. Select the **Active** option if the resource is available.
 - c. Enter any other information in the appropriate fields.
- 6) In the **Units and Prices** detail window:
 - a. Click **+Add**.
 - b. Configure the **Effective Date**, **Max Units/Time**, and **Standard Rate**.
 - c. Enter any other information in the appropriate fields.

- 7) Click **Save**.

Tips

- ▶ If you intend to use BI Publisher, avoid using commas when creating data other than Project names. The way that data other than Project names is passed to BI Publisher can cause a comma to be interpreted as a delimiter between data items.
- ▶ You can also importing resource data from a Microsoft Excel (.xls) spreadsheet.

Assigning a Role to a Resource

The set of roles you assign to a resource describes the resource's skill capabilities. These role assignments make it easy to assign resources to activities according to role. You can also assign roles to activities directly when you are unsure of the actual resources available to work on those activities. You can later replace the roles with the applicable resources.

To assign a role to a resource:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.
- 3) On the Administration page, click the **Resources** tab.
- 4) On the **Resources** tab:
 - a. Click the resource.
 - b. Click the **Roles** detail window.
- 5) In the **Roles** detail window, click **Assign....**
- 6) In the **Select Role** dialog box:
 - a. Choose a role and click **Select**.
- 7) In the **Roles** detail window:
 - a. To change the proficiency level for that role, double-click the **Proficiency** field and select a level.
 - b. A resource can have many roles. The first role added is marked as the primary role. To change this, select the **Primary Role** field for the appropriate role.
- 8) Click **Save**.

Tips

Assign a resource to a role from the **Roles** tab to view all resources assigned to a particular role.

Assigning a Resource Team to a Resource

Perform these steps to assign a resource team to a resource. You can do this from either the **Resources** tab or the **Resource Teams** tab. Use this method if you want to view all the resource teams assigned to a single resource.

To assign a resource to a resource team:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.

- 3) On the Administration page, click the **Resources** tab.
- 4) On the **Resources** tab:
 - a. Click the name of the resource you are assigning to a resource team.
 - b. Click the **Resource Teams** detail window.
- 5) In the **Resource Teams** detail window, click **Assign....**
- 6) In the **Select Resource Team** dialog box:
 - a. Expand either the **Global** or **User** category, and select a resource team.
 - b. Click **Select**.
- 7) Click **Save**.

Tips

To view all resources assigned to a particular resource team, assign a resource to a resource team from the **Resource Team** tab.

Configuring Resource Settings

Use the Settings detail window available from the Administration Resources tab to define settings for the resource, such as the resource calendar and default units/time, as well as P6 Team Member settings. If you subsequently change a setting, it affects only new assignments, not existing ones.

To configure resource settings:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.
- 3) On the Administration page, click the **Resources** tab.
- 4) On the **Resources** tab, select the resource for which you want to define general settings.
- 5) Click the **Settings** detail window, review the following options and make selections based on your project needs.
 - Calendar:** Click **...Select** to assign a calendar to the resource that is different from the default calendar. Click **Create Personal Calendar** to create a unique calendar for the resource, or select an existing calendar, and click **Select**.
 - Calculate Costs from Units:** Select this option to indicate that any new assignment for this resource will have its cost recalculated whenever any quantity changes occur, such as changing an activity's remaining duration.
 - Auto Compute Actuals:** Select to automatically calculate the selected resource's actual quantity of work according to the project plan rather than reported hours in the **Timesheets** tab of P6 Team Member. Clear this option if the user will use timesheets.
 - Overtime Allowed:** Select to enable the labor resource to record overtime hours for activities.
 - Default Units/Time:** Use the default value or change the default units/time value. Enter these values as units per duration or as a percentage, depending on your choice in the Units/Time Format area of the My Preferences page.
 - Currency:** Click **...Select** to select a currency that is different from the default currency, and click **Select**.

Overtime Factor: Type the number by which the resource's standard price should be multiplied to determine the resource's overtime price.

Team Member: Configure timesheet settings for the selected resource.

- 6) Click **Save**.

Assigning Calendars to Resources

Assign a global or resource calendar to a resource to determine when the resource is available to work.

To assign a calendar to a resource:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.
- 3) On the Administration page, click the **Resources** tab.
- 4) On the **Resources** tab:
 - a. Click a resource.
 - b. Click the **Settings** detail window.
- 5) In the **Settings** detail window, click **...Select** in the **Calendar** field.
- 6) In the **Select Calendar Name** dialog box:
 - a. In the **View calendar type** list, choose to view either global or resource calendars.
 - b. Select a calendar.
 - c. Click **Select**.

Note: If you want a personal calendar for the resource, click **Create Personal Calendar**. You can also create personal or resource calendars from the **Enterprise Data** page.

- 7) Click **Save**.

Tips

- ▶ You can perform the same procedure from the Calendars field on the Resources tab.
- ▶ Configure **My Calendar** to edit exceptions to your personal calendar. To view a personal calendar, the resource must be a user in the system.

Configuring Timesheet Reporting for Resources

Configure timesheet reporting if some users will report progress using the **Timesheets** tab in P6 Team Member Web.

To configure timesheet reporting for a resource:

- 1) If the resource is not already defined as a user in the system:
 - a. Add the user.
 - b. Assign the resource to the new user.
- 2) Enable access to P6 Team Member Web by selecting the **Team Member** module access options.

- 3) Enable access to timesheets by selecting the **Timesheet** module access option.
- 4) Configure timesheet options for the resource if you are implementing non-automatic approval.

Tips

For faster setup of timesheet reporting, configure settings on the **Timesheets** page of the **Application Settings** pane, located on the **Administer** menu. Use these options to designate a default approval manager whenever you create a new resource.

Configuring Resource Settings for Timesheet Reporting

Configure timesheet reporting settings if some users will report progress using the **Timesheets** tab in P6 Team Member Web and are implementing non-automatic approval.

To configure resource settings for timesheet reporting:

Note: You must perform these steps in order when configuring these settings for the first time for each new resource.

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **User Administration**.
- 3) On the User Administration page, click **Users**.
- 4) In the **Users** pane, select the user and click the **Module Access** detail window.
- 5) In the **Module Access** detail window, select **Timesheet**.
- 6) Click **Resources**.
- 7) On the Resources navigation bar, click **Administration**.
- 8) On the Administration page, click the **Resources** tab.
- 9) On the **Resources** tab, select the resource and click the **Settings** detail window.
- 10) In the **Settings** detail window:
 - a. Click **...Select** in the **User Login** field.
 - b. In the **Select User** dialog box, select the resources name from the list and click **OK**.
- 11) In the **Settings** detail window:
 - a. In the **Timesheet Approval Manager** field, click **...Select**.
- 12) In the **Select User** dialog box, choose a manager to assign to the resource and click **OK**.
- 13) Click **Save**.

Note: Users designated as timesheet approval managers are not automatically granted access to P6 Team Member Web, even if they are assigned the required module access. To enable timesheet approval managers to access timesheets in P6 Team Member Web, you must configure them as timesheet resources, as you would any other resource that requires access to timesheets in P6 Team Member Web. Configuring timesheet approval managers as timesheet resources enables approval managers to log into P6 Team Member Web to edit the timesheets of their reporting resources.

Assigning Resource Codes

With potentially hundreds of resources in use across the enterprise, resource codes provide an efficient means for tracking and sorting resources for reporting or analysis.

Use this procedure to assign resource codes to resources. Once assigned, you can categorize resources using codes.

To assign resource codes:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.
- 3) On the Administration page, click the **Resources** tab.
- 4) On the **Resources** tab:
 - a. Click a resource.
 - b. Click the **Codes** detail window.
- 5) On the **Codes** detail window, click **Assign...**
- 6) In the **Select Resource Code** dialog box:
 - a. Expand a resource code.
 - b. Select a code value and click **Select**.

Note:

- The top levels of the hierarchy in the Select Resource Code dialog box represent resource codes. All lower levels of the hierarchy represent resource code values.
- You can only assign one value from each code to a resource. If you try to assign a second value from the same code, the first value will be replaced with the new value.

- 7) Click **Save**.

Assigning Resource Rates

Use this procedure to assign rates to resources. You can assign multiple rates to resources to reflect price changes over time. For example, suppose the price per unit for a group of resources was \$20.00 per hour for the months January through June, but the price rate increases to \$30.00 starting in July through December. You can assign time-varying rates for resources to more accurately determine total resource (and activity) costs.

To assign resource rates:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.
- 3) On the Administration page, click the **Resources** tab.
- 4) On the **Resources** tab:
 - a. Click a resource.
 - b. Click the **Units and Prices** detail window.

- 5) In the **Units and Prices** detail window:
 - a. Click **+Add**.
 - b. In the **Effective Date** field, double-click to open the calendar and choose a date and time to start the new rate.
 - c. In the **Max Units/Time** field, double-click and type the maximum work units per time for this resource.
 - d. In the appropriate price fields, double-click and type an amount. The default time period is price per hour unless you specify another time period.
- 6) Click **Save**.

Assigning Resource Curves to Resource or Role Assignments from the Resources Assignments Page

You can assign a resource distribution curve to any resource or role assignment on activities with a duration type of Fixed Duration and Units/Time or Fixed Duration & Units.

To assign a resource curve:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Assignments**.
- 3) On the **Assignments** page:
 - In **Classic View**:
 - a. Display the **Curves** column if it is not visible on the table. To display the **Curves** column, click  **Customize Columns**, expand **General** and double-click **Curve** to move it to the **Selected Columns** list.
 - b. On the **Assignments** page:
 - Click the row with the resource or role.
 - Double-click the **Curve** field, and click .
 - c. In the **Select Curves** dialog box, choose a curve and click **OK**.
 - d. On the **Assignments** page, click  **Save** (Ctrl+S).

In **Standard View**:

- a. Display the **Curves** column if it is not visible on the table. To display the **Curves** column, click  **Customize View** and click **Columns**, expand the **General** grouping and double-click **Curve** to move it to the **Selected Columns** list.
- b. On the **Assignments** page:
 - Click the row with the resource or role.
 - Double-click the **Curve** field, and click **...Select**.
- c. In the **Select Curves** dialog box, choose a curve and click **OK**.
- d. On the **Assignments** page, click **Save**.

Tips:

- ▶ You can also assign resource curves to resource or role assignment from the **Activities** page.

About Resource Teams

Resource teams provide a convenient way for you to associate personnel into smaller, more meaningful groups within an organization. Using resource teams increases efficiency in staffing activities, tracking allocation, and communicating project progress and performance. When working with pages and tabs that display resource data, such as the Resources Planning, Assignments, or Analysis pages, you can choose to organize by resource team. You can then choose to view team data, such as total units for the team, or view individual unit values for each team member. For example, the Resource Usage tab available from the Analysis page provides total allocation data for the team, as well as for each team resource when the tab is grouped by Resource Team.

Global resource teams are available to all users. User resource teams are only accessible to the user currently logged in. You can create and modify user resource teams for your personal use. A resource can be assigned to more than one resource team. If you have the required security privilege, you can also create and modify global resource teams.

In addition to viewing Resource Teams from the Resources section, you can view the resources that belong to a team, including each resource's primary role and number of active projects, by viewing the Resource Team Summary portlet on the Dashboards page.

Creating Resource Teams

Create resource teams to reduce potentially large resource pools into smaller, more meaningful and manageable groups.

To create a resource team:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.
- 3) On the Administration page, click the **Resource Teams** tab.
- 4) On the **Resource Teams** tab:
 - a. If you are creating a global resource team, select the **Global** group and click **+Add**.
If you are creating a team only for your use, select the **User** group and click **+Add**.
 - b. In the **Name** field, double-click and type a resource team name.
- 5) In the **Resources** detail window, click **Assign....**
- 6) In the **Select Resource** dialog box:
 - a. Select a resource and click **Select**
Use Ctrl+click or Shift+click to select multiple resources.
- 7) Click **Save**.

Assigning a Resource to a Resource Team

Perform these steps to assign a resource to a resource team. You can assign a resource to a resource team from the **Resource** tab or the **Resource Teams** tab. Use this method if you want to view all resources assigned to a particular resource team.

To assign a resource to a resource team:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.
- 3) On the Administration page, click the **Resource Teams** tab.
- 4) On the **Resource Teams** tab, expand either the **Global** or the **User** group and click a resource team name.
- 5) In the **Resources** detail window, click **Assign....**
- 6) In the **Select Resource** dialog box:
 - a. Select a resource and click **Select**
Use Ctrl+click or Shift+click to select multiple resources.
- 7) Click **Save**.

Tips

To view all resource teams assigned to a particular resource, assign a resource team to a resource from the **Resources** tab.

Setting Up The Work Breakdown Structure

About Work Breakdown Structures (WBS)

A WBS, or work breakdown structure, is a hierarchical arrangement of work activities that divides a project into discrete levels, phases, or layers. The WBS is structured in levels of work detail, beginning with the deliverable and separated into identifiable work elements.

When creating a project, the project manager typically develops the WBS first. The manager assigns documents to each WBS element, and then defines activities to complete that element. In addition to document and activity assignments, each WBS element can also have specific earned value calculation settings, issue assignments, and notebook topics.

Each project has its own WBS hierarchy with the top-level WBS element equal to that of each enterprise project structure (EPS) node or project. Each WBS element can contain more detailed WBS levels, activities, or both.

Working with WBS Elements

If you have the 'Add/Edit/Delete WBS Except Costs/Financials' project privilege, you can add, copy and paste, cut and paste, modify, or delete WBS elements.

Before you begin

To add, copy and paste, cut and paste, edit, or delete WBS elements, whether you are working with a single project or a group of projects, the grouping in your view must be configured to have the **Level 1 Field** list set to **WBS**. Either select this type of view from the **Activity View** list or, if necessary, modify the grouping, customize the view, or create a new view.

Add WBS elements

Except for the top level element of the WBS hierarchy, which represents the project, you can add a WBS element at the same level as an existing element (sibling) or at a subordinate level (child). At the top level of the WBS, you can add only child elements.

In addition to creating a brand new WBS element, you can create one from a template, or by copying a current WBS element and modifying the content.

Copy and Paste WBS elements

When you copy a WBS element, all activities and child WBSs subordinate to the WBS element are also copied.

When you copy a WBS and paste it into the same project, all data except the following is copied:

- ▶ Summary data
- ▶ Activity feedback
- ▶ Relationships to activities that were not included in the copied WBS
- ▶ Documents from the content repository
- ▶ Status update history (for P6 Team Member interfaces)

When you copy a WBS from one project and paste it into another, all data except the following is copied:

- ▶ Summary data
- ▶ Activity feedback
- ▶ Relationships to activities that were not included in the copied WBS
- ▶ Project and EPS activity codes
- ▶ Risk assignments
- ▶ Documents from the content repository
- ▶ Work products and documents (WP & docs)
- ▶ Status update history (for P6 Team Member interfaces)

You cannot copy a WBS if any of the following are true:

- ▶ All open projects are checked out in P6 Professional or are opened exclusively by another user.
- ▶ You do not have the required security privileges.
- ▶ Multiple WBSs are selected. You can only copy one WBS at a time.
- ▶ You have Contributor project module access.

Cut and Paste WBS Elements

When you cut and paste a WBS, all data is retained. You cannot cut a WBS from one project and paste the WBS to another project. If you need to move the WBS to a different project, copy the WBS and paste it to the new location, and then delete the original entry.

You cannot cut a WBS if any of the following are true:

- ▶ All open projects are checked out in P6 Professional or are opened exclusively by another user.
- ▶ You do not have the required security privileges.
- ▶ Multiple WBSs are selected. You can only copy one WBS at a time.
- ▶ You have Contributor project module access.

Modify WBS elements

In **Classic View**, horizontal arrows change the level of an element in the hierarchy. Vertical arrows change the position of an element within its current level. In **Standard View**, when you have your view grouped by all levels of the WBS you can change the position of an element by clicking  **Row Actions** and selecting one of the move options.

Delete WBS elements

If you attempt to delete a WBS that has activities associated with it, you must specify what you want to do with the activities:

- ▶ To delete the WBS, but reassign its activities to the parent WBS, select **Merge**.
- ▶ To delete both the WBS and its associated activities, select **Delete**.

Note: These two options also appear if the WBS has both activities and planned resource allocations. However, resource allocations cannot be merged. Regardless of the option you choose, the planned resource allocations are deleted. For this reason, when a WBS has planned resource allocations but no activities, these options do not appear.

Creating a WBS

Create a work breakdown structure (WBS) to divide a project into levels. You can create sibling WBSs to represent WBSs that are hierarchically equal, or child WBSs to represent WBSs that are subordinate to projects or other WBSs.

To create a WBS:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Select a WBS or project. The WBS can act as a sibling or a parent. The project will always act as a parent.
 - b. Click the **Actions**  menu:
 - To add a sibling, select **Add ▶ Add Sibling WBS** (Shift+Insert).
 - To add a child, select **Add ▶  Add Child WBS** (Ctrl+Insert).
 - To add a WBS from a template, select **Add ▶ Add WBS from Template...**
 - c. Double-click in the **WBS/Activity** field to enter a name for the new WBS.
 - d. Click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. Select a WBS or project. The WBS can act as a sibling or a parent. The project will always act as a parent.
- b. Click  **Row Actions**
 - To add a sibling, select **Add Sibling WBS**.

- To add a child, select **Add Child WBS**.
 - To add a WBS from a template, select **Add WBS from Template**.
- c. Click **Save**.

Tips

- ▶ Create an Activity View in Classic View with grouping configured to have the Level 1 Field list set to *WBS*. When you configure this view, you are able to add, edit, or delete WBS elements. This type of view is identified by the  (WBS) icon. If this type of view is already available, click the Activity View list on the Activities toolbar, and select it.
- ▶ The WBS will automatically be assigned a name based upon the project or WBS you select. For example, if the project or WBS is named *WBS: Business Project 1.5*, the application will automatically name the new *WBS: Business Project 1.6*.
- ▶ To create a WBS from an existing WBS in Classic View, right-click on a WBS and select **Copy**. Select a WBS to paste the copied WBS. Right-click and paste the WBS, which includes its associated activities and data items, with some exceptions, to the new location. To create a WBS from an existing WBS in Standard View, select a WBS click **Row Actions** and select **Copy**. Select a WBS to paste the copied WBS. Click **Row Actions** and select **Paste** to paste the WBS, which includes its associated activities and data items, with some exceptions, to the new location.

Creating a WBS from a Template

You can add a predefined WBS element from a template to a project.

To add a WBS from template:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Click the **View** menu and select **Table**.
 - b. Click the **View** menu and select **Group...**
 - c. On the **Customize Groupings** dialog box, set the **Level 1** field to *WBS* and the **Sort Order** field to *Hierarchy*. Click **OK**.
 - d. In the Activity Table, right-click a project or WBS element and select **Add WBS from Template**.
 - e. In the **Select WBS** dialog box, select a WBS from the list of templates and click **OK**.
 - f. On the **Activities** page:
 - Update the name in the **WBS/Activity** field.
 - Click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View**:
 - a. In the Activity Table, select a project or WBS element and select **Row Actions** then select **Add WBS from Template**.
 - b. In the **Select WBS** dialog box, select a WBS from the list of templates and click **Select**.

Tips

- ▶ The application automatically assigns the WBS element a name based upon the selected WBS.
- ▶ The new WBS element is created and saved automatically as a child of the selected WBS element.

Configuring General WBS Information

Configure WBS information in **Classic View** to account for any updates or changes made to the WBS.

To configure general WBS information:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select a WBS and click the **General** detail window.
- 4) In the **General** detail window:
 - a. Add or remove columns as needed to configure to the detail window.
 - b. Select an option or enter a value for each field.
 - c. Save your changes
 - In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View** click **Save**.

Defining Earned Value Calculations for WBS Elements

Earned value is a technique for measuring project performance according to both project costs and the schedule. This technique compares the planned cost of the work to the actual cost. While earned value analysis is typically performed for WBS elements, you can also perform an earned value analysis for activities, groups of activities, or one or more projects.

You can define the technique used to calculate the **Performance Percent Complete** and **Estimate to Complete** used in the earned value calculation:

$$\text{Earned Value} = \text{Performance \% Complete} \times \text{Budget At Completion (BAC)}$$

To define the default P6 technique for computing earned value calculations:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Application Settings**.
- 3) On the Application Settings page, click **Earned Value**.

To define the technique for computing earned value calculations for a WBS:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Activities**.
- 3) On the Activities page:
 - a. Select an activity view that is grouped by WBS, or group by WBS.
 - b. Expand the project and any parent WBS elements.
 - c. Select a WBS to define the technique used for computing earned value.

- d. Click the **Earned Value** detail window.
- 4) In the Earned Value detail window:
 - a. In the Technique for computing performance percent complete section, select the technique you want to use for calculating an activity's earned value.
 - b. In the Technique for computing Estimate to Complete (ETC) section, select the technique you want to use for calculating ETC.
- 5) Click **Save** or **Save and Close**.

Working with WBS Milestones

You can add an almost unlimited number of WBS milestones, which can be used instead of activities to calculate earned value. WBS milestones are assigned at the WBS level, and each milestone is given a weight representing its importance in the project schedule. When you mark a WBS milestone as complete, P6 uses its weight to calculate the performance percent complete of all activities included in the WBS level. That is, the performance percent complete is applied to all activities under that WBS level and then aggregated to the WBS.

For example, suppose a particular level of the WBS includes ten activities, and actual finish dates have been entered for five of these activities. The same WBS is also assigned four WBS milestones having equal weights, but only one of these milestones is marked as complete. P6 uses the completed WBS milestone to calculate the WBS level's performance percent complete as 25%, even though 50% of the activities included in the WBS level are finished.

In the initial stages of project planning, decide how you want P6 to calculate earned value, percent complete, resource use, and financial data. You may want to use WBS milestones when higher-level task increments comprise a body of activities and you want to control the activities at the WBS level. For example, to control the design of a new product, you might assign WBS milestones to the major steps required to complete the design such as drafting the requirements, writing the design specifications, and so on. Each of these milestones would contain the detailed activities required to complete it.

Working with WBS Categories

Use the **WBS Categories** page to define custom work breakdown structure (WBS) categories. Categories are not project-specific; you can assign them to any WBS elements in the EPS. WBS categories help reflect your organization's terminology and unique requirements. You can also use categories to group, sort, and filter WBS elements.

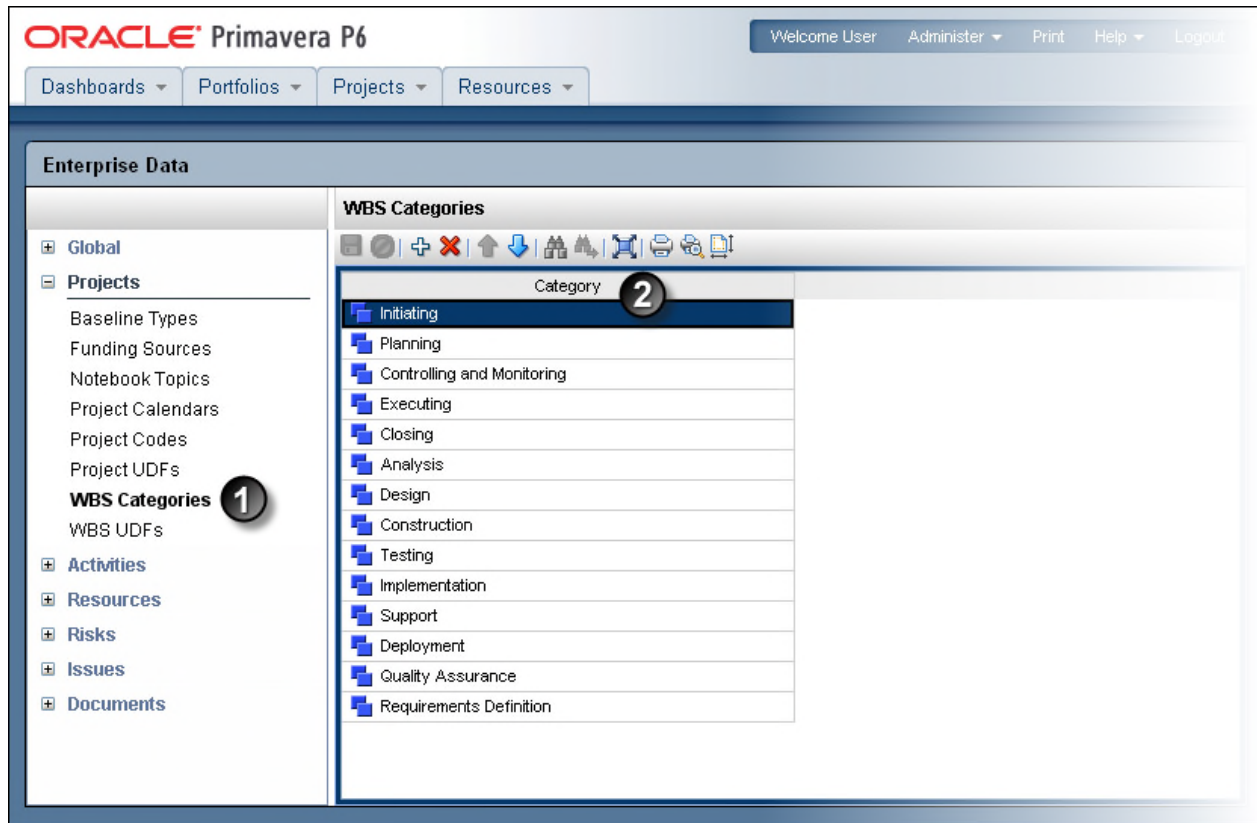


Table of WBS Category Administration

Item	Description
1	WBS Categories: Use the WBS Categories page to view and add WBS categories. This page is part of the Enterprise Project Data for your organization.
2	Category field: The Category field shows the WBS category's name. You can edit this value.

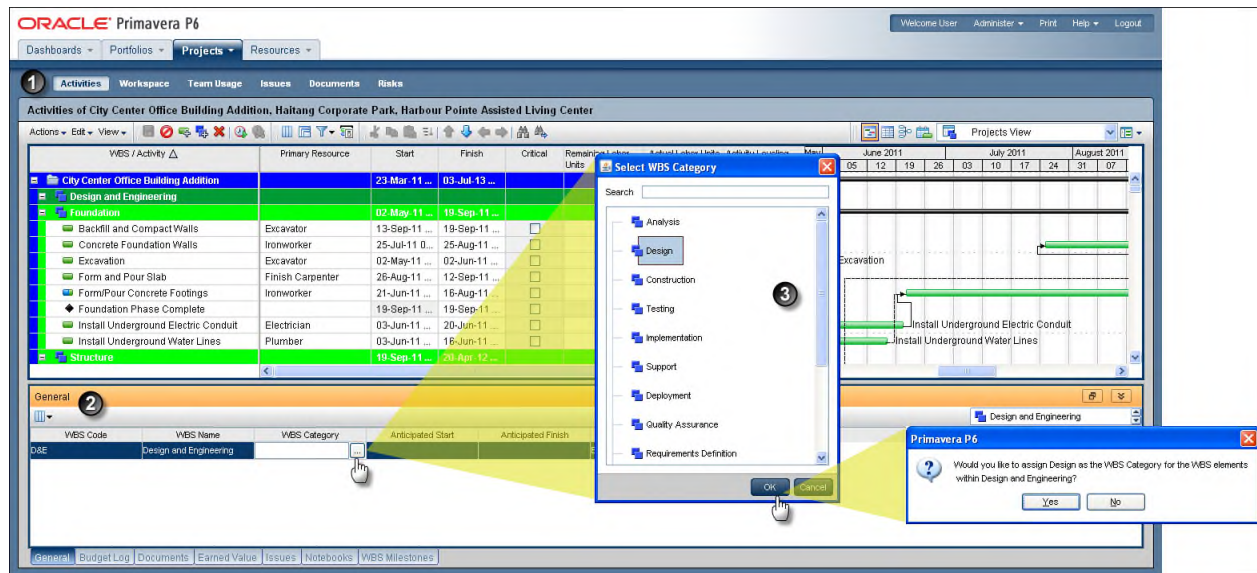


Table of WBS Category Assignment

Item	Description
1	Activities page: On the Activities page, use the General detail window to select the WBS category you want to assign.
2	General Detail Window: In the General detail window, you can assign a WBS category by clicking in the WBS Category field. If the WBS Category field is not visible, click Columns and choose WBS Category . The category you assign helps organize the WBS element within the project. For example, a WBS category called <i>Design</i> would indicate that this WBS will focus on design tasks.
3	Select WBS Category dialog box: Use the Select WBS Category dialog box to assign a WBS category. You can select only one category. If you are assigning a WBS category to a parent WBS, you will be asked if you also want to assign that category to the child WBS elements. Choose yes or no as needed.

Establishing Project Codes

About Project Codes

Project codes help you track different projects based on characteristics they share. You can use project codes to arrange projects hierarchically when your EPS contains many projects within many levels. If you have many projects in the hierarchy, project codes help you group and filter potentially vast amounts of information spanning different areas of the organization. The application supports an almost unlimited number of hierarchical project codes and values; you can establish as many as you need to meet the filtering, sorting, and reporting requirements of your organization.

Working with Project Codes

Create and configure project codes in the Administer section of the application. For each project code, create as many code values as needed to assign to projects to track them over time. Periodically, revisit your enterprise data settings to add, modify, or delete project codes and values.

Project Codes Table Data:

Name	Description	Maximum Length	Secure	Weight	Weight Percent	Maximum Code Value Weight
Priority		11		0.0	0%	0.0
1 Mandatory	1 Mandatory					
2 High	2 High Priority					
3 Medium	3 Medium Priority					
4 Low	4 Low Priority					
5 Nice2Have	5 Nice to Have					
Strategic Rating		20	☒	30.0	30%	1.0
1 Weak Alignment	1 Weak Alignment			0.3		
2 Moderate Alignment	2 Moderate Alignment			0.5		
3 Strong Alignment	3 Strong Alignment			0.7		
4 Mission Critical	4 Mission Critical			0.8		
5 Legal - Reg	5 Legal - Regulatory			1.0		
Financial Rating		20	☐	35.0	35%	1.0
1 NPV under \$100K	1 NPV under \$100K			0.3		
2 NPV \$100K to \$500K	2 NPV \$100K to \$500K			0.5		
3 NPV \$500K to \$1M	3 NPV \$500K to \$1M			0.7		
4 NPV \$1M to \$2M	4 NPV \$1M to \$2M			0.8		
5 NPV over \$2M	5 NPV over \$2M			1.0		
Technology Rating		20	☐	20.0	20%	1.0
5 Competitive Adv	5 Competitive Advantage			1.0		
4 Innovative	4 Innovative			0.8		
3 Ind Standard	3 Industry Standard			0.7		
2 Status Quo	2 Status Quo			0.5		
1 Aging	1 Aging			0.3		
Resource Rating		20	☐	15.0	15%	1.0

Table 1 of 3: Administering Project Codes

Item	Description
1	Administer menu: Define project codes in Enterprise Data.
2	Project Codes page: The Project Codes page available under the expanded Projects entry.

Item	Description
3	Project Codes toolbar: Create codes and values, add columns, and move entries using the tools in the toolbar.
4	Name field: Displays both the code's name and the code value's short identifier. For example, the 1 Mandatory code value appears under the Priority project code.
5	Description field: Displays the full name for the code value.
6	Weighted Code fields: Weighted project codes enable you to rank or prioritize projects using a weight value and then view projects by a score determined by the application. For example, assume you rank projects in terms of risk. Project codes with the highest score have the most risk; those with the lowest score have the least risk. To add weight to a project code, enter a value in the Weight column. To view the score of each weighted project code, display the Project Score field in the Project Statistics portlet, in any scorecard portfolio view, or on the EPS page.

The screenshot displays the Oracle Primavera P6 Enterprise Project Structure (EPS) view. The interface includes a navigation pane on the left with tabs for EPS, Activities, Workspace, Team Usage, Issues, Documents, and Risks. The main area shows a hierarchical tree of project codes and a corresponding data table. A 'Customize Groupings' dialog box is open, allowing users to configure the display of project data across eight levels. The table columns include Project Name, Project ID, Project Type, Location, and various financial metrics such as Budget, Actuals, and Remaining. Annotations 1, 2, and 3 highlight specific features: 1 points to the Project Name column header, 2 points to a project entry in the tree, and 3 points to the 'Customize Groupings' dialog box.

Table 2 of 3: Using Project Codes with the EPS

Item	Description
1	Grouped by Contract Type: The projects in this EPS view are grouped at their outermost level (Level 1) by Project Type .

Item	Description
2	Grouped by Division/Office: The projects are also grouped by Location at their second level (Level 2).
3	Customize Groupings dialog box: Use this dialog box to set the groupings, colors, and sort order.

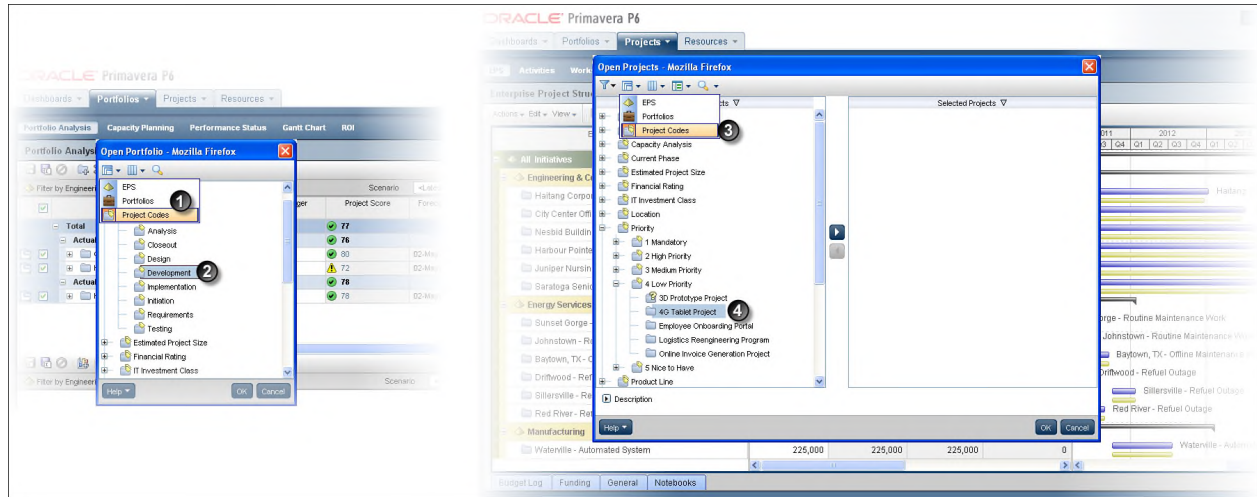


Table 3 of 3: Using Project Codes with Portfolios and Projects

Item	Description
1	Portfolios Grouped by Project Code: The Open Portfolio dialog box grouped by project code.
2	A Portfolio Based on a Project Code Value: In this example, the user has selected the <i>Development</i> project code. All projects assigned to this code value will be opened as a portfolio.
3	Projects Grouped by Project Code: The Open Projects dialog box grouped by project code. Behind the list, notice the search field. You can use this field to search for a project by project code.
4	Projects Based on a Project Code Value: In this example, the user has selected the second of five projects under the 4 Low Priority code value, which is itself part of the Priority project code.

Creating Project Codes

Create project codes to represent project evaluation criteria. These steps represent the minimum required to create a project code.

To create a project code:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Projects** and click **Project Codes**.
- 4) On the Project Codes page:
 - a. Click **Row Actions** and select **Add Code**.
 - b. In the **Name** field, double-click and type a unique code name.
 - c. In the **Secure** field, select the option to make the code read-only for users without the necessary security privileges to make changes.
 - d. Move the code to the correct location in the list by clicking **Row Actions** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
 - e. In the **Maximum Length** field, double-click and click the up or down arrow to specify the maximum length for project code value names.
 - f. Click **Save**.

Tips

- ▶ If you intend to use BI Publisher, avoid using commas when creating data other than Project names. The way that data other than Project names is passed to BI Publisher can cause a comma to be interpreted as a delimiter between data items.
- ▶ Project codes at the same level are siblings. Subordinate project codes are children.

Creating Project Code Values

Create project code values to group, sort, and filter project data.

To create project code values:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Projects** and click **Project Codes**.
- 4) On the Project Codes page:
 - a. Select a code or code value.
 - b. Click **Row Actions** and select **Add Code Value** or **Add Child Code Value**.
 - c. In the **Name** field, double-click and type a unique code value name.
 - d. In the **Description** field, double-click and type a brief narrative about the code value.
 - e. Move the code value to the correct location in the list by clicking **Row Actions** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
 - f. In the **Weight** field, double-click and type a value.
 - g. Click **Save**.

Tips

- ▶ Project code values at the same level are siblings. Subordinate project code values are children.
- ▶ The weight reflects the ranking of a code value against other values in the project code.

Assigning Project Codes

Assign project codes to categorize projects.

To assign a project code:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page, select a project and click the **Codes** detail window.
 - In **Classic View**:
 - a. In the **Codes** detail window, click  **Assigning Project Codes** (Insert).
 - b. In the **Select Project Codes** dialog box, assign codes and click **Close**.
 - c. On the **EPS** page, click the **Actions**  menu and click  **Save** (Ctrl+S).
 - In **Standard View**:
 - a. In the **Codes** detail window, click **Assign...**
 - b. In the **Select Project Codes** dialog box, assign codes and click **Close**.
 - c. On the **EPS** page, click **Save**.

User-Defined fields

About User Defined Fields

User defined fields allow you to create and maintain data specific to your organization. For example, you can track additional activity data, such as delivery dates and purchase order numbers. You can also track additional resource data or project cost-related data, such as profit, variances, and revised budgets. User defined fields are global, so they can be used across all projects in your organization.

You can also create project user defined fields. Project user defined fields track information specific to projects. For example, your organization might require a custom field to track project profit. Project user defined fields are unique in that you can define a formula or statement to automatically calculate field values, and identify graphical indicators to display for a field, based on its value.

Creating Activity UDFs

Create activity user defined fields (UDFs) if the predefined fields do not meet your needs.

To create an activity UDF:

- 1) Click **Administration**.

- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Activities** and click **Activity UDFs**.
- 4) On the Activity UDFs page:
 - a. Click **+Add**.
 - b. In the **User Defined Field**, double-click and type a name.
 - c. In the **Data Type** field, choose a type from the list.
 - d. Click **Save**.

Tips

- ▶ If you intend to use BI Publisher, avoid using commas when creating data other than Project names. The way that data other than Project names is passed to BI Publisher can cause a comma to be interpreted as a delimiter between data items.
- ▶ The software automatically creates a UDF called MSP Activity ID the first time anyone exports a project to Microsoft Project format. This UDF is hidden and cannot be modified. You should avoid creating a UDF with that name.

Creating Assignment UDFs

Create assignment user defined fields (UDFs) if the predefined fields do not meet your needs.

To create an assignment UDF:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Resources** and click **Assignment UDFs**.
- 4) On the Assignment UDFs page:
 - a. Click **+Add**.
 - b. In the **User Defined Field**, double-click and type a name.
 - c. In the **Data Type** field, choose a type from the list.
 - d. Click **Save**.

Tips

- ▶ If you intend to use BI Publisher, avoid using commas when creating data other than Project names. The way that data other than Project names is passed to BI Publisher can cause a comma to be interpreted as a delimiter between data items.

Creating Document UDFs

Create document user defined fields (UDFs) if the predefined fields do not meet your needs.

To create a document UDF:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Documents** and click **Document UDFs**.
- 4) On the Document UDFs page:
 - a. Click **+Add**.

- b. In the **User Defined Field**, double-click and type a name.
- c. In the **Data Type** field, choose a type from the list.
- d. Click **Save**.

Tips

- ▶ If you intend to use BI Publisher, avoid using commas when creating data other than Project names. The way that data other than Project names is passed to BI Publisher can cause a comma to be interpreted as a delimiter between data items.

Creating Expense UDFs

Create expense user defined fields (UDFs) if the predefined fields do not meet your needs.

To create an expense UDF:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Activities** and click **Expense UDFs**.
- 4) On the Expense UDFs page:
 - a. Click **+Add**.
 - b. In the **User Defined Field**, double-click and type a name.
 - c. In the **Data Type** field, choose a type from the list.
 - d. Click **Save**.

Tips

- ▶ If you intend to use BI Publisher, avoid using commas when creating data other than Project names. The way that data other than Project names is passed to BI Publisher can cause a comma to be interpreted as a delimiter between data items.

Creating Issue UDFs

Create issue user defined fields (UDFs) if the predefined fields do not meet your needs.

To create an issue UDF:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Issues** and click **Issue UDFs**.
- 4) On the Issue UDFs page:
 - a. Click **+Add**.
 - b. In the **User Defined Field**, double-click and type a name.
 - c. In the **Data Type** field, choose a type from the list.
 - d. Click **Save**.

Tips

- ▶ If you intend to use BI Publisher, avoid using commas when creating data other than Project names. The way that data other than Project names is passed to BI Publisher can cause a comma to be interpreted as a delimiter between data items.

Creating Project UDFs

Create project user defined fields (UDFs) if the predefined fields do not meet your needs. You can create formulas that automatically calculate values for project UDFs.

To create a project UDF:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Projects** and click **Project UDFs**.
- 4) On the Project UDFs page:
 - a. Click **+Add**.
 - b. In the **User Defined Field**, double-click and type a name.
 - c. In the **Data Type** field, choose a type from the list.
 - d. In the UDF Type list:
 - Choose **Manual** if you want to be able to select or enter a value for the UDF field.
 - Choose **Formula** if you want the value of the UDF field to be calculated from other fields.
 - e. If you chose Formula in the UDF Type list, in the Formula detail window, define a formula or statement.
 - f. If you chose Indicator in the Data Type list, in the Indicators and Summary Indicators detail windows, define graphical indicators.
 - g. Click **Save**.

Tips

- ▶ If you intend to use BI Publisher, avoid using commas when creating data other than Project names. The way that data other than Project names is passed to BI Publisher can cause a comma to be interpreted as a delimiter between data items.
- ▶ You cannot filter views by UDFs calculated on the basis of a formula.
- ▶ You cannot define a formula for fields with Indicator marked.
- ▶ You can edit the Indicator detail window only if you select Integer, Cost, and Number.

Creating Resource UDFs

Create resource user defined fields (UDFs) if the predefined fields do not meet your needs.

To create a resource UDF:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Resources** and click **Resource UDFs**.
- 4) On the Resource UDFs page:

- a. Click **+Add**.
- b. In the **User Defined Field**, double-click and type a name.
- c. In the **Data Type** field, choose a type from the list.
- d. Click **Save**.

Tips

- ▶ If you intend to use BI Publisher, avoid using commas when creating data other than Project names. The way that data other than Project names is passed to BI Publisher can cause a comma to be interpreted as a delimiter between data items.

Creating Risk UDFs

Create risk user-defined fields (UDFs) to store additional project risk data on the Risks page that is pertinent to your project or business and is not available from the default fields. For example, you might need to include a location field to identify where the risk might occur, or a ranking field to determine the order in which the risks will be handled.

UDFs can be of many types: text, start date, finish date, cost, number, integer, or indicator. Data from UDFs is not used in scoring calculations.

To create a risk UDF:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Risks** and click **Risk UDFs**.
- 4) On the Risk UDFs page:
 - a. Click **+Add**.
 - b. In the **User Defined Field**, double-click and type a name.
 - c. In the **Data Type** field, choose a type from the list.
 - d. Click **Save**.

Tips

- ▶ If you intend to use BI Publisher, avoid using commas when creating data other than Project names. The way that data other than Project names is passed to BI Publisher can cause a comma to be interpreted as a delimiter between data items.

Creating Step UDFs

Create step user defined fields (UDFs) if the predefined fields do not meet your needs.

To create a step UDF:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Activities** and click **Step UDFs**.
- 4) On the Step UDFs page:
 - a. Click **+Add**.
 - b. In the **User Defined Field**, double-click and type a name.

- c. In the **Data Type** field, choose a type from the list.
- d. Click **Save**.

Tips

- ▶ If you intend to use BI Publisher, avoid using commas when creating data other than Project names. The way that data other than Project names is passed to BI Publisher can cause a comma to be interpreted as a delimiter between data items.

Creating WBS UDFs

Create WBS user defined fields (UDFs) if the predefined fields do not meet your needs.

To create a WBS UDF:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Projects** and click **WBS UDFs**.
- 4) On the WBS UDFs page:
 - a. Click **+Add**.
 - b. In the **User Defined Field**, double-click and type a name.
 - c. In the **Data Type** field, choose a type from the list.
 - d. Click **Save**.

Tips

- ▶ If you intend to use BI Publisher, avoid using commas when creating data other than Project names. The way that data other than Project names is passed to BI Publisher can cause a comma to be interpreted as a delimiter between data items.

Defining Formulas for User Defined Fields

Define formulas to calculate values for the user defined field.

You must create a project user defined field before defining a formula.

To define formulas for user defined fields:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Projects** and click **Project UDFs**.
- 4) On the Project UDFs page, select a UDF and click the **Formula** detail window.

Note: The UDF Type must be set to Formula to access the Formula detail window.

- 5) In the Formula detail window:
 - a. Click the **Fields** list and choose a field.

Note: You can select any existing project-related field defined in the

project management database, including project codes, or any other user defined field that exists for your organization.

- b. Click **Insert Field**.
 - c. Continue to build your formula by inserting fields and using the operator buttons.
- 6) Click **Save**.

Tips

Operator buttons include: +, -, *, /, (, and).

Defining Indicators for User Defined Fields

Define indicators for user defined fields (UDFs) that will display based on criteria set for field values. For example, you can choose a graphical indicator to display when the value of the field equals a certain number, or when the value of the field falls between a certain range of dates.

You must create a project user defined field before defining an indicator.

Note: You can identify graphical indicators only for fields with a 'Cost', 'Integer', or 'Number' **Data Type**.

To define indicators for UDFs:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Projects** and click **Project UDFs**.
- 4) On the Project UDFs page, select a UDF and click the **Indicators** detail window.

Note: You can also follow these steps for the Summary Indicators detail window

- 5) In the Indicators detail window repeat the following for each parameter statement:
 - a. Click the **Select Parameter** list and choose a parameter.
 - b. Select the **Value** or **Field** option.
 1. If you select the Value option, double-click the field and type a value.
 2. If you select the Field option, click the list and select a field.

Note: If you select a "is within the range of" or "is not in the range of" condition, use the Value field to specify the lower range value and the High Value field to specify the upper range value.

- c. Click each **Indicator** list and choose an indicator.
- 6) On the Project UDFs page, click **Save**.

Tips

- ▶ Click **⚙️ Row Actions** and select **Add** to add another indicator statement or **Delete** to remove a statement.

Defining Statements for User Defined Fields

Define statements to calculate values for the user defined field.

You must create a project user defined field before defining a statement.

To define statements for user defined fields:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Projects** and click **Project UDFs**.
- 4) On the Project UDFs page, select a UDF and click the **Formula** detail window.

Note: The UDF Type must be set to Formula to access the Formula detail window.

- 5) In the Formula detail window:

- a. Click **IF/ELSE**.

Note: The default statement 'IF (condition) THEN (expression) ELSE (expression)' is displayed in the detail window.

- b. Highlight a (condition) or (expression) entry and its parentheses.
- c. Click the **Fields** list and choose a field.

Note: You can select any existing project-related field defined in the project management database, including project codes, or any other user defined field that exists for your organization.

- d. Click **Insert Field**.

Note: The selected field will replace the highlighted (condition) or (expression) entry.

- e. Continue to replace fields and use the operator, relational operator, and expression buttons to build your statement.

Note: Relational operators (<, >, =, <>) are only valid for the 'IF' condition statement.

- f. Click **Validate** to check the formula.

- 6) On the **Project UDFs** page, click **Save**.

Tips

- ▶ Text values must be enclosed in quotes. For example: IF [Division]="Marketing." Numeric values do not require quotes. For example: IF [Proposed Budget]>500000.
- ▶ Only the = (equal) and <> (not equal) relational operators are valid for text values.
- ▶ Date values must be enclosed in quotes and follow the dd-mm-yyyy format. For example, IF [Start Date]>"01-APR-2007".

- ▶ Operator buttons include: +, -, *, /, (, and). Expression buttons include: AND, OR, and IF/THEN/ELSE.
- ▶ You can also replace (condition) and (expression) entries by deleting the entries and their parentheses, placing the cursor in the appropriate location in the statement, and following steps 4.d. through 4.f.

About Calendars

Calendars enable you to define available workdays and workhours in a day. You can also specify national holidays, recognized holidays, project-specific work/nonworkdays, and resource vacation days. You can establish an unlimited number of calendars to accommodate different work patterns. There are three calendar pools: global, project, and resource. The global calendar pool contains calendars that apply to all projects in the database. The project calendar pool is a separate pool of calendars for each project in the organization. The resource calendar pool is a separate pool of calendars for each resource. You can assign multiple users a resource calendar that they can share, but cannot edit. You can also assign a personal calendar to a resource that will show up in My Calendars and that the resource can customize. You can assign resource or global calendars to resources, and global or project calendars to activities.

Assign calendars to each resource and activity to determine time constraints in a uniform way. For example, based on its calendar, a resource might not be available; or, if the resource is available, the activity might not fit the calendar requirements.

The application uses your calendar assignments for leveling resources, scheduling, and tracking activities.

Working with Calendars

The P6 application supports three types of calendars:

- ▶ **Global:** Global calendars can be defined and applied to all projects and resources in the database.
- ▶ **Project:** Separate project calendars can be defined and applied to projects through activity assignments.
- ▶ **Resource:** Resource calendars can be defined and applied to each individual resource.

Begin by defining one or more global calendars and then link any project or resource calendars to them. Changes to a global calendar apply to all project and resource calendars linked to it.

Assign global or resource calendars to resources, and global or project calendars to activities. You can establish an unlimited number of calendars to accommodate different work patterns. For example, if some activities require a five day workweek, while others are performed part-time (such as Monday, Wednesday, and Friday), you can create different calendars and assign them to the activities and resources in your projects.

An activity's **Activity Type** field value determines whether the activity uses the calendar of an assigned resource or its project calendar.

Creating Global Calendars

Create global calendars to identify global work or nonwork days. You can use global calendars as base calendars when creating a resource or project calendar.

To create a global calendar:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Global** and click **Global Calendars**.
- 4) On the Global Calendars page, click **+Add**.
- 5) In the Select Calendar to Copy dialog box:
 - a. Select the **Global** or **Resource** option.

Note: This determines which list of calendars you can select.

- b. Select a calendar and click **Select**.
- 6) On the Global Calendars page, click the **Calendar** tab.
- 7) On the Calendar tab, triple-click the **Name** field and enter a name.

Note: The application automatically assigns the name *New Calendar*.

- 8) On the Global Calendars page, click **Save**.
- 9) Configure the global calendar.

Configuring Global Calendars

Perform the following tasks when creating or updating a global calendar:

Setting Work Hours Per Time Period for Global Calendars

Configure the work hours per time period settings to specify the default number of hours in a work period for a calendar.

To set the number of work hours for each time period:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Global** and click **Global Calendars**.
- 4) On the Global Calendars page:
 - a. Click the calendar you want to modify.
 - b. Click the Summary tab.
 - c. In the **Time Periods** section, type an hour value in each field.
- 5) Click **Save**.

Configuring the Standard Work Week for Global Calendars

Configure the standard work week for the calendar to set the work and nonwork days and hours for a standard work week.

To modify the standard work week:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Global** and click **Global Calendars**.
- 4) On the Global Calendars page:
 - a. Click on the calendar you want to modify.
 - b. Click the **Standard Work Week** tab.
- 5) On the Standard Work Week tab:
 - ▶ Type the number of hours for each work day in the total hours field.
 - ▶ Or click and drag on the chart to create work periods for each work day.
- 6) Click **Save**.

Tips

- ▶ You can create multiple work periods for each day.
- ▶ You can delete a work period by moving your mouse over the work period and clicking ✕.

Modifying Calendar Days on Global Calendars

Modify calendar days to account for work or nonwork days or hours that are different than the standard hours defined on the Standard Work Week tab.

To modify work or nonwork calendar days:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Global** and click **Global Calendars**.
- 4) On the Global Calendars page:
 - a. Click on the calendar you want to modify.
 - b. Click the **Calendar** tab.
 - c. On the **Calendar** tab, click the **Date** ▼ list for a date and select **Set to Standard** or **Nonwork**.
- 5) Click **Save**.

Setting the Default Global Calendar

Choose a calendar to use as the default when new calendars are created.

To set the default global calendar:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Global** and click **Global Calendar**.

- 4) On the Global Calendar page:
 - a. Click on the calendar you want to designate as the default calendar.
 - b. Click  **Row Actions** and select **Set as Default Calendar**.
 - c. Click **Save**.

Creating Project Calendars

Create project calendars to determine work or nonwork time for a project.

To create a project calendar:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Projects** and click **Project Calendars**.
- 4) On the Project Calendars page:
 - a. Click on a project.

Note: If the project you need is not open, click  **Open Project**. Choose one or more projects and click **OK**.

- b. Click  **Add**.
- 5) In the Select Calendar to Copy dialog box:
 - a. Select the **Global**, **Resource**, or **Project** option.

Note: This determines which list of calendars you can select.

- b. Select a calendar and click **Select**.
- 6) On the Project Calendars page, click the **Calendar** tab.
- 7) On the Calendar tab, click in the **Name** field and enter a name for the project calendar.
- 8) On the Project Calendars page, click **Save**.

Tips

- ▶ Configure the project calendar by modifying additional settings.

Configuring Project Calendars

Perform the following tasks when creating or updating a project calendar:

Assigning a Base Calendar to a Project Calendar

Assign a base calendar to determine holidays and exceptions for the selected project calendar.

To assign a base calendar:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Projects** and click **Project Calendars**.

- 4) On the Project Calendars page:
 - a. Expand a project.

Note: If the project you need is not open, click  **Select Projects**. Choose one or more projects and click **OK**.

- b. Select a calendar to assign a base calendar.
 - c. Click  **Select a Base Calendar**.
- 5) In the **Select Base Calendar** dialog box, select a calendar and click **OK**.
- 6) Click  **Save** (Ctrl+S).

Tips

The  (globe) on calendar days indicates exception days marked in the base calendar. You can modify these exceptions days and the globe will disappear. If you set the calendar day back to standard, the exception day will reset and the globe will reappear.

Setting Work Hours Per Period for a Project Calendar

Configure the work hours per time period settings to specify the default number of hours in a work period for a calendar.

To set the number of work hours for each time period:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Projects** and click **Project Calendars**.
- 4) On the Project Calendars page:
 - a. Expand a project.

Note: If the project you need is not open, click  **Select Projects**. Choose one or more projects and click **OK**.

- b. Click the calendar you want to modify.
 - c. Click the Summary tab.
 - d. In the **Time Periods** section, type an hour value in each field.
- 5) Click **Save**.

Configuring the Standard Work Week for Project Calendars

Configure the standard work week for the calendar to set the work and nonwork days and hours for a standard work week.

To configure the standard work week:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.

3) On the Enterprise Data page, expand **Projects** and click **Project Calendars**.

4) On the Project Calendars page:

- a. Expand a project.

Note: If the project you need is not open, click  **Select Projects**. Choose one or more projects and click **OK**.

- b. Click on the calendar you want to modify.

- c. Click the **Standard Work Week** tab.

5) On the **Standard Work Week** tab, right-click on a working or nonworking timeslot and use the menu options to adjust the workday. You can also resize the working time to increase or decrease the work hours.

6) Click  **Save** (Ctrl+S).

Modifying Calendar Days on Project Calendars

Modify calendar days to account for work or nonwork days or hours that are different than the standard hours defined on the Standard Work Week tab.

1) Click **Administration**.

2) On the Administration navigation bar, click **Enterprise Data**.

3) On the Enterprise Data page, expand **Projects** and click **Project Calendars**.

4) On the Project Calendars page:

- a. Expand a project.

Note: If the project you need is not open, click  **Select Projects**. Choose one or more projects and click **OK**.

- b. Click on the calendar you want to modify.

- c. Click the **Calendar** tab.

- d. On the **Calendar** tab, click the **Date**  list for a date and select **Set to Standard** or **Nonwork**.

- e. Click **Save**.

Tips

The  (globe) on calendar days indicates exception days in the base calendar. You can modify these exceptions days and the globe will disappear. If you set the calendar day back to standard, the Global exception day will reset and the globe will reappear.

Changing a Project Calendar to a Global Calendar

You can turn an existing project calendar into a global calendar.

To make a project calendar a global calendar:

1) Click **Administration**.

2) On the Administration navigation bar, click **Enterprise Data**.

- 3) On the Enterprise Data page, expand **Projects** and click **Project Calendars**.
- 4) On the Project Calendars page:
 - a. Expand a project.

Note: If the project you need is not open, click  **Select Projects**. Choose one or more projects and click **OK**.

- b. Click on the calendar you want to change to global.
- 5) On the toolbar, click  **Promote to Global Calendar**.
- 6) Click  **Save** (Ctrl+S).

Creating Resource Calendars

Create a resource calendar to determine when a resource can work.

To create a resource calendar:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Resources** and click **Resource Calendars**.
- 4) On the Resource Calendars page:
 - a. Click on **Personal Calendars** to create a private calendar for the resource, or click on **Shared Calendars** to create a calendar for multiple resources to share that the resources cannot edit.
 - b. Click **+Add**.
- 5) If you are creating a Personal Calendar, in the Select Resource dialog box, select a resource and click **Select**.

If you are creating a Shared Calendar, in the Select Calendar To Copy dialog box:

 - a. Choose **Global** or **Resource** calendar to use as the base for the new calendar.
 - b. Click on a global or resource calendar.
 - c. Click **Select**.
- 6) On the Resource Calendars page, click the **Calendar** tab.
- 7) On the Calendar tab, click in the **Name** field and enter a name for the personal or resource calendar.
- 8) On the Resource Calendars page, click **Save**.
- 9) Configure additional resource calendar settings.

Configuring Resource Calendars

Perform the following tasks when creating or updating a resource calendar:

Assigning a Base Calendar to a Resource Calendar

Assign a base calendar to apply all the exception days (i.e. holidays and other work or nonwork days) from the base calendar for the selected resource calendar.

To assign a base calendar:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Resources** and click **Resource Calendars**.
- 4) In the Resource Calendars pane:
 - a. Expand **Personal Calendars** or **Shared Calendars** and select a calendar.
 - b. Click the **Summary** tab.
 - c. In the Base Calendar field, click **...Select**.
 - d. In the Select Base Calendar dialog box, select a calendar.
 - e. Click **Select**.

Assigning a Resource to a Resource Calendar

Resources can be assigned a personal calendar or a shared calendar. A resource is assigned to a personal calendar when creating a personal calendar.

To assign a resource to a shared calendar:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Resources** and click **Resource Calendars**.
- 4) On the Resource Calendars page:
 - a. Expand **Shared Calendars** and select a shared calendar.

Note: Click the **Used By** tab to view resources currently assigned to the shared calendar.

- b. Click **Row Actions** and select **Assign Resource**.
- 5) In the Select Resource dialog box:
 - a. Select the resources to assign to the calendar and click **Select**.
- 6) On the Resource Calendars page, click **Save**.

Tips

- ▶ If you need to remove a resource from a shared calendar, assign a different calendar to the resource from the Resources tab on the Resources Administration page.

Setting Work Hours Per Time Period for a Resource Calendar

Configure the work hours per time period settings to specify the default number of hours in a work period for a calendar.

To use this feature, select the **Use assigned calendar to specify the number of work hours for each time period** option, located on the **Time Periods** page of the **Application Settings** pane.

To set the number of work hours for each time period:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Resources** and click **Resource Calendars**.
- 4) On the **Resource Calendars** page:
 - a. Click the calendar you want to modify.
 - b. Click the Summary tab.
 - c. In the **Time Periods** section, type an hour value in each field.
- 5) Click **Save**.

Configuring the Standard Work Week for Resource Calendars

Configure the standard work week for the calendar to set the work and nonwork days and hours for a standard work week.

To configure the standard work week:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Resources** and click **Resource Calendars**.
- 4) On the Resource Calendars page:
 - a. Click on the calendar you want to modify.
 - b. Click the **Standard Work Week** tab.
- 5) On the Standard Work Week tab:
 - ▶ Type the number of hours for each work day in the total hours field.
 - ▶ Or click and drag on the chart to create work periods for each work day.
- 6) Click **Save**.

Tips

- ▶ You can create multiple work periods for each day.
- ▶ You can delete a work period by moving your mouse over the work period and clicking ✕.

Modifying Calendar Days

Modify calendar days to account for work or nonwork days or hours that are different than the standard hours defined on the Standard Work Week tab. For example, if you are using a personal calendar, you might choose to specify vacation days by setting the standard working days to nonworking days.

To modify work or nonwork calendar days:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.

- 3) On the Enterprise Data page, expand **Resources** and click **Resource Calendars**.
- 4) On the Resource Calendars page:
 - a. Click on the calendar you want to modify.
 - b. Click the **Calendar** tab.
 - c. On the **Calendar** tab, click the **Date** ▼ list for a date and select **Set to Standard** or **Nonwork**.
- 5) Click **Save**.

Tips

The  (globe) on calendar days indicates exception days in the base calendar. You can modify these exceptions days and the globe will disappear. If you set the calendar day back to standard, the Global exception day will reset and the globe will reappear.

Changing the Calendar Type

You can change the type of calendar you created from a personal calendar to a global calendar or shared calendar, or a shared calendar to a personal calendar or global calendar.

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Resources** and click **Resource Calendars**.
- 4) On the Resource Calendars page, expand **Personal Calendars** or **Shared Calendars** and select a calendar.
- 5) Click **⚙️ Row Actions** and select **Promote to Global Calendar**, **Convert to Shared Calendar**, or **Convert to Personal Calendar**.
- 6) Click **Yes** to confirm the calendar change.
- 7) Click **Save**.

Tips

- ▶ If you promote a calendar on the Resource Calendars page to be a global calendar, it will no longer appear on the Resource Calendars page. To see the calendar, expand **Global** and click **Global Calendars**.

Setting Up the Enterprise Project Structure

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About the Enterprise Project Structure (EPS)

The enterprise project structure (EPS) represents the hierarchical structure of all projects in the database. The EPS can be subdivided into as many levels or nodes as needed to represent work at your organization. Nodes at the highest, or root, level might represent divisions within your company, project phases, site locations, or other major groupings that meet the needs of your organization; projects always represent the lowest level of the hierarchy. Every project must be included in an EPS node.

The number of EPS levels and their structure depend on the scope of your projects and how you want to summarize and aggregate data. For example, you might want to define increasingly lower levels of EPS nodes, similar to an outline, to represent broad areas of work that expand into more detailed projects. Specify as many projects as needed to fulfill the requirements of your operations executives and program managers.

Multiple levels enable you to manage projects separately while retaining the ability to aggregate and summarize data to higher levels. For example, you can summarize and aggregate information for each node in the EPS. Conversely, you can use top-down budgeting from higher-level EPS nodes down through their lower-level projects for cost control.

User access and privileges to nodes within the EPS hierarchy are implemented through a global organizational breakdown structure (OBS) that represents the management responsible for the projects in the EPS. Each manager in the OBS is associated with an area of the EPS, either by node or by project, and the WBS of the particular level of the hierarchy.

Once you have added users and associated them with OBS elements and project profiles, you can define the EPS and assign a responsible manager (OBS element) to each level. You must specify a responsible manager for each node of the EPS.

Working with the EPS

Your P6 projects are arranged in a hierarchy called the enterprise project structure, or EPS. The EPS can be subdivided into as many levels or nodes as needed to parallel work at your organization. Nodes at the highest, or root, level might represent divisions within your company, project phases, site locations, or other major groupings that meet the needs of your organization. Projects always represent the lowest level of the hierarchy. Every project must be included in an EPS node.

Ideally, one person or group controls the EPS across the organization. The project control coordinator creates the hierarchical structure that identifies the company-wide projects. The coordinator works with the project manager in each area of the organization to define basic project information for each group and to develop standards before any projects are added.

After you set up an EPS, you can define additional data about each EPS division, such as anticipated dates, budgets, and spending plans. Use the detail windows on the EPS page to specify this information. Or, you can begin adding projects under the applicable levels in the structure if you have access rights to these functions. Access rights are set by your application administrator.

Throughout the application, when selecting projects to work with, you can open all projects that belong to an EPS node or sort them by EPS. When you create a project, you must specify a single parent EPS node. User access and privileges to nodes within the EPS hierarchy are implemented through a global OBS that represents the management responsible for each project. Each manager in the OBS is associated with an area of the EPS, either by node or by project, and the WBS of the particular level of the hierarchy.

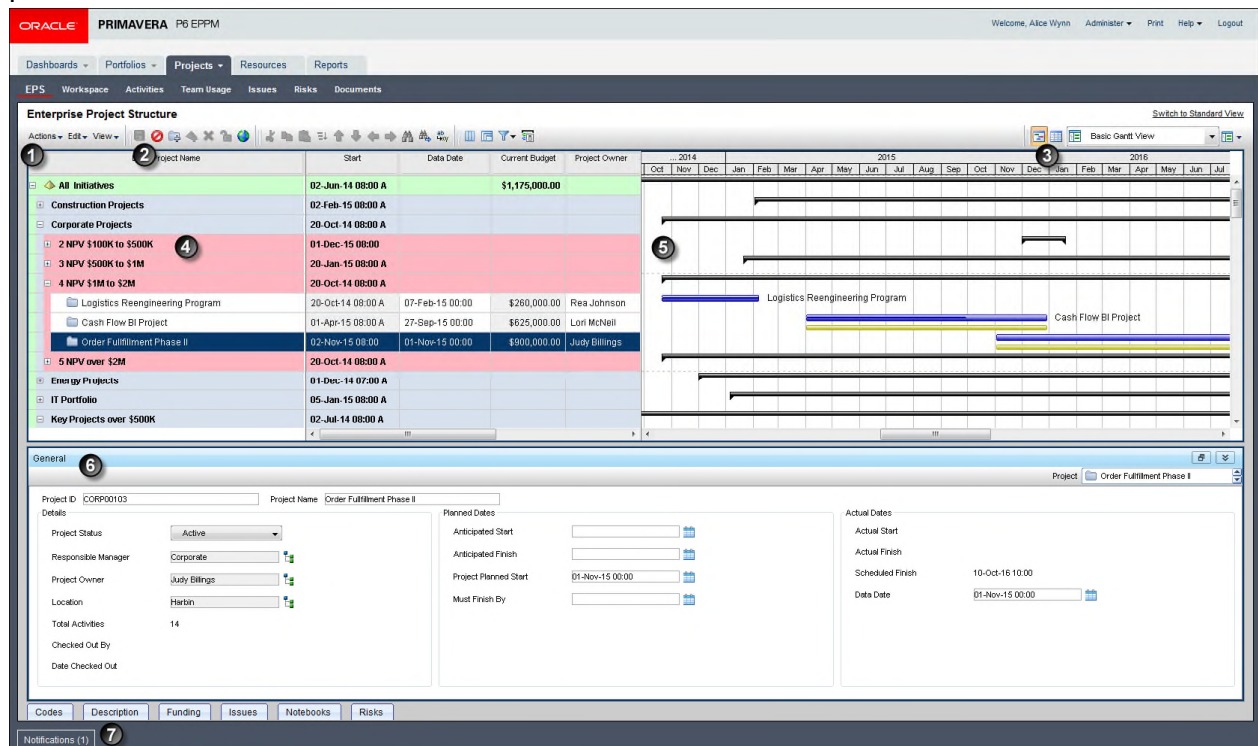


Table of Key EPS Page Elements

Item	Description
1	Actions, Edit, and View menus: Use these menus to work with and customize the EPS page.
2	EPS toolbars: Customize the toolbars to include icons that you use most often.

Item	Description
3	EPS View toolbar: Determines how you see data on the EPS page.
4	EPS/Project table: Displays each project within the EPS. In this example, the data is grouped by EPS , then by Portfolio , and then by a project code called Financial Rating .
5	EPS Gantt chart: Displays project and EPS data in a Gantt chart format.
6	Detail Windows: The General detail window for the project selected in the table. Additional detail windows appear along the bottom of the table.
7	Notifications area: When background services, for example project summarization, finish running you will be notified here.

The screenshot displays the Oracle Primavera P6 EPPM interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', 'Resources', and 'Reports'. The sub-navigation bar shows 'EPS', 'Workspace', 'Activities', 'Team Usage', 'Issues', 'Risks', and 'Documents'. The main content area is titled 'Enterprise Project Structure' and features a table of projects with columns: ID, Name, Start, Data Date, Current Budget, and Project Owner. A Gantt chart is visible on the right side of the table. Below the table, there is a 'Details' section with various fields for project information, including Project ID, Project Status, Project Name, Location, Responsible Manager, and Project Owner. A 'Notifications' area is visible at the bottom left.

Table of Key EPS Page Elements

Item	Description
1	EPS Views list: Determines how you see data on the EPS page.
2	Grid and Gantt view buttons: Determines whether you see a grid of EPS data, or a grid and a graphical representation of dates on a timeline.

Item	Description
3	Open and Actions menus: Use these menus to work with the EPS page.
4	Customize View and Filter buttons: Enable you to customize the EPS page.
5	EPS/Project Grid: Displays each project within the EPS. In this example, the data is grouped by EPS , then by Portfolio , and then by a project code called Financial Rating .
6	EPS Gantt : Displays project and EPS data in a Gantt format.
7	Detail Windows: The General detail window for the project selected in the table. You can customize which detail windows appear in the view.
8	Notifications area: When background services, for example project summarization, finish running you will be notified here.

Creating EPS Elements

Create enterprise project structure (EPS) elements to represent the hierarchical positions of all the projects in your database. You can create sibling EPSs to represent those that are hierarchically equal, or child EPSs to represent those that are subordinate.

To create EPS elements:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. Select an EPS. The EPS can act as a sibling or a parent.
 - b. Click the **Actions**  menu:
 - To add a sibling, select **Add**  **Add Sibling EPS** (Shift+Insert).
 - To add a child, select **Add**  **Add Child EPS** (Ctrl+Insert).
 - c. Double-click in the **EPS/Project Name** field to enter a name for the new EPS.
 - d. Click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. Select an EPS. The EPS can act as a sibling or a parent.
- b. Click  **Row Actions** :
 - To add a sibling, select **Add Sibling EPS**.
 - To add a child, select **Add Child EPS**.

- c. Double-click in the **ID** field to enter an ID for the new EPS.
- d. Click **Save**.

Tips

- ▶ To remove all projects and templates from the view, apply the *EPS Only* standard filter when creating an EPS element. You are then able to easily see where your new EPS fits into the EPS hierarchy as a whole.
- ▶ To create an EPS, grouping must be configured to have the **Level 1 Field** list set to *EPS*. When filtering is configured to display projects that belong to an EPS, the **Hide if empty** option is disabled. Data will not display.
- ▶ You can only create a new root level EPS if you are logged in to P6 as a user with the *Admin Superuser* global security profile.
- ▶ The application automatically names the new EPS *New EPS*, *New EPS-1*, *New EPS-2*, et cetera.
- ▶ You can also right-click an EPS on the table and select **Add Child EPS** or **Add Sibling EPS** to create an EPS.

Configuring the EPS

Configure the EPS for your organization to develop a hierarchy that establishes the way your organization operates. Divide the EPS into multiple levels or nodes to represent the work that needs to be done in your organization. You can then assign projects to these nodes and levels to reflect work that needs to be done in each area.

The number of EPS levels and their structure depend on the scope of your projects and how you want to summarize and aggregate data. For example, you might want to define increasingly lower levels of EPS nodes, similar to an outline, to represent broad areas of work that branch into more detailed projects.

To configure the EPS:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. Create the EPSs you need to represent the divisions in your company, site locations, or other major groupings of projects.
 - Use the  **Move Up** (Ctrl+Alt+Up),  **Move Down** (Ctrl+Alt+Down),  **Move Left** (Ctrl+Alt+Left), and  **Move Right** (Ctrl+Alt+Right) arrows on the **Edit** menu to arrange the EPS nodes in a hierarchy that establishes the highest level and lowest level EPSs.
 - Add projects to the EPS nodes. You can create an entirely new project, or create a project using elements from an existing project or project template.
 - b. On the **EPS** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. Create the EPSs you need to represent the divisions in your company, site locations, or other major groupings of projects.
 - Click **⚙️Row Actions** and select **Add Sibling EPS** or **Add Child EPS** to create an EPS structure.
 - Add projects to the EPS nodes. Click **⚙️Row Actions** and select **Add Project**.
- b. On the **EPS** page, click **Save**.

Tips

The farther to the left an EPS is, the higher-level EPS it is.

About Projects

A project is any temporary series of activities performed in some coordinated arrangement in order to create a product, service, or measurable business result. Projects have a definite beginning and end. A project is concluded when its objectives have been reached or when the project is terminated.

Working with Projects

While it is true that you are working with project data in almost all areas of the application, P6 provides two main pages for working with projects: the **EPS** page and the **Activities** page.

By default, if no projects are open when you log on to P6 or if you are a new user, clicking **Projects** in the P6 navigation bar will take you directly to the **EPS** page as long as this page is available in your user interface view. If you do not have access to the **EPS** page or you navigate to another page in the **Projects** section, the **Open Projects** dialog box appears when you click **Projects**. Use this dialog box to open the projects you need. Once you have at least one project open, the next time you click **Projects** (and each time thereafter), the application automatically opens the last open project or project group.

You can always open a different project or project group from the **Open Projects** dialog box, the most recently used projects list in the **Projects** menu, or the **EPS** page. To access the **Open Projects** dialog box at any time, select **Open Projects** from the **Projects** menu.

Note: When you upgrade P6, the projects you previously had open are not lost. When you click **Projects**, the application will open the last open project or group of projects.

To restrict or grant access to projects and their data, you must assign project profiles to users. A project profile is a role-based profile that limits privileges to specific project data, such as baselines and the WBS. Project profiles are linked to users through one or more OBS assignments. You assign responsibilities to specific projects and work within projects by assigning OBS elements to various levels of the EPS and each project's WBS.

The combination of the user assignment to an OBS element, and the OBS assignment to the EPS/project/WBS, determines which projects and project data the user can view. For each OBS element a user is assigned to, the user's assigned project security profile (per OBS assignment) further determines the project data the user can view or edit.

Creating Projects

Create projects to define a set of activities and WBSs that work toward a common goal.

To create a project:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. Select the  **EPS** element to which you want to add the new project.
 - b. Click the **Actions**  menu and select **Add**  **Add Project**.
 - c. In the **Add Project** dialog box:
 - Click the **General** tab and select an option or enter a value in each required field.

Notes: Avoid using the pipe character (|), or brackets (< or >) in the Project Name.

- d. Click **Create**.

In **Standard View**:

- a. Select the EPS element to which you want to add the new project.
- b. Click  **Row Actions** and select **Add Project**.
- c. In the **Add Project** dialog box:
 - Click the **General** tab and select an option or enter a value in each required field.

Notes: Avoid using the pipe character (|), or brackets (< or >) in the Project Name.

- d. Click **Create**.

Tips

- ▶ You can add a **Description** of the project. If the project has a definitive deadline you can add a **Must Finish By** date, which will allow you to determine if the project is behind schedule.
- ▶ You can copy a project from an existing project or template.
- ▶ To configure advanced options, you must select a project to copy. This will enable the **Advanced** tab. If you select to copy a template, the **Advanced** tab will not be enabled. When you choose to copy data from another project, the new project might not appear immediately. The process runs as a background service and you will see a notification once it has completed.
- ▶ You can also right-click the table and select **Add Project** to create a project.
- ▶ You can perform the cut, copy, and paste functions to create new projects from existing projects.

Assigning Locations to Projects

Assign locations to projects so you can report on projects by location in Analytics.

To assign a location to a Project:

- 1) Click **Projects**.
 - 2) On the Projects navigation bar, click **EPS**.
 - 3) On the **EPS** page, select a project and click the **General** detail window.
In **Classic View**:
 - a. In the **General** detail window, click **...Select** in the **Location** field.
 - b. In the **Select Location** dialog box, select the appropriate location and click **Assign**.
 - c. On the **EPS** page, click the **Actions**  menu and click  **Save** (Ctrl+S).
-
- In **Standard View**:
- a. In the **General** detail window, click **...Select** in the Location field.
 - b. In the **Select Location** dialog box, select the appropriate location and click **Select**.
 - c. On the **EPS** page, click **Save**.

Tips

- ▶ You must create locations before you can assign them.
- ▶ In classic view, you can add a new location quickly by clicking the **Add Location** button in the **Select Location** the dialog box. The new location will be added instantly to the dictionary and you can add it to Activities, Resources and Projects.
- ▶ You must have the 'Edit Project Details Except Costs/Financials' project privilege to assign locations to projects.

Creating Projects from Existing Projects or Templates

In place of making a project from scratch, you can use a template or a copy of an existing project as a starting point.

To create a project from an existing project or template:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
In **Classic View**:
 - a. Select the  **EPS** element to which you want to add the new project.
 - b. Click the **Actions**  menu and select **Add** ▶  **Add Project**.
 - c. In the **Add Project** dialog box, click the **General** tab.
 - d. On the **General** tab select an option or enter a value in each required field.
 - e. In the **Copy from existing project or template** field, click  **Select Project or Template to Copy** and select an option from the dialog box.

Note: Click  **Select Project Type** and select **Projects** or **Templates** to open the list of projects or templates.

- f. Click **Create**.

In Standard View:

- a. Select the EPS element to which you want to add the new project.
- b. Click  **Row Actions** and select **Add Project**.
- c. In the **Add Project** dialog box, click the **General** tab.
- d. On the **General** tab select an option or enter a value in each required field.
- e. Click the **Advanced** tab.
- f. Click the **Copy from existing project or template** field and click **...Select**.
- g. In the **Select Project or Template** dialog box:
 - Click **Projects** or **Templates**.
 - Select a project or template.
 - Click **OK**.
- h. Select the data items to copy from the project or template.
- i. Click **Create**.

Tips

- ▶ To configure advanced options, you must select a project to copy. This will enable the **Advanced** tab. If you select to copy a template, the **Advanced** tab will not be enabled.
- ▶ You can also right-click the table, select **Add Project**, and follow steps 4 and 5 to create a project from an existing project or template.
- ▶ You cannot copy from a project unless you have the privilege to view costs for a project.

Creating Project Templates from Existing Projects or Templates

In place of making a project from scratch, you can use a template or a copy of an existing project as a starting point.

To create a project from an existing project or template:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:

In Classic View:

- a. Select the  **EPS** element to which you want to add the new project template.
- b. Click the **Actions**  menu and select **Add**  **Add Project Template**.
- c. In the **Add Project Template** dialog box, click the **General** tab.
- d. On the **General** tab:
 - Select an option or enter a value in each required field.

- In the **Copy from existing project or template** field, click  **Select Project or Template to Copy** and select a project or template from the dialog box.

Note: Click  **Select Project Type** and select **Projects** or **Templates** to open the list of projects or templates.

- Click **Create**.

In **Standard View**:

- a. Click the  **Row Actions** select **Add Project Template**.
- b. In the **Add Project Template** dialog box:
- c. On the **General** tab:
 - Select an option or enter a value in each required field.
- d. On the **Advanced** tab:
 - In the **Copy from existing project or template** field, click **...Select**
 - In the **Select Project or Template** dialog box, click **Projects** or **Templates** and select a project or template from the dialog box, then click **Select**.
- e. Click **Create**.

Tips

- ▶ If you choose to copy from an existing project, select either the **Use Actual Costs and Units** or **Use Planned Costs and Units** option. If you select to copy from a template, the application will disable the **Use Actual Costs and Units** option.

Deleting Projects or EPS Elements

Delete projects or EPS elements when they are no longer necessary.

To delete a project or EPS element:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:

In **Classic View**:

 - a. Select a project or EPS element.
 - b. Click the **Actions**  menu and select  **Delete** (Delete).
 - c. In the **Primavera P6** dialog box, click **Yes**.
 - d. Click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. Select a project or EPS element.
- b. Click  **Row Actions** and select **Delete**.
- c. In the **Confirm** dialog box, click **Yes**.

- d. Click **Save**.

Caution:

- You cannot retrieve deleted projects.
 - When you delete a project or EPS element, you are also deleting all of its project, WBS, and activity data.
-

Opening Projects or Templates in the EPS

While viewing the EPS, it is also possible to designate one or more projects or a single template as *open*. When you later navigate to other pages in the Projects section, such as the Activities page, these projects or the designated template will already be open so you can begin viewing or modifying them.

To open projects or templates from the EPS:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:

In Classic View:

- a. Select a project, template, or EPS element to open.
- b. Click the **Actions**  menu and select  **Open Project** or  **Open Project Template**.

In Standard View:

- a. Select a project, template, or EPS element to open.
- b. Click **Open**  and select Project or Project .

Tips

- ▶ If you select to open an EPS, all the projects contained in that EPS will open.
- ▶ You can open more than one project. Use **Shift+click** or **Ctrl+click** to select all the items you want to open.
- ▶ You cannot open a template in combination with any other item.
- ▶ To close a project, right-click the project you want to close and select **Close Project**. To close all of the open projects and templates on the **EPS** page, right-click and select **Close All**.
- ▶ When a project is open, it will display an open folder indicator . When a project is closed, its corresponding folder indicator will also be closed . Templates also exhibit this change in their visual indicators.
- ▶ The **Team Usage**, **Workspace**, **Documents**, and **Issues** pages are not available when you open a template.

Opening Projects Exclusively

Open a project exclusively to ensure changes will not be made by other users when you are performing an important action on the project, such as updating the schedule.

You can open a project exclusively from the EPS page or the Open Projects dialog box.

To open a project exclusively from the EPS page:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. Select one or more projects.
 - b. Click the **Actions**  menu and select **Open**  **Open Exclusively**.

In **Standard View**:

- a. Select one or more projects.
- b. Click **Open**  and select **Open Exclusively**.

To open a project exclusively from the Open Project dialog box:

- 1) Click the **Projects**  menu and select **Open Projects**.
- 2) In the **Open Projects** dialog box:
 - a. Move the projects you want to open exclusively to the **Selected Projects** list.
 - b. Select **Open Exclusively**.
 - c. Click **OK**.

Tips

- ▶ You cannot open a project exclusively if it is already opened exclusively by another user.
- ▶ Opening one or more projects exclusively closes all other projects that are open in your view that are not already opened exclusively by you.
- ▶ The locked project icon  indicates a project is opened exclusively. Click on the project name to show which user has the project opened exclusively.
- ▶ You cannot open a project exclusively if another user currently has it open. You are prompted with a message that includes the name of the project and the user. You can send an email directly from the dialog box requesting that the user close the project.
- ▶ You can see which users have a project open by selecting the project and clicking  **Users** in the Open Projects dialog box.
- ▶ All projects open in your view are either opened exclusively or opened in shared mode. You cannot open projects in exclusive mode and shared mode at the same time.
- ▶ You must have the Check In/Check Out Projects and Open Project Exclusively project privilege to open projects exclusively.

Removing the Exclusive Lock on Projects

Remove the exclusive lock on projects to enable other users to modify project data.

Note: You can only release the exclusive lock for projects that you opened in P6. If you opened a project exclusively in P6 Professional, you must use P6 Professional to remove the exclusive lock.

To remove the exclusive lock:

1) Click **Projects**.

In **Classic View**:

- a. On the **Projects** navigation bar, click **EPS** or **Activities**.
- b. From the **EPS** or **Activities** page, click the **Actions**  menu and select  **Release Exclusive Lock**.

In **Standard View**:

- a. On the **Projects** navigation bar, click **EPS**.
- b. Click **Actions**  and select **Release Exclusive Lock**.

Tips

You can also remove the exclusive lock for a project by:

- ▶ Logging out of the application.
- ▶ Opening the **Open Project** dialog box and reopening the same set of projects, making sure the **Open Exclusively** option is cleared.
- ▶ Closing the project on the **EPS** page by right-clicking on the project and selecting **Close**.

Customizing Detail Windows

In Classic View, you can customize which detail windows appear on the EPS page or Activities page.

To customize detail windows:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Activities** or **EPS**.
- 3) On the **Activities** or **EPS** page:
 - a. Select a view from the **Activity View** or **EPS View** list.
 - b. Click the **View**  menu and select **Customize Detail Windows**.
- 4) In the **Customize Detail Windows** dialog box:
 - a. In the **Area** section, select one of the options to determine which listing of detail windows is available for you to customize.
 - b. In the **Detail Window** section, select or clear the options beside detail windows to add or remove them from the page.
 - c. Click **Save**.

Tips

- ▶ Select or clear the option beside the **Detail Window** title to add all or remove all the detail windows.
- ▶ Right-click a detail window tab or titlebar to customize detail windows. Click **Customize** on the menu to open the **Customize Detail Windows** dialog box, or click a detail window name to add or remove it from the page.
- ▶ Click and drag detail windows to change their order. Otherwise, the detail windows appear in the same order that they appear in the **Customize Detail Windows** dialog box.
- ▶ Click  **Float** on the detail window to separate it from any others in the series. You can then freely move this detail window to change its position or re-dock it.
- ▶ When you navigate to a new page, you can save or cancel the view changes you made to the detail windows. These changes will only be saved for the view selected in the **Activity** or **EPS View** list.

Configuring Project Preferences

You can set various behavior and data preferences for each project by performing the tasks below on the **Project Preferences** dialog box of the **EPS** page.

Configuring History Settings for Analytics

Use this task to configure the type of data stored in Analytics and in what time interval.

To configure history settings:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. Select a project.
 - b. Click the **Actions**  menu and select  **Set Project Preferences....**
 - c. In the **Project Preferences** pane, click **Analytics**.
 - d. On the **Analytics** page select the **History Level** and **History Interval** settings.
 - e. Click **Save** to continue working or click **Save and Close** if you are finished.

In **Standard View**:

- a. Select a project.
- b. Click  **Row Actions** and select **Set Project Preferences**.
- c. In the **Project Preferences** dialog box, click **Analytics & Services**.
 - On the **Analytics & Services** page:
 - Select a **History Level**.
 - Select a **History Interval - Project or WBS**.
- d. Click **OK**.

Configuring Project Calculations

Configure project calculations to define how the application will compute values concerning activities, earned value, and units and costs.

To configure project calculations:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. Select a project.
 - b. Click the **Actions**  menu and select  **Set Project Preferences....**
 - c. In the **Project Preferences** pane, click **Calculations**.
 - d. On the **Calculations** page:
 - e. Configure the options in each section.
 - f. Click **Save** to continue working or click **Save and Close** if you are finished.

In **Standard View**:

- a. Select a project.
- b. Click  **Row Actions** and select **Set Project Preferences**.
- c. In the **Project Preferences** dialog box, click **Calculations**.
- d. On the **Calculations** page:
- e. Configure the options in each section.
- f. Click **OK**.

Linking P6 and Contract Management Projects

When the P6 and Contract Management applications are linked, you can then link a specific project in P6 to a Contract Management project. This will enable you to view up-to-date contractual information for the project within portlets.

To link a P6 project to a Contract Management project:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. Select a project.
 - b. Click the **Actions**  menu and select  **Set Project Preferences....**
 - c. In the **Project Preferences** pane, click **Contract Management**.
 - d. On the **Contract Management** page, click **Group Name: Project Name** .
 - e. In the **Primavera P6** dialog box, log on to **Contract Management**.

- f. In the **Select Project and Group** dialog box, expand a project, select a group, and click **OK**.
- g. In the **Project Preferences** dialog box, click **Save** to continue working or click **Save and Close** if you are finished.

In Standard View:

- a. Select a project.
- b. Click  **Row Actions** and select **Set Project Preferences**.
- c. In the **Project Preferences** dialog box, click **Integrations**.
- d. On the **Integrations** page, click **Contract Management**.
- e. In the **Group Name - Project Name** field, click **...Select**.
- f. In the **Select Project and Group** dialog box, expand a project, select a group, and click **OK**.
- g. In the **Project Preferences** dialog box, click **OK**.

Tips

To link the project to a Contract Management project, you must have a valid user name and password. If you have a Contract Management user name and password that is the same as the user name and password with which you are currently logged in to P6, you are not prompted to login again. If you do not have the same user name and password for both applications, you must enter a valid Contract Management user name and password in the **Primavera P6** dialog box.

Configuring Project Defaults

Configure project defaults to define how new activities and assignments will display in a project.

To configure project defaults:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In Classic View:**
 - a. Select a project.
 - b. Click the **Actions**  menu and select  **Set Project Preferences....**
 - c. In the **Project Preferences** pane, click **Defaults**.
 - d. On the **Defaults** page:
 - Configure the defaults to represent how you want the application to handle new activities and assignments.
 - e. Click **Save** to continue working or click **Save and Close** if you are finished.

In Standard View:

- a. Select a project.

- b. Click  **Row Actions** and select **Set Project Preferences**.
- c. In the **Project Preferences** pane, click **General**.
- d. On the **General** page:
 - Configure the defaults to represent how you want the application to handle new activities and assignments.
- e. Click **OK**.

Configuring General Project Preferences

Configure general project preferences to specify general information concerning the project such as when the fiscal year begins.

To configure general project preferences:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. Select a project.
 - b. Click the **Actions**  menu and select  **Set Project Preferences....**
 - c. In the **Project Preferences** pane, click **General**.
 - d. On the **General** page:
 - e. Configure the **WBS Code Separator** field and select a month for the **Fiscal year begins on the first day of** list.
 - f. Click **Save** to continue working or click **Save and Close** if you are finished.
 - In **Standard View**:
 - a. Select a project.
 - b. Click  **Row Actions** and select **Set Project Preferences**.
 - c. In the **Project Preferences** dialog box, click **General**.
 - d. On the **General** page configure the **WBS Code Separator** field and select a month for the **Fiscal year begins on the first day of** list.
 - e. Click **OK**.

Configuring Project Summarization and Publication Services

You can configure options for the project summarization and publication services.

To configure project services:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:

- a. Select a project.
- b. Click the **Actions**  menu and select  **Set Project Preferences....**
- c. In the **Project Preferences** pane, click **Services**.
- d. On the **Services** page:
 - Select or clear the **Enable Summarization** option.
 - If you select this option, configure the enabled options and **Summarize to WBS Level** list.
 - Select or clear the **Enable Publication** option.
 - If you select this option, configure the **Publication Priority** by selecting a number from 0 to 100.
- e. Click **Save** to continue working or click **Save and Close** if you are finished.

In **Standard View**:

- a. Select a project.
- b. Click  **Row Actions** and select **Set Project Preferences**.
- c. In the **Project Preferences** dialog box, click **Analytics & Services**.
- d. On the **Analytics & Services** page:
 - Select or clear the **Enable Summarization** option.
 - If you select this option, configure the enabled options and **Summarize to WBS Level** list.
 - Select or clear the **Enable Publication** option.
 - If you select this option, configure the **Publication Priority** by selecting a number from 0 to 100.
- e. Click **OK**.

Tips

If you clear the **Enable Summarization** option in the EPS table, you will be asked if you would like to delete the summary information. If there is no summary information, then the application will not prompt you.

Configuring P6 Team Member Status Update Reviews

Configure the team member status updates feature to enable a project manager to manually edit and approve status updates made by P6 Team Member interface users before the updates are applied to the project.

Note: The status update reviews feature is turned off by default.

To configure status updates:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:

In Classic View:

- a. Select a project.
- b. Click the **Actions**  menu and select  **Set Project Preferences....**
- c. In the **Project Preferences** pane, click **Team Member**.
- d. On the **Team Member** page, click the **Status Reviews** tab.
- e. On the **Status Reviews** tab:
 - Select **Enable review for team member status updates**.
 - Select **Review required by default for new activities** if all new activities require approval. When prompted to apply the setting to all existing activities in the project, choose **Yes** or **No**.
 - In the **Reviewer** field, click  **Select User**.
- f. In the **Select Status Reviewer** dialog box:
 - Select a person to review activity status updates.
 - Click **OK**.
 - When prompted to set this user as the status reviewer for all WBS nodes in the project, choose **Yes** or **No**.
- g. Click **Save and Close**.

In Standard View:

- a. Select a project.
- b. Click  **Row Actions** and select **Set Project Preferences**.
- c. In the **Project Preferences** dialog box, click **Team Member**.
- d. On the **Team Member** page, click **Status Reviews**.
- e. On the **Status Reviews** tab:
 - Select **Enable review for team member status updates**.
 - Select **Review required by default for new activities** if all new activities require approval. When prompted to apply the setting to all existing activities in the project, choose **Yes** or **No**.
 - In the **Reviewer** field, click **...Select**.
- f. In the **Select Status Reviewer** dialog box:
 - Select a person to review activity status updates.
 - Click **OK**.
 - When prompted to set this user as the status reviewer for all WBS nodes in the project, choose **Yes** or **No**.
- g. Click **OK**.

Tips

- ▶ You can manually choose which activities require reviews by selecting or clearing the **Review Required** option for each activity on the **Activities** page.
- ▶ The assigned status reviewer, or a user with Admin or Project superuser privileges can view, edit, and approve the status updates for the project.

- ▶ A status reviewer is set at the WBS level and applies to each activity included in the WBS.
- ▶ You can manually change the required reviewer for each WBS on the **Activities** page. Click the **General** detail window for the WBS and double-click the **Status Reviewer** field. If the **Status Reviewer** column is not displayed, click  ▾ **Customize Columns** or ✕ **Customize View** and add the **Status Reviewer** column.
- ▶ If the status reviewer is only set at the WBS level and not the project level, then the reviewer only has review privileges for the activities within the WBS the reviewer is assigned.
- ▶ To require approval on an activity, on the **Activities** page, select **Review Required** for the activity. If the **Reviewer Required** column is not displayed, click  ▾ **Columns** or ✕ **Customize View** and add the **Review Required** column.
- ▶ If an activity does not require review, it is automatically approved. View the **Update History** detail window on the **Activities** page to view all updates made to the activity.
- ▶ Team members can continue to update their activities even if a review is pending.

Configuring P6 Team Member View Preferences

Configure the Team Member view preferences to enable users to view and update the fields that are important for statusing the project in P6 Team Member Web, P6 for Android, or P6 for iOS.

To configure view preferences:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. Select a project.
 - b. Click the **Actions**  menu and select  **Set Project Preferences....**
 - c. In the **Project Preferences** pane, click **Team Member** then click the **Status Updates** tab.
 - d. On the **Status Updates** tab:
 - Choose whether you want **Resource Assignments**, **Activity Owners**, or both to provide status on activities using P6 Team Member Web, Email Statusing Service P6 for Android, and P6 for iOS. Select the **Activity Owners** option if your team members are assigned Team Member work distribution filters.
 - Click **+ Add** to add an **Assignment Field** or **Activity Field** and select the field you want team members to use to update their activities. Users assigned Team Member work distribution filters update Activity Fields.
 - Select the **Team members enter new actual units** option if you want to allow team members using P6 Team Member Web, P6 for Android or P6 for iOS to be able to use the **Log Additional Time** field to update status on activities. The additional time that the team members enter will be added to **Time Spent** automatically.
 - Select the **Team members can status other resource assignments on an activity** option if you want to allow team members using P6 Team Member Web who are assigned as the activity owner, primary resource or who have been assigned Team Member work distribution filters, to update other resource assignments on the activity.

- Choose whether you want team members to update status in P6 Team Member Web Timesheets view by changing **Percent Complete** or **Remaining Units**.
- e. On the **Team Member** page, click the **Other Privileges** tab.
- f. On the **Other Privileges** tab:
 - Select the **Team members can assign themselves to activities** option if you want to allow team members using P6 Team Member Web, P6 for Android, or P6 for iOS to add themselves to activities.
 - Select the **Team members can add and delete steps** option if you want to allow team members using P6 Team Member Web, P6 for Android, or P6 for iOS to add and delete their own steps.
 - Select the **Team members can update notebooks** option if you want to allow team members using P6 Team Member Web, P6 for Android, or P6 for iOS to be able to update notebook topics.
 - Click **+ Add Code or UDF** and select a global activity code, EPS activity code, or a UDF that should be visible to team members. The **Read-only** option next to each code and UDF is selected by default. If you want team members to update the code or UDF value clear this option.
 - Click **Save and Close**.

In Standard View:

- a. Select a project.
- b. Click **⚙ Row Actions** and select **Set Project Preferences**.
- c. In the **Project Preferences** dialog box, click **Team Member** then click the **Status Updates** tab.
- d. On the **Status Updates** tab:
 - Choose whether you want team members to provide status at **Assignment Level**, **Activity Level**, or both.
 - If you selected the Activity Level option choose whether you want team members to provide status **As Owner** or **As Primary Resource**. Select the **As Owner** option if your team members are assigned Team Member work distribution filters.
 - Click **+ Add** to add an **Assignment Field** or **Activity Field** and select the field you want team members to use to update their activities. Users assigned Team Member work distribution filters update Activity Fields.
 - Choose whether you want team members to update **Additional Time Spent** or **Total Time Spent** when updating actual units.
 - Select the **View Planned Units in My Activities and Timesheets** option if you want Team Members to be able to see planned units.
 - Choose whether you want team members to update status in P6 Team Member Web Timesheets view by changing **Percent Complete** or **Remaining Units**.
 - Choose whether you want primary resources to be able to mark activities as complete.
- e. On the Activity Updates Tab:

- Select the **Assign themselves to activities** option if you want to allow team members using P6 Team Member Web, P6 for Android, or P6 for iOS to add themselves to activities.
- Select the **Add and delete steps** option if you want to allow team members using P6 Team Member Web, P6 for Android, or P6 for iOS to add and delete their own steps.
- Select the **Update notebooks** option if you want to allow team members using P6 Team Member Web, P6 for Android, or P6 for iOS to be able to update notebook topics.
- Select the **Status other resource assignments on an activity** option if you want to allow team members using P6 Team Member Web who are assigned as the activity owner, primary resource or who have been assigned Team Member work distribution filters, to update other resource assignments on the activity.
- Click **+ Add Code or UDF** and select a global activity code, EPS activity code, or a UDF that should be visible to team members. The **Read-only** option next to each code and UDF is selected by default. If you want team members to update the code or UDF value clear this option.
- Click **Save and Close**.

Tips

- ▶ Time Spent is read only if the **Team members enter new actual units** option is selected.
- ▶ If reviews are enabled for status updates and you allow team members to add or delete steps, the status reviewer is prompted to approve the change of a step name; however, steps that are added or deleted by a team member are not submitted for review.
- ▶ The assignment and activity fields display in P6, Email Statusing Service, P6 for Android, and P6 for iOS in the following order, if selected:
 - ▶ Expected Finish
 - ▶ Activity % Complete
 - ▶ Remaining Duration
 - ▶ Actual Units or Actual Labor Units
 - ▶ Actual Nonlabor Units
 - ▶ Remaining Units or Remaining Labor Units
 - ▶ Remaining Nonlabor Units
- ▶ The activity codes and UDF fields will appear in the P6, Email Statusing Service, P6 for Android, and P6 for iOS interfaces in the same order as shown on this tab.

About Project Templates

Project templates are reusable models of projects you can store and use later, in whole or in part, to save time and standardize your operations.

A template includes all the details, best practices, and de facto standards your organization associates with projects of a particular type. For example, use project templates to create a library of predefined project structures that can later be used as starting points for new projects. In addition, specific WBS branches and their activities can be copied from projects or templates and inserted wherever you need them.

You can organize your template projects within the EPS, assign them project codes, and provide them with descriptions to aid in reuse. You can create templates from projects or to create projects from templates. You can also create projects based on other projects, and templates based on other templates.

Working with Project Templates

Project templates act as a format that you can use when creating new projects or templates.

Working with project templates

The **Documents**, **Issues**, **Team Usage**, and **Workspace** pages are not available for project templates. If you navigate to one of these pages while working with a project template, you will see the message: *Project templates are not supported on this page*. When working with templates on the **Activities** or **EPS** pages, the **Issues** and **Documents** detail windows are visible but their icons are disabled.

Creating project templates

You can create a brand new project template, or you can copy and modify an existing template or project to make a new template. If you select to copy a project or template, you can copy the entire template, or you might insert only the WBS portion into a project.

Because issues and documents are not available for project templates, when you copy an existing project to make a template, the issue and document information does not carry over.

When you copy a project to create a template, some fields are automatically cleared of any values and disabled to prevent the reuse of data out of context. For example, actual dates and costs are not permitted in templates.

Opening project templates

Project templates cannot be opened in conjunction with other project templates or with projects. If you open a project or a project template on the **EPS** page when you have a project template open, the initial project template will close. Conversely, if you have a project or group of projects open and you open a project template, the projects will close.

This is also true when working in the **Open Projects** dialog box. For example, when you have a project template open, the **Open Projects** dialog box will display the template in the **Selected Templates** list. If you add a project to the **Selected** list, the application will remove the project template from the list. If you already have a project template selected, the application will not allow you to add another template to the list. On the other hand, if you try to open a project template when projects are already open, the projects are replaced by the project template.

Creating Project Templates

You can create project templates to act as a standard or format for future projects.

To create project templates:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. Select the  **EPS** element to which you want to add the new project template.
 - b. Click the **Actions**  menu and select **Add**  **Add Project Template**.
 - c. In the **Add Project Template** dialog box:
 - Click the **General** tab and configure each required field.
 - Click **Create**.
 - d. Click  **Save**.

In **Standard View**:

- a. Select the EPS element to which you want to add the new project template.
- b. Click  **Row Actions** and select **Add Project Template**.
- c. In the **Add Project Template** dialog box:
 - Click the **General** tab and configure each required field.
 - Click **Create**.

Tips

- ▶ To configure advanced options, you must select to copy from an existing project or template. This will enable the **Advanced** tab.
- ▶ If you choose to copy from an existing project, select either the **Use Actual Costs and Units** or **Use Planned Costs and Units** option. If you select to copy from a template, the application will disable the **Use Actual Costs and Units** option.
- ▶ You can also right-click the table and select **Add Project Template** to create a project template.

Implementing the Schedule

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About Activities

Also known as tasks, events, or work packages, activities are the lowest level manageable work elements in a project or WBS. Activities typically have expected durations, costs, and resource or role requirements. Milestone activities, however, have no duration or cost. Collectively, all activities form the foundation of the entire project, driving resource assignments, relationships, constraints, expenses, and durations. Activities are sometimes further divided into any number of discrete steps.

Working with Activities

Although you might view activities any number of ways in P6, including on dashboards, workspaces, reports, and the **Resource Assignments** page, the most common and direct way to work with project activities is on the **Activities** page and, specifically, in the Activity Table. There are two formats for the Activities page, **Classic View** and **Standard View**. You can select which format you want to see by default on the **My Preferences** page.

Classic View

The screenshot displays the Primavera P6 Classic View interface. The top navigation bar includes the Oracle Primavera P6 PPM logo and a user menu for Vanessa Lafferty. The main navigation pane shows tabs for Dashboards, Portfolios, Projects, Resources, and Reports. The main area is titled 'Activities of City Center Office Building Expansion, Haitang Corporate Park, Harbour Pointe Assisted Living Center, Nesbid Building Expansion'. It features a Gantt chart showing activity timelines from 2016 to 2018. A table on the left lists activities with columns for WBS/Activity, Planned Duration, Planned Total Cost, Start, and Finish. A 'Steps' table at the bottom shows progress for Planning, Execution, and Inspection. An 'Assignments' dialog box is open, showing resource assignments for 'Excavation'.

WBS / Activity	Planned Duration	Planned Total Cost	Start	Finish
Harbour Pointe Assisted Living Center	749.0d	4,472,154	01-Sep-14 0...	13-Jul-17 0...
Nesbid Building Expansion	519.8d	553,589	12-Oct-15 0...	06-Oct-17 ...
Haitang Corporate Park	521.0d	587,419	03-Aug-15 0...	31-Jul-17 0...
City Center Office Building Expansion	508.8d	560,539	18-Jan-16 0...	28-Dec-17 ...
Design and Engineering	82.3d	31,080	18-Jan-16 0...	11-May-16 ...
Foundation	110.3d	104,774	07-Apr-16 0...	08-Sep-16 ...
Backfill and Compact Walls	3.8d	4,110	05-Sep-16 1...	08-Sep-16 ...
Begin Building Construction	0.0d	0	07-Apr-16 0...	07-Apr-16 0...
Concrete Foundation Walls	18.0d	20,240	28-Jul-16 10...	23-Aug-16 ...
Excavation	18.0d	10,080	24-May-16 1...	17-Jun-16 ...
Form and Pour Slab	9.0d	14,944	23-Aug-16 1...	05-Sep-16 ...
Form/Pour Concrete Footings	20.0d	26,400	30-Jun-16 1...	28-Jul-16 1...
Foundation Phase Complete	0.0d	0	08-Sep-16 0...	08-Sep-16 ...

Step Name	Step % Complete	Step Weight	Completed
Step 1 - Planning	100%	1.0	☒
Step 2 - Execution	25	2.0	☐
Step 3 - Inspection	0%	1.0	☐

Details	Durations	Units and Costs
Activity ID: EC1230	Planned Duration: 18.0d	Labor Units: 18.00d
Activity Name: Excavation	Actual Duration: 0.0d	Planned Labor Units: 18.00d
Activity Type: Task Dependent	Remaining Duration: 18.0d	Actual Labor Units: 0.00d
Location:	At Completion Duration: 18.0d	Remaining Labor Units: 18.00d

The Activity Table in Classic View

Item	Description
1	Open Projects: Open the projects you want to work with using the Open Projects menu item. Then click Activities in the navigation bar. The Activities page shows which projects are currently open.
2	Activity View: Next, select an activity view that already includes the Activity Table or click  Table . The view should be sorted hierarchically by WBS in order to optimize your ability to manage WBS elements and activities within them. When working with activities, always make sure you have set the column, group, sort, and filter view options that help you focus on only the data that matches your needs. Use the View menu to customize the view.
3	Switch to Standard View: Switch to the standard view of the Activities page.
4	Menus and Toolbars: The menus and customizable toolbars on the Activities page provide you with convenient access to the commands of most importance to your work.
5	Activity Table: You can select activities and update them within the table itself or on the detail windows. In the table, you can modify, Cut, Copy, Paste, and Fill Down values. When multiple projects are open, you can copy and paste activities between projects just as you would within a single project. When you copy an activity, all attributes are copied along with it except for Issues, Assignment UDF values, Expense UDF values, Step UDF values, and Risk Assignments. All attributes are retained when you cut and paste an activity.
6	Activity Gantt: Refer to the optional Gantt chart to supplement your work in the table with a visual representation of the schedule.
7	Assignments detail window: Update resource and role assignments in this detail window. The first resource also appears in the Primary Resource column in the table. In this example, the Assignments detail window is floatable, meaning it can freely be moved within the screen.
8	Steps detail window: Break the activity down into smaller units called steps. The progress of steps can also be measured. The user in this example has elected to dock the Steps detail window above the other windows but below the Activity Table.
9	General detail window: Record basic details about the activity in this detail window. You can show or hide the series of detail windows that appears for each activity and WBS.

Standard View

The screenshot displays the Primavera P6 EPPM Standard View interface. The top navigation bar includes tabs for Dashboards, Portfolios, Projects, Resources, and Reports. The main area shows a project titled "Activities of City Center Office Building Expansion, Haitang Corporate Park, Harbour Pointe Assisted Living Center, Nesbid Building Expansion". The interface includes a Gantt chart and a table of activities. Numbered callouts 1 through 8 highlight key features: 1. Project title, 2. Switch to Classic View button, 3. Toolbar, 4. Activity table grid, 5. Gantt chart, 6. Row Actions Menu, 7. Activity details pane, and 8. Settings gear icon.

The Activity Table in Standard View

Item	Description
1	Open Projects: Open the projects you want to work with using the Open Projects menu item. Then click Activities in the navigation bar. The Activities page shows which projects are currently open.
2	Switch to Classic View: Switch to the classic view of the Activities page.
3	Toolbar: The toolbar on the Activities page provides you with convenient access to the commands of most importance to your work.
4	Grid: You can select activities and update them within the grid or on the detail windows.
5	Gantt: Refer to the optional Gantt view to supplement your work in the table with a visual representation of the schedule.
6	Row Actions Menu: Add and delete activities or add, delete, expand, and collapse WBS elements with this menu.

Item	Description
7	Expand/Collapse Dock: Expand or collapse the dock to view detailed information about the selected activity.
8	Show/Hide Tabs: Show or hide the tabs you want to see in the view.

Notes:

- Using Primavera P6 Administrator, your administrator can set a default value for the maximum number of activities that appear on the **Activities** page.
- Your Administrator can provide a URL to access the Standard View of the Activities Page directly after logging into the system.

Creating Activities

Create activities to define a more detailed breakdown of projects or WBSs.

To create activities:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Select a project, WBS, or activity; the new activity will be added beneath your selection.
 - b. Click the **Actions**  menu and select **Add**  **Add Activity**.
 - c. Enter a name in the **Activity** field.
 - d. Click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. Click the  **Row Actions** menu and select **Add Activity**.
- b. Enter an ID in the **ID/Code** field.

Note: The ID/code must be unique in the project.

- c. Enter a name in the **Name** field.
- d. Click **Save**.

Tips

- ▶ Right-click a project, WBS, or activity and select **Add Activity** to quickly add an activity.
- ▶ The application automatically names new activities *New Activity*.
- ▶ The default limit allows you to create up to 5000 activities per activity view.

Copying and Pasting Activities

You can copy and paste activities. When you copy and paste activities, you can control which data types are copied to the new activities.

To copy and paste activities:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Select one or more activities.
 - b. Right click the activities and select  **Copy** (Ctrl+C).
 - c. Select a single activity in the grouping band that you want to paste the new activities into, or if the grouping band is empty, select the grouping band itself.
 - d. Right click and select  **Paste** (Ctrl+V)
 - e. In the **Copy Activity options** dialog box:
 - Select the data items to be copied.
 - Click **OK**.
 - f. Click  **Save**.

In **Standard View**:

- a. Select one or more activities.
- b. Click  **Row Actions** and select **Copy**.
- c. Select a single activity in the grouping band that you want to paste the new activities into, or if the grouping band is empty, select the grouping band itself.
- d. Click  **Row Actions** and select **Paste**.
- e. In the **Copy Activity options** dialog box:
 - Select the data items to be copied.
 - Click **OK**.
- f. Click **Save**.

Notes:

- Hold down the **Ctrl** key while clicking to select multiple rows in a table. Hold down the **Shift** key to select contiguous rows.
- When you copy an activity, the following data items are not copied: Issues, Assignment UDF values, Expense UDF values, Step UDF values, Activity Feedback, Risk Assignments, and Status Update History (from Team Member interfaces only)
- If you copy a WBS that includes activities, then Issues, Assignment UDF values, Expense UDF values, and Step UDF values are copied for each activity. Risk Assignments are copied for each activity when you copy a WBS to the same project. If you copy the WBS to a

different project, Risk Assignments are not copied.

Configuring General Activity Information

You can configure some of the general information for activities, including Activity Type, Duration Type, and Percent Complete Type.

To configure general activity information:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **General** detail window.
 - In **Classic View**:
 - a. In the **General** detail window, configure the **Details**, **Durations**, **Units and Costs**, **Status**, and **Constraints** sections to represent the information you want to display for that activity.
 - b. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. In the **General** detail window, configure the activity details to represent the information you want to display for that activity.
- b. Click **Save**.

Assigning Locations to Activities

Assign locations to activities so that you can report on activities by location in Analytics.

To assign a location:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **General** detail window.
 - In **Classic View**:
 - a. In the **General** detail window, click **...Select** in the **Location** field.
 - b. In the **Select Location** dialog box, select the appropriate location and click **Assign**.
 - c. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. In the **General** detail window, click in the **Location** field.
- b. In the **Select Location** dialog box, select the appropriate location and click **Select**.
- c. In the **Activities** page, click **Save**.

Tips

- ▶ You must create locations before you can assign them.

- ▶ In classic view, you can add a new location quickly by clicking the **Add Location** button in the **Select Location** the dialog box. The new location will be added instantly to the dictionary and you can add it to Activities, Resources and Projects. You cannot add new locations in the **Add Location** box in Standard View.
- ▶ You must have the Add/Edit Activities Except Relationships project privilege to assign locations to activities.

About Suspending and Resuming Activities

When updating progress for a project, you might need to record that the work on a particular activity has been suspended or resumed after a period of inactivity. For example, an activity might be suspended or resumed due to a plant shutdown. To record this, you must enter suspend and resume dates. The suspend date is the date on which an activity's progress has, or is planned to be, stopped. The resume date is the date progress on an activity begins again. When you indicate a suspend or resume date, work for the activity is considered to be suspended or resumed at the beginning of the specified day.

Dissolving Activities

You can dissolve an activity to remove the dissolved activity and join the predecessor and successor activities to maintain the project's network logic. You cannot dissolve an activity unless it has a predecessor and successor. You can only dissolve one activity at a time.

To dissolve an activity:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.

In **Classic View**:

- a. Select a single activity and click the **Actions**  menu and select  **Dissolve**.
- b. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. Select a single activity and click **Actions**  and select **Dissolve**.
- b. In the **Confirm** dialog box, click **Yes**.
- c. Click **Save**.

Tips:

- ▶ When you dissolve an activity in Classic View, the lags of the predecessor and successor relationships are combined and applied to the new relationships.
- ▶ When you dissolve an activity in Standard View, all new relationships between the predecessors and successors of the dissolved activities become zero.

Recalculating Assignment Costs

Recalculate assignment costs to update price per time values on activities. This ensures that project costs reflect any updates.

To recalculate assignment costs:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Select an activity.
 - b. Click the **Actions**  menu and select **Run**  **Recalculate Assignment Costs**.
 - c. In the **Recalculate Assignment Costs** dialog box:
 - d. (Optional) Select the **Synchronize Overtime Factor** option to synchronize the overtime factor defined for each resource when recalculating costs.
 - e. Click **Recalculate**.

In **Standard View**:

- a. Select an activity.
- b. Click **Actions**  and select **Recalculate Assignment Costs**.
- c. In the **Recalculate Assignment Costs** dialog box:
- d. (Optional) Select the **Synchronize overtime factor while recalculating costs** option to synchronize the overtime factor defined for each resource when recalculating costs.
- e. Click **Recalculate**.

Tips

- ▶ When activity dates change, run **Recalculate Assignment Costs** to update resource costs based on the new dates.
- ▶ These services are removed from the database based on the **ASAP Cleanup Rate** your P6 administrator specifies on the **Configurations** tab in Primavera P6 Administrator. Once the time is met all ASAP jobs that have a status other than running or delegated will be removed from the table automatically. Running and delegated jobs will be removed if they are older than the cleanup rate or if they are older than one day, whichever is greater.

Sending Project Data to an ERP System

In Classic View, if P6 is configured to function with an Oracle Enterprise Resource Planning (ERP) application, such as JD Edwards EnterpriseOne, and your administrator has granted you appropriate security privileges, you can send project cost data for an approved and baselined project to the configured ERP application for integration. You can send project data to an ERP system in **Classic View**. The data from your projects then becomes available within your ERP applications for assignment and tracking.

To send project data to ERP:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, click the **Actions**  menu and select **Import/Export**  **Send to ERP**.

Note: Any pending changes are automatically saved.

- 4) In the **Send Projects to ERP** dialog box:
 - a. Select the projects you want to send to ERP.
 - b. Select or clear the options.
 - c. Click **Send**.

Customizing Detail Windows

In Classic View, you can customize which detail windows appear on the EPS page or Activities page.

To customize detail windows:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Activities** or **EPS**.
- 3) On the **Activities** or **EPS** page:
 - a. Select a view from the **Activity View** or **EPS View** list.
 - b. Click the **View** ▾ menu and select **Customize Detail Windows**.
- 4) In the **Customize Detail Windows** dialog box:
 - a. In the **Area** section, select one of the options to determine which listing of detail windows is available for you to customize.
 - b. In the **Detail Window** section, select or clear the options beside detail windows to add or remove them from the page.
 - c. Click **Save**.

Tips

- ▶ Select or clear the option beside the **Detail Window** title to add all or remove all the detail windows.
- ▶ Right-click a detail window tab or titlebar to customize detail windows. Click **Customize** on the menu to open the **Customize Detail Windows** dialog box, or click a detail window name to add or remove it from the page.
- ▶ Click and drag detail windows to change their order. Otherwise, the detail windows appear in the same order that they appear in the **Customize Detail Windows** dialog box.
- ▶ Click  **Float** on the detail window to separate it from any others in the series. You can then freely move this detail window to change its position or re-dock it.
- ▶ When you navigate to a new page, you can save or cancel the view changes you made to the detail windows. These changes will only be saved for the view selected in the **Activity** or **EPS View** list.

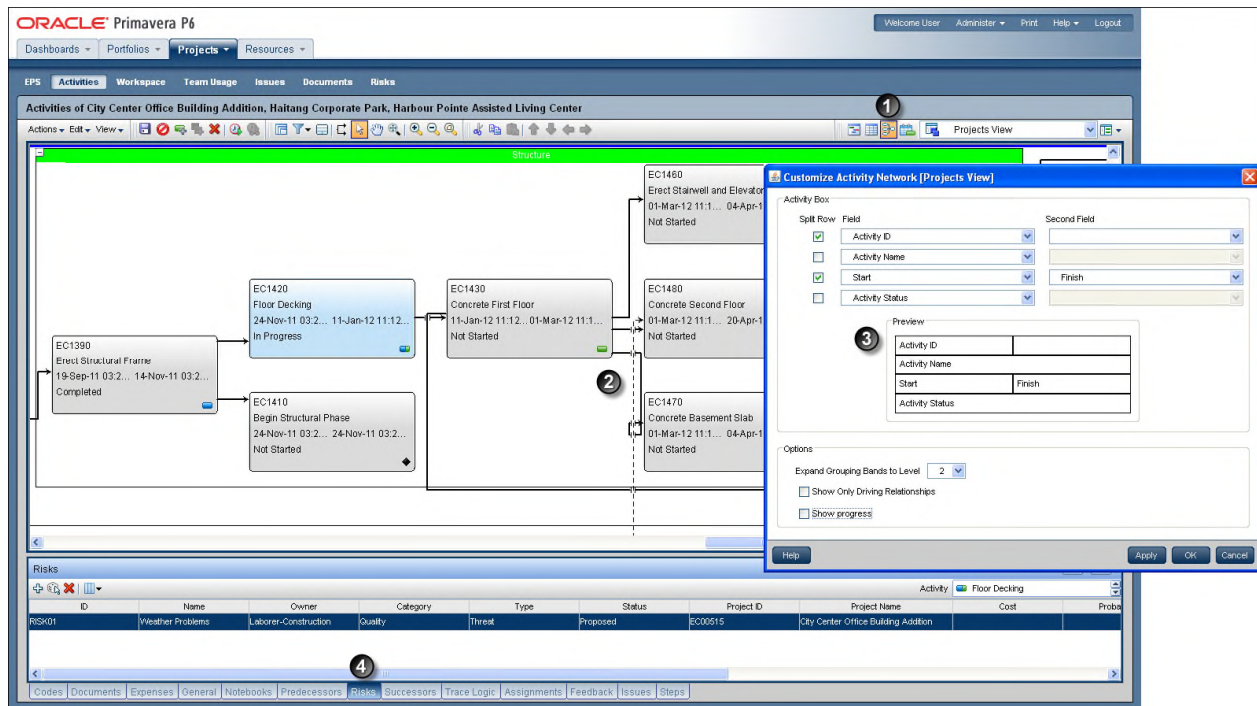
About Activity Networks

An Activity Network is a graphical display of activities and their logical relationships according to the WBS. You can use an Activity Network in **Classic View** to view activity relationship paths and the flow of work through a project. Activity Networks also allow you to examine and edit an activity and its predecessors and successors.

Working with the Activity Network

In addition to the Activity Table format, you can also view activities in an Activity Network in **Classic View**. You can include your choice of WBS and activity detail windows in this alternate viewing format.

The Activity Network maps the WBS elements and activities in your project into a series of interconnected boxes. Arrows between boxes represent the relationships between activities. The standard color-coded activity status icons also appear in this viewing format: black diamonds represent milestones, and other status icons reveal when an activity is  not yet started,  in progress,  completed, or  critical. Activity boxes outlined in red represent critical activities while activity boxes outlined in blue are not.



Activity Network

Item	Description
1	Activity View: Select an activity view that already includes the Activity Network or click  Activity Network .

Item	Description
2	Activity Network: The arrow from a predecessor activity points to its successor. Solid lines represent driving relationships, which indicate when a predecessor activity influences the start date of its successor. The predecessor drives the start date of the successor activity by causing it to start earlier or later than the scheduled date depending on the finish date of the predecessor. Dashed lines represent non-driving relationships, which include all predecessor and successor activity relationships: Start-to-Start, Finish-to-Start, Start-to-Finish, and Finish-to-Finish. You can show only driving relationships or show all relationships.
3	Customize Activity Network: You can customize the content and arrangement of the boxes that represent your activities in the network. If you select the Show progress option on the Customize Activity Network dialog box or on the Activity Network tab of the Customize Activity View dialog box, you can view activity progress in the Activity Network. Completed activities are marked with an X across the activity box. Activities in progress are marked with a slash (\) across the activity box.
4	Detail Windows: The same WBS and Activity detail windows are available with any activity viewing format. In this example, the user has elected to show the Risks detail window. When you select an Activity Network box, the selected box displays a light blue background while the boxes that are not selected display a gray background.

Note: P6 identifies relationships as driving when all of the following are true: 1) the successor activity has **Free Float** less than or equal to zero; 2) the activity does not have a **Start On** or **Finish On** constraint; and, 3) the activity does not have an **Actual Finish** date.

About Activity Types

One of many attributes for an activity, the *Activity Type* determines how the activity is scheduled according to various scheduling scenarios:

- ▶ **Task Dependent:** This type of activity indicates that assigned resources should be scheduled based on the activity's calendar, rather than the calendars of the resources.
- ▶ **Resource Dependent:** This type of activity indicates that resources should be scheduled based on their assigned calendars. Use this type when the activity duration may be affected by resource availability.
- ▶ **Level of Effort:** This type of activity indicates that it is ongoing with a duration determined by its dependent activities. The duration is calculated based on the schedule dates of its predecessors and successors. Administrative activities are typically designated as *Level of Effort*.
- ▶ **Start Milestone:** This type of activity indicates the beginning of a major project phase. Activities of this type have a duration of zero (0) with no resource assignments.

- ▶ **Finish Milestone:** This type of activity indicates the end of a major project phase. Activities of this type have a duration of zero (0) with no resource assignments.

About Activity Views

An activity view is the visual layout of activity and WBS information. For each view, you can customize data and content-specific choices such as grouping, column selection, column label, and visual display options. Selecting the best view for your needs can facilitate the process of recording project data. For example, to record a range of details for new activities, you might select a table view which maximizes the number of data columns available. Or, to assign an attributes to new activities as you add them, you could select a view which groups activities based on that attribute.

Note: When you customize a column name in **Classic View**, you can save the customized name as part of the view. The Select Columns, Group, Sort, Filter and Activity Network Options dialog boxes will also show the customized column name while you have that view open. Other views will show the default column name. To see the default name of a customized column, right click the column heading and click **Rename Column**.

Working with Activity Views

Configure the **Activities** page and the **Customize Activity View** or **Customize View** dialog box to customize the views that display the project and activity data you require in a format that meets your needs. You can save these settings with the view. Save the changes if you want them to appear the next time you work with the view. Do not save the changes if you only want your alterations to last for the session.

The view list provides quick and easy access to all activity views that are available to you. While working with activities, choosing the best view for your needs can facilitate the process of recording project data.

You can configure the content and organization of any activity view you create. For activity views you can access but did not create, you can review activity view settings, but you cannot make changes.

Note: On the **Activities** page, to quickly rearrange the columns currently displayed in a view, drag and drop them.

Your ability to perform certain actions in a view depends on the view's access class, your role as either creator or user of the view, and your security profile. For example, if a multi-user or global view includes cost data elements and the current user does not have rights to view costs, the data is dashed out so it is not visible to the user.

You can group all activities that contain the same value for a specific data field. For example, if you choose to group by **Project** then by **Primary Resource**, the **Activities** page groups activities in project groupings. Then, within each project group, activities are further categorized according to primary resource. Finally, within each primary resource group, activities are sorted based upon the sort field and sort order you specify, for example **Start Date**. You can sort EPS, Activities, and Assignments views by up to five columns.

In the Gantt chart, when you group activities, a summary bar appears for each group. You can expand and collapse the group as needed to focus only on the project **Summary Schedule** or on the **Detailed Schedule**. In the table, when you group activities, each grouping level is identified and separated by a colored band or background. You can elect to show aggregates, for each group.

Creating Activity or EPS Views

Create views to determine how information is visually displayed. These steps represent the minimum required to create an activity or EPS view. You can create Activity Views in the Classic View of the Activities Page.

To create an activity or EPS view:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Activities** or **EPS**.
- 3) On the **Activities** or **EPS** page:
 - In **Classic View**:
 - a. Select a view similar to the view you want to create from the **Activity** or **EPS View** list.
 - b. Click  **View** and select  **Save View As**.
 - c. In the **Save View As** dialog box, type a name in the **Please specify the view name** field and click **OK**.
 - d. On the **Activities** or **EPS** page:
 - Configure the new view to have the properties you want.
 - Click the **Actions**  menu and select  **Save** when you are finished.

In **Standard View**:

- a. Click **Views** and select **Manage Views....**
- b. In the Manage Views dialog box:
 - To create a new Global View, select the Global Views grouping band, then click  **Row Actions** and select **Add**.
 - To create a new User View, select the User Views grouping band, then click  **Row Actions** and select **Add**.
 - Type a name for the new view.
 - Select the view.
- c. In the Customize View dialog box:
 - Configure the options on the **Columns**, **Filtering**, **Grouping**, **Sorting**, **Bars**, and **Gantt** tabs.

- Click **Save and Apply**.

Configuring Activity Views

Configure activity views in **Classic View** to define how you see activity data. Activity views affect the filters, grouping, and columns that are applied to the Activities page. Detail window visibility is also affected by the selected activity view.

To configure activity views:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Click the **Activity View** list and select an activity view.
 - b. Click the **View**  menu and select  **Customize View**.
 - c. In the **Customize Activity View** dialog box:
 - Configure the **Columns** tab.
 - Configure the **Sorting** tab.
 - Configure the **Grouping** tab.
 - Configure the **Filters** tab.
 - Configure the **Bars** tab.
 - Configure the **Gantt Chart** tab.
 - Configure the **Activity Network** tab.
 - Configure the **Access** tab.
 - Click **OK**.
 - d. Click **View**  and select  **Save View**.

In **Standard View**:

- a. Click the **Views** list and select an activity view.
- b. Click  **Customize View**.
- c. In the **Customize View** dialog box:
 - Configure the **Columns** tab.
 - Configure the **Filtering** tab.
 - Configure the **Grouping** tab.
 - Configure the **Sorting** tab.
 - Configure the **Bars** tab.
 - Configure the **Gantt** tab.
 - Click **Save and Apply**.

Tips

- ▶ You can modify any view you create. You can only modify multi-user and global activity views if you have the appropriate security privileges.
- ▶ You cannot save modifications you have made to a multi-user activity view unless you created it. If you need to save a multi-user view that another user created, go to the **View**  menu and select  **Save View As**.
- ▶ When you copy and paste a user, you also copy the user's Activity Views.
- ▶ Many of these configurations, configuring columns and filters for example, do not require you to open the **Customize Activity View** dialog box. If the necessary icons are available on your toolbar, you can use them to configure the activity view.

Configuring Activity View Columns

Configure activity view columns to specify which columns are visible in the Gantt chart or table.

To configure columns:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Click the **Activity View** list and select an activity view to configure.
 - b. Click the **View**  menu and select  **Customize View**.
 - c. In the **Customize Activity View** dialog box, click the **Columns** tab.
 - d. On the **Columns** tab:
 - In the **Select the columns to display** section, customize the **Selected Columns** list using values from the **Available Columns** list.
 - In the **Column Options** section, select an option from each list.
 - e. Click **OK**.
 - f. Click **View**  and select  **Save View**.
 - In **Standard View**:
 - a. Click  **Customize View**.
 - b. In the **Customize View** dialog box, click the **Columns** tab.
 - c. On the **Columns** tab:
 - Customize the **Selected Columns** list using values from the **Available Columns** list.
 - Click **Save and Apply**.

Tips

- ▶ You can display a maximum of 30 columns.
- ▶ Click **Font Picker** and select a font and size from the dialog box to change the font for a column.

- ▶ You can customize activity view columns from the **View** menu. Click the **View** menu and select **Columns**.

Configuring Activity View Grouping

Configure grouping options to define how fields are grouped in **Classic View**.

To configure activity view grouping:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Click the **Activity View** list and select an activity view to configure.
 - b. Click the **View**  menu and select  **Customize View**.
 - c. In the **Customize Activity View** dialog box:
 - Click the **Grouping** tab and configure the grouping options in each section.
 - Click **OK**.
 - d. Click **View**  and select  **Save View**.
 - In **Standard View**:
 - a. Click the **Views** list and select an view to configure.
 - b. Click  **Customize View**.
 - c. In the **Customize View** dialog box:
 - Click the **Grouping** tab and configure the grouping options in each section.
 - Click **Save and Apply**.

Tips

- ▶ When activities are grouped, the **Gantt chart** on the **Activities** page displays a summary bar for each group. The summary bar represents the time period from the earliest **Early Start** to the latest **Early Finish** for the group.
- ▶ Use the **To Level** list to select the number of hierarchy levels when grouping by a hierarchical field. When grouping by dates, use the **To Level** list to select a time interval.
- ▶ The band color you select will display in the table and the Activity Network.
- ▶ You can also access activity view grouping from the **View** menu. Click the **View** menu, then select **Group**.
- ▶ Grouping bands are displayed by default when you group by a project code or EPS even if the bands are empty. Select the **Hide if empty** option in the **Customize View** or **Customize Groupings** dialog boxes to remove these bands from view.
- ▶ Empty bands are hidden, even if the **Hide if empty** option is not selected, when the view is grouped by multiple data items and one of the data items is hierarchical.

Configuring Activity View Sorting

Configure activity view sorting to determine the order in which activities will be displayed within a grouping band.

To configure sorting:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the Activities page:
 - In **Classic View**:
 - a. Click the Activity View list and select an activity view to configure.
 - b. Click the **View**  menu and select  **Customize View**.
 - c. In the **Customize Activity View** dialog box:
 - Click the **Sorting** tab and configure the column sorting options.
 - Click **OK**.
 - d. Click **View**  and select  **Save View**.

In **Standard View**:

- a. Click the **Views** list and select an view to configure.
- b. Click  **Customize View**.
- c. In the **Customize View** dialog box:
 - Click the **Sorting** tab and configure the sorting options in each section.
 - Click **Save and Apply..**

Tips

- ▶ To sort by a column it must be showing in the view.

Configuring Activity View Gantt Chart Bars

Configure the bar settings for the Gantt chart view on the Activities page.

To configure activity view bars:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Click the **Activity View** list and select an activity view to configure.
 - b. Click the **View**  menu and select  **Customize View**.
 - c. In the **Customize Activity View** dialog box, click the **Bars** tab.
 - d. On the **Bars** tab:
 - Click the **Bar Type** list and choose one of the available bar types.

Note: You can configure up to three bars. Set at least one bar to **Current Bar**.

- In the **Height** field, select the height in pixels of each bar.
- In the **Color** options, choose to display the bar with a selected color or to set an activity code for the bar.

Note: Your administrator sets color definitions of activity codes.

- Select the **Show Necking** option to apply bar necking to each of the three bars. Bar necking refers to indentations of bars in the Gantt chart during periods of nonwork time.
- e. If configuring options for the **Current Bar**, click **Options**.
- f. In the **Current Bar Options** dialog box:
- Select the **Show Progress** option to chart progress, or actual work, along the Current Bar.
 - Select the **Show Critical** option to represent critical activities with a red bar instead of the color selected for the Current Bar.
 - In the **Name** list, select a bar label.
 - In the **Position** list, select the location on the bar to position its label.
-
- Note:** When you display many bars at once, for greater ease in reading the bar labels and identifying a specific bar, you might find it helpful to vary the position of the label on each bar.
-
- In the **Font** field, click  and select options for the font type, size, and color of the bar label.
 - Click **OK**.
- g. On the **Bars** tab, if you selected **Show Necking**, in the **Necking** section, choose the options for displaying non-work time.
- h. Click **OK**.
- i. Click **View**  and select  **Save View**.

In **Standard View**:

- a. Click **✕Customize View**
- b. In the **Customize View** dialog box, click the **Bars** tab.
- c. On the **Bars** tab click **Configure**.
- d. Select a theme to use a pre-configured set of colors for bars.
- e. Click a bar to configure it and then:
 - Click the **Bar Type** list and choose one of the available bar types.
 - Click the **Height** list and choose a height for the bar.
 - Select the **Show Progress** option to chart progress, or actual work, along the Current Bar.

Select a **Progress Color**, a **Bar Color**, and a **Progress Style** to determine how progress will be shown on the bar.

 - Select **Show Critical** to determine that the bar will display differently if the activity is critical.

Note: Click the **+Add**  menu and select **Bar** or **Label** to add a new bar or label. Select a bar or label and click  to delete it.

- f. Click a label to configure it and then:
- In the **Label Field** list, select a field.
 - In the **Color** field, select a text color.
 - In the **Height** list, select a height.

Note: Click **Preview** to see how the bars and labels you have configured will look when shown with other bars.

- g. Click **Apply**.

Tips

- ▶ The Gantt chart only prints if it is displayed.
- ▶ A **Late Bar** does not display if the project has not been scheduled.
- ▶ The **Progress Bar** is blue in the Classic View of the Activities Page.
- ▶ You can also customize activity view bars in the Classic View of the Activities Page from the **View** menu. On the **View** menu, click **Gantt Chart Options**, then click the **Bars** tab.

Configuring Activity View Gantt Chart

Configure Gantt chart options to determine how the chart will display.

To configure Gantt chart options:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Click the **Activity View** list and select an activity view to configure.
 - b. Click the **View**  menu and select  **Customize View**.
 - c. In the **Customize Activity View** dialog box click the **Gantt Chart** tab and configure the Gantt chart options in each section.
 - d. Click **OK**.
 - e. Click **View**  and select  **Save View**.
 - In **Standard View**:
 - a. Click  **Customize View**.
 - b. In the **Customize View** dialog box, click the **Gantt** tab.
 - c. On the **Gantt** tab:
 - Select the **Data date line** option to show the data date on the Gantt.
 - Select the **Relationship lines** option to show lines between activities on the Gantt.

- Select the **Non-driving relationships** option to draw lines between activities on the Gantt even where the relationship doesn't affect the successor's dates.
 - Select the **Sight Lines** option to show vertical lines between each segment of the timescale.
 - Select the **Non-work time shading** option to have non-work time shaded on the Gantt.
 - Select a **Timescale**.
- d. Click **Apply**.

Tips

- ▶ Bar necking in **Classic View** extends down to the day.
- ▶ The Gantt chart only prints if it is displayed.
- ▶ In **Classic View** you can also select **Gantt Chart Options** on the **View** menu and click the **Gantt Chart** tab in the **Customize Gantt Chart Options** dialog box to configure Gantt charts.
- ▶ In **Standard View** you can right click on the timescale to change the timescale of the Gantt.

Configuring Activity Network

Configure an Activity Network to determine how the network displays in **Classic View**.

To configure an Activity Network:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - a. Click the **Activity View** list and select an activity view to configure.
 - b. Click the **View**  menu and select  **Customize View**.
- 4) In the **Customize Activity View** dialog box, click the **Activity Network** tab.
- 5) On the **Activity Network** tab, configure the options, fields, and level and click **OK**.
- 6) Click **View**  and select  **Save View**.

Tips

- ▶ Select the **Split Row** option in the **Activity Box** section to divide a row into two fields. The **Second Field** list for that row is disabled until the **Split Row** option is selected.
- ▶ You can also customize **Activity Network** options from the **View** menu. In the **Activity Network** view, select **Activity Network Options** on the **View** menu.

Configuring Activity View Access

Configure activity view access to define which users will have access to a particular view in **Classic View**.

To configure access:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:

- a. Click the **Activity View** list and select an activity view to configure.
 - b. Click the **View**  menu and select  **Customize View**.
- 4) In the **Customize Activity View** dialog box, click the **Access** tab.
 - 5) On the **Access** tab, select one of the access options and click **OK**.
 - 6) Click **View**  and select  **Save View**.

Tips

- ▶ Unless you specify otherwise, **Current User** is the default access.
- ▶ If you select **List of Users**, search for the user, or select users from the **Available Users** list.
- ▶ When you copy and paste a user, you also copy the user's Activity Views and any multi-user assigned to that user.

Configuring Activity View Filters

You can modify or create filters. These filters can then be applied to several different activity views.

To configure activity view filters:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
In **Classic View**:
 - a. On the **Activities** page:
 - Click the **Activity View** list and select an activity view to configure.
 - Click the **View**  menu and select  **Customize View**.
 - b. In the **Customize Activity View** dialog box, click the **Filters** tab.
 - c. On the **Filters** tab:
 - You can modify a filter.
 - You can create a filter.
 - You can apply filters.
 - Click **OK** when finished.
 - d. Click **View**  and select  **Save View**.

In **Standard View**:

- a. On the **Activities** page:
 - Click the **Activity View** list and select an activity view to configure.
 - Click  **Customize View**.
- b. In the **Customize View** dialog box, click the **Filtering** tab.
- c. On the **Filtering** tab:
 - You can modify a filter.
 - You can create a filter.
 - You can apply filters.

- Click **Save and Apply** when finished.

Tips

- ▶ The **My Activities** filter displays all project activities you are either assigned to as a resource or designated as the activity owner.
- ▶ For the **Activities occurring within (blank) days** or **Activities finishing within (blank) days** filters, specify a number of days.
- ▶ You can also customize activity view filters from the **View** menu. Click the **View** menu and select **Filters** from the **Filters** submenu.

Applying Filters

Apply filters to a project to specify the data you want to display. You can add user-created filters or select from the list of standard filters.

To apply filters:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Activities** or **EPS**.

In **Classic View**:

 - a. On the **Activities** or **EPS** page:
 - Click the **Activity View** or **EPS View** list and select a view to which you will add the filters.
 - Click the **View**  menu and select  **Customize View**.
 - b. In the **Customize Activity View** or **Customize EPS View** dialog box, click the **Filters** tab.
 - c. On the **Filters** tab:
 - Select an option from the **Show matches for** list.
 - In the **Apply to View** column, select the option for each filter you want to apply.
 - Click **OK**.
 - d. Click the **View**  menu and select  **Save View**.

In **Standard View**:

 - a. On the **Activities** or **EPS** page:
 - Click the **Views** list and select a view to which you will add the filters.
 - Click **✕Customize View**.
 - b. In the **Customize View** dialog box, click the **Filtering** tab.
 - c. On the **Filtering** tab:
 - Select to match **all applied** or **any applied**.
 - In the filter list, select the option for each filter you want to apply.
 - Click **Save and Apply**.

Tips

- ▶ If you have Contributor module access, either assigned as a resource or activity owner, applying the **My Activities** filter will have no effect on the activity list display because your access is already restricted to your assigned and owner activities.
- ▶ You can also click the **View** menu and select **Filters** from the **Filters** submenu to open the **Customize Filters** dialog box. You can apply filters from this dialog box.
- ▶ If you want to save the application of these filters to the view, click **Yes** in the **Primavera P6** dialog box which opens when you navigate away from the page.
- ▶ You can apply filters to the Activities page in **Classic View**.

Creating Filters

Create filters to narrow activity or project information to a specific data group.

To create filters:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Activities** or **EPS**.
- 3) On the **Activities** or **EPS** page:
 - In **Classic View**:
 - a. Click the **Activity** or **EPS View** list and select a view to which you will add the filters.
 - b. Click the **View** ▾ menu and select  **Customize View**.
 - c. In the **Customize Activity View** or **Customize EPS View** dialog box, click the **Filters** tab.
 - d. On the **Filters** tab, click  **Add Filter**.
 - e. In the **Create Filter** dialog box:
 - Click the **Definition** tab and configure the fields and lists for one or more filter statements.
 - Note:** In addition to standard filtering options, the **is under**, **contains**, and **does not contain** options are provided to enable you to include hierarchical elements, including nodes, when filtering in the EPS, Activities, or Resources Assignments view.
 - Click the **Access** tab and define user access.
 - Click **OK**.
- f. Click **View**  and select  **Save View**.

In **Standard View**:

- a. Click the **Views** list and select a view to which you will add the filters.
- b. Click **▼Filters** and select **Manage Filters....**
- c. In the **Manage Filters** dialog box:
 - Click  **Row Actions** and select **Add**.

Note: You can add new global or user filters. You cannot add new standard filters.

- Configure the fields and lists for one or more filter statements.
- Click **Save**.

Tips

- ▶ To add more criteria statements, click . To remove a criteria statements, click . To nest a criteria statement inside another, click .
- ▶ You can also click the **View** menu and select **Filters** from the **Filters** submenu to open the **Customize Filters** dialog box. From this dialog box, you can create filters.
- ▶ You can create activity filters in the **Classic View**.

Configuring Filters

You can configure the detailed statements of a filter and who can use it.

To configure filters:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Activities** or **EPS**.
- 3) On the **Activities** or **EPS** page:
 - In **Classic View**:
 - a. Click the **Activity** or **EPS View** list and select a view to which you will add the filters.
 - b. Click the **View**  menu and select  **Customize View**.
 - c. In the **Customize Activity View** or **Customize EPS View** dialog box, select a filter and click  **Modify Filter**.
 - d. In the **Modify Filter** dialog box:
 - Click the **Definition** tab and configure the fields and lists to edit the filter statements.
 - Click the **Access** tab, and select an access option.
 - Click **OK**.
 - e. Click **View**  and select  **Save View**.

In **Standard View**:

- a. Click the **Views** list and select a view to which you will add the filters.
- b. Click  **Filters** and select **Manage Filters...**
- c. In the **Manage Filters** dialog box:
 - To add a new filter, click  **Row Actions** and select **Add**.
 - Select a filter and configure the fields and lists to edit the filter statements.
 - Click **Save**.

Tips

- ▶ You can not edit **Standard Filters**.

- ▶ To add more filter statements to the **Definition** tab, click . To remove a filter, click . To nest a criteria statement inside another, click . You can add up to ten levels of nesting.
- ▶ You can also click the **View** menu and select **Filters** from the **Filters** submenu to open the **Customize Filters** dialog box. You can configure filters from this dialog box.
- ▶ You can configure activity filters in **Classic View**.

Sending Activity Views by Email

In **Classic View** you can send Email with a link to a global activity view to distribute details about activities or projects to other P6 users. If the column names in the view have been customized, other users will be able to see the customized names when they log into the view.

To send an activity view by Email:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, click the  **View** menu and select  **email View**.
- 4) In the **Email View** dialog box:
 - a. Edit the recipient list, message, and subject as needed.
 - b. Click **Send Email**.

Tips

You must have an Email address listed in your user account to send an Email.

About the Activity Table and Grid View

The Activity Table of the **Classic View** presents all WBS and activity information for the currently open projects in a familiar table format. You can customize Activity Table columns, filters, grouping, sorting, fonts, and colors.

For example, you might change the information displayed in columns to show scheduling data, resource and cost data, user-defined fields, or any data items you select, including calculated data. You can also format specific information to call attention to it by using the filter, group and sort, and other table display features.

Use the Activity Table to:

- ▶ Create a list of activities and activity information quickly when you don't need to see the information graphically over time as in a Gantt chart.
- ▶ Group activities that share a common attribute into hierarchies. For example, focus on activities by resource, responsibility, or date. Once you organize activities into groups, P6 aggregates project data to simplify its presentation.
- ▶ Sort activities to arrange them in an order you specify. For example, to view activities chronologically, you might sort them by a date field.

The Grid View of the **Standard View** present all WBS and activity information for the currently open projects in a familiar table format. You can customize Grid View columns.

For example, you might change the information displayed in columns to show scheduling data, resource and cost data, user-defined fields, or any data items you select, including calculated data.

Use the Grid View to:

- ▶ Create a list of activities and activity information quickly when you don't need to see the information graphically over time as in a Gantt chart.
- ▶ View all the activities for the currently open projects grouped by project and WBS.
- ▶ Sort activities to arrange them in an order you specify. For example, to view activities chronologically, you might sort them by a date field.

About WBS Summary Activities

A WBS summary activity type represents a group of activities that share a common work breakdown structure (WBS) level. The summary-level WBS activity enables the aggregation of dates for the activity group. Aggregate values for a WBS summary activity are calculated when the project is scheduled. The duration of a WBS summary activity extends from the start of the earliest activity in a group to the finish of the latest activity.

The WBS summary activity type combines the aggregation capabilities of the WBS structure with task-level attributes such as relationships, resource assignments, and notebooks. Use this activity type to aggregate dates, duration, and percent complete values for a group of activities that share a common WBS code.

The WBS code of a WBS summary activity determines which activities comprise the group. For example, a WBS summary activity assigned to WBS code A, would aggregate values for all activities under any subordinate WBS that relates to code A: A.1, A.1.1, A.2, A.2.1, and so on. If the WBS summary activity in this case were assigned to WBS code A.1, it would aggregate values for activities under WBS A.1 and A.1.1, but not for those activities under A.2 or A.2.1.

Establishing Activity Codes

About Activity Codes

Activity codes enable you to categorize activities into logical groups based on your organization's criteria. An activity code can be one of three types: Global, EPS, or Project. Global activity codes organize activities across all projects in an organization. EPS activity codes organize activities within a specific branch or node of the enterprise project structure (EPS). Project activity codes categorize activities based on specific features within a project.

Activity codes represent broad categories of information, a department or project manager for instance. You can create multiple activity codes according to specific categories, then assign different values for each code. For example, assume your organization has many departments and you want to review activities within each department. You can first create an activity code "department," then assign different values such as quality assurance, finance, and sales. You can then associate activities with specific departments.

A key characteristic of an activity code as opposed to an activity user defined field is that activity codes will only allow entries from a predefined list of values. After you create activity codes, users can assign activity code values to activities to group, sort, and filter project data based on these values.

Working with Activity Codes

There are three types of activity codes: Global, EPS, and Project. Global activity codes can be used in all projects within the enterprise. EPS activity codes can only be used in projects that belong to a specific EPS, including its subordinate EPS nodes, if any. Project activity codes can be used only in their designated project. The EPS or project that an activity code is associated with is specified when the code is created.

The screenshot displays the Oracle Primavera P6 EPPM interface. The 'Enterprise Data' sidebar on the left lists various data types, with 'Activity Codes - Global' selected. Three overlapping windows are shown, each displaying a table of activity codes. The windows are titled 'Activity Codes - Global', 'Activity Codes - EPS', and 'Activity Codes - Project'. The 'Global' window shows codes like 'Status' (W, R, P, C) and 'Phase' (P). The 'EPS' window shows codes under 'Engineering & Construction' (BRINK, DESGN, ELECTR, STAFF, STDRD) and 'Manufacturing' (EQUIP, LABOR-A, LABOR-B, LABOR-C). The 'Project' window shows codes under 'Nesbid Building...' (ITEM, TEMPC, SYSTC, HRDWR, SFTWR, CSDSG) and '4G Tablet Project' (Project Nano). Numbered callouts 1 through 4 highlight specific UI elements: 1 points to the 'Enterprise Data' sidebar, 2 points to the 'Status' icon in the Global window, 3 points to the 'Construction' icon in the EPS window, and 4 points to the 'Item' icon in the Project window.

Name *	Description	Maximum Length	Color	Secure
Status		7		
W	Work In Progress			
R	Ready to Work			
P	Planning in Progress			
C	Completed			
Phase		5		
P	Pre-Turnaround Work			

Name *	Description	Maximum Length	Color	Secure
Engineering & Construction				
Construction		7		
BRINK	Brink Contractor			
DESGN	Design Group			
ELECTR	Electrical Contr			
STAFF	Staff			
STDRD	Standard Contr			
Manufacturing				
EQUIP	Internal Equipm			
LABOR-A	Labor - Internal			
LABOR-B	Labor - External			
LABOR-C	Labor - Contrac			

Name *	Description	Maximum Length	Color
Nesbid Building...			
Item		7	
TEMPC	Temperature Control Equipment		
SYSTC	System Controller		
HRDWR	Hardware		
SFTWR	Software		
CSDSG	Conveyor System Design		
4G Tablet Project			
Project Nano			

Table of Key Activity Code Administration Elements

Item	Description
1	Navigation Controls: Expand Activities and select Activity Codes - EPS , Activity Codes - Global , or Activity Codes - Project in the Enterprise Data pane to configure activity codes.
2	Activity Codes - Global page: In this example, Phase is a global activity code. Like all activity codes, each of its values contains a short code Name, Description, and Color. For example, INSTL is the Installation Phase activity code value for the Phase activity code.
3	Activity Codes - EPS page: In this example, Construction is an EPS activity code. DESGN is the Design Group activity code value.
4	Activity Codes - Project page: This tab displays a third set of activity codes arranged by project for use only within that project.

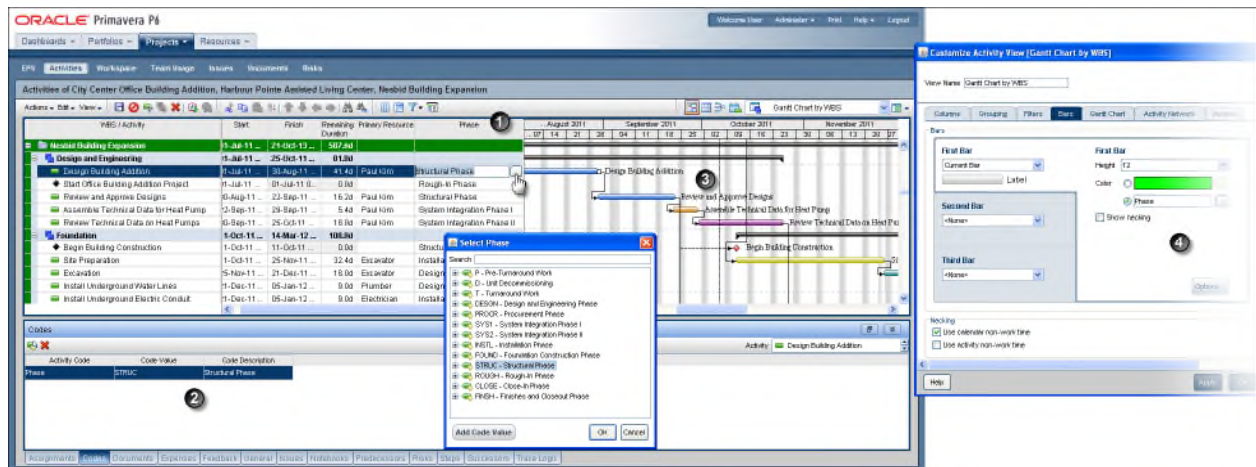


Table of Key Activity Code Assignment Elements

Item	Description
1	Phase activity code field: In this example, the user has added the Phase activity code field to the columns in the table and has assigned the STRUC - Structural Phase code value to the selected activity.
2	Codes detail window: Use this detail window to assign global, EPS, or project activity codes to the currently selected activity.
3	Activity Gantt chart: The color of the bars can be configured to display the corresponding colors of the assigned activity code.

Item	Description
4	Bars tab of the Customize Activity View dialog box: In this example, the Phase activity code will determine the color of the bar in the Gantt chart.

Creating Activity Codes

Create activity codes to organize activities into groups. Activity codes can be one of three levels: global, EPS, or project.

To create activity codes:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Activities** and click **Activity Codes - EPS, Activity Codes - Global**, or **Activity Codes - Project**.
- 4) On the **Activity Codes - EPS, Activity Codes - Global**, or **Activity Codes - Project** page:
 - a. Click **⚙️Row Actions** and select **Add Code**.
 - b. In the **Name** field, double-click and type a unique code name.
 - c. In the **Secure** field, select the option to make the code read-only for users without the necessary security privileges to make changes.
 - d. Move the code to the correct location in the list by clicking **⚙️Row Actions** and selecting **Move Up, Move Down, Move Left, or Move Right**.
 - e. In the Maximum Length field, double-click and click the up or down arrow to specify the maximum length for project code value names.
 - f. Click **Save**.

Tips

- ▶ If you intend to use BI Publisher, avoid using commas when creating data other than Project names. The way that data other than Project names is passed to BI Publisher can cause a comma to be interpreted as a delimiter between data items.
- ▶ Project-level activity code names must be unique across a project. Enterprise-level activity code names must be unique across all EPSs. Global activity code names must be unique across the organization.
- ▶ You can designate an activity code as secure only if you have the appropriate security privilege; otherwise, this option does not display.
- ▶ Activity codes at the same level are siblings. Subordinate activity codes are children.
- ▶ You can change EPS-level or project-level activity codes into Global activity codes, and you can change project-level activity codes into EPS-level activity codes. Click **⚙️Row Actions** and select **Move to Global** or **Move to EPS**.
- ▶ If you are working on the Activity Codes - Project page and the project you need is not visible, click **🔍Open Project**. In the Open Projects dialog box, select a project from the Available Projects list, click **>** to move the project to the Selected Projects list, and click **OK**.

Creating Activity Code Values

Create activity code values to represent variations within the larger scope of the activity code. These values, not the activity codes, will be assigned to projects. You can add code values for project-level, EPS-level, and global activity codes. These steps represent the minimum required to create an activity code value. You can configure an activity code value by modifying additional settings.

To create activity code values:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Activities** and click **Activity Codes - EPS**, **Activity Codes - Global**, or **Activity Codes - Project**.
- 4) On the Activity Codes - EPS, Activity Codes - Global, or Activity Codes - Project page:
 - a. Select a code or code value.
 - b. Click  **Row Actions** and select **Add Code Value** or **Add Child Code Value**.
 - c. In the **Name** field, double-click and type a unique code value name.
 - d. In the **Description** field, double-click and type a brief narrative about the code value.
 - e. Move the code value to the correct location in the list by clicking  **Row Actions** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
 - f. Click **Save**.

Tips

- ▶ The code value cannot exceed the Maximum Length specified by the activity code.
- ▶ Activity code values at the same level are siblings. Subordinate activity code values are children.
- ▶ You can also create activity code values from the Codes detail window on the Activities page.
- ▶ If you are working on the Activity Codes - Project page and the project you need is not visible, click  **Open Project**. In the Open Projects dialog box, select a project from the Available Projects list, click **>** to move the project to the Selected Projects list, and click **OK**.
- ▶ Each time you update the list of projects on the Activity Codes - Project page, the application saves the list of displayed projects.

Configuring Activity Code Values

Configure activity code values to reflect changing variations within the larger scope of the activity code.

To configure activity code values:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Activities** and click **Activity Codes - EPS**, **Activity Codes - Global**, or **Activity Codes - Project**.
- 4) On the Activity Codes - EPS, Activity Codes - Global, or Activity Codes - Project page, select an activity code value.

- a. In the Name field, double-click and type a name for the code value.
- b. In the Description field, double-click and type a brief narrative about the code value.
- c. In the Color field, double-click and select a color.

Note: In the Gantt chart and the Activity Calendar, activity status shown by activity code will display the color you apply to the activity code value.

- 5) On the Activity Codes page, click **Save**.

Tips

- ▶ Activity code values at the same level are siblings. Subordinate activity code values are children.
- ▶ You can also configure activity code values from the Codes detail window on the Activities page.
- ▶ If you are working on the Activity Codes - Project page and the project you need is not visible, click  **Open Project**. In the Open Projects dialog box, select a project from the Available Projects list, click > to move the project to the Selected Projects list, and click **OK**.

Assigning Activity Code Values to Activities

Assign activity code values to selected activities in **Classic View** to group and filter data.

To assign activity code values:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Codes** detail window.

In **Classic View**:

- a. In the **Codes** detail window, click  **Assign** (Insert).
- b. In the **Select Code Value** dialog box, assign code values and click **Close**.
- c. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. In the **Codes** detail window, click **Assign....**
- b. In the **Select Code Value** dialog box, assign code values and click **Close**.
- c. On the Activities page, click **Save**.

Creating Activity Code Values for Activities

You can quickly create activity code values in the Activity Codes detail window.

To create activity code values in the Activity Codes detail window:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Codes** detail window.

In **Classic View**:

- a. In the **Codes** detail window, click  **Assign** (Insert).
- b. In the **Select Code Value** dialog box:
 - Select the **Global**, **EPS**, or **Project** option for a list of activity codes.
 - Select an activity code to which you will add the value.
 - Click **Add Code Value**.
- c. In the **Add Activity Code Value** dialog box, enter a value in each field and click **Create**.
- d. In the **Select Code Value** dialog box:
 - Assign the value to the selected activity and click **Close**.
 - Or
 - Click **Close**.
- e. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In Standard View:

- a. In the **Codes** detail window, click **Assign...**
- b. In the **Select Code Value** dialog box:
 - Select the **Global**, **EPS**, or **Project** option for a list of activity codes.
 - Select an activity code to which you will add the value.
 - Click **+Add**  and select **Code Value**.
- c. In the **Add Activity Code Value** dialog box, enter a value in each field and click **Create**.
- d. In the **Select Code Value** dialog box:
 - Select the new code value and click **Assign**.
 - Or
 - Click **Close**.
- e. On the **Activities** page, click **Save**.

Tips

- ▶ In the **Code Value** field, you must enter a value that is unique across the project.
- ▶ You can also create activity code values from the **Enterprise Project Data** dialog box or the **Administer** menu.

About Gantt Charts

A Gantt chart is a graphical representation of the duration and sequence of activities or projects. It is useful for planning, scheduling, and monitoring progress against a timeline.

Working with the Activity Gantt Chart

Use the Activity Gantt chart to view the progression and relationships of activities or projects on a timeline.

Gantt chart bars and activity dates or durations

In **Classic View** you can easily update dates and durations by resizing or moving Gantt chart bars. When you change bar positions in a Gantt chart, the start and finish date columns update automatically to reflect the new bar position. After moving a Gantt bar, when you save your changes, the remaining duration is recalculated based on the new dates and the activity or project calendar. Because this calendar is applied when you save, if you move but do not resize a Gantt bar, the duration might shorten or lengthen based on the calendar's non-work time.

Note: If you click the center of a bar and drag it along the timescale, you will be prompted to add a **Start On** or **After** constraint. In the Gantt chart, you can impose only a **Start On** or **After** constraint.

Customizing the Gantt chart

You can change the progress line options or the timescale for the Gantt chart in the **Customize Activity View** dialog box.

Viewing the Gantt chart

In the Gantt chart, a vertical blue line represents the current data date for the project. Vertical sightlines appear at each minor increment (bottom) of the timescale. Horizontal sightlines appear at the bottom of every fifth table row. The timescale background is shaded to indicate non-work time based on the global default calendar.

Activity highlight

To quickly locate the activities you need to update, in **Classic View** you can use the Progress Spotlight feature, which highlights all activities that should have progressed during a specific time period. This time period is defined by the smallest increment of the current timescale since the last data date. For example, if the current timescale is set to Month/Week, Progress Spotlight highlights all activities that should have progressed during the week since the data date.

Configuring Gantt Charts

In Classic View, on the EPS page and in the **Classic View** of the Activities page, configure the Gantt chart to adjust activity beginning and finishing dates as well as constraints.

To configure the Gantt chart:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Activities** or **EPS**.
- 3) On the **Activities** or **EPS** page, click the **View**  menu and select  **Gantt Chart**.
- 4) On the **Gantt chart**:
 - a. To resize bars, select a bar and click and drag the beginning or end of it to a new date. (Only applicable on the **Activities** page.)
 - b. To focus the Gantt chart on a specific time interval, double-click a year, quarter, month, week, or day on the timescale. The Gantt chart timescale will expand or shrink to show the entire time interval.
 - c. To expand a specific area of the Gantt chart, click the timescale at the top of the Gantt chart once (the pointer will become a double-headed arrow), move the pointer to select the portion of the timescale you want to expand, and click again. You can perform this step several times.

- d. To apply a **Start On or After Activity Constraint**, click the middle of a bar and drag it along the timescale. (Only applicable on the **Activities** page.)
- 5) On the **Activities** or **EPS** page, click the **View ▾** menu and select  **Save** (Ctrl+S).

Tips

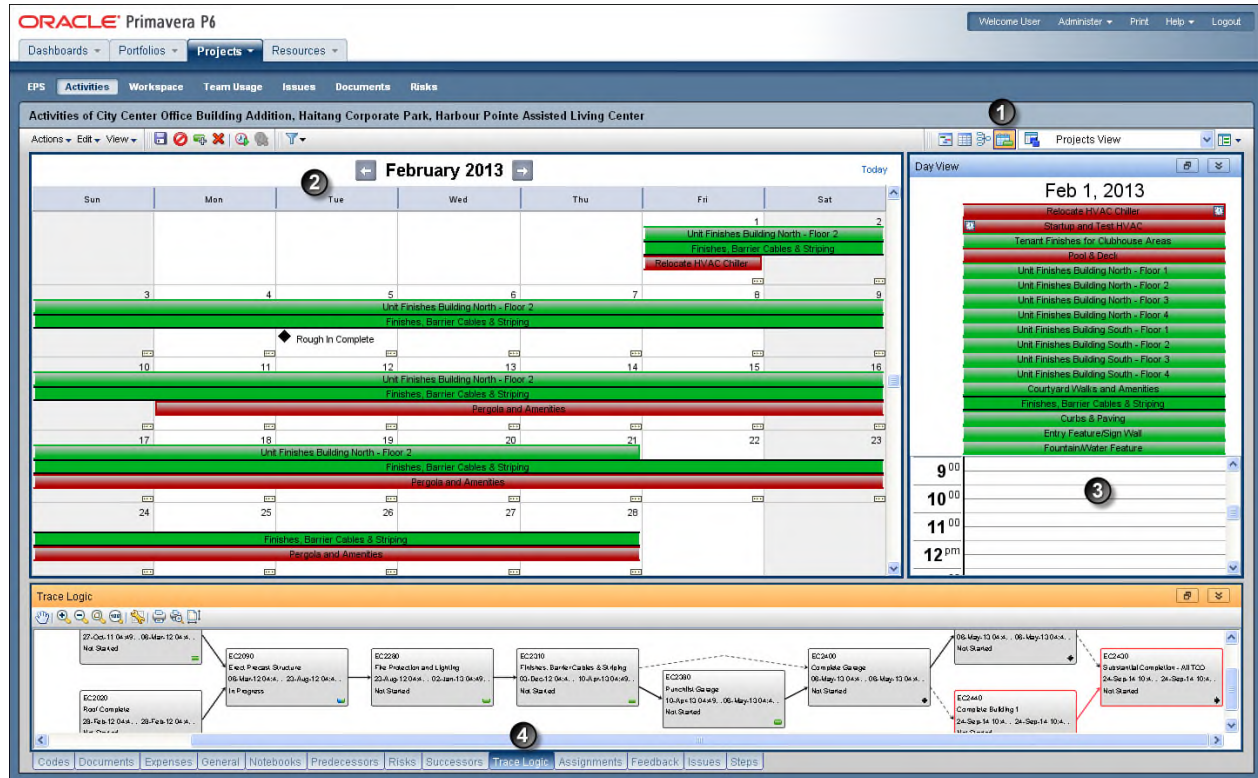
- ▶ To back out of a zoom, double-click the top bar of the timescale.
- ▶ After resizing or moving a Gantt bar, when you save your changes, the activity remaining duration is recalculated based on the new dates and the activity's calendar. Because the calendar for the activity is applied when you save, a date you specified for an activity might change slightly if it occurs during calendar non-work time. Also, if you move, but do not resize, a Gantt bar, the duration might shorten or lengthen based on the activity calendar's non-work time.
- ▶ If you select the option **Do not show this again** in the **Activity Constraint** dialog box, it will not reappear until the next time you log in.
- ▶ You can create or configure activity relationships directly in the **Gantt chart**.

About Calendar View

The Calendar View displays activities in a monthly calendar format. Bars on the calendar represent each activity and its duration. The Calendar View is available in **Classic View**.

Working with the Activity Calendar

In addition to the Activity Table format, you can also view activities in a calendar format, including a **Day View** detail window in **Classic View**. You can also include your choice of WBS and activity detail windows in this alternate viewing format.



The Activity Calendar Viewing Format

Item	Description
1	Activity View: Select an activity view that already includes the Calendar or click Calendar View .
2	Calendar Work Area: View project activities in the calendar by month. Use the controls at the top to view the next or previous month. In Calendar View, activity bars display in the color specified within the First Bar section of the Bars tab in the Customize Activity Views dialog box, or as the color assigned to an activity code value. Critical activities display as red bars. Milestones display as black diamonds.
3	Day View Detail Window: Double-click an activity in the Calendar View to see the activities assigned to an individual day. When more activities are scheduled on a day than can be displayed in a day of Calendar View, an ellipsis is displayed within the day.

Item	Description
4	Detail Windows: The same WBS and activity detail windows are available with any activity viewing format. In this example, the user has elected to show the Trace Logic detail window below the Calendar View.

About Progress Spotlight

Progress Spotlight highlights the activities that should have progressed during a specific time period. A yellow curtain is dropped behind the activities to enable quick navigation to the activities in this timeperiod. Use the Progress Spotlight feature in **Classic View** (View, Progress Spotlight) to highlight activities in the layout that have started, progressed, or finished between the previous data date and the new data date.

About Progress Lines

A progress line is a way to graphically trace progress on activities and see how a project is performing with regard to its scheduled deadlines. When a progress line is drawn to the left of the data date, the activity is behind schedule. When a progress line is drawn to the data date, the activity is on schedule. When a progress line is drawn to the right of the data date, the activity is ahead of schedule.

Progress lines can be either progress point lines or variance lines. As a progress point line, the progress line shows either the remaining duration of an activity or the percent of the activity that has been completed. Progress points are determined by calculating the difference between current and baseline dates for each activity, or based on actual progress determined by each activity's remaining duration or percent complete. As a variance line, the progress line can represent an inconsistency between the planned and actual start dates or finish dates of a task.

About Grouping and Sorting

To simplify the display of complex tables of data, you can group rows of similar data and sort the grouped bands as well as the data under them. Grouping helps you block distracting data and focus only on the information you need. It also permits you to collapse and expand hierarchical arrangements of your data rather than navigate large flat lists.

Note: If you apply grouping and sorting in a view, data is sorted only within each grouping band. For example, if you group the **Classic View** of the Activities page by WBS and sort it by Start date, then activities may look as though they are out of order in the Gantt chart. The activities are sorted, but only within their grouping bands.

You can sort the EPS page, Assignments page, and the **Classic View** of the Activities page by up to five columns in your view and specify the order in which column sorts are applied. For example, you might sort by Primary Resource, then Start date, then by Planned duration, and finally by Activity ID. This would mean that if more than one activity has the same Primary Resource, Start Date, and Planned Duration, they will be in the same place in the list and sorted in order of Activity ID.

When you sort your view by multiple columns, the column headings will show numbers representing the sort order as well as an arrow showing whether the sort is ascending or descending. It is not possible to sort hierarchically, even for data items which have a hierarchical structure.

Grouping and Sorting Information

Grouping and sorting data helps reduce its visual complexity.

To group and sort data:

- 1) Navigate to a page supporting grouping and sorting.
- 2) If available in a toolbar, click  **Grouping** and select a grouping option. The entries are grouped hierarchically and sorted alphabetically.
- 3) If available in a toolbar, click  **Group...** to open the **Customize Groupings** dialog box.
- 4) On the **Customize Groupings** dialog box:
 - a. In the **Level 1** Field list, select the first field you want to use to group all other data. The available fields are arranged into categories that apply to your specific context within the application.
 - b. In the remaining levels, select additional fields you want to use to further group data empirically.
 - c. For each field, in the **To Level** list, select how deep the hierarchical groupings of each field should appear. For example, if your project contained ten levels of hierarchical WBS elements, enter **2** here if you only want to group all activities by their top two WBS values. This is useful if you only want to see tasks grouped into high-level arrangements, making them easier to scan. Instead of having to click through each nested level, you might only be interested in seeing activities for *Phase II* that fall under the *Planning* stage. To see activities grouped by all ten levels, choose **10** or **All**.
 - d. For each field, in the **Sort Order** list, select how you want the grouped data bands to be sorted when your grouping options are applied.

Note: You can click a column header in the actual table you just customized later to change the column used to sort the data rows under each band, but the sort order for the grouping bands themselves is only

determined by your selections in the Sort Order list on the Customize Groupings dialog box.

- e. Click **OK** to close the dialog box and apply your grouping options to the page you selected in step 1.

5) Click **View**  and select  **Save View**.

About Activity Owners

Users in P6 can be designated as activity owners. An activity owner who has Projects module access and the required privileges can update the status and other details for their assigned activities.

When adding an activity to a project, the activity can be assigned an activity owner or a resource assignment. Activity owners are typically used when resource assignments are not used for reporting status on activities, or when one person is responsible for reporting for a team or a crew. For example, a construction foreman is assigned as an activity owner and is responsible for reporting status on the progress for the entire crew.

This feature can be used in combination with Reflection projects in P6 Professional to enable controlled merging of contractor schedules with activity owner schedules.

Activity Owners can report status on activities in P6 or in P6 Team Member interfaces. If status is reported in P6 Team Member interfaces, project managers can turn on Team Member status reviews and review, update, and approve the activity updates in P6.

Assigning an Activity Owner to an Activity

Assign an activity owner to an activity to designate a user who is responsible for reporting status on the activity.

To assign an activity owner to an activity:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - a. Select the activity to which you want to assign the activity owner.
 - b. Double-click the **Owner** field.
- 4) In the **Select Owner** dialog box, select a user and click **OK**.
 - a. In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - b. In **Standard View** click **Save**.

Tips

An activity owner must be a P6 user with Projects module access and the required privileges.

About Resources

A resource is any quantifiable item in limited supply and of sufficient value to justify tracking and assigning to specific activities for a project. Resources include general or specialized labor, non-labor items such as equipment, and material items such as bricks.

Resources perform roles, if defined. Resources are indirectly assigned to activities by first planning the role required. It is also possible to directly assign resources to activities. For example, Chris, a level 2 contractor with the confirmed skills and status, is directly assigned to activity 01. However, a technician level 4 role is assigned to activity 02. The project will proceed while management determines the best available resource to fulfill this role.

Assigning Resources to an Activity

Perform these steps to assign one or more resources to an activity.

To assign resources to an activity:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Assignments** detail window.

In **Classic View**:

- a. In the **Assignments** detail window, click  **Assign Resource and Save** (Ctrl+Alt+R).
- b. In the **Select Resource** dialog box:
 - Select one or more resources.

Note: Mark **View Usage** to show the usage spreadsheet and histogram for the selected resource. The usage spreadsheet and histogram do not display if you select multiple resources or a row which does not represent a resource.

- Click **Assign**.
- Click **Close** when you are finished.

In **Standard View**:

- a. In the **Assignments** detail window, click **Assign...** and select **Resource**.
- b. In the **Select a Resource** dialog box:
 - Select one or more resources.

Note: Click **Show Usage** » to show the usage spreadsheet and histogram for the selected resource. The usage spreadsheet and histogram show the first resource you selected if you select multiple resources.

- Click **Assign**.
- c. Confirm whether you want to send an email notification to the affected resources.

Tips

- ▶ When assigning resources to activities, the list of available resources includes only the resources that belong to your access node, based on resource access, and resources who are currently assigned to the project.
- ▶ When you assign a resource to an activity that does not have any resource assignments, the resource is identified as the primary resource. If you subsequently assign more resources to the same activity, you can change the primary resource assignment for the activity by selecting the **Primary Resource** option for one of the resources in the **Assignments** detail window. If the **Primary Resource** option is not displayed in the **Assignments** detail window, click  ▾ **Customize Columns**, select **General** and click **Primary Resource**.
- ▶ When you create, delete, or modify a resource assignment, your changes are automatically saved when you select another activity. You will not be able to undo the changes after selecting a different activity.

Assigning Resources to Multiple Activities

In Classic View, perform these steps to assign resources to multiple activities at one time.

To assign resources to multiple activities:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, use **Ctrl+click** to select one or more activities to which you want to assign resources.

In **Classic View**:

- a. Click the **Actions**  menu and select  **Assign Resource**.
- b. In the **Select Resource** dialog box select one or more resources and click **Assign**.
- c. If you have another activity to staff:
 - On the **Activities** page, click on the activity.
 - In the **Select Resource** dialog box, select the resources and click **Assign**.

Note: Mark **View Usage** to show the usage spreadsheet and histogram for the selected resource. The usage spreadsheet and histogram do not display if you select multiple resources or a row which does not represent a resource.

- d. Click **Close** when you are finished.

In **Standard View**:

- a. Click  **Row Actions** and select **Assign Resource**.
- b. In the **Select Resource** dialog box select one or more resources.

Note: Click **Show Usage** » to show the usage chart for the selected resource. If you select more than one resource, the usage chart only shows usage for the first resource you selected.

- c. Click **Select**.

Tips

- ▶ To view all resources assigned to an activity, click the **Assignments** detail window.
- ▶ When assigning resources to activities, the list of available resources includes only the resources that belong to your access node, based on resource access, and resources who are currently assigned to the project.
- ▶ When you assign a resource to an activity that does not have any resource assignments, the resource is identified as the primary resource. If you subsequently assign more resources to the same activity, you can change the primary resource assignment for the activity by selecting the **Primary Resource** option for one of the resources in the **Assignments** detail window. If the **Primary Resource** option is not displayed in the **Assignments** detail window, click  ▾ **Customize Columns**, select **General** and click **Primary Resource**.

Configuring Activity Resources

You can configure resource information for activities, including the Planned Units/Time, Proficiency, or Rate Type for a resource.

To configure activity resources:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Assignments** detail window.
- 4) In the **Assignments** detail window:
 - a. Select a resource.
 - b. Add or remove the columns you need to configure to the detail window.
 - c. Select an option or enter a value for each field.
 - In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View** click **Save**.

Tips

- ▶ You can also configure activity resources from the **Open Requests for Resources** portlet of the **Dashboards** page.
- ▶ When you create, delete, or modify a resource assignment, your changes are automatically saved when you select another activity. You will not be able to undo the changes after selecting a different activity.

Assigning Locations to Resources

Assign locations to resources so you can report on resources by location in Analytics.

To assign a location to a resource:

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Administration**.
- 3) On the Administration page, click the **Resources** tab.
- 4) On the **Resources** tab, click the **General** detail window.
 - a. In the **General** detail window, click **...Select** in the **Location** field.
 - b. In the **Select Location** dialog box, select the appropriate location and click **Assign**.
- 5) Click **Save**.

Tips

- ▶ You must create locations before you can assign them.
- ▶ In classic view, you can add a new location quickly by clicking the **Add Location** button in the **Select Location** the dialog box. The new location will be added instantly to the dictionary and you can add it to Activities, Resources and Projects.
- ▶ You must have the Edit Resources global privilege to assign locations to resources.

Adding Activity Resource Estimates

You can plan resource usage by adding resource estimates to activities.

To add resource estimates:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Assignments** detail window.
- 4) In the **Assignments** detail window:
 - a. Assign a resource or role to the selected activity.
 - b. Add the **Planned Units/Time**, **Planned Units**, **Planned Cost**, and **Planned Duration** columns to the detail window.
 - c. Select an option or enter a value for each field.
 - In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View** click **Save**.

Requesting Resources for Activities

When planning for an activity, you can assign a role to the activity and replace that role with the appropriate resource at a later time. To assign a role with specific search criteria, including role proficiency, resource name, and resource code, use the **Request Resources** feature.

To request resources:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) Click **Switch to Classic View**.
- 4) On the **Activities** page, select an activity and click the **Assignments** detail window.

- 5) In the **Assignments** detail window, click  **Request Resources** (Ctrl+Alt+Q).
- 6) In the **Open a request for a resource** dialog box, enter criteria for the resource and click **Save**.

Tips

- ▶ The list of available resources includes only the resources you have access to, based on resource security, and current project resources.
- ▶ You must specify a **Primary Role**.
- ▶ The resource request criteria is stored and available when assigning resources to roles. To view resource request criteria, click the **Yes** link in the **Search Criteria** field.

Specifying Resource Assignment Rates

You can set rate information for resources or roles.

To specify resource assignment rates:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity in the table and click the **Assignments** detail window.
- 4) In the **Assignments** detail window:
 - a. Add the **Rate Type** and **Rate Source** columns.
 - b. Select an option for the type and source.
 - c. Save your changes.
 - In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View** click **Save**.

Tips

When you save your changes, costs for the assignment are recalculated based on the new rate: Cost equals Units times Price/Unit. You can add the **Price/Unit** column to the detail window to view the price used. To manually specify a price/unit, select **Override** in the **Rate Source** field and type a value in the **Price/Unit** field.

Assigning Resource Curves to Resource or Role Assignments from the Activities Page

You can assign a resource distribution curve to any resource or role assignment on activities with a duration type of Fixed Duration and Units/Time or Fixed Duration & Units. Resource usage and costs are distributed evenly during an activity unless you specify nonlinear distribution using curves.

To assign a resource curve:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.

In **Classic View**:

- a. On the **Activities** page, to set the **Duration Type** to **Fixed Duration and Units/Time** or **Fixed Duration & Units**, click the **View** ▾ menu and select  **Columns**.
 - b. In the **Customize Columns** dialog box:
 - Expand **General** in the **Available Columns** section.
 - Double-click **Duration Type**.
 - Click **OK**.
 - c. On the **Activities** page:
 - Select **Fixed Duration and Units/Time** or **Fixed Duration & Units** from the **Duration Type** list for the activity whose curve you want to configure.
 - Click the **Assignments** detail window.
-
- Note:** You must assign a resource or role to the activity.
-
- d. In the **Assignments** detail window, double-click the **Curve** field, and click .
 - e. In the **Select Curves** dialog box, select a curve and click **OK**.
 - f. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. On the **Activities** page, to set the **Duration Type** to **Fixed Duration and Units/Time** or **Fixed Duration & Units**, click **✕Customize View** and click the **Columns** tab.
 - b. On the **Columns** tab:
 - Expand **General** in the **Available Columns** section.
 - Double-click **Duration Type**.
 - Click **Save and Apply**.
 - c. On the **Activities** page:
 - Select **Fixed Duration and Units/Time** or **Fixed Duration & Units** from the **Duration Type** list for the activity whose curve you want to configure.
 - Click the **Assignments** detail window.
-
- Note:** You must assign a resource or role to the activity.
-
- d. In the **Assignments** detail window, double-click the **Curve** field, and click **...Select**.
 - e. In the **Select a Resource Curve** dialog box, select a curve and click **OK**.

Tips

- ▶ If you assign a resource curve to an assignment with a manual curve, the manually-entered future period values will be overwritten.
- ▶ Resource curves do not support expenses. The **Accrual Type** will continue to spread the expenses.
- ▶ If the **Curve** column is not available, add it to the detail window.
- ▶ You can also assign resource curves to resource or role assignments from the **Resources Assignments** page.

Assigning Resources to Unstaffed Activities

You can assign resources to activities that currently have no resources.

To assign resources to unstaffed activities:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Team Usage**.
- 3) On the **Team Usage** page:
 - a. Click **Role**.
 - b. Expand a role and select a project.
- 4) In the **Role Activities for Project** dialog box, select the **Select** option next to an assignment and click **Assign Resource....**
- 5) In the **Select Resource** dialog box:
 - a. Select an option on the **View Resources By** list.
 - b. Select a resource.
 - c. Click **Select**.
- 6) In the **Assignment Settings** dialog box:
 - a. Select whether to **Use the Price per Unit from the** resource or assignment.
 - b. Select whether to **Use the Units Per time and Overtime Factor from** resource or assignment.
 - c. Click **OK**.
- 7) Click **Close**.

Tips

- ▶ The list of resources you can select from is determined by your resource access privileges and individual resource's current project association.
- ▶ To review allocation details before assigning, in the **Select Resource** dialog box, select a resource and click **Show Usage** ».
- ▶ To save time, you can search for resources who meet specific requirements.
- ▶ You can also assign resources to activities from the **Assignments** detail window of the **Activities** page, the **Open Requests for Resources** portlet of a dashboard, or the **Assignments** page of the **Resources** section.

About the Recalculate Assignment Costs Feature

Whenever any of the five possible price per unit values changes for a resource or role already assigned to activities, run the *Recalculate Assignment Costs* feature. This feature recalculates any changed assignment costs.

You should also run this feature during scheduling or leveling because dates will change and resources might be using time varying rates. This means their activities can shift into periods with different effective prices. Therefore, the costs would have to be recalculated.

The *Recalculate Assignment Costs* feature only applies to currently open projects. This provides project managers with control over recalculating costs only when prices have changed.

When another user changes prices for resources or roles, P6 will display a message indicating that the *Recalculate Assignment Costs* feature should be run in order for project assignments to use the new values.

This feature can be run at any time from the Activities page or scheduled as a service.

Recalculating Assignment Costs

Recalculate assignment costs to update price per time values on activities. This ensures that project costs reflect any updates.

To recalculate assignment costs:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Select an activity.
 - b. Click the **Actions**  menu and select **Run**  **Recalculate Assignment Costs**.
 - c. In the **Recalculate Assignment Costs** dialog box:
 - d. (Optional) Select the **Synchronize Overtime Factor** option to synchronize the overtime factor defined for each resource when recalculating costs.
 - e. Click **Recalculate**.

In **Standard View**:

- a. Select an activity.
- b. Click **Actions**  and select **Recalculate Assignment Costs**.
- c. In the **Recalculate Assignment Costs** dialog box:
- d. (Optional) Select the **Synchronize overtime factor while recalculating costs** option to synchronize the overtime factor defined for each resource when recalculating costs.
- e. Click **Recalculate**.

Tips

- ▶ When activity dates change, run **Recalculate Assignment Costs** to update resource costs based on the new dates.
- ▶ These services are removed from the database based on the **ASAP Cleanup Rate** your P6 administrator specifies on the **Configurations** tab in Primavera P6 Administrator. Once the time is met all ASAP jobs that have a status other than running or delegated will be removed from the table automatically. Running and delegated jobs will be removed if they are older than the cleanup rate or if they are older than one day, whichever is greater.

Configuring Resource Leveling Options and Priorities

Level resources in your project schedules to ensure that resource demand does not exceed resource availability. To handle scheduling conflicts that might occur during leveling, you can add priorities that specify which project or activity is leveled first. Before leveling, configure the options and priorities specified in the steps below.

To configure resource leveling options and priorities:

- 1) Click **Projects** .
- 2) On the **Projects** navigation bar, click **EPS**.

In **Classic View**:

 - a. On the **EPS** page, click the **View** ▾ menu and select  **Columns**.
 - b. In the **Customize Columns** dialog box, expand the **General** section in the **Available Columns** list and double-click **Project Leveling Priority** to add it to the **Selected Columns** list and click **OK**.
 - c. On the **EPS** page:
 - Enter a value in the **Project Leveling Priority** field for each project.

Note: Enter a value from 1, the highest priority, to 100, the lowest. The default is 10.

 - Click the **Actions**  menu and select  **Save** (Ctrl+S).
 - d. On the **Projects** navigation bar, click **Activities**.
 - e. On the **Activities** page, click the **View** ▾ menu and select  **Columns**.
 - f. In the **Customize Columns** dialog box, expand the **General** section in the **Available Columns** list and double-click **Activity Leveling Priority** to add it to the **Selected Columns** list and click **OK**.
 - g. On the **Activities** page:
 - Enter a value in the **Activity Leveling Priority** field only for those activities that require a specific change to their leveling priority. For example, a **Normal** activity might become a **Top** priority.
 - Click the **Actions**  menu and select **Run** ▸  **Leveler...** (Shift+F9).
 - h. In the **Level Resources** dialog box, click the **Options** tab.
 - i. On the **Options** tab:
 - Select the **Consider assignments in other projects with priority equal or higher than** option and select a value from the list to include in the leveling process projects that are not currently open, but that do fit the required priority level.
 - Select or clear the **Preserve scheduled early and late dates** option to determine if the leveling process can alter activity dates or not. If you select this option, configure the options it enables.
 - Select or clear the **Recalculate assignment costs when leveling** option to determine if the application should automatically recalculate assignment costs if they are affected by the leveling.
 - Select the **Display leveling log upon completion** option if you would like to see a summary of activities delayed by leveling and exceptions made for critical activities.

- In the **Leveling Priorities** section, specify priorities that will be used to level the activities. Add priorities in the order in which you want the application to consider them. For each priority you add, repeat the following steps:
 - Click  **Add**.
 - In the **Field Name** list, select **Project Leveling Priority**, **Activity Leveling Priority**, or another field.
 - In the **Sort Order** list, select *Ascending*, *Descending*, or, for some fields, *Hierarchy*.
- j. In the **Level Resources** dialog box, click the **Resources** tab.
- k. On the **Resources** tab, select an option and click **Save**.

Note: If you select **Selected Resources**, add resources to the **Selected Resources** list from the **Available Resources** list.

In Standard View:

- a. On the **EPS** page, click  **Customize View** and click **Columns**.
- b. On the **Columns** tab, expand the **General** section in the **Available Columns** list and double-click **Project Leveling Priority** to add it to the **Selected Columns** list and click **Save and Apply**.
- c. On the **EPS** page:
- Enter a value in the **Project Leveling Priority** field for each project.
-
- Note:** Enter a value from 1, the highest priority, to 100, the lowest. The default is 10.
-
- Click **Save** when you are done.
- d. On the **Projects** navigation bar, click **Activities**.
- e. On the **Activities** page, click  **Customize View** and select **Columns**.
- f. On the **Columns** tab, expand the **General** section in the **Available Columns** list and double-click **Activity Leveling Priority** to add it to the **Selected Columns** list and click **Save and Apply**.
- g. On the **Activities** page:
- Enter a value in the **Activity Leveling Priority** field only for those activities that require a specific change to their leveling priority. For example, a **Normal** activity might become a **Top** priority.
 - Click **Actions**  and select **Leveler**.
- h. In the **Level Resources** dialog box:
- Select the **Consider assignments in other projects with priority equal or higher than** option and select a value from the list to include in the leveling process projects that are not currently open, but that do fit the required priority level.
 - Select or clear the **Preserve scheduled early and late dates** option to determine if the leveling process can alter activity dates or not. If you select this option, configure the options it enables.

- Select or clear the **Recalculate assignment costs when leveling** option to determine if the application should automatically recalculate assignment costs if they are affected by the leveling.
- Select the **Display leveling log upon completion** option if you would like to see a summary of activities delayed by leveling and exceptions made for critical activities.
- i. On the **Resources** tab, choose whether to level **All resources** or **Selected resources**. If you choose to level **Selected Resources**, double click the resources you want to level in the **Available** list to add them to the **Selected** list.
- j. On the **Prioritization** tab, specify priorities that will be used to level the activities. Add priorities in the order in which you want the application to consider them. For each priority you add, repeat the following steps:
 - Click  **Row Actions** and select **Add Above** or **Add Below**.
 - In the **Field Name** list, select **Project Leveling Priority**, **Activity Leveling Priority**, or another field.
 - In the **Sort Order** list, select *Ascending*, *Descending*, or, for some fields, *Hierarchy*.
- k. Click **Save**.

Tips

You cannot edit the **Project Leveling Priority** of a project if you do not have the appropriate security privileges or if the project is checked out or opened exclusively by another user.

Leveling Project Resources

Level one or more projects whenever the required shared or critical resources have limited supply or availability or to generally keep resource usage at a constant level. For example, when a resource has been assigned to more than one activity during the same time period, level the projects to eliminate potential resource over-allocation. Once you have performed resource leveling against your project or projects, you will be able to see where resources are overallocated and make decisions about whether work assigned to some resources should be redistributed to other available resources.

To level resources in one or more projects:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Click the **Actions**  menu and select **Run**  **Leveler...** (Shift+F9).
 - b. In the **Level Resources** dialog box:
 - Select the **Options** tab to configure resource leveling options and set optional leveling priorities to specify which assignments are leveled first when a conflict exists.
 - Select the **Resources** tab to specify which resources should be leveled.
 - (Optional) Click **Save** to save your settings and close the dialog box.
 - Click **Level**.

In Standard View:

- a. Click **Actions**  and select **Leveler**.
- b. In the **Level Resources** dialog box:
 - Configure resource leveling options.
 - Select the **Resources** tab to specify which resources should be leveled.
 - Select the **Prioritization** tab to specify which assignments are leveled first when a conflict exists.
 - (Optional) Click **Save** to save your settings and close the dialog box.
 - Click **Level Now**.

Tips

- ▶ Using the **Project Scheduled Services** page, you can configure scheduled services to have the application level resources automatically.
- ▶ These services are removed from the database based on the **ASAP Cleanup Rate** your P6 administrator specifies on the **Configurations** tab in Primavera P6 Administrator. Once the time is met all ASAP jobs that have a status other than running or delegated will be removed from the table automatically. Running and delegated jobs will be removed if they are older than the cleanup rate or if they are older than one day, whichever is greater.

About the Check Resource Overallocation Service

Project managers and resource managers need a way to easily identify resource bottlenecks that could jeopardize the outcome of a project. The Check Resource Overallocation service provides an efficient way to identify and resolve overallocated resources.

The Check Resource Overallocation service generates a report listing all resources assigned to activities in the projects open in your current view who have exceeded capacity for the selected time period. You can edit the resource assignments directly in the report or from the **Activities** page or **Resource Assignments** page.

Note: Template projects, Requested projects, and What-if Scenario projects are not included in the Check Resource Overallocation service.

Table of Check Resource Overallocation Service Elements

Item	Description
1	You initiate the Check Resource Overallocation service from the Actions menu on the Activities page. The Publish Project service runs on all projects open in your view to ensure the latest project data is used when calculating resource utilization. If a resource is assigned to a project that is not open in the current view, the resource data as of the last publish project run date is used.
2	To view the status of the Check Resource Overallocation service, click View Service Status... on the Administer menu to open the Service Status dialog box.
3	The results of the Check Resource Overallocation service are displayed in the the Notifications panel. Click the Notifications button to view the panel. If an overallocation is identified, you can click on the message text to open the Overallocation Report .
4	You can make updates directly to this report, including reassigning resources, changing assignment dates, updating units, or updating the remaining time/units.

Checking for and Resolving Overallocated Resources

In Classic View, run the Check Resource Overallocation service to identify where resource demand exceeds availability.

Note: Template projects, Requested projects, and What-if Scenario projects are not included in the Check Resource Overallocation service.

To run the Check Resource Overallocation service:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the Activities page, click the **Actions**  menu and select **Run ▶ Check Resource Overallocation...**
- 4) In the Check Resource Overallocation dialog box:
 - a. Select a date to begin the overallocation check.

Note: The service checks from the beginning of the week. If you did not select the first day of the week, the service will automatically begin on the first day of the selected week.

- b. Select the number of months to include in the overallocation check.
- c. Click **Run**.

The results of the Check Resource Overallocation service are displayed in the Notifications panel after the service has run.

- 5) In the footer, click the **Notifications** button.
- 6) In the Notifications panel, if overallocations exist, click on the overallocated resources message.
- 7) In the Overallocation Report dialog box, review the time periods and the activities where the overallocation occurs. You can make adjustments directly on the report.

Note: The allocation data for projects not open in the current view is represented as *Projects: Other Projects* in the report.

Tips

- ▶ Enable Publication must be turned on for all projects you want to include in the Check Resource Overallocation service run. On the EPS page, select a project, click the **Actions**  menu and select  **Set Project Preferences....** Click Services and select Enable Publication.
- ▶ To check the status of the Check Resource Overallocation service, click the **User**  menu and select **View Service Status...**
- ▶ If Check Resource Overallocation is not enabled, either:
 - ▶ none of the projects in your view have Enable Publication turned on, or
 - ▶ the Enable Publish Projects application setting is not enabled. Contact your administrator.

About Resource Assignments

The Resources Assignments area enables you to view a customized list of resource or role assignments based on the filters you assign to the view. Using this view, you can analyze assignment unit and cost values and make any necessary modifications to the assignment data. You can also view unit and cost values in a spreadsheet based on a specified timescale using the spreadsheet. In addition, you can extend your customized view by displaying the Gantt chart, which is a graphical display of the start and end dates for the resource assignments. In Classic View you can perform future period planning for resource and role assignments.

Assigning Resources to an Activity

Perform these steps to assign one or more resources to an activity.

To assign resources to an activity:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Assignments** detail window.

In **Classic View**:

 - a. In the **Assignments** detail window, click  **Assign Resource and Save** (Ctrl+Alt+R).
 - b. In the **Select Resource** dialog box:
 - Select one or more resources.

Note: Mark **View Usage** to show the usage spreadsheet and histogram for the selected resource. The usage spreadsheet and histogram do not display if you select multiple resources or a row which does not represent a resource.

- Click **Assign**.
- Click **Close** when you are finished.

In Standard View:

- a. In the **Assignments** detail window, click **Assign...** and select **Resource**.
- b. In the **Select a Resource** dialog box:
 - Select one or more resources.

Note: Click **Show Usage** » to show the usage spreadsheet and histogram for the selected resource. The usage spreadsheet and histogram show the first resource you selected if you select multiple resources.

- Click **Assign**.
- c. Confirm whether you want to send an email notification to the affected resources.

Tips

- ▶ When assigning resources to activities, the list of available resources includes only the resources that belong to your access node, based on resource access, and resources who are currently assigned to the project.
- ▶ When you assign a resource to an activity that does not have any resource assignments, the resource is identified as the primary resource. If you subsequently assign more resources to the same activity, you can change the primary resource assignment for the activity by selecting the **Primary Resource** option for one of the resources in the **Assignments** detail window. If the **Primary Resource** option is not displayed in the **Assignments** detail window, click  ▾ **Customize Columns**, select **General** and click **Primary Resource**.
- ▶ When you create, delete, or modify a resource assignment, your changes are automatically saved when you select another activity. You will not be able to undo the changes after selecting a different activity.

Configuring Activity Resources

You can configure resource information for activities, including the Planned Units/Time, Proficiency, or Rate Type for a resource.

To configure activity resources:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Assignments** detail window.
- 4) In the **Assignments** detail window:

- a. Select a resource.
- b. Add or remove the columns you need to configure to the detail window.
- c. Select an option or enter a value for each field.
 - In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View** click **Save**.

Tips

- ▶ You can also configure activity resources from the **Open Requests for Resources** portlet of the **Dashboards** page.
- ▶ When you create, delete, or modify a resource assignment, your changes are automatically saved when you select another activity. You will not be able to undo the changes after selecting a different activity.

Requesting Resources for Activities

When planning for an activity, you can assign a role to the activity and replace that role with the appropriate resource at a later time. To assign a role with specific search criteria, including role proficiency, resource name, and resource code, use the **Request Resources** feature.

To request resources:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) Click **Switch to Classic View**.
- 4) On the **Activities** page, select an activity and click the **Assignments** detail window.
- 5) In the **Assignments** detail window, click  **Request Resources** (Ctrl+Alt+Q).
- 6) In the **Open a request for a resource** dialog box, enter criteria for the resource and click **Save**.

Tips

- ▶ The list of available resources includes only the resources you have access to, based on resource security, and current project resources.
- ▶ You must specify a **Primary Role**.
- ▶ The resource request criteria is stored and available when assigning resources to roles. To view resource request criteria, click the **Yes** link in the **Search Criteria** field.

Specifying Resource Assignment Rates

You can set rate information for resources or roles.

To specify resource assignment rates:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity in the table and click the **Assignments** detail window.

- 4) In the **Assignments** detail window:
 - a. Add the **Rate Type** and **Rate Source** columns.
 - b. Select an option for the type and source.
 - c. Save your changes.
 - In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View** click **Save**.

Tips

When you save your changes, costs for the assignment are recalculated based on the new rate: Cost equals Units times Price/Unit. You can add the **Price/Unit** column to the detail window to view the price used. To manually specify a price/unit, select **Override** in the **Rate Source** field and type a value in the **Price/Unit** field.

Adding Activity Resource Estimates

You can plan resource usage by adding resource estimates to activities.

To add resource estimates:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Assignments** detail window.
- 4) In the **Assignments** detail window:
 - a. Assign a resource or role to the selected activity.
 - b. Add the **Planned Units/Time**, **Planned Units**, **Planned Cost**, and **Planned Duration** columns to the detail window.
 - c. Select an option or enter a value for each field.
 - In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View** click **Save**.

About Roles

Roles represent personnel job titles or skills needed to execute projects. Architect, general laborer, quality assurance tester, and engineer are all examples of possible roles. You can create a standard set of roles that you then assign to labor and non-labor resources and activities for all projects in the organization. You can establish an unlimited number of roles and organize them in a hierarchy for easier management and assignment. The set of roles you assign to an activity defines the activity's skill requirements. You can also define multiple price per unit rates and unit per time limits for each role to accurately plan future costs and allocation.

You can assign one or more roles to individual resources. When you assign roles to a resource, you also indicate their proficiency in that role and identify which role is their primary role. A primary role is the main role the resource is currently performing. The proficiency level describes the resource's skill level in that role. For example, Joe is a resource and fills the role of both software engineer and manager. He has been a software engineer for 20 years and is *1 - Master* in that role; however, his primary role is manager, which he has been for 5 years and his proficiency level is *3- Skilled*.

Assign roles to activities as you would resources during project schedule and cost planning. When your plans are finalized, you can replace roles with resources, based on each activity's role and skill requirements.

Assigning Roles to an Activity

Assign roles to an activity to show which roles are needed to perform the work required for an activity. Perform these steps to assign one or more roles to an activity.

To assign roles to an activity:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Assignments** detail window.

In **Classic View**:

- a. In the **Assignments** detail window, click  **Assign Role and Save** (Ctrl+Alt+O).
- b. In the **Select Role** dialog box:
 - Select one or more roles and click **Assign**.
 - Click **Close** when you are finished.

In **Standard View**:

- a. In the **Assignments** detail window, click **Assign...**  and select **Role**.
- b. In the **Select a Role** dialog box:
 - Select a role.
 - Click **Show Usage**  to view the role usage.
 - Click **Assign**.

Tips

The **Assignments** detail window enables you to see all resources and roles assigned to any activity. You can also assign roles to an activity from the **Actions**  menu on the **Activities** page.

Assigning Roles to Multiple Activities

In Classic View, perform these steps to assign roles to multiple activities at one time.

To assign roles to multiple activities:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select one or more activities to which you want to assign roles.

In **Classic View**:

- a. Click the **Actions**  menu and select  **Assign Role**.
- b. In the **Select Role** dialog box:
 - Select one or more roles and click **Assign**.
 - Click **Close**.

In **Standard View**:

- a. Click  **Row Actions** and select **Assign Role**.
- b. In the **Select Role** dialog box select one or more roles and click **Select**.

Tips

- ▶ To select more than one item, use **Shift+click** to select contiguous items or **Ctrl+click** to select individual items.
- ▶ When the **Select Role** dialog box is open, you can click on any activity on the **Activities** page to assign roles.
- ▶ To view all roles and resources assigned to an activity, select the activity, then click the **Assignments** detail window.

Configuring Activity Roles

You can configure role information for activities.

To configure activity roles:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Assignments** detail window.
- 4) In the **Assignments** detail window:
 - a. Select a role.
 - b. Add or remove the columns you need to configure to the detail window.
 - c. Select an option or enter a value for each field.
- 5) In the **Assignments** detail window:
 - a. In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - b. In **Standard View** click **Save**.

Tips

You can also configure activity roles from the **Open Requests for Resources** portlet of the **Dashboards** page.

About Expenses

Expenses are non-resource costs associated with a project and assigned to a project's activities. An expense is typically a one-time expenditure for non-reusable items. Expenses are project-specific and not time-based. Some examples include facilities, travel, consulting, and training. Each expense has an actual, remaining, and at completion value for both cost and units that is either budgeted or planned.

Expense categories classify and standardize expenses, and organize and maintain your expense information.

Creating Expenses

Create expenses to show costs that you expect each activity to accrue.

To create expenses:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Expenses** detail window.

In **Classic View**:

- a. In the **Expenses** detail window:
 - Click  **Add Expense Item** (Insert).
 - Enter a name in the **Expense Item** field.
- b. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. In the **Expenses** detail window:
 - Click  **Add**.
 - Enter a name in the **Expense Item** field.
- b. Click **Save**.

Configuring Expenses

Configure expenses to update costs associated with an activity.

To configure expenses:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Expenses** detail window.
- 4) In the **Expenses** detail window:
 - a. Select an expense.
 - b. Add or remove columns as needed to configure to the detail window.
 - c. Select an option or enter a value for each field.
 - In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).

- In **Standard View** click **Save**.

Configuring Auto Compute Actuals for Expenses

You can configure auto compute actuals for activity expenses.

To configure auto compute actuals:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Expenses** detail window.
- 4) In the **Expenses** detail window:
 - a. Select an expense item.
 - b. Select the **Auto Compute Actuals** option in the **Auto Compute Actuals** column.
 - In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View** click **Save**.

Tips

If the **Auto Compute Actuals** column is not displayed, add it to the detail window.

About Activity Progress

An activity's status is a brief representation of its progress or condition at any given time. An activity's status might include its duration, beginning and ending dates, percent complete, units and costs, and associated constraints. Team members should periodically update the status of their assigned activities in order for their project managers to adequately assess both individual and overall progress.

Updating the Progress of Activities Using P6

Update status to define percent complete and start and finish dates.

To update status:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.

In **Classic View**:

 - a. On the **Activities** page, select an activity and click the **General** detail window.
 - b. In the **General** detail window, in the **Status** section:
 - Select or clear the **Started** and **Finished** options.
 - If you select an option, click  and select a date from the calendar.
 - Enter a percentage in the **Activity % Complete** field.
 - c. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. On the **Activities** page, select an activity and click the **Status** detail window.
- b. In the **Status** detail window:
 - Select or clear the **Started** and **Finished** options.
 - If you select an option, click  **Select Date** and select a date from the calendar.
 - Enter a percentage in the **Activity % Complete** field.
- c. Click **Save**.

About Duration Types

Duration type is the basis for estimating an activity's completion time. It determines whether the schedule, resource availability, or costs are most important when updating activities. The duration type applies only when you have at least one resource assigned to the activity. Select one of the following duration types based on which factor is most important (least flexible) in planning your project: Fixed Duration & Units/Time, Fixed Duration & Units, Fixed Units/Time, or Fixed Units.

- ▶ **Fixed Duration & Units/Time or Fixed Duration & Units:** Indicate that the schedule is a limiting factor in your project. The activity's duration does not change regardless of the number of resources assigned when you modify or update activities. You usually select one of these duration types when you are using task-dependent activities. When you update the remaining duration for the activity, you can select to calculate either the remaining units or the units per timeperiod. The duration type enables you to control which variables of an equation are calculated when you change a value.

If you want to recalculate the remaining units and keep the units/time for the resource constant, select Fixed Duration & Units/Time. The application uses the equation: $\text{Remaining Units} = \text{Units/Time} \times \text{Remaining Duration}$. For example, if a resource is assigned to an activity for 8 hours/day for 5 days, the remaining units or work is calculated as 40 hours.

If instead you want to keep the remaining units constant and recalculate the units/time, select Fixed Duration & Units. The application uses the equation: $\text{Units/Time} = \text{Remaining Units} / \text{Remaining Duration}$. For example, if a resource is assigned to work 40 hours in 5 days, the units/time is calculated as 8 hours/day.

- ▶ **Fixed Units/Time:** Indicates that resource availability is the most critical aspect of your project. In this case, the units/time or rate of the resource remains constant, even if the activity's duration or work effort changes. You most often use this duration type when you are planning resource-dependent activities.
- ▶ **Fixed Units:** Indicates that the budget (units or cost) is a limiting factor; that is, the total amount of work is fixed. When you update activities, the work effort required to complete the activity does not change, even if the activity's duration or the resource rate changes. Typically, you would use this type in conjunction with resource-dependent activities. Increasing resources can decrease the activity duration.

Working with Duration Types

Duration type options

Duration type determines whether the schedule, resource availability, or cost is most inflexible when calculations are performed to reflect activity progress. Duration type affects update calculations only when resources are assigned to an activity.

Choose a duration type based on which factor is the most important, or least flexible, in planning your project.

- ▶ If schedule is most important, choose **Fixed Duration and Units/Time** or **Fixed Duration and Units**.
- ▶ If resource availability is most important, choose **Fixed Units/Time**.
- ▶ If total work effort or fixed costs are most important, choose **Fixed Units**.

About Constraints

Constraints are recognized real-world restrictions that affect project performance. Any factor that potentially delays when an activity can be scheduled is a constraint. The most typical constraints are date restrictions. Constraints can apply to the entire project or only to individual activities and can even reflect external project requirements that cannot be built into the network logic. Some examples of constraints are: must finish by (project-level constraint) and start on or after (activity-level constraint).

Working with Activity Constraints

P6 supports the following types of activity constraints:

Start On: Imposes the specific start date you select. The Start On constraint can delay an activity's early start or move forward an activity's late start to satisfy the constraint date.

Start On or Before: Defines the latest date an activity can start. This constraint only affects late dates and can decrease total float. When calculating a schedule, P6 imposes the start on or before constraint in the backward pass only if the calculated late start date will be later than the imposed date.

Start On or After: Defines the earliest date an activity can begin. This constraint affects only early dates. When calculating a schedule, P6 imposes the start on or after constraint in the forward pass only if the calculated early start date will be earlier than the imposed date.

Finish On: Imposes the specific finish date you select. The Finish On constraint can delay an activity's early finish or move forward an activity's late finish to satisfy the constraint date.

Finish On or Before: Defines the latest time an activity can finish. The finish on or before constraint affects only late dates.

Finish On or After: Defines the earliest date an activity can finish. The finish on or after constraint reduces float to coordinate parallel activities, ensuring that the finish of an activity is not scheduled before the specified date. It is usually applied to activities with few predecessors that must finish before the next phase of a project.

As Late As Possible: Imposes a restriction on an activity with positive float to allow it to start as late as possible without delaying its successors. When calculating a schedule, P6 sets the activity's early dates as late as possible without affecting successor activities. This option disables the calendar icon.

Mandatory Start: Imposes the early and late start dates you select. P6 uses the mandatory early start date regardless of its effect on network logic. A mandatory early start date could affect the late dates for all activities that lead to the constrained activity and all early dates for the activities that lead from the constrained activity.

Mandatory Finish: Imposes the early and late finish dates you select. P6 uses the mandatory finish date regardless of its effect on network logic. This constraint affects the late dates for all activities that lead to the constrained activity and all early dates for the activities that lead from the constrained activity.

About Issues

Issues are perceived problems within a schedule that require attention or corrective action. When you create them in the Activities section, you can associate them with a single project or workgroup and assign them to a responsible manager in the OBS for follow-up based on priority. You can also associate issues with a single activity. You can choose to receive email notifications when new issues of a certain priority are added, when existing issues are modified, or when issues are assigned a specific issue code.

You can also think of issues as impediments, action items, open items, punch lists, logs, or concerns. Over time, if you do not resolve or close open issues or issues placed on hold, they can become risks.

For example, you can create an issue code titled *Severity*, and subsequently create issue code values: *High*, *Medium*, and *Low*. You can assign each of these code values to issues across multiple projects, enabling you to categorize each issue according to how severe it is. Similarly, you can create codes to categorize issues by responsibility, subproject, or any other classification you require to organize issues. Assigning issue codes enables you to quickly search for and view issues according to specific criteria.

Creating Activity Issues

In Classic View, create activity issues to identify problems that must be addressed before a project can be completed.

To create activity issues:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Issues** detail window.

Note: To create a project or WBS issue, select a project or WBS in place of an activity.

- 4) In the **Issues** detail window:
 - a. Click  **Add Issue** (Insert).
 - b. Enter or select a value for the **Issue Name**, **Priority**, **Status**, and **Responsible Manager** fields.
- 5) On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

Tips:

- ▶ You cannot add an issue to a project that is checked out or locked.
- ▶ The application automatically names the issue *New Issue*. Update the issue so it has a unique name.

Configuring Activity Issues

Configure activity issues to account for changes since the last update on the issue.

To configure activity issues:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Issues** detail window.

Note: To configure a project or WBS issue, select a project or WBS in place of an activity.

- 4) In the **Issues** detail window:
 - a. Select an issue.
 - b. Add or remove the columns you need to configure to the detail window.
 - c. Select an option or enter a value for each field.
- 5) On the **Activities** page:
 - a. In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - b. In **Standard View** click **Save**.

About Notebooks

A notebook is another name for a log or binder of electronic details about an activity, WBS, project, or EPS element. All the notes users enter or paste into the notebook, including email messages, web links, tables, and other entries, share a single common theme called a notebook topic. See **About Notebook Topics** (on page 179).

Working with Notebooks

Notebook topics are created by the administrator on the **Enterprise Data** page of the **Administer** menu. These topics are then assigned to activity, WBS, project, or EPS node notebooks.

About Notebook Topics

Notebook topics help multiple users apply a common theme or label to shared information about an activity, WBS, project, or EPS element such as its purpose, completion instructions, or other helpful notes. For example, you might copy an email message, a web link, a table of observations, and a series of text notes into a notebook topic called *Budget Recommendations* to capture the ongoing cost impacts of a recurring project.

Assigning Notebook Topics

Depending on the page you are working on, you can assign notebook topics to a selected project or activity.

To assign a notebook topic to a project:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **EPS**.
- 3) On the **EPS** page, select a project or EPS node and click the **Notebooks** detail window.
In **Classic View**:
 - a. In the **Notebooks** detail window, click  **Assign** (Insert).
 - b. In the **Select Notebook Topic** dialog box, select a notebook topic, click **Assign**, then **Close**.
 - c. On the **EPS** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. In the **Notebooks** detail window, click **Assign....**
- b. In the **Select Notebook Topic** dialog box, select a notebook topic then click **OK**.
- c. On the **EPS** page, click **Save**.

Tips

- ▶ You can also create notebook topic descriptions. In the **Notebooks** detail window, double-click the **Description** field and click  (browse). Enter a description in the dialog box.
- ▶ You can also assign notebook topics to activities from the **Notebooks** detail window of the **Activities** page or the **Activity Details** page of the **Open Requests for Resources** portlet of the **Dashboards** page.

About Relationships

A relationship defines how an activity relates to the start or finish of another activity or assignment. An activity can have as many relationships as necessary to model the work that must be done. These relationships are used together with activity durations to determine schedule dates. Relationships can also exist between activities in different projects; this type of relationship is referred to as an external relationship.

Activities that are dependent on one another are known as predecessors and successors, where the first activity is the predecessor and the second is the successor. Between these two types of activities, there are four possible relationship types:

Finish to Start: The successor activity cannot start until its predecessor finishes.

Finish to Finish: The successor activity cannot finish until its predecessor finishes.

Start to Start: The successor activity cannot start until its predecessor starts.

Start to Finish: The successor activity cannot finish until its predecessor starts.

A permitted modification to these logical relationships is called lag. Lag values can be positive numbers (a delay, slower, deceleration of progress) or negative numbers (lead time, faster, acceleration of progress). For example, in a Finish to Start relationship, if you specify a ten-day lag (+10), the successor activity cannot start until ten days after the predecessor has finished. Likewise, if you specify a negative ten-day lag (–10), the successor activity could start ten days before the related predecessor activity finishes.

About Relationship Lines

Relationship lines graphically illustrate the links between activities in Gantt charts and Activity Networks. Whether the relationship line is connected to the beginning or end of an activity bar determines the type of relationship. See **About Relationships** (on page 180) for more information on relationships.

Creating Activity Relationships

In Classic View, you can create activity relationships in the Gantt chart to show interdependencies between activities.

To create an activity relationship:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - a. Click the **View**  menu and select  **Gantt Chart**.
 - b. Click the **View**  menu and select  **Show Relationship Lines**.

Note: If  **Hide Relationship Lines** is displayed in the **View** menu, the lines are already set to show. Exit the menu and return to the **Gantt chart**.

- c. Right-click the bar to which you want to assign a relationship and click **Create Relationship**.

Note: Your cursor will become a cross.

- d. With the cross, click the beginning or end of the bar and then click the beginning or end of the bar you want to relate.

Note: Where you click each bar determines the type of relationship.

- e. Click the **Actions**  menu and select  **Save** (Ctrl+S).

Tips

- ▶ You can scroll through the **Gantt chart** while your cursor is a cross to find a related bar.
- ▶ To delete a relationship, right-click the relationship line and select **Delete Relationship**.
- ▶ If multiple projects are open, you can create external relationships.

- ▶ You can also create new relationships and view or configure existing predecessor or successor relationships, from the **Predecessors**, **Successors**, or **Relationships** detail windows.

Configuring Activity Relationships

Configure activity relationships to adjust interdependencies between different activities.

To configure activity relationships:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:

In **Classic View**:

- a. Click the **View**  and select  **Gantt Chart**.
- b. Click the **View**  menu and select  **Show Relationship Lines**.

Note: If  **Hide Relationship Lines** is displayed in the **View** menu, the lines are already set to show. Exit the menu and return to the **Gantt chart**.

- c. Right-click the relationship line of the relationship you want to configure and click **Edit Relationship**.
 - In the **Edit Relationship** dialog box, configure the relationship type and lag and click **OK**.
- d. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. Click the **Relationships** detail window.
 - In the **Relationships** detail window, configure the relationship type and lag for the relationship you want to configure.
- b. On the **Activities** page, click **Save**.

Tips

You can also configure predecessor and successor relationships from the **Predecessor**, **Successor**, or **Relationships** detail windows.

Assigning Predecessor Relationships

You can assign predecessor relationships to the activities in a project.

To assign a predecessor relationship:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.

In **Classic View**:

- a. On the **Activities** page, select an activity to which you want to assign predecessors and click the **Predecessors** detail window.
- b. In the **Predecessors** detail window, click  **Assign** (Insert).
- c. In the **Select Predecessor Activity** dialog box, select one or more activities and click **Assign**, then click **Close**.
- d. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In Standard View:

- a. On the **Activities** page, select an activity to which you want to assign predecessors and click the **Relationships** detail window.
- b. In the **Relationships** detail window, in the **Predecessors** area, click **+ Add**.
- c. In the **Select Predecessor Activity** dialog box, select one or more activities and click **OK**.
- d. On the **Activities** page, click **Save**.

Tips

- ▶ You can also assign predecessor relationships in the **Relationships** detail window.
- ▶ You can also change an existing relationship in the **Predecessors** detail window. To choose a different predecessor, select the Activity ID field in an existing relationship and choose a different activity from an open project. The Relationship type and lag will be maintained if you select a new predecessor.
- ▶ You can assign relationships to multiple activities at one time. Select multiple activities using **Ctrl+click** or **Shift+click**. Right-click the selected activities and select **Link Selected Activities**. Based on their sequence in the view, the application creates **Finish to Start** relationships between selected activities. That is, a **Finish to Start** relationship is applied between the first and second activities, between the second and third activities, and so on. If an activity pair already has a **Finish to Start** relationship, the application tries, in turn, to apply each of the other relationship types, if possible. Otherwise, no relationship is applied to the pair.
- ▶ When selecting a predecessor or successor activity, you can choose from activities in the open projects only.

Configuring Predecessor Relationships

Configure predecessor relationships to define lag or relationship type.

To configure predecessor relationships:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity whose predecessor relationships you want to configure and click the **Relationships** detail window.
- 4) In the **Relationships** detail window:
 - a. Select a predecessor relationship.
 - b. Add or remove columns as needed to configure to the detail window.
 - c. Select an option or enter a value for each field.

- d. Save your changes.
 - In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View** click **Save**.

Tips

In Classic View you can also configure predecessor relationships in the **Predecessors** detail window or the Gantt chart.

Assigning Successor Relationships

You can assign successor relationships to the activities in your project.

To assign a successor relationship:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
 - In **Classic View**:
 - a. On the **Activities** page, select an activity to which you want to assign successors and click the **Successors** detail window.
 - b. In the **Successors** detail window, click  **Assign** (Insert).
 - c. In the **Select Successor Activity** dialog box, select one or more activities and click **Assign**, then click **Close**.
 - d. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View**:
 - a. On the **Activities** page, select an activity to which you want to assign successors and click the **Relationships** detail window.
 - b. In the **Relationships** detail window, in the **Successors** area, click **+Add**.
 - c. In the **Select Successor Activity** dialog box, select one or more activities and click **OK**.
 - d. On the **Activities** page, click **Save**.

Tips

- ▶ You can also assign successor relationships in the **Relationships** detail window.
- ▶ You can also change an existing relationship in the Successors detail window. To choose a different successor, select the Activity ID field in an existing relationship and choose a different activity from an open project. The Relationship type and lag will be maintained if you select a new successor.
- ▶ You can assign relationships to multiple activities at one time. Select multiple activities using **Ctrl+click** or **Shift+click**. Right-click the selected activities and select **Link Selected Activities**. Based on their sequence in the view, the application creates **Finish to Start** relationships between selected activities. That is, a **Finish to Start** relationship is applied between the first and second activities, between the second and third activities, and so on. If an activity pair already has a **Finish to Start** relationship, the application tries, in turn, to apply each of the other relationship types, if possible. Otherwise, no relationship is applied to the pair.

- ▶ When selecting a predecessor or successor activity, you can choose from activities in the open projects only.

Configuring Successor Relationships

Configure successor relationships to define lag or relationship type.

To configure successor relationships:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity whose successor relationships you want to configure and click the **Relationships** detail window.
- 4) In the **Relationships** detail window:
 - a. Select a successor relationship.
 - b. Add or remove columns as needed to configure to the detail window.
 - c. Select an option or enter a value for each field.
 - d. Save your changes.
 - In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View** click **Save**.

Tips

In Classic View you can also configure successor relationships in the **Successors** detail window or the Gantt chart.

About Risks

Risks are any uncertain events or conditions that, if they occur, have a positive or negative effect on project objectives. Risks are also known as threats, warnings, imperatives, escalation notices, or jeopardies. Positive risks are often classified as opportunities which, if they occur, are realized as rewards. Thorough documentation and analysis of risks over multiple projects offer lessons, and potentially cost and time savings, for all future projects.

You can document risks in P6 and perform quantitative analysis of the data in the P6 risk register in Oracle Prime. Once that analysis is complete, you can see the results in the Activities view in P6.

Working with Project Risks

The risk register on the **Risks** page is the main area of the application where you identify and manage risks for a project. Additionally, you can add risks to a project from the **EPS** page, and add risks to a project and assign the risks to activities from the **Activities** page.

Once you add a risk to the risk register, you can perform further analysis on the risk and create one or more risk response plans which include activities to reduce the negative impact of the risk.

Risks of Harbour Pointe Assisted Living Center

ID	Name	Type	Status	Owner	Probability	Schedule	Cost	Score	Exposure
R001	Concrete supply constrained	Threat	Active	Concrete Foundation Subcontractor	H (50% to 70%)	H (20.0d to 40.0d)	L (45,000 to 90,000)	28	40,500
R002	Site access restricted for 2 weeks	Threat	Open	Project Managers	VH (70% or higher)	M (10.0d to 20.0d)	VH (300,000 or higher)	72	382,500
R012	Weather delay due to hurricane	Threat	Proposed	Project Managers	M (25% to 50%)	H (20.0d to 40.0d)	M (90,000 to 150,000)	30	45,000
R004	Poor ground conditions	Threat	Open	Project Managers	L (10% to 25%)	L (5.0d to 10.0d)	L (45,000 to 90,000)	3	11,813
R005	Failed electrical inspection	Threat	Rejected (Closed)	Electrician	VL (Up to 10%)	L (5.0d to 10.0d)	VL (Up to 45,000)	1	1,125
R010	Interior design changes	Threat	Proposed	Project Managers	L (10% to 25%)	M (10.0d to 20.0d)	M (90,000 to 150,000)	6	21,000

Activities

Activity ID	Activity Name	Early Start	Early Finish
EC1090	Building Pad Including UG Utils	01-May-11 12:00 AM	01-May-11 12:00 AM
EC1140	First Floor Masonry Structure	01-May-11 12:00 AM	01-May-11 12:00 AM
EC1170	Second Floor Slab & Collar Beam	01-May-11 12:00 AM	01-May-11 12:00 AM
EC1190	Second Floor Masonry Structure	01-May-11 12:00 AM	01-May-11 12:00 AM
EC1210	Third Floor Slab & Collar Beam	01-May-11 12:00 AM	01-May-11 12:00 AM
EC1240	Third Floor Masonry Structure	02-May-11 08:00 AM	05-May-11 10:40 AM
EC1250	Fourth Floor Slab & Collar Beam	05-May-11 10:40 AM	17-Jun-11 10:40 AM

Table of Project Risks Elements

Item	Description
1	Risks toolbar
2	Risks work area: Risks for all the projects you have open display in the risk register. You can group by field name, such as project name, to view all risks organized by project, or create a filter to view only the risks that interest you. When adding a risk to the risk register, you supply a name for the risk, identify the risk as a threat or an opportunity, identify the current status of the risk, identify the owner of the risk, and then assign the values for probability, schedule, cost, and any other applicable user-defined impacts. The values for probability, schedule, cost, and additional user-defined impacts are used to calculate the risk score. The values for probability and cost are used to calculate risk exposure. Note: If the Probability, Cost, and Schedule fields are disabled, a risk scoring matrix has not been assigned to the project. You can still use the risk register to track your risks; however, you cannot use the qualitative risk analysis features in the application until you create a risk scoring matrix and assign it to the project.

Item	Description
3	Risks detail windows: Response Plans: The area where you add response plans and response plan action items. Activities: The area where you associate scheduled activities in your project to an identified risk. Refer to the example above to see a list of the project activities impacted by risk R001: Concrete supply constrained. Description: The area used to provide a detailed explanation of the risk. Cause: The area used to explain why this risk is occurring. Effect: The area used to describe the impact this risk has on this project. Notes: The area used to capture any additional information regarding the risk. Probability and Impact Diagram: The Probability and Impact Diagram (PID) is a graphical representation of the probability and impact thresholds assigned to the risk scoring matrix associated with the project.

Assigning a Risk to an Activity

Assign a risk to an activity to explicitly identify the activity impacted by the risk.

You can assign a risk to an activity while you are adding project risks on the **Risks** page or while managing your activities on the **Activities** page.

To assign a risk to an activity from the Risks page:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Risks**.
- 3) On the **Risks** page, click a risk.
- 4) Click the **Activities** detail window and click  **Assign Activities**.
- 5) On the **Select Activity** dialog box:
 - a. Select an activity and click **Assign**.
 - b. Select any additional activities impacted by the risk and click **Assign**.
 - c. Click **Close**.
- 6) On the **Risks** page, click  **Save** (Ctrl+S).

To assign a risk to an activity from the Activities page:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.

In **Classic View**:

 - a. On the **Activities** page, select the activity you want to assign a risk.
 - b. On the **Risks** detail window, click  **Assign** (Insert).

- c. On the **Select Risk** dialog box:
 - Select a risk and click **Assign**.
 - Click **Close**.
- d. On the **Activities** page, click  **Save** (Ctrl+S).

In **Standard View**:

- a. On the **Activities** page, select the activity you want to assign a risk.
- b. On the **Risks** detail window, click **Assign....**
- c. In the **Select Risk** dialog box select a risk and click **Assign**.
- d. On the **Activities** page, click **Save**.

About Steps

Steps make it possible to describe and report progress for activity work at a granular level by breaking an activity into its component parts.

Steps can have a step weight that quantifies the portion of an activity's total work that each step represents. On a project per project basis, you can use step weights to calculate Activity Percent Complete. For example, three steps are assigned to an activity; the first step has a weight of 2, and the second and third steps each have a weight of 1. When you mark the first step (weight of 2) as complete, the percent complete is 50. When you mark the first and second steps complete, the percent complete is 75. When all three steps are marked complete, the percent complete is 100.

Working with Activity Steps

How can I use activity steps?

Activity steps make it possible to describe and report progress for activity work at a more granular level of detail. If you have privileges to edit activities, you can add individual steps to activities, or you can add predefined groups of steps based on templates that have been defined for your organization. You can specify a weight for each step to show how much work for the activity is contained in a step.

Activity step templates

Step templates enable an organization to define groups of steps that can be shared by many projects. By creating templates for groups of activity steps that are relevant in many projects, an organization can streamline data entry and ensure that work is identified consistently throughout the organization.

In P6, when adding steps to an activity, you can choose from a list of available templates. You can use more than one template, but you can add steps from only one template at a time.

If you use a template to add steps to an activity, you can edit the step details but not the step name.

Weighted activity steps

To indicate the portion of activity work that a single step represents, you can assign it a numerical value, or weight. Once work for a step is underway, Primavera can use the step weight and the reported progress of step work (*Step Percent Complete*) to calculate the percentage of total work that has been completed for the activity (*Activity Percent Complete*).

Creating Activity Steps

Create steps to break activities down into their component parts.

To create steps:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity you want to break down into smaller parts and click the **Steps** detail window.
- 4) In the **Steps** detail window, repeat the following for each step you want to add to the activity:

In **Classic View**:

- a. Click  **Add Activity Step** (Insert).
- b. Enter a value in the **Step Name**, **Step % Complete**, and **Step Weight** fields.
- c. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. Click  **Add**.
- b. Enter a value in the **Step Name**, **Step % Complete**, and **Step Weight** fields.
- c. Click **Save**.

Tips

- ▶ You can also create steps on the **Activity Details** page of the **Open Requests for Resources** portlet of the **Dashboards** page.
- ▶ In Standard View, you can also create steps by clicking  **Row Actions** and selecting **Add**.

Configuring Activity Steps

Configure steps to show percent complete and to give a description of the step.

To configure steps:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Steps** detail window.
- 4) In the **Steps** detail window, repeat the following for each step you need to configure:
 - a. Select a step.
 - b. Add the columns you need to configure to the detail window if they are not already available, or hide columns, if necessary.

- c. Select an option or enter a value for each field.
 - In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View** click **Save**.

Tips

- ▶ Select the **Completed** option if the step is finished.
- ▶ You can also configure steps from the **Activity Details** page of the **Open Requests for Resources** portlet of the **Dashboards** page.

About Step Templates

Step templates enable you to define a group of steps common to multiple activities, and then assign the template to different activities. By creating templates for groups of activity steps that are relevant in many projects, an organization can streamline data entry and ensure that work is identified consistently throughout the organization.

Adding Activity Steps from a Step Template

You can add steps from a step template to add a group of predefined steps to an activity.

To add steps from a step template to an activity:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Steps** detail window.
 - In **Classic View**:
 - a. In the **Steps** detail window, click  **Add from Template** (Ctrl+Alt+S).
 - b. In the **Select Activity Step Template** dialog box, assign templates and click **Close**.
 - c. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View**:
 - a. In the **Steps** detail window, click **Assign....**
 - b. In the **Select Activity Step Template** dialog box, select a templates and click **Assign**.

Tips

Step templates are created on the **Enterprise Data** or **Enterprise Project Data** page.

About Locations

A location is a geographical reference defined by a pair of coordinates; longitude and latitude.

To create a location, you can enter its coordinates directly or enter a street address and allow P6 to find the longitude and latitude for you.

Assign locations to projects, activities, and resources so you can later use Analytics to produce powerful, interactive, graphical reports based on geographical location. In Analytics you can drill down to view data by country, region or city. This can make it easier to show large amounts of data in a relatively small area. Because the data is shown graphically, it also makes it easier for you to see trends and relationships.

You can also sort the Activities, EPS or Resources views by location and can group and filter by location in the Activities and EPS views. The assignments view cannot be grouped or filtered by location.

Assigning Locations to Activities

Assign locations to activities so that you can report on activities by location in Analytics.

To assign a location:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **General** detail window.

In **Classic View**:

- a. In the **General** detail window, click **...Select** in the **Location** field.
- b. In the **Select Location** dialog box, select the appropriate location and click **Assign**.
- c. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. In the **General** detail window, click in the **Location** field.
- b. In the **Select Location** dialog box, select the appropriate location and click **Select**.
- c. In the **Activities** page, click **Save**.

Tips

- ▶ You must create locations before you can assign them.
- ▶ In classic view, you can add a new location quickly by clicking the **Add Location** button in the **Select Location** the dialog box. The new location will be added instantly to the dictionary and you can add it to Activities, Resources and Projects. You cannot add new locations in the **Add Location** box in Standard View.
- ▶ You must have the Add/Edit Activities Except Relationships project privilege to assign locations to activities.

About Trace Logic

Trace logic provides a graphical display of dependency relationships for an activity. You can step forward or backward through a sequence of activities to focus on predecessor and successor relationships. This alternative viewing format enables you to examine a path of relationships while still viewing the entire project.

Trace logic provides visual cues to help you read the diagram. The selected activity is highlighted in blue. Activity boxes with a red border represent critical activities. Activity boxes to the left of the selected activity are predecessors. Activity boxes to the right are successors. Solid lines represent driving relationships, while dashed lines represent non-driving relationships.

You can manage activity relationships using the detail windows or Gantt chart on the Activities page. When multiple projects are open, you can even add relationships between activities in different projects. You can view activity relationships in the Trace Logic detail window on the Activities page. You can use Trace Logic to determine why an activity is scheduled at a particular time. It also helps answer questions such as:

- ▶ Were any of an activity's predecessors delayed?
- ▶ Do any predecessors or successors have an obsolete constraint?
- ▶ Are two activities that should be linked start to start currently linked finish to start?
- ▶ Why is there negative float?

Viewing Relationships with Trace Logic

In Classic View, use trace logic to follow activity relationships throughout a project.

To view relationships with trace logic:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Trace Logic** detail window.
- 4) In the **Trace Logic** detail window:
 - a. The selected activity is shown with its predecessor and successor activities.
 - b. Click another activity in the detail window to see its connections to predecessor and successor activities.
 - c. Click  **Pan** and click and drag the detail window contents.
 - d. Click  **Trace Logic Options** (Ctrl+Y) to configure the number of predecessor and successor levels shown.
- 5) Click **View**  and select  **Save View**.

Tips

Click the top edge of the **Trace Logic** detail window and drag upward to make the window larger.

About Budgets

Budgets help you track the total estimated effort or quantity of resources or materials and the cash flow required to complete a project. Before a project starts, the resource/cost manager, along with the operations executive, program manager, and project manager, determine scope and budget requirements, and set these high-level budget estimates at the EPS level. As requirements change, resource and financial support are adjusted to compensate for those changes. The individuals involved in project planning, funding, and financial support can estimate their budgets from the top down and log changes to the budget at any time from as early as the project planning stage to well after the project is underway. P6 tracks these changes, while retaining the original amounts.

Budget change logs help you keep track of budget alterations as they occur. The **Current Budget** field (original budget plus approved budget changes) and **Proposed Budget** field (original budget plus approved and pending budget amounts) incorporate changes so you have up-to-date and accurate budget information for each EPS node or project. These logs also provide a clear indication of the who, what, when, where, and why behind the approved or denied request.

Change amounts are not incorporated in the current budget until these amounts have an **Approved** status. Only authorized project participants can issue budget changes and mark them as approved. You can post a change amount as **Pending**; the program manager of the affected EPS node, or the project manager of the affected project, must then mark the amount as **Approved** or **Not Approved**. P6 recalculates the new budgeted amount and adjusts the current budget based on approved changes to the log.

Working with Budgets

Establish budget estimates during the planning stage, then refine them as projects progress. Document budget changes as they occur, and then use these changes to calculate the latest budgeted amounts for the project. You can also record monthly, quarterly, or yearly spending of budgeted funds, track the current and undistributed variance amounts, and aggregate the monthly spending plan of each project in a branch to its higher EPS nodes.

P6 facilitates a top-down budgeting approach to cost management. The resource/cost manager or other person responsible for making decisions about project launches generally establishes high-level budget estimates. These estimates are set for each EPS element. Project managers distribute the budgets to the projects for which they are responsible in each EPS element, as shown in the following example.

Once budget estimates are set at the EPS level, you can establish a monthly spending plan to keep track of cash flow for each node and project.

The screenshot displays the Oracle Primavera P6 interface. At the top, the 'Enterprise Project Structure' table is visible, showing columns for 'Original Budget', 'Proposed Budget', 'Current Budget', and 'Distributed Current Budget'. A 'Customize Columns [Budgetary Planning]' dialog box is open, showing a list of available budget fields and a 'Selected Columns' list. Below the table, the 'Budget Log' detail window is shown, displaying a table of budget changes with columns for Date, Amount, Status, Reason, Responsible, and Change Number. Numbered callouts 1 through 4 are placed on the interface to guide the user through the process: 1 points to the 'EPS' tab, 2 points to the 'Customize Columns' dialog, 3 points to a project in the 'Enterprise Project Structure' table, and 4 points to the 'Budget Log' detail window.

Table of Key Budget Elements

Item	Description
1	EPS Page: Navigate to the EPS page in the Projects section.
2	Budget fields: Customize the EPS table by selecting the columns available under the Budget category. You can also configure an EPS view with these settings for easy retrieval when needed in the future.
3	Select a project: Select a project or EPS element and then click the Budget Log detail window.
4	Budget Log detail window: In this detail window, set the Original Budget . As the project life cycle continues, track budget changes within this same detail window.

Establishing Budgets

You can establish budget estimates during the planning stage, then refine them as projects progress. Start at the EPS level and work down through projects and their WBS elements. This is known as performing *top-down budgeting*.

Follow the steps below to set up the total budget for each EPS node in the hierarchy first, then enter the applicable portion of the total budgeted amount to each project in the node's branch. Once these initial total amounts are entered, you can start apportioning anticipated monthly spending amounts per project. P6 then tallies the amounts for the projects so you can keep track of the total spending plan and assess the variance between this total and the current budget. This process is ongoing throughout the project life cycle. Close to the completion of the project, you can better determine profitability. The return on investment (ROI) value can be used as a gauge when determining whether a project of this type should be undertaken in the future.

To establish budgets in a top-down approach:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. Select an EPS element.
 - b. Click the **Budget Log** detail window.
 - c. In the **Budget Log** detail window:
 - In the **Original Budget** field, enter the original budget in units of currency.
 - Click  **Add** (Insert) to add a budget log line item.
 - In the **Amount** field, enter a currency value.
 - In the **Status** list, select a value. Select *Pending* to add the amount to the **Proposed Budget** total. Select *Approved* to add the amount to the **Current Budget**. Select *Not Approved* to keep only a record of the budget change line item.
 - d. On the **EPS** page, click the **Actions**  menu and select  **Save** (Ctrl+S).
 - e. Repeat these steps with the following variations:
 - On the **EPS** page, repeat for each project or template within an EPS element.
 - On the **Projects** navigation bar, click **Activities**.
 - On the **Activities** page, repeat for each project, template, or WBS.

In **Standard View**:

- a. Select an EPS element.
- b. Click the **Budget Log** detail window.
- c. In the **Budget Log** detail window:
 - In the **Original Budget** field, enter the original budget in units of currency.
 - Click  **Add** to add a budget log line item.
 - In the **Date** field, select a date.
 - In the **Amount** field, enter a currency value.

- In the **Status** list, select a value. Select *Pending* to add the amount to the **Proposed Budget** total. Select *Approved* to add the amount to the **Current Budget**. Select *Not Approved* to keep only a record of the budget change line item.
- d. On the **EPS** page, click **Save**.
- e. Repeat these steps with the following variations:
 - On the **EPS** page, repeat for each project or template within an EPS element.
 - On the **Projects** navigation bar, click Activities.
 - On the **Activities** page, repeat for each project, template, or WBS.

Creating Budget Change Requests

Create budget change requests when seeking approval to proposed changes to an EPS, project, or WBS budget.

As projects progress, changes in scope, resource reallocation, funding additions/withdrawals, or other factors that affect original budgeted amounts, often occur. The **Budget Log** detail windows enable you to track modifications that affect the budget. This log also provides a clear indication of the who, what, when, where, and why behind the change.

To create a budget change request:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page, select an EPS or project and click the **Budget Log** detail window.
 - In **Classic View**:
 - a. In the **Budget Log** detail window:
 - Click  **Add** (Insert) to add a budget log line item.
 - In the **Amount** field, enter a currency value.
 - In the **Responsible** field, enter the name of the responsible person or department.
 - In the **Status** list, select a status value for the proposed change.
 - b. On the **EPS** page, click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View**:
 - a. In the **Budget Log** detail window:
 - Click **+Add** to add a budget log line item.
 - In the **Date** field, select a date.
 - In the **Amount** field, enter a currency value.
 - In the **Responsible** field, enter the name of the responsible person or department.
 - In the **Status** list, select a status value for the proposed change.
 - b. On the **EPS** page, click **Save**.

Tips

- ▶ You can also create budget change requests for a project or WBS element from the **Budget Log** detail window of the **Activities** page.

- ▶ In general, you should contact the person listed in the **Responsible** field to determine if the request is *Approved* or *Not Approved*.
- ▶ Enter a reason for the proposed change in the **Reason** field. The program manager of the affected EPS node or the project manager of the affected project can append this field with a reason for approval or denial.

Approving or Denying Budget Change Requests

If you have the authority, you can approve or deny a budget change request for a WBS, project, or entire EPS element.

To approve or deny a budget change request:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page, select the EPS or project with a budget change request and click the **Budget Log** detail window.
- 4) In the **Budget Log** detail window:
 - a. Select and review the budget change request.
 - b. In the **Status** list, select **Approved** or **Not Approved**.
 - c. In the **Reason** field, enter an explanation for the new status.
 - d. Save your changes.
 - In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View** click **Save**.

Tips

- ▶ You can also approve or deny budget change requests for a WBS or project from the **Budget Log** detail window on the **Activities** page.
- ▶ To update the original budget, enter a new amount in the **Original Budget** field and click **Save**. The **Current Budget** and **Proposed Budget** are updated with the new value.
- ▶ Only authorized project participants can issue budget changes and mark them as **Approved**.

About Spending and Benefit Plans

Spending and benefit plans are used with a defined discount rate and a rate application period to calculate the net present value (NPV), return on investment (ROI), and payback period for a project. The spending plan is the projected project spending for a specific time period. The benefit plan is the projected project revenue or income for a specific time period. For both plans, numbers can be positive or negative and are entered as non-discounted units of currency.

Working with Spending and Benefit Plans

With spending plans in place, you can compare the monthly totals for the EPS node with those of all projects in the node, to ensure monthly spending does not exceed your original budget estimates. When your projects are planned, underway, and completed, you can revisit the ROI page to record and maintain the spending and benefit, or return on investment (ROI), for each project. These values assist the operations executive in the strategic planning process when evaluating future projects.

ROI of Engineering & Construction

Name	Annual Discount Rate	Total Benefit Plan (Present Value)	Payback Period	Total Spending Plan (Present Value)	Net Present Value	Return on Investment
Engineering & Construction						
City Center Office Building Addition	10.00	0		0	0	
Hallang Corporate Park	10.00	0		0	0	
Harbour Pointe Assisted Living Center	5.00	195,798,648	344.0d	73,791,544	122,007,104	165.3%
Juniper Nursing	5.00	197,433,703				
Nestled Building Expansion	10.00	0				
Saratoga Senior Community	5.00	203,264,669				

ROI of Harbour Pointe Assisted Living Center

Edit Spending and Benefit Plans
Specify the timescale for entering ROI spending and benefit plans: Year

Annual Discount Rate: 5.00 Discount Application Period: Month
Project Start Date: 01-Sep-10 12:00 AM

Date	Spending Plan	Benefit Plan
2000	0	0
2001	0	0
2002	0	0
2003	0	0
2004	0	0
2005	0	0
2006	0	0
2007	58,699,500	0
2008	4,550,500	175,000,000
2009	0	0

Total Present Value (Discounted): 75,681,955 (Spending) / 199,905,009 (Benefit)

Return on Investment: 164.1% Payback Period: 259.0d

Edit Spending and Benefits Plans of Harbour Pointe Assisted Living Center

Enter Undiscounted Amounts Project Start Date: 01-Sep-10 12:00 AM

Date	Spending Plan	Benefit Plan
2000	0.00	0.00
2001	0.00	0.00
2002	0.00	0.00
2003	0.00	0.00
2004	0.00	0.00
2005	0.00	0.00
2006	0.00	0.00
2007	58,699,500.00	0.00
2008	4,550,500.00	175,000,000.00
2009	0.00	0.00

Annual Discount Rate: 5.00 Discount Application Period: Month

Table of Key ROI Elements

Item	Description
1	ROI Page: Begin by navigating to the ROI page in the Portfolios section.
2	View the ROI details: In the row representing the project you want to evaluate, click the project's name link. In the resulting ROI Details page, configure the timescale and click the << Previous or Next >> links to view the spending and benefit plans by month, quarter, or year.

Item	Description
3	Edit mode: Click the Edit Spending and Benefit Plans link to display the same information in write or edit mode instead of the previous read-only mode. In this mode, you can edit the values in the fields. Click Save and then Return one or more times or click Portfolios again to start over.

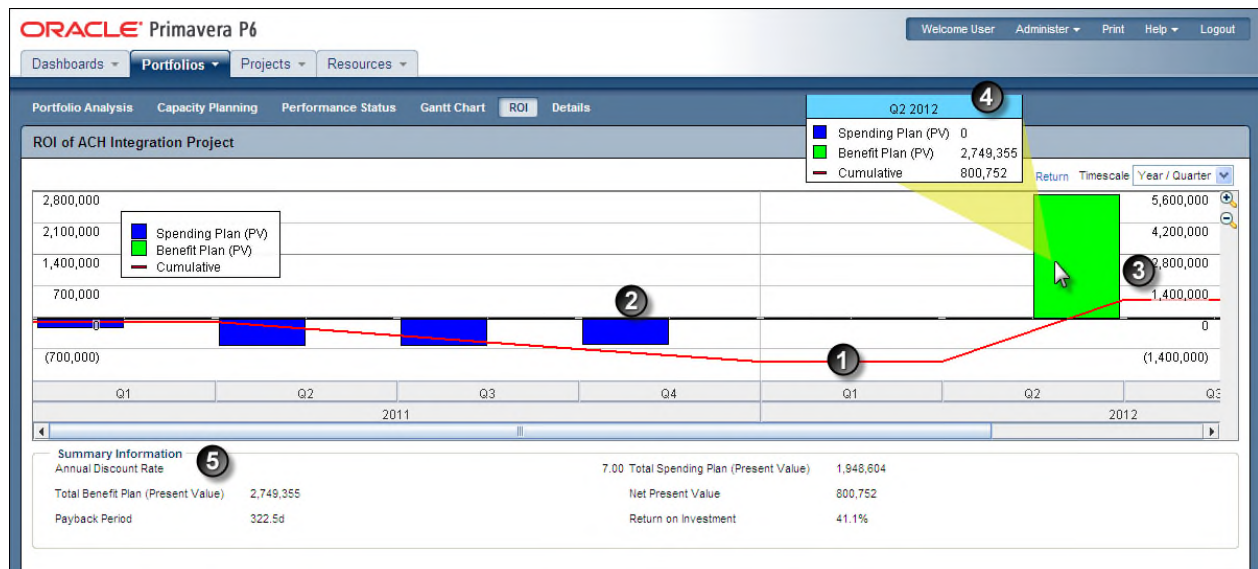


Table of Key ROI Chart Elements

Item	Description
1	Cumulative line: This line displays the cumulative profit or loss over time for the project.
2	Spending Plan (PV) bar: The blue bar displays the present value of the project's cost for the time period.
3	Benefit Plan (PV) bar: The green bar displays the present value of the project's expected revenue for the time period.
4	Plan data: Click on a bar or time period to display a visual summary of the source spending and benefit plan data used to generate the chart.
5	Summary Information: This section below the chart shows standard financial data including NPV, ROI, and payback period, essential for evaluating the project relative to business objectives.

Configuring Spending and Benefit Plans

You can distribute the budgeted costs and expected returns monthly, quarterly, or annually for each project to create a spending and benefit plan. The spending and benefit plans are totaled for each project and the entire portfolio. You can later display ROI, NPV, and current budget information on the **EPS** page where you can compare the portion of the total budget you distributed at a high level with how much was actually distributed to projects and WBS elements at lower levels.

To establish a project spending and benefit plan:

- 1) Click **Portfolios**.
- 2) On the **Portfolios** navigation bar, click **ROI**.
- 3) On the **ROI** page, identify a specific project row and click the link for the project name.
- 4) On the **ROI Details** page:
 - a. Specify a timescale in the **Specify the timescale for entering ROI spending and benefit plans** field.
 - b. Depending on the timescale you selected, click the **Previous** or **Next** links to target a specific time period.
 - c. Click **Edit Spending and Benefit Plans**.
- 5) On the **Edit Spending and Benefit Plans** page:
 - a. In the **Spending Plan** column, enter the anticipated value in units of currency that reflects what your organization plans to spend during each time period.
 - b. In the **Benefit Plan** column, enter the anticipated value in units of currency that reflects what your organization expects to receive in revenue or cost savings during each time period.
 - c. Click **Save**.

About Funding Sources

Funding sources are the agencies, businesses, or groups that provide funding for a project.

You can maintain a hierarchical list of funding sources as part of your enterprise project data and then assign specific funding sources to a project or EPS elements as they develop. You can assign the same funding source multiple times with varying amounts and share contributions for different levels of the EPS. The amount contributed by a specific funding source is called the fund share value.

Working with Funding Sources

If your projects use funding sources to support budgets, set up your enterprise project funding source data, and then assign specific funding sources to budget items as you develop projects. When estimates are firmly established, managers and team leaders can set budget amounts and spending plans at the WBS or project levels for which they are responsible. Resources and budgets can then be allocated at the activity level.

You can define funding sources on the **Funding Sources** page along with other enterprise project data. You can then assign funding sources to projects on the **EPS** page. Be aware that funds are not totaled by EPS level; you edit them per project or EPS level to allow for manual top-down assessments and individual planning. For example, you would not want to be restricted from funding an important project just because a limited level of funding was planned for its parent EPS element.

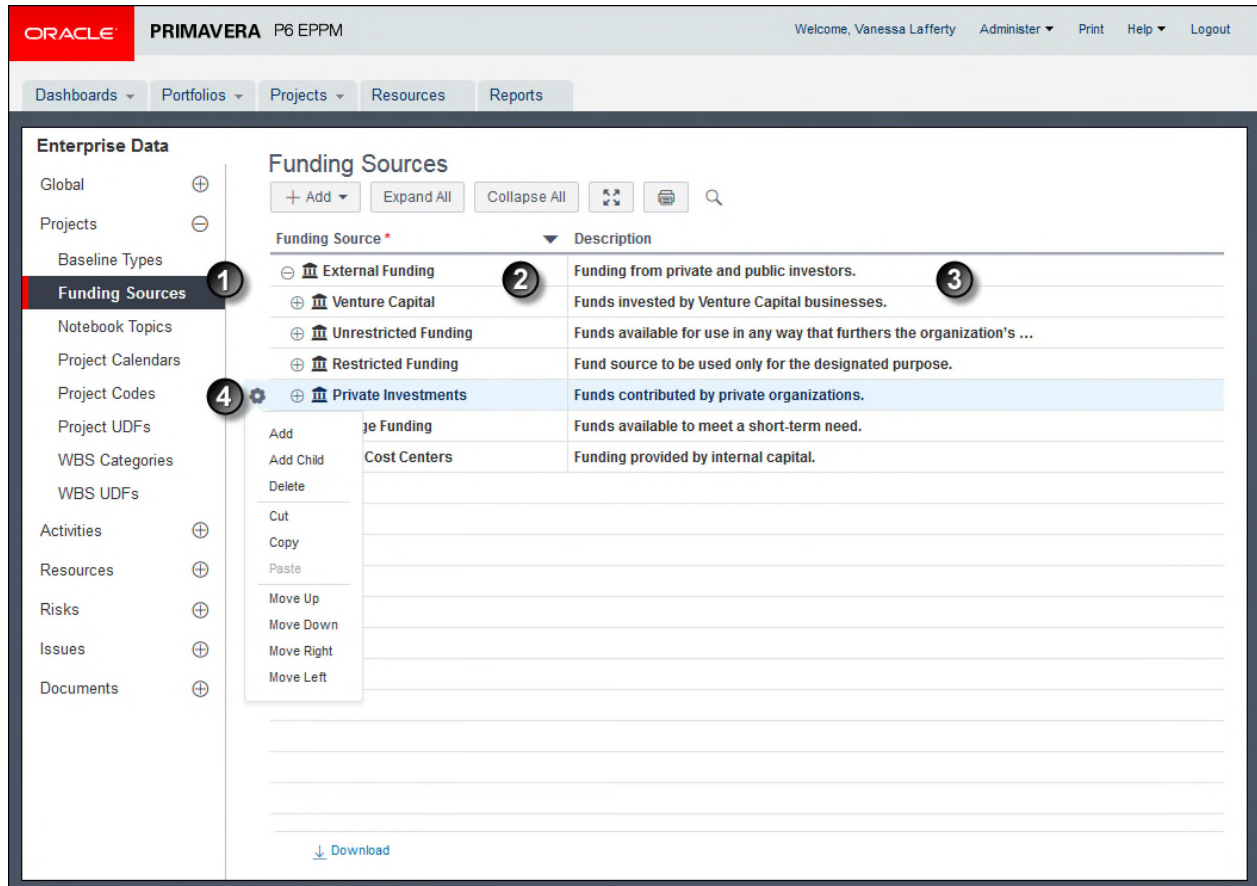


Table of Enterprise Data Funding Sources

Item	Description
❶	Funding Sources: You will use the Funding Sources page to view, add, and edit funding sources.
❷	Funding Source field: You can customize the name of the funding source by double-clicking in the Funding Source field.
❸	Description field: The Description field allows you to write a description of the funding source which includes any additional information about the funding source.

Item	Description
4	Row Actions Menu: You can configure funding sources, including creating new sources, and moving sources to new positions in the hierarchy from the Row Actions menu. If funding sources are affiliated with a particular group, you can group funding sources with that group. You can use the Move Up and Move Down items to move a funding source below or above other funding sources. The Move Right and Move Left items can make the funding source a child or parent to other funding sources.

The screenshot displays the Primavera P6 EPPM interface. At the top, the Oracle Primavera P6 EPPM header is visible, along with user information (Welcome, Vanessa Lafferty) and navigation links (Administer, Print, Help, Logout). The main navigation bar includes tabs for Dashboards, Portfolios, Projects, and Resources. The 'Projects' tab is active, showing the 'Enterprise Project Structure' view. A table lists project elements under 'E&C' (Engineering & Construction), including 'Harbour Pointe Assisted Living Center', 'Nesbid Building Expansion', 'Haitang Corporate Park' (highlighted), 'City Center Office Building Expansion', 'Juniper Nursing Home', and 'Saratoga Senior Community'. A 'Select Funding Source' dialog box is open, showing a list of funding sources: External Funding, Venture Capital (highlighted), Private Investments, Unrestricted Funding, Restricted Funding, Bridge Funding, and Dept / Cost Centers. The dialog has 'Close' and 'Assign' buttons. A 'Funding' tab is visible at the bottom of the project structure view.

Table of Funding Source Assignments

Item	Description
1	EPS Page: Use the EPS page to assign funding sources and edit funding source information for a project or entire EPS element.

Item	Description
2	Funding detail window: Click the Funding detail window to add funding sources. You can then edit the Amount and Fund Share fields, or you can remove the funding source from the project. Clicking remove will just remove the funding source from the project; it will still be available to assign to other projects. The total of all the funding source rows appears in the Activity Table in the Total Funding column.
3	Select Funding Source dialog box: You can assign the same funding source multiple times with varying amounts and fund share percentages for different levels of the EPS.

About Earned Value

Earned Value Project Management, or EVPM, is the best practice concerned with early comparisons between baseline or planned project data and actual or earned project data to arrive at an accurate assessment of true schedule and cost performance. The basic concepts are rooted in early Twentieth Century industrial engineering and factory productivity techniques.

You have probably already practiced at least a basic form of this technique. If you have ever verified that the work performed was actually accomplished prior to paying a contractor's invoice, you were utilizing a simple form of Earned Value. Whenever you measure the physical work performed against a baseline project plan, you are employing basic principles of EVPM. When you need a reliable way to predict the true cost performance of a project including its final costs, scheduling, and resource requirements, you will use Earned Value calculations.

Spanning industries and decades, Earned Value is also known by any of the following titles:

- ▶ Planned Value of Work Accomplished (PVWA)
- ▶ Budgeted Cost of Work Performed (BCWP)
- ▶ Cost/Schedule Control Systems Criteria (C/SCSC)
- ▶ PERT/Costs
- ▶ Earned Value Management (EVM)
- ▶ Performance Measurement

Example: Executive management wants to assess a critical project early in its schedule. The project has a planned value of 10 million dollars for 10 WBS units of equal value and is expected to last 1 year. At the end of 3 months, its actual costs are 3 million dollars, however, it has only completed 20% of the work, namely 2 units or 2 million dollars of earned value. This project is behind its baseline schedule by 1 million dollars. It is performing at 67%. The project will require a 50% increase in funding or 5 million dollars to complete the work. This is calculated based on its 10 million dollar budget divided by .67 to yield 15 million. If the project is required to return to its original time schedule, it will require additional resources and/or overtime.

Note:

For a video tutorial about Earned Value calculations, please visit the

following knowledge article:

- [How Is Earned Value Calculated In P6? \[Video\] \[ID 1463443.1\]](#)
-

Configuring WBS Earned Value

Configure earned value to define the techniques and settings used for earned value computations.

To configure WBS earned value:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select a WBS and click the **Earned Value** detail window.
- 4) In the **Earned Value** detail window:
 - a. Select one option for each technique section.
 - b. If your selections enable fields, selectors, or options, select an option or enter a value for each field.
 - c. Save your changes.
 - In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View** click **Save**.

Tips:

- ▶ To view WBS detail windows, group your view by all levels of the WBS.

About Milestones

A milestone represents any significant event, goal, or gate in a project. Although P6 considers them a type of activity, milestones have zero duration; at any given moment they are either achieved or not. Some examples of milestones in an office building addition project might include the following:

- ▶ project definition complete
- ▶ structure complete
- ▶ end bidding process

Milestones can also be assigned at the WBS-level, and each one given a weight which indicates its importance to the project schedule. When you mark a milestone as complete, the weight is used to calculate the performance percent complete of all activities included in the WBS level.

During project planning, you will want to identify the major milestones as they will help you monitor the project's progress. You can also assign an activity owner or a primary resource to a milestone.

Creating WBS Milestones

Create WBS milestones to specify goals for a project.

To create WBS milestones:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Select a project or WBS and click the **WBS Milestones** detail window.
 - b. In the **WBS Milestones** detail window, repeat the following steps for each milestone you want to add:
 - Click  **Add** (Insert) to add a WBS milestone line item.
 - Enter a value in each field.
 - Select or clear the **Completed** option.
 - c. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. Select a project or WBS and click the **WBS Milestones** detail window.
- b. In the **WBS Milestones** detail window, repeat the following steps for each milestone you want to add:
 - Click  **Add**.
 - Enter a value in each field.
- c. On the **Activities** page, click **Save**.

Tips

- ▶ The **Percent Complete** field within the **WBS Milestones** detail window indicates the percentage of tasks completed toward achieving the milestone.
- ▶ Use the **Move Up** and **Move Down** arrows to arrange the milestones.
- ▶ The weight you apply to a milestone is used to calculate the earned value of the percent of activities completed in achieving the milestone.

About Cost Accounts

Cost accounts enable you to monitor project expenses, activity costs, and earned value throughout the project life cycle. Costs are attached to activities and resources so you can track the amount of work accomplished against the amount of money spent. You can assign default or created cost accounts to any project.

Cost accounts are established in a hierarchy. For example, if you created a cost account for a project component such as hardware, you would create other cost accounts beneath this component to show its parts such as coding and installation.

Creating Cost Accounts

Create cost accounts to track activity cost and earned value throughout the project life cycle. You can associate predefined cost accounts with expenses to categorize them.

To create cost accounts:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Activities** and click **Cost Accounts**.
- 4) On the Cost Accounts page:
 - a. Select a cost account and click  **Row Actions** then select **Add** or **Add Child**.
 - b. In the **ID** field, double-click and type a unique ID.
 - c. In the **Name** field, double-click and type a name.
 - d. In the **Description** field, double-click and type a brief narrative about the cost account.
 - e. Move the cost account to the correct location in the list by clicking  **Row Actions** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
 - f. Click **Save**.

About Expenses

Expenses are non-resource costs associated with a project and assigned to a project's activities. An expense is typically a one-time expenditure for non-reusable items. Expenses are project-specific and not time-based. Some examples include facilities, travel, consulting, and training. Each expense has an actual, remaining, and at completion value for both cost and units that is either budgeted or planned.

Expense categories classify and standardize expenses, and organize and maintain your expense information.

Creating Expense Categories

Create an expense category to organize and track various expense types within an organization.

To create expense categories:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Activities** and click **Expense Categories**.
- 4) On the Expense Categories page:
 - a. Click **+Add**.
 - b. In the **Category** field, double-click and type a name.
 - c. Click **Save**.

Tips

- ▶ To change an expense category, double-click it, then type a new name. The change applies to all projects to which the expense item is assigned.
- ▶ To change the order in which an expense category is displayed, select it, then click  **Row Actions** and select **Move Up** or **Move Down**.

Managing the Schedule

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About Baselines

A baseline is a copy, or snapshot, of project data at a given time. Because a baseline is a static representation of a project plan, it can be used as a benchmark against which to measure performance as a project progresses.

You can create multiple baselines to establish metrics throughout the project life cycle. Typically, you would want to create an initial baseline once the project plan is approved, then you would create additional baselines according to your organization's requirements. For example, you could create new baselines at specific reporting intervals.

Although many baselines can be created for a project, only two baselines can be used at any given time to display and compare data. These are known as the Project Baseline and User's Primary Baseline. The current project can also be used as the baseline, for example, in situations where no other baseline yet exists.

The Project Baseline is a single metric for comparison that enables all members of a team to have a shared and consistent set of data against which to evaluate project progress. There is only one Project Baseline at any time. All pages that display summarized data compare and display data against the Project Baseline. As a project progresses, you can update baseline data.

The User's Primary Baseline is an optional personal baseline that is used to evaluate project progress.

Note:

For a video tutorial about Baseline date calculations, please visit the following knowledge article:

- [How Are Baseline Dates Calculated In P6? \[VIDEO\] \[ID 1402883.1\]](#)
-

Working with Baselines

Before you update a schedule for the first time, you should create a baseline plan. The simplest baseline plan is a complete copy, or snapshot, of the original schedule. This snapshot provides a target against which you can track a project's cost, schedule, and performance. You can save a copy of the current project to use as the baseline or you can convert another project in the EPS hierarchy to a baseline for the current project.

To help categorize, or track, multiple baselines for a single project, you can assign each baseline a type that reflects its purpose, for example, *initial planning baseline*, *What-if project baseline*, *customer sign-off*, or *midproject baseline*.

Regardless of the number of baselines you store for a project, at any given time you can only select at most two baselines for use in making comparisons in P6. The project-level baseline is used for project/activity usage spreadsheets and profiles, as well as for earned value calculations.

You can convert another project in the EPS hierarchy to a baseline for use in comparisons with the current project. Before converting a project to a baseline, if you still want to have access to the original project, you should make a copy of it. Once you convert a project to a baseline, it is no longer available in the project hierarchy. You can restore a baseline, making it available again as a separate project in the project hierarchy, in order to modify it or update it.

If you choose to update a baseline, you have control over which data items are updated. For example you can choose to add new activities from the project to the baseline, but not to delete activities from the baseline which have been deleted from the project. You can also control which activities to update using a filter.

Note: You must have the Edit Project Details Except Costs/Financials and Assign Project Baseline project privileges to set the project baseline.

The screenshot displays the Oracle Primavera P6 EPPM software interface. The main window shows the 'Activities of Magna Pad Product Test, Project Nano, Zepher Phase III'. A 'Define Baselines' dialog box is open, showing a table of baselines. The table has columns: Baseline Name, Baseline Type, Data Date, Project Baseline, User's Primary Baseline, Publish, and Last Update Date. The baselines listed are for 'Magna Pad Product Test', 'Project Nano', and 'Zepher Phase III'. The 'Define Baselines' button is highlighted with a red circle. The 'Enterprise Data' pane on the right shows the 'Baseline Types' list, with 'Initial Planning Baseline' selected.

Table of Working with Baseline Elements

Item	Description
1	Define Baselines: Use Define Baselines to add and delete baselines and restore projects from baselines.
2	Add Baselines: When you add a baseline, give it a name, assign it a type, and decide if you want to make it the Project Baseline or User's Primary Baseline for the currently selected project. Baseline designations are made in the projects rows of the table highlighted in blue.
3	Update Baselines: Update the baseline with the latest data from the project. You can select which data to update.
4	Convert a Project to Baseline: Save a copy of the baseline before you convert it. Convert a project to use it as a baseline for a current project.

Item	Description
5	Restore a Baseline: Use restore a baseline to modify a baseline project. You must first unlink a baseline from its current project by restoring it as a separate project. You can then work with this restored baseline project as you would any other project in the EPS.
6	Baseline Type: Assign baseline types to baselines to help categorize multiple baselines for a single project. Configure the available baseline types along with your other Enterprise Data settings.
7	Project Baseline: Lists the available baselines for the selected project. Select the baseline to use as the project baseline. If a baseline does not exist, the current project is the default value.
8	User's Primary Baseline: Select the user's primary baseline from the list of available baselines. If a baseline does not exist, the current project is the default value.
9	Publish: Select this option for all baselines that you want to publish for reporting purposes. You must publish a project before you can publish any of its baselines.
10	Last Update Date: The date that the baseline was last updated.

Note: You can define up to three baselines for a project in P6 Professional.

Creating Baselines

Create baselines to measure project performance.

To create a baseline:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Activities** or **EPS**.
- 3) On the **Activities** or **EPS** page
 - In **Classic View**:
 - a. Click the **Actions**  menu and select  **Define Baselines....**
 - b. In the **Baselines** dialog box:
 - Select the project to which you will add the baseline.
 - Click  **Add Baseline**.
 - Enter a name in the **Baseline Name** field.
 - Select a type from the **Baseline Type** list.
 - Click  **Save** (Ctrl+S).

In **Standard View**:

- a. Click the **Actions**  menu and select **Define Baselines....**
- b. In the **Define Baselines** dialog box:
 - Select the project to which you will add the baseline.
 - Click  **Row Actions** and select **Add**.
 - Enter a name in the **Baseline Name** field.
 - Select a type from the **Baseline Type** list.
 - Click **Save**.

Tips

- ▶ The application automatically assigns the baseline a name based on the selected project. For example, if you select Project A, the application will name the newly created baseline A - B1.
- ▶ Specify the default **Project Baseline** and **User's Primary Baseline** by selecting from the list of available baselines for each project in the table on the Baselines dialog box.
- ▶ Click **Convert a Project to Baseline** and select a project to convert a project into a baseline.
- ▶ Select a baseline and click **Restore a Baseline** to remove the baseline and make it a project.
- ▶ When you create a new baseline, the **Publish** option is switched off by default.

About Critical Path Activities

Critical path activities are project tasks that must start and finish on time to ensure that a project ends on schedule. A delay in any critical path activity will delay completion of the project, unless the project plan can be adjusted so that successor tasks finish more quickly than planned. Critical activities can be one of two types: float and longest path.

Float is a measure of schedule flexibility. The application uses the Critical Path Method (CPM) to generate a project schedule. This method calculates four dates for each activity in the project plan: Early Start, Late Start, Early Finish, and Late Finish. If the Early Start date and Late Start date for an activity are the same, the activity is said to have zero float. Activities that have zero float must start on time to prevent the schedule from slipping. When an imposed finish date creates a schedule that is shorter than the duration calculated to complete the activities on the critical path, a project has negative float. A project with negative float is behind schedule.

To meet the specific requirements of your project, you can specify the float tolerance used to identify activities as critical. For example, in some situations you might want critical activities to be those with zero or negative float. In other situations, activities with float of three days or less might be identified as critical.

Longest path defines the sequence of driving activities that determine the project end date. Longest path calculation includes interproject relationships. Therefore, activities designated as on the longest path might change depending on whether you schedule a project alone or with its related projects. If a project has interproject relationships and you schedule it alone, the interproject relationships are treated as scheduling constraints. The longest path is broken when activities are no longer driven by relationships; that is, when activity dates are driven by constraints or resource leveling.

Working with Critical Activities

When you schedule a project, you can choose to calculate multiple critical float paths (sequences of activities) that affect the project schedule. By calculating multiple critical float paths, you can determine the most critical path in the project schedule, along with sub-critical paths that affect the completion of the most critical path.

While you can determine the critical path of activities based on total float or longest path, these methods do not offer insight into sub-critical paths that might also affect the project schedule. For example, if you choose to identify critical activities based on a maximum total float threshold, P6 will identify all activities beyond the threshold as critical even if the activities have no relationships or do not affect the project end date. Likewise, if you choose to identify critical activities based on longest path, P6 will identify the critical path of activities but will not identify sub-critical paths that affect the critical path.

After you schedule a project, you can display the **Float Path** and **Float Path Order** columns in the table on the **Activities** page. Group by **Float Path** to view the activities in each critical float path, then sort by **Float Path Order** to view the order in which the activities were processed.

Notes:

- Calculating multiple critical float paths does not affect how you define critical activities. When you schedule a project, you must choose to define critical activities by a maximum float time or by longest path on the **General** tab of the **Scheduling Options** dialog box. When you run the scheduler, activities are flagged as critical based on this setting. If you also choose to calculate multiple critical float paths, the float paths are calculated after the project has been scheduled. Critical activities that are not part of a critical float path remain tagged as critical.
 - Calculating multiple float paths using retained logic requires early and late dates to be visible on all activities, including completed activities. Scheduling a project with retained logic always calculates early and late dates for completed activities, even if you do not select the option to calculate multiple float paths.
-

The **Critical Activities Behind Schedule** portlet of the **Workspace** page in the Projects section lists activities on the critical path that are behind schedule, along with the number of days the activity is behind and its total float. In order for an activity to appear in this portlet, both of the following conditions must have been met:

- ▶ its **Critical** check box field must have been set to true or checked meaning the activity's total float was calculated as being less than the critical duration specified for the project;
- ▶ its **Finish Date Variance** must be negative.

If a project does not have a specified baseline, P6 will refer to the current project's data and only activities that have an actual start date and meet the other criteria will appear in the portlet.

Finish Date Variance is calculated by comparing the planned finish of the current project to the baseline finish.

When there is no baseline, **Planned Finish** always equals **Baseline Finish**. This is true until an actual start date is recorded, which acts as a baseline. Hence, **Finish Date Variance** is always zero (0) in an activity that has no baseline and is not started.

If a project has a baseline, P6 must match each activity to its baseline activity and then calculate the finish variance.

Note: A negative finish variance can be calculated on both started and not started activities. In large databases, this may cause a timeout. By default the application allows two minutes to perform the calculation. If it does not succeed in two minutes, a message is returned advising you that the portlet should be removed from the Workspace. A setting in the Primavera P6 Administrator can extend this time, but the practice is not recommended as it can cause performance problems for all users.

The screenshot displays the Oracle Primavera P6 interface. On the left, the 'Activities' portlet shows a list of activities for 'City Center Office Building Addition'. Activities are color-coded: red for critical and green for non-critical. A red bar is visible in the 'Roof' section. On the right, the 'Workspace' portlet shows a 'Critical Activities Behind Schedule' table with columns for Activity, Days Late, and Total Float. A red bar is also visible in the 'Gantt' view at the bottom right.

Table of Key Elements for Critical Activities

Item	Description
①	Critical option: This check box is checked for all activities that are calculated as being critical.
②	Red indicator: Critical activities are indicated in the Activity Table with red indicators.
③	Red bars: Critical activities are indicated in the Activity Gantt with red bars.
④	Critical Activities Behind Schedule portlet: The Critical Activities Behind Schedule portlet of the Workspace page.

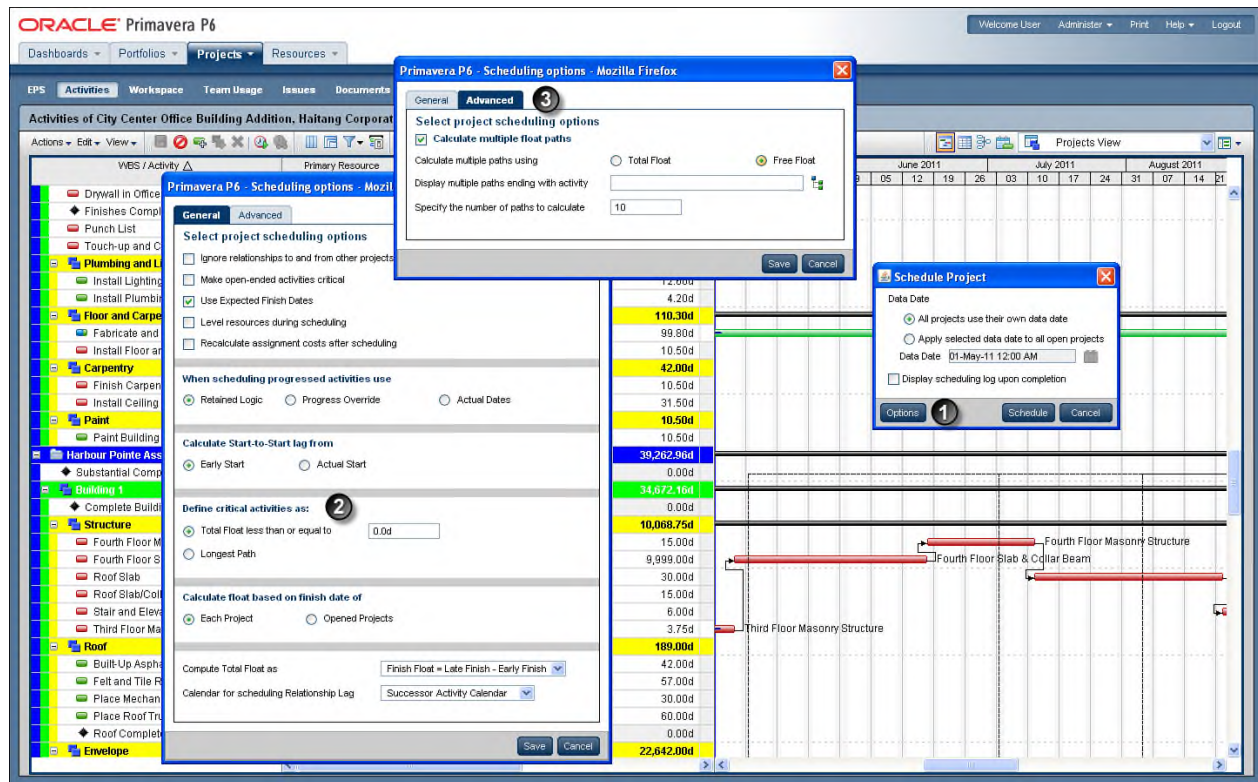


Table of Key Options for Critical Activities

Item	Description
1	Scheduling Options: On the Activities page, select Run Scheduler from the Actions menu. On the resulting Schedule Project dialog box, click the Options button to open the Scheduling Options dialog box.
2	General tab: Use the General tab of the Scheduling Options dialog box to define critical activities according to a maximum float time or by longest path.
3	Advanced tab: On the Advanced tab of the Scheduling Options dialog box, you can choose to calculate a specific number of critical float paths based on total float or free float. You can also choose the activity you want the float paths to end on. By choosing an activity, you can calculate multiple float paths that affect the entire project schedule, a specific part of the schedule, or a milestone in the schedule. When you schedule the project, P6 identifies the most critical float path in the schedule and assigns those activities a Float Path value of 1. Then, depending on the number of paths you choose to calculate, P6 identifies other float paths (sub-critical float paths) that affect the most critical float path and numbers the paths based on their criticality in ascending order beginning with 2.

About Schedule Preview

After modifying activity, relationship, and assignment data, but before deciding to formally schedule a project, use the optional *Schedule Preview* feature to estimate schedule changes without actually committing them to the project. *Schedule Preview* automatically recalculates the schedule for activities that have changed or were affected by a change to a relationship, resource assignment, or another activity. You can then decide to commit these changes to the schedule or, if the preview produces unwanted results, discard them. If *Schedule Preview* is disabled, changes to activities are not reflected in the schedule until you manually calculate the schedule again.

Enabling Schedule Preview

In Classic View, enable Schedule Preview to have the application automatically calculate the schedule for a project each time you add or delete an activity relationship, change an activity duration or relationship type, or change anything that affects schedule dates. This feature is available on the Activities page when you open a single project; it is disabled if more than one project is open.

To enable Schedule Preview for a project:

- 1) Open the project you need to schedule using one of the following methods:
 - ▶ Click **Projects** to open the last project you were working with.
 - ▶ Click the **Projects**  menu and select one of the most-recently used projects.
 - ▶ Click the **Projects**  menu and select **Open Projects** to select a project by portfolio type, EPS node, or project code.
- 2) On the **Projects** navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - a. Click the **Actions**  menu and select **Run** ▶  **Schedule Preview** to turn on Schedule Preview mode.
 - b. Update one or more activities; the activities will automatically be rescheduled.
 - c. Click the **Actions**  menu and select  **Save** (Ctrl+S).
- 4) In the **Schedule Project** dialog box:
 - a. To keep the changes and schedule the project, click **Yes**.
 - b. If you do not want to keep these changes or do not want to schedule the project, click **No**.

Tips

- ▶ The Schedule Preview icon is disabled if more than one project is open, or if you do not have the 'Schedule Project' privilege for the open project.
- ▶ To turn Schedule Preview mode off, click the **Actions**  menu and select **Run** ▶  **Schedule Preview** again so it is not highlighted on the **Run** menu.

- ▶ You might find it helpful to create an unfiltered activity view that you can use when you want to enable the Schedule Preview. If filters are applied to your view, the application will prompt you to remove the filters before the project is scheduled. If the removal of filters from the current view causes you to exceed your activity limit, you will receive a message and the feature will not be turned on. You will then need to ask your administrator to increase the activity limit to run this feature.

About Resource Leveling

Resource leveling is an automated process that can change the start date of activities. Level resources in your project schedule to ensure that resource demand does not exceed resource availability. Typically, you level during the forward pass through a project. This determines the earliest dates to schedule an activity when sufficient resources will be available to perform the task. If forward leveling delays the project's early finish date, a backward pass might be necessary to recalculate late dates.

During resource leveling, the resource requirements of all scheduled activities are compared to the maximum quantity available at the time of leveling, and an activity is only scheduled to occur when its resource demands can be met. To accomplish this, tasks can be delayed to resolve resource availability conflicts.

Leveling Project Resources

Level one or more projects whenever the required shared or critical resources have limited supply or availability or to generally keep resource usage at a constant level. For example, when a resource has been assigned to more than one activity during the same time period, level the projects to eliminate potential resource over-allocation. Once you have performed resource leveling against your project or projects, you will be able to see where resources are overallocated and make decisions about whether work assigned to some resources should be redistributed to other available resources.

To level resources in one or more projects:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Click the **Actions**  menu and select **Run** ▶  **Leveler...** (Shift+F9).
 - b. In the **Level Resources** dialog box:
 - Select the **Options** tab to configure resource leveling options and set optional leveling priorities to specify which assignments are leveled first when a conflict exists.
 - Select the **Resources** tab to specify which resources should be leveled.
 - (Optional) Click **Save** to save your settings and close the dialog box.
 - Click **Level**.

In **Standard View**:

- a. Click **Actions**  and select **Leveler**.
- b. In the **Level Resources** dialog box:
 - Configure resource leveling options.
 - Select the **Resources** tab to specify which resources should be leveled.
 - Select the **Prioritization** tab to specify which assignments are leveled first when a conflict exists.
 - (Optional) Click **Save** to save your settings and close the dialog box.
 - Click **Level Now**.

Tips

- ▶ Using the **Project Scheduled Services** page, you can configure scheduled services to have the application level resources automatically.
- ▶ These services are removed from the database based on the **ASAP Cleanup Rate** your P6 administrator specifies on the **Configurations** tab in Primavera P6 Administrator. Once the time is met all ASAP jobs that have a status other than running or delegated will be removed from the table automatically. Running and delegated jobs will be removed if they are older than the cleanup rate or if they are older than one day, whichever is greater.

Configuring Resource Leveling Options and Priorities

Level resources in your project schedules to ensure that resource demand does not exceed resource availability. To handle scheduling conflicts that might occur during leveling, you can add priorities that specify which project or activity is leveled first. Before leveling, configure the options and priorities specified in the steps below.

To configure resource leveling options and priorities:

- 1) Click **Projects** .
- 2) On the **Projects** navigation bar, click **EPS**.

In **Classic View**:

 - a. On the **EPS** page, click the **View** ▾ menu and select  **Columns**.
 - b. In the **Customize Columns** dialog box, expand the **General** section in the **Available Columns** list and double-click **Project Leveling Priority** to add it to the **Selected Columns** list and click **OK**.
 - c. On the **EPS** page:
 - Enter a value in the **Project Leveling Priority** field for each project.

Note: Enter a value from 1, the highest priority, to 100, the lowest. The default is 10.

 - Click the **Actions**  menu and select  **Save** (Ctrl+S).
 - d. On the **Projects** navigation bar, click **Activities**.
 - e. On the **Activities** page, click the **View** ▾ menu and select  **Columns**.
 - f. In the **Customize Columns** dialog box, expand the **General** section in the **Available Columns** list and double-click **Activity Leveling Priority** to add it to the **Selected Columns** list and click **OK**.

- g. On the **Activities** page:
 - Enter a value in the **Activity Leveling Priority** field only for those activities that require a specific change to their leveling priority. For example, a **Normal** activity might become a **Top** priority.
 - Click the **Actions**  menu and select **Run**  **Leveler...** (Shift+F9).
- h. In the **Level Resources** dialog box, click the **Options** tab.
- i. On the **Options** tab:
 - Select the **Consider assignments in other projects with priority equal or higher than** option and select a value from the list to include in the leveling process projects that are not currently open, but that do fit the required priority level.
 - Select or clear the **Preserve scheduled early and late dates** option to determine if the leveling process can alter activity dates or not. If you select this option, configure the options it enables.
 - Select or clear the **Recalculate assignment costs when leveling** option to determine if the application should automatically recalculate assignment costs if they are affected by the leveling.
 - Select the **Display leveling log upon completion** option if you would like to see a summary of activities delayed by leveling and exceptions made for critical activities.
 - In the **Leveling Priorities** section, specify priorities that will be used to level the activities. Add priorities in the order in which you want the application to consider them. For each priority you add, repeat the following steps:
 - Click  **Add**.
 - In the **Field Name** list, select **Project Leveling Priority**, **Activity Leveling Priority**, or another field.
 - In the **Sort Order** list, select *Ascending*, *Descending*, or, for some fields, *Hierarchy*.
- j. In the **Level Resources** dialog box, click the **Resources** tab.
- k. On the **Resources** tab, select an option and click **Save**.

Note: If you select **Selected Resources**, add resources to the **Selected Resources** list from the **Available Resources** list.

In Standard View:

- a. On the **EPS** page, click **✕Customize View** and click **Columns**.
- b. On the **Columns** tab, expand the **General** section in the **Available Columns** list and double-click **Project Leveling Priority** to add it to the **Selected Columns** list and click **Save and Apply**.
- c. On the **EPS** page:
 - Enter a value in the **Project Leveling Priority** field for each project.

Note: Enter a value from 1, the highest priority, to 100, the lowest. The default is 10.

- Click **Save** when you are done.

- d. On the **Projects** navigation bar, click **Activities**.
- e. On the **Activities** page, click **✕Customize View** and select **Columns**.
- f. On the **Columns** tab, expand the **General** section in the **Available Columns** list and double-click **Activity Leveling Priority** to add it to the **Selected Columns** list and click **Save and Apply**.
- g. On the **Activities** page:
 - Enter a value in the **Activity Leveling Priority** field only for those activities that require a specific change to their leveling priority. For example, a **Normal** activity might become a **Top** priority.
 - Click **Actions** ▼ and select **Leveler**.
- h. In the **Level Resources** dialog box:
 - Select the **Consider assignments in other projects with priority equal or higher than** option and select a value from the list to include in the leveling process projects that are not currently open, but that do fit the required priority level.
 - Select or clear the **Preserve scheduled early and late dates** option to determine if the leveling process can alter activity dates or not. If you select this option, configure the options it enables.
 - Select or clear the **Recalculate assignment costs when leveling** option to determine if the application should automatically recalculate assignment costs if they are affected by the leveling.
 - Select the **Display leveling log upon completion** option if you would like to see a summary of activities delayed by leveling and exceptions made for critical activities.
- i. On the **Resources** tab, choose whether to level **All resources** or **Selected resources**. If you choose to level **Selected Resources**, double click the resources you want to level in the **Available** list to add them to the **Selected** list.
- j. On the **Prioritization** tab, specify priorities that will be used to level the activities. Add priorities in the order in which you want the application to consider them. For each priority you add, repeat the following steps:
 - Click **⚙️Row Actions** and select **Add Above** or **Add Below**.
 - In the **Field Name** list, select **Project Leveling Priority**, **Activity Leveling Priority**, or another field.
 - In the **Sort Order** list, select *Ascending*, *Descending*, or, for some fields, *Hierarchy*.
- k. Click **Save**.

Tips

You cannot edit the **Project Leveling Priority** of a project if you do not have the appropriate security privileges or if the project is checked out or opened exclusively by another user.

About Updating Progress

To determine how a project is performing and what work remains to be done, update its progress weekly, daily, or as frequently as required.

You can record work progress in a number of ways: you can record progress for individual activities or resources by entering "live" status data you have collected; you can use P6 Team Member Web to collect data from resources, activity owners, or users who have been assigned Team Member work distribution filters, with the option to turn on reviews for status updates or allow the system to automatically approve the updates; you can use P6 Team Member Web to collect data from resources using timesheets and then approve or reject those timesheets; or you can automatically calculate progress based on the schedule plan.

P6 supports the following platforms for directly updating "live" status: web browsers using P6 and P6 Team Member Web, mobile devices and tablets using the P6 for iOS and P6 for Android apps, and email applications exchanging messages using Email Statusing Service. Your team may decide to use one method or some combination of these methods.

Working with Updating Progress in a Browser Running P6

To determine how a project is performing and what remains to be done, update its progress. Updating a project to reflect the actual work performed to date can be achieved using any of the following methods:

- ▶ **Manually record progress:** Record progress for individual activities or resources by entering status data from each member of the team.
- ▶ **Automatically calculate progress:** For individual activities, resources, and expenses, use the convenient *Auto-Compute Actuals* feature to estimate work progress based on the schedule plan. Then, run the *Apply Actuals* feature. Using these features, the application calculates and applies the expected progress from the previous data date to the new data date you specify. To regularly update a project so that it reflects current actual and remaining values, run the *Apply Actuals* process using the **Scheduled Services** page.

Updating the Progress of Activities Using P6

Update status to define percent complete and start and finish dates.

To update status:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.

In **Classic View**:

- a. On the **Activities** page, select an activity and click the **General** detail window.
- b. In the **General** detail window, in the **Status** section:
 - Select or clear the **Started** and **Finished** options.
 - If you select an option, click  and select a date from the calendar.
 - Enter a percentage in the **Activity % Complete** field.
- c. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. On the **Activities** page, select an activity and click the **Status** detail window.
- b. In the **Status** detail window:

- Select or clear the **Started** and **Finished** options.
 - If you select an option, click  **Select Date** and select a date from the calendar.
 - Enter a percentage in the **Activity % Complete** field.
- c. Click **Save**.

About Email Statusing Service

As a team member with assignments in P6, you can request a list of your assigned activities directly from the P6 server using Email Statusing Service. Only activities from active projects in which you (the requesting user) are assigned as a resource, activity owner, or if you are assigned a Team Member work distribution filter will be returned.

As a project manager with team members assigned to activities on the projects, you can send your team members an email request for status updates using Email Statusing Service. The email request includes a list of activities for the projects you specify. Team members can provide updates by replying to the email and updating their status in the body of the email.

Supporting Email Updates with Email Statusing Service

Projects may require that P6 users temporarily work in remote locations without access to the private network where the P6 server resides. Diverse project teams may also exist with some members updating their activities using P6, and others using email.

In order to support the updating of assignment status by email, you will need to verify the following requirements have been met.

To support email updates for your team at your organization:

- 1) Verify with your administrator that support for email activity updates has been deployed with your P6 application server.
- 2) Verify that the following prerequisites have been fulfilled in P6:
 - a. You have a valid user account in P6.

Note: With a P6 user account, you can be assigned to activities as a resource assignment if your user account is associated with a labor resource, assigned to an activity as an activity owner, or assigned a Team Member work distribution filter.

- b. Your user account is configured with at least one module access option.
- c. Your user account must specify your own unique email address.
- d. You have one or more activity assignments for at least one active project. The email will show activities that have not yet started, active activities in progress, and activities you completed in the last 180 days.

Note: OBS access to a project is not required in order for you to make status updates on your assigned activities unless you are assigned a Team Member work distribution filter.

- 3) Download and install any email client application or browser to access web mail.

- 4) Plan your activity status by email process with your team and manager. For example, consider details such as the timing of updates by email versus updates made in P6, P6 mobile, or other P6 Team Member interfaces to avoid conflicts.

Known Issues

- ▶ Yahoo and Hotmail web clients are not supported. If your email address is assigned to one of these accounts, access your account within an SMTP email client.
- ▶ When project managers use the Notify email request to send a list of activities to team members, the following time frame options are not supported:
 - ▶ Active Today, Due Today, or Completed Today
 - ▶ Active Tomorrow, Due Tomorrow, or Starting Tomorrow
 - ▶ Completed Yesterday

Instead, you can use:

- ▶ Active in next 1 day, Due, or Completed in last 1 day
- ▶ Active in next 2 days or Due in next 2 days
- ▶ Completed in last 1 day

Error Messages

You may receive error messages when updating activities if your email application is set to return email messages in HTML format.

One of the following situations will occur:

- ▶ An email will be returned with the message "Date or unit format specified was invalid or missing."
- ▶ If there is an error in the Time Spent, Time Left, or Remaining Duration fields, an email will be returned with a message that the updated value is incorrect because only part of the updated value was parsed by the Email Statusing Service.

The following methods can be used to avoid this issue:

- ▶ When entering activity updates, delete the original value in its entirety before entering an updated value.
- ▶ Set the email application to reply to messages in text format.
- ▶ Click the **Update this activity** link to update activities individually.

Updating the Progress of Activities Using Email Statusing Service

If Email Statusing Service is configured at your organization, you can request a list of your assigned activities using email. Then, you can reply with your status updates.

To update your status using email:

- 1) Log into the email account uniquely associated with your P6 user account.
- 2) Create a new email to send to the Email Statusing Service address provided to you by your P6 administrator.
- 3) Request a list of activities from P6 by specifying the **Email Statusing Service Activity Filter Options** (on page 223) in the subject line using the format:

<Activity Status> <Time Frame, optional> <Project, optional>

Send the email.

- 4) When you get the list of your assignments as a message in your inbox, open it.
- 5) (Optional) To update the status of only a single activity:
 - a. Click on the **Update this activity** link.
 - b. In the resulting form, enter your updates.
 - c. Click **Send**.

Note: To save time, try to update the status of all your activities at the same time. If your email application does not support inline email editing in your reply message, use the **Update this activity** step for each activity.

- 6) To update the status of one or more activities at the same time, click **Reply**.
- 7) In the reply message:
 - a. Enter your status updates using the approved formatting.

Notes:

- To avoid potential errors, delete the original value in its entirety before entering an updated value.
 - If the same activity is listed twice in your activity list, you are assigned as a resource to this activity and you are also either assigned as the activity owner or you are assigned a Team Member work distribution filter that is capturing the same activity. Update only one of the two activities per email update. If you need to update both activities, request another activities list and then update the second activity.
-

- b. Click **Send**.

A confirmation message will be sent to you after your updates have been processed.

Note: If you need assistance with the options, syntax, or required formatting of these messages, send an email message with only the word **Help** or **?** in the subject line to receive more detailed instructions.

Email Statusing Service Activity Filter Options

As a team member or project manager, you must follow the syntax and formatting for the filter options below when sending a request to Email Statusing Service.

Filter Options

There are three types of request filters: *Status*, *Time Frame*, and *Project*. A status request is a minimum requirement; a time frame and project request are optional extensions to the status request.

For team members, a valid request for an activity list would appear in the email subject line as:

<Status> <Time Frame, optional> <Project, optional>

Note: If you need assistance with the options, syntax, or required formatting of these messages, send an email message with only the word Help or a ? in the subject line to receive more detailed instructions. In addition, if your status request message is ever invalid, you will be notified by email.

For project managers, a valid request to send a notification email to team members would appear in the subject line as:

Notify <Status> <Time Frame, optional> <Project, optional>

Status Options

Active

Activities that are in progress or have not started.

Due

Activities scheduled to finish today.

Overdue

Activities that were scheduled to finish prior to today.

Completed

Activities where the finished date is today's date.

Starting

Activities that are scheduled to start today.

Starred

Activities team members marked as important. This filter can only be combined with a Project ID or Project Name filter. The starring feature is not available to users assigned Team Member work distribution filters.

Time Frame Options

Requests by status can optionally be filtered based on a specified number of days, weeks, or months, or by specifying today, tomorrow, or yesterday.

Active in next <number> <units of time>

Activities that are in progress or scheduled to start in the next number of days, weeks, or months.

Example: Active in next 3 weeks

Active Today

Activities that are in progress or are scheduled to start on or before today's date.

Active Tomorrow

Activities that are in progress or are scheduled to start on or before tomorrow's date.

Due in next <number> <units of time>

Activities that should be completed in the next number of days, weeks, or months.

Example: Due in next 5 days

Due Today

Activities scheduled to finish today.

Due Tomorrow

Activities that are scheduled to finish tomorrow.

Completed in last <number> <units of time>

Activities that were completed in the last number of days, weeks, or months.

Example: Completed in last 3 days

Notes:

- There is a 180 day limit to viewing completed activities . Any completed activity with a Finished Date more than 180 days in the past will not be returned.
 - If the completed activity was updated with a Finished Date within the past 180 days and the last approved Finished Date is more than 180 days in the past, the activity will not be sent to you regardless of the updated Finished Date. (This only applies if Team Member status updates require approval.)
-

Completed Today

Activities where the finished date is today's date.

Completed Yesterday

Activities where the finished date is yesterday's date.

Starting in next <number> <units of time>

Activities that are scheduled to start in the next number of days, weeks, month.

Example: Starting in next 1 month

Starting Today

Activities that are scheduled to start today.

Starting Tomorrow

Activities that are scheduled to start tomorrow.

Project Options

Requests by status can optionally be filtered based on an active project name or project ID.

on Project <Project ID or Name>

Restricts the results of the requested status and optional time frame filter to the activities that belong to the specified active project. If no project is specified, all active projects for which you have access rights will be included.

Examples:

- ▶ Overdue on project MFG00925
- ▶ Due in next 5 days on project Plant Expansion and Modernization

Fields Available for Activity Status Updates

The fields available in the email are assigned by the project manager in P6. Also, in P6, team members are assigned as either a resource assignment, an activity owner, or a user with a Team Member work distribution filter. Project managers should let team members know what fields are assigned to them and whether they are a resource assignment, an activity owner, or a user with a Team Member work distribution filter because some of the status fields depend on their role.

The updates you can make to the fields that are returned depend on the activity status (Not Started, In Progress, or Completed). Use the following table to determine which fields can be updated for a Not Started, In Progress, or Completed activity.

Table of Activity Status Fields Available by Email

Resource Assignment

Field	Status: Not Started	Status: In Progress	Status: Completed	Sample Value
Start/Started Date	Yes	Yes	Yes	15 - APR - 2012
Finish/Finished Date	Yes	Yes	Yes	18 - APR - 2012
Time Spent	Yes	Yes	Yes	1d 2h
Time Left	Yes	Yes	No	2d 6h
Remaining Duration	Yes	Yes	No	5d
Finished (Y/N)	Yes	Yes	No	N
Starred (Y/N)	Yes	Yes	No	N

Activity Owner or User Assigned a Team Member Work Distribution Filter

Field	Status: Not Started	Status: In Progress	Status: Completed	Sample Value
Start/Started Date	Yes	Yes	Yes	15-APR-2012
Finish/Finished Date	No	No	Yes	18-APR-2012
Activity % Complete (see notes)	Yes	Yes	No	25%
Expected Finish	Yes	Yes	No	30-APR-2012
Time Spent (Labor/Nonlabor)	Yes	Yes	Yes	1d 2h
Time Left (Labor/Nonlabor)	Yes	Yes	No	2d 6h
Remaining Duration	Yes	Yes	No	4d
Finished (Y/N)	Yes	Yes	No	N
Starred (Y/N) (see notes)	Yes	Yes	No	N

Notes for Activity % Complete:

- The calculation of the Activity % Complete field depends on the settings your project manager configured in P6. The field is either calculated using units or duration, calculated using the percentage complete from steps, or a value you enter based on your own perception of the work you completed on this activity.
- When you enter **100%** to indicate your work is complete, you must also enter **Y** for **Finished (Y/N)** to mark this activity complete.

Note for Starred (Y/N): The starring feature is not available to users assigned Team Member work distribution filters.

Updating the Progress of Activities Using P6 Team Member Web

If configured at your organization, P6 Team Member Web provides a way for team members to view, update progress, and communicate about their assignments. See the *P6 Team Member User's Guide*.

Updating the Progress of Activities Using the P6 Team Member Mobile Apps

If configured at your organization, the P6 Team Member mobile apps provides a way for remote users to view, update progress, and communicate about their assignments. See the *P6 Team Member Help*.

About Timesheets

With the optional P6 Team Member Web module installed, users can submit timesheets reflecting their work assignments on projects. Timesheet approval managers can then approve or reject those timesheets.

Timesheets allow the user to record hours for assigned activities. Timesheets are assigned a period and an approval level. The period defines the amount of time the timesheet covers, lasting from one week to a month, and what day of the week will conclude the timesheet. The approval level specifies how many levels of approval are necessary to submit a timesheet. Approval levels range anywhere from no approval required to two approval levels.

Working with Timesheets

Resources required to submit their time using the optional timesheets provided by P6 Team Member Web will navigate to an online timesheet they can fill in and submit for approval by their manager.

Resources submitting a timesheet must meet the following requirements:

- a) The resource must be assigned to activities in the project.
- b) The resource must be assigned to a user account with Timesheet module access by their administrators.

Approval managers must meet the following requirements:

- a) Approval managers must be assigned as the Approval Manager for the resource submitting the timesheet.
- b) Approval managers must be granted Timesheet access by their administrators to utilize the full set of timesheet features; however, a manager strictly reviewing timesheets just needs access to the Timesheet Approval page from dashboards.

After a resource completes an online timesheet, the assigned approval manager for the resource, or a designated delegate, then performs any of the following tasks:

- ▶ approves or rejects the timesheet

- ▶ notifies the resource about the status of the timesheet
- ▶ views/determines if a resource has started or submitted a particular timesheet
- ▶ adds timesheet notes
- ▶ runs a timesheet report in the **Reports** section of P6

Note: If you are a timesheet approval delegate for a project manager, you can review timesheets for resources who are assigned to activities within the projects for which you have been granted approval rights. A project manager can transfer timesheet approval rights to different delegates for each project.

Approving or Rejecting Timesheets

As a timesheet approval manager or delegate, you can approve or reject timesheets for resources for which you are responsible.

To approve or reject timesheets:

- 1) Click **Approvals**.
- 2) On the **Approvals** navigation bar, select **Timesheets**.
- 3) On the **Timesheets** page:
 - a. Select Project Manager or Resource Manager from the **Approving as** list. Or, if you are a delegate, select the value from the list that best represents your current role.
 - b. Click **Action Required** to view timesheets awaiting your input or **All Timesheets** to view all timesheets.
 - c. Configure the options in the **Filter** dock to filter the list of timesheets if required.
 - d. Select the timesheets you want to approve or reject. To select multiple timesheets, use Ctrl+click or Shift+click.
 - e. To approve the selected timesheets, click **Approve** or, to reject the selected timesheets, click **Reject**.

Tips

- ▶ The **Timesheets** page of the **Application Settings** pane specifies how timesheets are submitted and approved, including whether Resource Managers or Project Managers, or both, must review and approve timesheets. Manager approval is not required if these settings specify that timesheets are automatically approved upon submission; however, you can still review and even reject those timesheets if needed.
- ▶ The PM Approved and RM Approved status types are only valid when two approval levels are required. In this case, the PM Approved status appears in the Action Required filter for the resource manager when two approval levels are required, the PM has approved, and resource manager approval is pending; likewise, the RM Approved status appears in the Action Required filter for the project manager when two approval levels are required, the RM has approved, and project manager approval is pending.

- ▶ If you are a Resource Manager, you can review timesheets for resources to whom you have been assigned as timesheet approval manager. If you are a Project Manager, you can review timesheets for resources who are assigned to activities within projects for which you are responsible. If you are a timesheet approval delegate for a Resource or Project Manager, you can review timesheets for resources to whom the original manager has been assigned as timesheet approval manager.

Sending Email about Timesheets to Resources

As a timesheet approval manager, you can send an Email notification to a resource at any time. For example, you might want to remind a resource or group of resources about timesheets that need to be submitted. The resources and users you notify must already have a valid Email address stored in P6.

To send Email about timesheets:

- 1) Click **Approvals**.
- 2) On the **Approvals** navigation bar, select **Timesheets**.
- 3) On the **Timesheets** page:
 - a. Select Project Manager or Resource Manager from the **Approving as** list. Or, if you are a delegate, select the value from the list that best represents your current role.
 - b. Click **Action Required** to view timesheets awaiting your input or **All Timesheets** to view all timesheets.
 - c. Select a timesheet about which you want to send an email.
 - d. Click **⚙️ Row Actions** and select **Email**.
- 4) In the **Send Email** dialog box:
 - a. P6 pre-fills the recipient list and subject of the Email. Edit the recipients and subject as necessary.
 - b. Enter the message body in the large field below the subject line.
 - c. Click **Send**.

Note: Use the **Bcc** field to send Email to multiple recipients. This hides the list of recipients when delivered, safeguarding the privacy of each recipient.

Assigning a Project Manager Delegate for Timesheets

If you are a project manager, you can assign a temporary delegate to process timesheets awaiting your approval while you are not able to process them yourself. For example, you might be on business travel or vacation, or the workload requires you to assign timesheet approval responsibility to others.

To assign a project manager delegate:

- 1) Click **Approvals**.
- 2) On the **Approvals** navigation bar, select **Timesheets**.
- 3) On the **Timesheets** page:
 - a. Select **Project Manager** from the **Approving as** list.

- b. Click **Actions** and select **Assign Project Manager Delegate**.
- 4) In the **Assign Project Manager Delegate** dialog box:
 - a. If more than one project is listed, select a project.
 - b. Double click the **delegate** field, click **...Select**, and select a user from the **Select a User** dialog box. Click **OK**.
 - c. To activate the delegate's approval rights, select the check box for the project row where you need to designate a delegate.
 - d. Click **Apply**.
 - e. Repeat for each project that you want to assign to a delegate.
 - f. Click **OK**.

Tips

- ▶ You can assign any user as your delegate; however, the activities that appear in the table are dependent on the delegate's OBS access.
- ▶ If you are a project manager, the **Assign Project Manager Delegate** dialog displays a list of all projects for which you are responsible for processing timesheets. You can assign the same delegate to each project, or you can select a different delegate per project.
- ▶ The maximum number of projects displayed in the **Assign Project Manager Delegate** dialog is controlled by the **Maximum number of rows displayed in trees and pick lists** value on the **My Preferences** page **Global** tab.
- ▶ To disable a delegate's approval rights, clear the check box or clear the top-level option to clear all delegate options. If you want to remove a user as a potential delegate in the **Assign Project Manager Delegate** dialog box, select the user's name and press the **Delete** key or select another user to replace the previously listed user.
- ▶ Even when you activate a delegate's approval rights, you continue to have approval rights as a resource manager or project manager.
- ▶ When you add or remove a delegate's approval rights, the delegate will receive an email notification if they have a valid email address defined with their user account.

When adding a delegate, the format of the message is:

<username> has assigned you to review timesheets for the following projects:
<project 1>, <project 2>, etc. Please contact <username> if you need assistance.

When removing a delegate, the format of the message is:

<username> has removed your time approval delegate rights for the following projects: <project 1>, <project 2>, etc. Thank you for your assistance.

Assigning a Resource Manager Delegate for Timesheets

If you are a resource manager, you can assign a temporary delegate to process timesheets awaiting your approval while you are not able to process them yourself. For example, you might be on business travel or vacation, or the workload requires you to assign timesheet approval responsibility to others.

To assign a resource manager delegate:

- 1) Click **Approvals**.
- 2) On the **Approvals** navigation bar, select **Timesheets**.
- 3) On the **Timesheets** page:
 - a. Select **Resource Manager** from the **Approving as** list.
 - b. Click **Actions**  and select **Assign Resource Manager Delegate**.
- 4) In the **Assign Resource Manager Delegate** dialog box:
 - a. Click **...Select** and select a user from the **Select a User** dialog box.
 - b. To activate the delegate's approval rights, select **Make this delegate active**.
 - c. Click **Apply**.

Tips

- ▶ You can assign any user as your delegate; however, the activities that appear in the table are dependent on the delegate's OBS access.
- ▶ To disable a delegate's approval rights, clear the check box next to the delegate's name. If you want to remove a user as a potential delegate in the **Assign Resource Manager Delegate** dialog box, you can select the user's name and press the **Delete** key or select another user to replace the previously listed user.
- ▶ Even when you activate a delegate's approval rights, you continue to have approval rights as a resource manager or project manager.
- ▶ When you add or remove a delegate's approval rights, the delegate will receive an email notification if they have a valid email address defined with their user account.
- ▶ When adding a delegate, the format of the message is:

<username> has assigned you to review timesheets for the following people: <resource 1>, <resource 2>, etc.

When removing a delegate, the format of the message is:

<username> has removed your time approval delegate rights for the following people: <resource 1>, <resource 2>, etc. Thank you for your assistance.

About P6 Team Member Status Updates

Project managers need a way to view team member status updates before the updates are committed to the schedule. The team member status updates feature enables you to view, update, and approve activity progress captured by users of the P6 Team Member interfaces.

When setting up team member status reviews in Project Preferences, you enable reviews for the project, choose the required reviewer, and choose whether to require reviews for all activity updates in the project. Status updates can be turned on and off for individual activities on the Activities page. In addition to setting a reviewer for all activities, you can set another reviewer for all activities within a specific WBS on the Activities page. The assigned status reviewer, or a user with Admin or Project superuser privileges can view, edit, and approve the status updates for the project.

When a team member assigns an activity or saves a change in a P6 Team Member interface, the change appears in the Status Updates page.

The history of all activity updates made in P6 Team Member interfaces is captured in the Update History detail window on the Activities page.

Working with P6 Team Member Status Updates

If you are assigned the appropriate privileges, you can view, update, and approve status updates made by team members using P6 Team Member interfaces.

ORACLE PRIMAVERA P6 EPPM Welcome, Lori McNeil Administrator Print Help Logout

Dashboards Portfolios Projects Resources Approvals

Status Updates Timesheets

Status Updates

Search

Project ☒ Pending 3 Held 1 Accept all updates 3

- ☐ PROD00414 - 4G Tablet Project 4
- ☐ IT00829 - ACH Integration Project 5
- ☒ IT00992 - Digitization Program 3 1
- ☐ IT00509 - Catalyst Virtualization 3

IT00992 - Digitization Program

IT1050 - Design System Michelle Peterson IT00992 - Digitization Program Design Phase

Accept

Changed Field	Old	New
Remaining Units		106.94d
Actual Start		31-Oct-16 09:00 AM
Remaining Early Finish		05-Apr-17 05:00 PM
Remaining Duration		106.9d

IT1060 - Develop System Michelle Peterson IT00992 - Digitization Program Development Phase

Accept Hold Override

Changed Field	Old	New
Go / No-Go		Yes

IT1060 - Develop System Frank Chu IT00992 - Digitization Program Development Phase

Accept Hold Override

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Dashboards Portfolios Projects Resources Approvals

Status Updates Timesheets

Status Updates

Search

Project ☒ Pending 3 Held 1 Accept all updates 1

- ☒ IT00992 - Digitization Program 3 1

IT00992 - Digitization Program

IT1060 - Develop System Michelle Peterson IT00992 - Digitization Program Development Phase

Accept Remove hold Override

Changed Field	Old	New
Remaining Duration	78.8d	50.0d

Override Updates for IT1060 - Develop System

Project WBS
IT00992 - Digitization Program Development Phase

Updated by Michelle Peterson Updated for Michelle Peterson

Edit and Review

Changed Field	Old	New
Remaining Duration	78.8d	65.0d

Cancel Override

Table of Screen Elements

Item	Description
1	Project Filter: To reduce the number of status updates displayed on the page, choose to view only some projects. The status update cards are grouped by project.
2	Search: Use search as another way to filter the status updates visible on the page. You can search using any field name in the view. For example, to view all status updates for a single resource, search on the name of the resource. When you select Accept all updates , only the status updates in the view are approved.
3	 Pending: View only pending status updates to see the new updates requiring your attention. The number in the bubble shows how many updates are currently pending for the selected projects.
4	 Held: View only held updates to focus on updates which were not approved when they were initially made. The number in the bubble shows how many updates are currently held for the selected projects.
5	Accept all updates: When you have reviewed all the updates in the view and are satisfied that the updated data is correct, select Accept all updates to apply the updated information to the activities. When you select Accept all updates , only the status updates in the view are approved. The number in the bubble shows how many updates will be accepted.
6	 Resource Assignment or  Activity Owner or Team Member work distribution filter: These icons indicate whether the activity is assigned to a resource assignment, an activity owner, or a user with a Team Member work distribution filter assigned.
7	Hold: If you need to obtain more information before you approve the status update, place the update on hold. Once you click Hold, the status update will move to the Held category. Select  More... to view the date the status update was held. Team members can continue to make updates to their activities even when the update is in the held state. If a team member makes another update while the initial status update is in the held state, the data is updated and a message displays indicating a change was made. Remove Hold: When you are ready to approve a status update in a held state, select Remove Hold to return the card to the Pending list. The status update will be approved when you select Accept All in the Pending list. Alternatively you can select Accept on the card in the Held list to accept the status update.

Item	Description
8	Override: If you need to make a correction to a status update, click Override . The updated values will be saved to the activity once you click Accept .
9	 Send Email: To email the team member about an assignment, select  Send Email to open a dialog box with a preformatted message. You can edit the email before you send it.  Discussion: Launches a dialog box where you can communicate with the team member assigned to the activity. A number by the discussion icon indicates the number of unread messages.  More...: Launches a dialog box which provides information about the submitted date, held date, activity codes, and UDFs assigned to the activity.

Assigning a Status Reviewer to a WBS

Assign a status reviewer to a WBS to enable the reviewer to view team member activity updates, make changes to the updates, and approve the updates for the selected activities in the WBS.

You only need to perform this task if the required reviewer is someone other than the reviewer set at the project level or a user with Admin or Project superuser privileges.

To assign a status reviewer to a WBS:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - a. Select a WBS.
 - b. In the **General** detail window, double-click the **Status Reviewer** field.

Note: If the **Status Reviewer** field is not displayed, click  **Customize Columns** or  **Customize View** and select **Status Reviewer**.

- 4) In the **Select Status Reviewer** dialog box, select a reviewer and click **OK**.
- 5) If the WBS contains child WBSs, you are prompted with a choice to assign the status reviewer to all child WBSs in the project. Choose **Yes** or **No**.
- 6) Click **Save**.

Tips

- ▶ Team member status reviews must be enabled in Project Preferences to edit the **Status Reviewer** field.

- ▶ A status reviewer is set at the WBS level and applies to each activity included in the WBS. If a WBS includes child WBSs, the child WBSs will not inherit the status reviewer assigned to the parent.

Selecting an Activity for Review

Select an activity for review to enable the project manager or assigned status reviewer to approve the activity when updated by a team member before the status updates are applied to the project.

To select an activity for review:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - a. Select an activity.
 - b. Select the **Review Required** option.

Note: If the **Review Required** option is not displayed, in Classic View click  **Columns** or in Standard View click **✕Customize View** and select the **Columns** tab, then select **Review Required** from the **General** category.

- c. Save your changes.
 - In **Classic View** click the **Actions**  menu and select  **Save** (Ctrl+S).
 - In **Standard View** click **Save**.

Tips

- ▶ Team member status reviews must be enabled in **Project Preferences**.
- ▶ If the **Review Required** option is not selected, status updates made by team members are approved automatically. View updates for each activity assigned to a team member in the **Update History** detail window.

Reviewing Team Member Status Updates

Review updates your team members made to activities. While reviewing updates, you can modify the data, approve the status updates, or place a hold on a status update to reconcile at a later time. You can view status updates for all projects that you are assigned as a reviewer, or choose to view status updates only for some projects.

Note: Only the fields updated by a team member using one of the P6 Team Member interfaces are displayed in the **Status Updates** page.

To view status updates:

- 1) Click **Approvals**.
- 2) On the **Approvals** navigation bar, select **Status Updates**.
- 3) On the **Status Updates** page:
 - a. To accept an update, on the status update card, select **Accept**.

- b. To make a change to an update:
 1. Select **Override**.
 2. In the **Override Updates for Activity** dialog box, enter a new value and select **Override**.
- c. To place a hold:
 1. Select **Pending**.
 2. On the status update card, select **Hold**.
- d. To remove a hold:
 1. Select **Held**.
 2. On the status update card, select **Remove hold**.
- e. To accept all status updates, including any override updates you made, select **Accept all updates**.

Tips

- ▶ Team members can continue to make updates to activities that have not been approved yet or are on hold. The status updates will reflect the latest team member updates.
- ▶ Pending updates for a project checked out in P6 Professional or opened exclusively are not displayed until the project is checked in or the exclusive lock is released.
- ▶ When team members update Actual Units, the updated value for Remaining Units is displayed when the field is updated by the team member or calculated automatically. The Remaining Units field is displayed even when the field is not selected for editing in the Project Preferences dialog box.
- ▶ Steps that are added or deleted by team members do not go through the approval process.

About The Apply Actuals Feature

After progress is recorded by approving timesheets, entering actual data, or setting the **Auto Compute Actuals** option, you can run the *Apply Actuals* feature to update the schedule. The *Apply Actuals* feature runs as a service and schedules activities with progress and/or activities that have the **Auto Compute Actuals** option set.

When you run *Apply Actuals*, you can move the data date. P6 schedules activities only within the specified time period (between the current data date and new data date) and calculates progress for those activities that are set to automatically calculate actuals.

Working with the Apply Actuals Feature

Before you run the **Apply Actuals** command, decide which method you will use to update progress, *Auto Compute Actuals* or *P6 Team Member* (timesheets). If using the *Auto Compute Actuals* method, ensure project managers have marked the **Auto Compute Actuals** option for select activities, resources, and expenses. If using timesheets, make sure all project resources have recorded their timesheets in P6 Team Member and those timesheets have been approved.

When you run the **Apply Actuals** command, both methods are invoked to determine the actuals that are applied to a given project:

1. **Auto Compute Actuals method:** Actual values and dates are progressed for the activities (and their resources and expenses) that are scheduled to occur between the last data date and the new one. This method acts on activities, resources, and expenses that have their **Auto Compute Actuals** option selected.
2. **Timesheets method:** Actual timesheet hours from P6 Team Member are applied. This method acts on resource assignments for resources with **Timesheets** module access. In P6 Team Member you also have the option of updating the following, depending on what fields are being updated:
 - a. Actual units
 - b. Actual and Remaining Units
 - c. Actual and Percent Complete

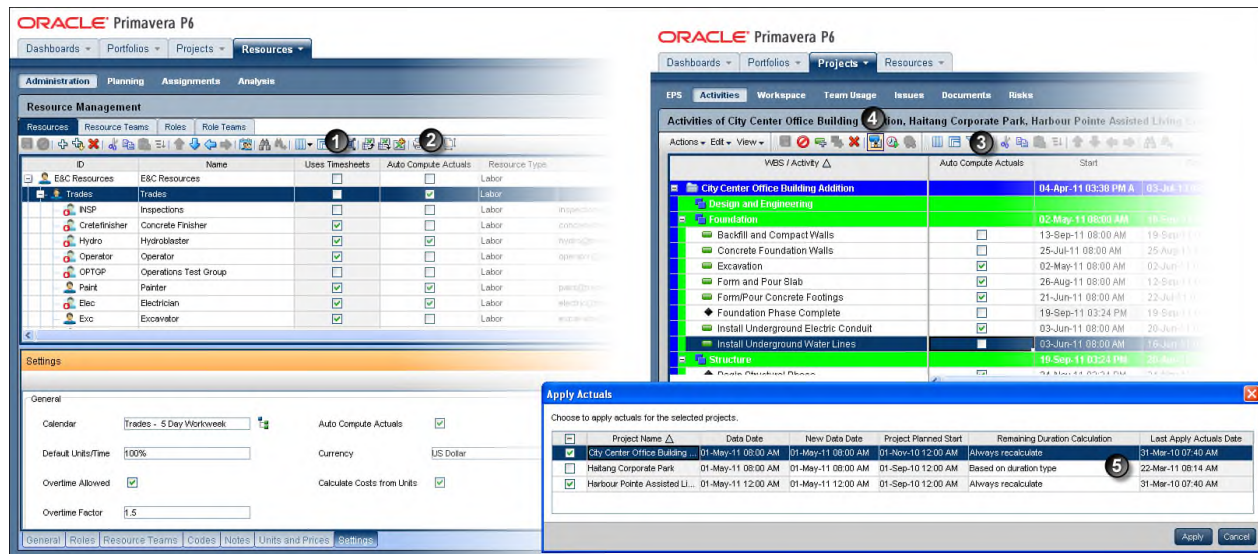


Table of Key Elements When Applying Actuals

Item	Description
1	Uses Timesheets option: Select this option to indicate you want to allow this resource to enter hours using timesheets provided by P6 Team Member. When applying actuals to the schedule, actual duration units (e.g., hours) for all the selected resource's assignments will be updated based on timesheet data.
2	Auto Compute Actuals option: Select this option to indicate you want actual hours to be updated for resources (shown in this example), activities, and/or expenses when project actuals are applied.
3	Auto Compute Actuals option: Select this option to indicate you want actual hours to be updated for activities (shown in this example), resources, and/or expenses when project actuals are applied.
4	Apply Actuals icon: Click this toolbar icon or select it from the Actions menu to open the Apply Actuals dialog box.

Item	Description
5	Apply Actuals dialog box: From the list of open projects, select the ones you want actuals to be applied to. You can also apply a new data date. Right-click and select Fill Down to apply the new date to multiple projects. Select a method for calculating the remaining durations in the Remaining Duration Calculation field.

Example (Labor Resource): Sarah enters her hours for the most recent timesheet period in P6 Team Member. She then submits her timesheet for review and approval. Once approved, the timesheet hours are ready to be applied to the project. Paul, the project manager, runs the Apply Actuals command. P6 looks for all approved timesheets that fall within the timesheet period and that are less than or equal to the **New Data Date** value Paul entered on the **Apply Actuals** dialog box. Only Sarah's approved actuals that fall within the timesheet period will get posted. If she enters actuals in timesheets for 5 weeks but the timesheet period is set for every 2 weeks, the entries that were entered for the 5th week will not get posted until the next timesheet period. Her approved actual hours will be applied to the **Actual Units** field for the appropriate Labor or Non-Labor assignment which will then trigger the **Remaining Units**, **Actual Duration** and **Percent Complete** fields to be recalculated.

Example (Non-Labor Resource): A special pump is listed as a non-labor resource for a project. Since non-labor resources cannot enter actual hours per day in a timesheet, a designated user defined as a resource enters a lump sum amount of hours used for the non-labor resource per timesheet period in the **Prior Actuals** field. When the **Apply Actuals** command runs against the project, P6 determines if a value appears in this field, and if it does, it applies this value (with a special calculation for AIA ERP integrations) to the **Actual Units** field.

Applying Actuals to a Project

Apply actuals to update progress on the currently selected projects as of the specified data date.

To apply actuals:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Click the **Actions**  menu and select **Run**  **Apply Actuals**.
 - b. In the **Apply Actuals** dialog box:
 - Select the projects to which you want to apply actuals.
 - Select a date from the **New Data Date** calendar.
 - Select an option from the **Remaining Duration Calculation** list.
 - Click **Apply**.

In **Standard View**:

- a. Click **Actions**  and select **Apply Actuals**.

b. In the **Apply Actuals** dialog box:

- Select the projects to which you want to apply actuals.
- Select a date from the **New Data Date** calendar.
- Select an option from the **Remaining Duration Calculation** list.
- Click **Apply**.

Tips

- ▶ Using the **Project Scheduled Services** page, you can configure scheduled services that have the application apply actuals automatically.
- ▶ These services are removed from the database based on the **ASAP Cleanup Rate** your P6 administrator specifies on the **Configurations** tab in Primavera P6 Administrator. Once the time is met all ASAP jobs that have a status other than running or delegated will be removed from the table automatically. Running and delegated jobs will be removed if they are older than the cleanup rate or if they are older than one day, whichever is greater.

About the Auto Compute Actuals Feature

Instead of manually recording actual progress or collecting data from P6 Team Member Web users' timesheets, you can automatically calculate expected progress based on the schedule plan. This technique, which uses an option called auto-compute actuals, is a quick and convenient way to update your project.

Working with the Auto-Compute Actuals Feature

You can use the auto compute actuals option to automatically calculate expected progress based on the schedule plan. The auto compute actuals feature is available for individual activities, resources, or expenses. Because the auto-compute actuals option is available for these individual elements, you can choose to selectively perform automatic progress calculations as needed for your project.

Activities

If you select to compute actuals automatically for an activity, the application calculates the actual dates, percent complete, remaining duration, and actual and remaining units for all assigned resources and for the activity expenses.

Caution: If you are collecting timesheet data for an activity, you should not choose the auto-compute actuals option. If you auto-compute actuals for an activity, when you update the project, actual and remaining units/costs are automatically updated for all of the activity's assigned resources. If assigned resources have existing actuals that they reported for the activity through timesheets in P6 Team Member Web, their reported data is overwritten by the auto-compute calculations.

If you want to update progress automatically for some, but not all, of an activity's resource assignments, clear the **Auto Compute Actuals** option for the activity and select the option for the specific resources you want to update automatically.

Resources

If you select to compute actuals automatically for a resource, the application calculates the actual and remaining units for all of the resource's assignments.

Note: To turn on the **Auto Compute Actuals** option for individual resources, you must have access to the features available through the **Resources** section of P6 and have access to the specific resources through 'Resource Security' privileges.

Expenses

If you select to compute actuals automatically for an expense, the application will automatically calculate the estimated expenditure for an expense, based on the schedule plan.

Applying Auto Compute Actuals to Activities

Apply auto compute actuals to activities and P6 will calculate the actual dates, percent complete, remaining duration, and actual and remaining units for assigned resources and activity expenses.

To apply auto compute actuals:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Click the **View**  menu and select  **Customize View**.
 - b. In the **Customize Activity View** dialog box, click the **Columns** tab.
 - On the **Columns** tab, expand **General** in the **Available Columns** list and double-click **Auto Compute Actuals** to add it to the **Selected Columns** list.
 - Click **OK**.
 - c. On the **Activities** page, select the **Auto Compute Actuals** option for one or more activities.
 - d. Click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. Click **✕Customize View**.
- b. In the **Customize View** dialog box, click the **Columns** tab.
 - On the **Columns** tab, expand **General** in the **Available Columns** list and double-click **Auto Compute Actuals** to add it to the **Selected Columns** list.
 - Click **Save and Apply**.
- c. On the **Activities** page, select the **Auto Compute Actuals** option for one or more activities.
- d. Click **Save**.

Caution: If you are collecting timesheet data for an activity, you should not select the auto compute actuals option. If you auto compute actuals

for an activity, when you update the project, actual and remaining units/costs are automatically updated for all of the activity's assigned resources. If assigned resources have existing actuals that they reported for the activity through timesheets in P6 Team Member Web, their reported data is overwritten by the auto compute calculations.

About Store Period Performance

Using the Store Period Performance feature, you can track actual to date units and costs. Storing period performance records actuals for the selected financial period along with earned value and planned value, so you can track previous periods and compare current and future trends. Users can store period performance for any predefined period in the Financial Period dictionary.

Storing Period Performance

Use the Store Period Performance feature, to track actual units and costs to date. This feature allows you to track previous periods and compare current and future trends.

To store period performance:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
In **Classic View**:
 - a. On the **Activities** page, click the **Actions**  menu and select **Run**  **Store Period Performance**.
 - b. In the **Store Period Performance** dialog box, select projects for which you want to store performance and click **Store**.
In **Standard View**:
 - a. On the **Activities** page, click **Actions**  and select **Store Period Performance**.
 - b. In the **Store Period Performance** dialog box, select projects for which you want to store performance and click **Store**.

Tips

- ▶ To select or clear all projects, select or clear the option at the top of the options column.
- ▶ These services are removed from the database based on the **ASAP Cleanup Rate** your P6 administrator specifies on the **Configurations** tab in Primavera P6 Administrator. Once the time is met all ASAP jobs that have a status other than running or delegated will be removed from the table automatically. Running and delegated jobs will be removed if they are older than the cleanup rate or if they are older than one day, whichever is greater.
- ▶ P6 includes only stored data in spreads. To see up to date spread data, select Actions, Run, Store Period Performance before summarizing the data.

About Future Period Planning

Future Period Planning allows you to represent work patterns which cannot be represented by a linear spread of units or by applying a curve to an assignment. You can enter the planned resource or role allocation per assignment in the Spreadsheet, then compare the planned future period resource distribution to actual units and costs in the Resource Usage Spreadsheet, Activity Usage Profile, and time-distributed reports

Working with Future Period Planning

You can edit the planned resource or role allocation per assignment in the timescale unit you choose (days, weeks, months, quarters, years, or financial periods). You can compare the planned future period resource distribution to actual units and costs in the Resource Usage Spreadsheet, Activity Usage Profile, and time-distributed reports. If you plan your project work in defined financial periods, after you store period performance, you can compare the resource distribution you planned to the past period actuals of the project.

For example, let us assume an activity has a planned duration of 28 days and planned units of 80 hours. For this activity, you know that the actual work will not be spread evenly across the duration of the activity; instead, the planned units will be spread as follows:

Week 1	Week 2	Week 3	Week 4
10h	30h	15h	25h

By editing the planned resource or role distribution in future periods, you can create an accurate baseline plan to measure against current project progress. Edited future period values are stored in the baseline when you save a copy of the current project as a new baseline. When you restore a baseline, the edited future period values are also restored. As the current project schedule progresses and you apply actuals, you can track how the project is performing by comparing the planned future periods of the project or baseline to the current actuals.

If work on an activity is not proceeding according to plan, you can update the remaining units for the future periods of an assignment. Then you can measure the remaining work for an assignment without changing the original plan. Alternatively, if you choose to change the estimates for future work based on changes to the project schedule, you can edit the future period planned units for an assignment while the activity is in progress. If you need to change the estimates for many assignments, you can create a new baseline plan based on your changes.

Notes:

- You must have the Edit Future Periods and Add/Edit Activities Except Relationships project privileges to edit period data.
- Activity costs, including earned value and planned value, are calculated using the planned future period resource distribution you define for activity assignments.
- P6 includes only stored data in spreads. To see up to date spread data, select Actions, Run, Store Period Performance before

summarizing the data.

Creating a Future Period Planning Layout

You can plan future period resource or role assignments in the Usage Spreadsheet in the Classic View of the Assignments page or in the Spreadsheet view of the Standard View of the Assignments page. Once an assignment is in progress, if work is not being performed according to plan, you can adjust the remaining early units as necessary. Alternatively if you choose to reestimate the remaining work for an assignment, you can adjust the planned units.

To create a layout for future period planning:

- 1) Click **Resources**.
 - 2) On the Resources navigation bar, click **Assignments**.
 - 3) On the **Assignments** page:
 - In **Classic View**:
 - a. Click  **Usage Spreadsheet**.
 - b. Click the **View** ▾ menu and select  **Usage Options**.
 - c. In the **Customize Usage Options** dialog box:
 - Expand **Units** in the **Available Columns** list and double-click **Planned Units** and **Remaining Early Units** to add them to the **Selected Columns** list.
 - If you want to be able to compare planned work against the actuals, you can also add the **Actual Units** column.
 - If you want to be able to view costs related to the assignments as you plan, you can also add the **Planned Cost** and **Actual Cost** columns.
 - Select a **Timescale**.
-
- Notes:** If you track past period actuals per financial period and plan to report performance against planned future period values, select the Financial Period timescale.
-
- Click **OK**.
 - d. Click the **View** ▾ menu and select  **Columns**.
 - e. In the **Customize Columns** dialog box:
 - Expand **General** in the **Available Columns** list and double-click **Curve**, **Start**, and **Finish** to add them to the **Selected Columns** list.
 - If you want to be able to assign total units to assignments which do not yet have units assigned, you can also add the **Planned Units** and **Remaining Early Units** columns.
 - Click **OK**.
 - f. Click **View** ▾ and select  **Save View**.

In Standard View:

- a. Click  **Spreadsheet View**.
- b. Click  **Customize View**.
- c. In the **Customize View** dialog box:
- d. On the **Columns** tab:
 - Expand **General** in the **Available Columns** list and double-click **Curve**, **Start**, and **Finish** to add them to the **Selected Columns** list.
 - If you want to be able to assign total units to assignments which do not yet have units assigned, add the **Planned Units** and **Remaining Early Units** columns.
- e. On the **Spreadsheet** tab:
 - Expand **Units** in the **Available Columns** list and double-click **Planned Units** and **Remaining Early Units** to add them to the **Selected Columns** list.
 - If you want to be able to compare planned work against the actuals, add the **Actual Units** column.
 - If you want to be able to view costs related to the assignments as you plan, add the **Planned Cost** and **Actual Cost** columns.
 - Select a **Timescale**.
- f. Click **Apply**.

Tips:

- ▶ Group and sort your view in a way that allows you to identify roles and resources, the activities to which they are assigned, and the project to which the activities are assigned (because the same activity may appear in different projects). For example, you can group and sort the resource usage spreadsheet by project and by resource.
- ▶ Future period planning only supports a single line in the timescale. See: **Future Period Planning: Settings** (on page 248).
- ▶ When you enter a value into a future period column for an assignment, P6 assigns the value Manual to the resource curve, so adding the **Curve** column to your view allows you to identify the assignments you have modified. Adding **Start** and **Finish** to your view makes it easier to identify the periods which you can plan.
- ▶ If you enter a value in the planned units or remaining early units columns for an assignment which does not yet have total units assigned, the units will be spread evenly over the duration of the assignment.

Editing Period Values for Assignments

You can enter or edit future period values for assignments of labor, non-labor, and material resource, as well as for role assignments.

- 1) Click **Resources**.
- 2) On the Resources navigation bar, click **Assignments**.
- 3) On the Assignments page:

In Classic View:

 - a. Click  **Usage Spreadsheet**.

- b. For each resource assignment you want to plan, enter or edit the **Planned Units** and the **Remaining Early Units** for each time period.
- c. Click  **Save**.

In Standard View:

- a. Click  **Spreadsheet View**.
- b. For each resource assignment you want to plan, enter or edit the **Planned Units** and the **Remaining Early Units** for each time period.
- c. Click **Save**.

Tips

- ▶ When you modify period values, the curve changes to Manual.
- ▶ You can apply a resource curve to an assignment before you edit period values for the assignment. When you apply the resource curve, P6 will spread period values across the planned duration of the activity according to the resource curve distribution. You can then modify the period values as necessary.

Future Period Planning: Settings

Timescale setting of the Usage Options dialog box.

When you select a smaller timescale interval from the timescale you used to enter future period values, the values you entered in the future periods are spread linearly over the smaller future periods based on the assigned calendar.

When you select a larger timescale interval, the values you originally entered in the smaller timescale intervals are aggregated into the larger intervals.

If you subsequently change the timescale back to the setting you used when you entered values in future periods, the values appear as you originally entered them.

Note: The timescale value does not affect the number of units you can assign to a future period. For example, if your timescale is set to Day, P6 will not prevent you from entering more than 24 hours.

Future period planning only supports a single line in the timescale.

- ▶ If you select **Year/Month**, the timescale will show monthly intervals.
- ▶ If you select **Year/Quarter**, the timescale will show quarterly intervals.
- ▶ If you select **Quarter/Month**, the timescale will show monthly intervals, labeled with the quarter number, month and year.
- ▶ If you select **Month/Week**, the timescale will show weekly intervals.
- ▶ If you select **Week/Day**, the timescale will show daily intervals.
- ▶ If you select **Financial Period**, the timescale will show financial periods.

Linking planned and at completion.

If the project option **Link planned and at completion for not started activities** is selected and you enter a value in the planned units field for a not started activity, P6 populates the remaining early units field with the same value; the reverse is also true. If this option is not selected, you can enter different values for the same future period in the planned units and remaining early units fields; in this case, the total values for each field are calculated independently for the assignment.

Activity settings.

Duration types: You can enter period values on assignments when the activity associated with the assignment has a duration type of Fixed Duration & Units or Fixed Duration and Units/Time. You cannot enter future period values for assignments to activities with a duration type of Fixed Units or Fixed Units/Time.

Activity types: You can enter period values on assignments to any type of activity except milestone activities.

About Summary Data

Projects often contain large amounts of data. Users expect to rearrange and group this data to obtain subtotals and totals for status reporting. Performance problems would naturally arise if the data had to be re-calculated over and over for each minor change. To resolve these issues and to obtain accurate aggregate values representing sub-totals and totals, projects are summarized using the web summarizer. The web summarizer creates *summary data* and *spread data*. *Summary data* means a new summary record is created to store aggregate values for totals in columns. *Spread data* means a new sub-summary or spread record for each spread period is created with only the individual values for that period.

Example: You want to see resource assignments spanning multiple resources and break out the subtotals by project and WBS. By summarizing the selected projects, the database performs the calculations necessary to display subtotals for all cost and unit fields by resource, by project, by WBS, and by time period.

Many features in P6 and P6 Professional use summary enterprise or project data calculations spanning multiple records and therefore rely on the creation of up-to-the-minute summarized data. To ensure that enterprise records are current, you need to summarize projects. Summarization performs the series of calculations that update records with any new information that has been entered since the last update. Summary data tables temporarily store and share the data.

When a project is summarized, a scheduled service creates summary data for the following entities:

- ▶ All project data for a given project. This includes all the data displayed in columns in the tables on the Activities, EPS, and Resource Assignments pages.
- ▶ Project and WBS data for each financial period or week/month, including totals.
- ▶ Resources and roles by project, and totals for all projects (enterprise resource summary).

When an EPS element is summarized, a scheduled service creates summary data for the following entities:

- ▶ EPS summary records representing all project summary data for all projects within a given EPS node.

Note: Portfolio features such as *Capacity Planning*, *Performance Status*, and data in dashboard portlets require EPS summaries. If using these features in the application, you should use the scheduled job service to summarize all projects in the portfolio.

The following types of projects are not summarized:

- ▶ Templates
- ▶ Baselines
- ▶ Requested Projects
- ▶ What-if Scenario Projects

Note: Projects that are checked out in P6 Professional or opened exclusively by another user cannot be summarized even if set to *Enable Summarization*. Projects that are opened exclusively by another user can only be summarized by that user.

Working with the Summarizer Service

You can summarize data at any time or you can use the **Scheduled Services** page to schedule a time when data are regularly summarized. For example, set the application to summarize every Monday at 8:00 a.m. In each case, project data are summarized according to the settings you specify and the new summary values are saved to the project database, overwriting any previously calculated summary data. If you run the summarizer from the **Scheduled Services** page, you can select to summarize an EPS rather than individual projects. Otherwise, an EPS node uses the sum of all the project records beneath it.

Resources

Resource-related features in P6 that use summary data rely on the creation of enterprise (EPS) resource records. Each record is the sum of all assignments for a resource. When you summarize a project, the application creates resource records for that project. Each time the service runs, the records are updated.

Summarizing Projects

Summarize projects to maintain up-to-date project data.

To summarize projects:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 In **Classic View**:

- a. Select a project or EPS node.
- b. Click the **Actions**  menu and select  **Summarize Projects**.

In Standard View:

- a. Select a project or EPS node.
- b. Click **Actions**  and select **Summarize Projects**.

Tips

- ▶ When you summarize projects from the **Activities** page, the application will summarize any of the currently open projects. When you summarize from the **EPS** page, only the selected projects will be summarized.
- ▶ Using the **Project Scheduled Services** page, you can schedule the application to automatically summarize projects on a periodic basis.
- ▶ To summarize projects after you modify high-level planning assignments, select the **Automatically summarize on leaving the spreadsheet** option on the **Customize Spreadsheet** dialog box of the **Planning** page in the **Resources** section.
- ▶ These services are removed from the database based on the **ASAP Cleanup Rate** your P6 administrator specifies on the **Configurations** tab in Primavera P6 Administrator. Once the time is met all ASAP jobs that have a status other than running or delegated will be removed from the table automatically. Running and delegated jobs will be removed if they are older than the cleanup rate or if they are older than one day, whichever is greater.
- ▶ You can also summarize projects from the **Actions** menu of the **Activities** page.

Issues

About Issues

Issues are perceived problems within a schedule that require attention or corrective action. When you create them in the Activities section, you can associate them with a single project or workgroup and assign them to a responsible manager in the OBS for follow-up based on priority. You can also associate issues with a single activity. You can choose to receive email notifications when new issues of a certain priority are added, when existing issues are modified, or when issues are assigned a specific issue code.

You can also think of issues as impediments, action items, open items, punch lists, logs, or concerns. Over time, if you do not resolve or close open issues or issues placed on hold, they can become risks.

For example, you can create an issue code titled *Severity*, and subsequently create issue code values: *High*, *Medium*, and *Low*. You can assign each of these code values to issues across multiple projects, enabling you to categorize each issue according to how severe it is. Similarly, you can create codes to categorize issues by responsibility, subproject, or any other classification you require to organize issues. Assigning issue codes enables you to quickly search for and view issues according to specific criteria.

Working with Issues

Issues are known problems within an activity, WBS, project, or workgroup that require attention or corrective action. You can view issues from several areas within the application:

- ▶ In the Dashboards section, use the My Issues portlet to view issues you are associated with in the context of the filter criteria selected for the dashboard.
- ▶ In the Projects section:
 - ▶ From the Issues page, you can access all issues for any open project.
 - ▶ From the Activities page or EPS page, use the Issues detail window to view issues associated with an activity, WBS, or project.
 - ▶ From the Workspace page, use the Project Issues portlet to view issues associated with the current project selected in the Select Project list.
 - ▶ From the Workgroup Workspace page, use the Issues portlet to view issues associated with the workgroups to which you belong.

You can customize how issues are presented. For example, you can choose to view issues in either a list or chart format. You can also configure column, group, sort, and filter options to focus on issue data that is most important to you. Additionally, you can add, revise, or delete issues from each of these areas.

Notes:

- The issue name must be unique relative to the names of any other issues assigned to the same project, WBS, or activity. P6 will prompt you when it is not.
 - Issues cannot be created for template projects.
-

To help organize and manage issues for your project or workgroup, additional issue management features are available, depending on your security privileges. To organize issues, you can assign enterprise-level issue codes, which enable you to categorize issues in a way that is meaningful to you. The features for organizing and managing issues are accessible on the Enterprise Data page. Use the issues options in the Enterprise Data page to add, edit, and delete issue codes and issue user-defined fields. These options appear only if you have the required privileges.

Creating Project Issues

Create project issues to identify problems within a schedule that must be addressed before the project can be completed.

To create a project issue:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, select **Issues**.
- 3) On the Issues Management page click **+ Add**.
- 4) In the Select Project dialog box, select a project for the issue and click **Select**.
- 5) On the Issues Management page, configure the issue fields and click **Save**.

Tips

- ▶ The issue name must be unique relative to the names of any other issues assigned to the same project, WBS, or activity.
- ▶ You cannot add an issue to a project that is checked out or locked. You also cannot create issues for template projects.
- ▶ You can also create project issues from the Project Issues portlet of the Workspace page, the Issues detail window of the Activities page or EPS page, or the My Issues portlet of the Dashboards page.

Configuring Project Issues

Configure project issues to update issues that have been identified for a project.

To configure project issues:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Issues**.
- 3) On the Issues Management page, expand a project and click an issue:
 - a. In the General detail window, configure the fields and lists.
 - b. In the Codes detail window assign issue codes.
 - c. In the Related Documents detail window assign related documents.
 - d. In the Related Issues detail window assign related issues.
 - e. Click **Save**.

Tips

- ▶ You can also configure workgroup issues from the Issues portlet of the Workgroup Workspace page.
- ▶ You can also configure issues from the Project Issues portlet of the Workspace page or the My Issues portlet of the Dashboards page.

Customizing Project Issues

Customize the display of project issues to define how their available columns, filters, grouping, and sort options appear in the user interface.

To customize project issues:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Issues**.
- 3) On the Issues page, click **Customize**.
- 4) In the Customize Project Issues dialog box:
 - a. Click the Columns tab and use the common controls to configure the **Selected Columns** list.
 - b. Click the Filtering tab and show all available issues or define a filter.
 - c. Click the Grouping tab and configure the grouping lists and options.
 - d. Click the Sorting tab and configure the sorting lists and order.
 - e. Click **Save**.

Tips

- ▶ You can also customize project issues from the Project Issues portlet of the Workspace page, the Issues portlet of the Workgroup Workspace page, or the My Issues portlet of the Dashboards page.

Assigning Related Items to Issues

You can assign related documents and issues to an issue.

To assign related items to an issue:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Issues**.
- 3) On the Issues Management page, expand a project and select an issue.
 - ▶ In the Relate Documents detail window, click **Assign...** and select documents from the dialog box.
 - ▶ In the Relate Issues detail window, click **Assign...** and select issues from the dialog box.

Tips

- ▶ To remove a document or issue, click  **Row Actions** next to the name of the item and select **Delete**.
- ▶ The instructions in this topic assume that the content repository is configured.
- ▶ The Related Documents dialog box will only display documents of the selected project.
- ▶ You can also assign items to issues from the Project Issues portlet of the Workspace page. You can assign items to workgroup issues from the Issues portlet of the Workgroup Workspace page.

Sending Email about Issues

You can send emails about project and workgroup issues that include basic information, such as project, issue name, priority and due date.

To send issue emails:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Issues**.
- 3) On the Issues Management page, expand a project, click  **Row Actions** and select **Email Issue Details** for one of the issues.
- 4) In the Send Email dialog box:
 - a. Edit the fields as needed.
 - b. Click **Send**.

Tips

- ▶ You must have an email address listed in your user profile to send an email.
- ▶ You can also send issue emails from the Issues portlet of the Workgroup Workspace page, the Project Issues portlet of the Workspace page, or the My Issues portlet on the Dashboards page.

About Issue Codes

For example, you can create an issue code titled *Severity*, and subsequently create issue code values: *High*, *Medium*, and *Low*. You can assign each of these code values to issues across multiple projects, enabling you to categorize each issue according to how severe it is. Similarly, you can create codes to categorize issues by responsibility, subproject, or any other classification you require to organize issues. Assigning issue codes enables you to quickly search for and view issues according to specific criteria.

Assigning Issue Codes

You can assign issue codes to organize and categorize issues in a way that is meaningful to you.

To assign an issue code:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Issues**.
- 3) On the **Issues Management** page, expand a project and select an issue.
- 4) In the **Codes** detail window click **Assign...**
- 5) In the **Select Issue Code** detail window, select a code and click **Select**.
- 6) Click **Save**.

Tips

- ▶ You can only assign one issue code at a time. Click **Assign...** again to assign another code.
- ▶ You can also assign issue codes from the **Project Issues** portlet on the **Workspace** page or the **My Issues** portlet on the **Dashboards** page.

Risks

About Risks

Risks are any uncertain events or conditions that, if they occur, have a positive or negative effect on project objectives. Risks are also known as threats, warnings, imperatives, escalation notices, or jeopardies. Positive risks are often classified as opportunities which, if they occur, are realized as rewards. Thorough documentation and analysis of risks over multiple projects offer lessons, and potentially cost and time savings, for all future projects.

You can document risks in P6 and perform quantitative analysis of the data in the P6 risk register in Oracle Prime. Once that analysis is complete, you can see the results in the Activities view in P6.

Working with Risks Enterprise Data

Risk Enterprise data is used to setup categories, risk scoring matrices, and thresholds that are standard across your company. The categories and matrices that are assigned to a project can be displayed in the risk register, which is located on the **Risks** page in the **Projects** section.

Risk Categories page: Risk categories are used to categorize and organize project risks. They are global across the enterprise and are a mechanism to group risks across multiple projects to see risk trends across the organization as well as a single project. Technical, Operational, and External are examples of risk categories that might apply to a typical project. The risk categories are created in the Risks Enterprise Data area and assigned on the **Risks** page in the **Projects** section.

Risk Scoring Matrices page: Create a risk scoring matrix to perform qualitative risk analysis on your project risks. When creating a risk scoring matrix, you must define the probability, tolerance, cost, and schedule impacts. Additionally, you can add user-defined impacts to the matrix. You must also assign a risk scoring method (Highest Impact, Average Impact, and Average Individual Impact) to the matrix. A probability and impact diagram is created based on the information assigned in the matrix. Click on the **Probability and Impact Diagram** detail window to view the diagram.

To use the risk scoring matrix, you must add the projects you want to use the matrix to the risk scoring matrix from the **Projects** detail window. You can also assign a risk scoring matrix to a project on the **EPS** page in the **Projects** section.

Note: You can add risks to a project without a risk scoring matrix; however, you cannot perform qualitative risk analysis and will not be able to assign probability or impact thresholds without a risk scoring matrix. You can add a risk scoring matrix to the project at any time.

Risk Thresholds page: Create risk thresholds, including probability, tolerance, cost impact, schedule impact, and any additional user-defined impacts, for use in the risk scoring matrix.

Risk UDFs page: Risk user-defined fields (UDFs) are used to track additional information about the risk that is not provided by the standard risk fields. Create Risk UDFs when it is necessary to view additional data fields on the **Risks** page. A risk UDF can include a text string, a numerical value, start date, finish date, cost, integer, or indicator.

Configuring Risk Enterprise Data

You can configure enterprise data to include risk categories and risk UDFs, and to define the criteria for performing qualitative risk analysis using a risk scoring matrix.

To define the criteria for performing qualitative risk analysis, perform the following tasks:

- 1) **Creating Risk Thresholds** (on page 258)
- 2) **Creating Risk Scoring Matrices** (on page 262)
- 3) **Assigning a Risk Scoring Matrix to a Project** (on page 264)

Note: If you want to perform quantitative risk analysis in Oracle Prime, you must also populate the **Minimum Duration**, **Maximum Duration**, and **Most Likely Duration** fields in the Activities view.

To configure risk categories or risk UDFs, perform the following tasks:

- 1) **Creating Risk Categories** (on page 266)
- 2) **Creating Risk UDFs** (on page 76)

About Risk Thresholds

Risk thresholds are a range of values (monetary, time, quality, technical, etc.) used in rating or assessing the impact of the risk to the project.

These thresholds are the inputs used to create a risk scoring matrix, which is the overall scoring mechanism used to perform qualitative risk analysis on your project risks.

Working with Risk Thresholds

From the **Risk Thresholds** page, create risk thresholds for use in risk scoring matrices.

Risk thresholds necessary for a risk scoring matrix are:

- ▶ **Probability:** The likelihood of a risk occurring.
- ▶ **Tolerance:** The acceptability or manageability of a risk on a project.
- ▶ **Schedule Impact by percentage or value:** The amount of time the risk will increase or decrease the project schedule, defined as either a percentage of the project's planned duration (by percentage) or as a duration value (by value).
- ▶ **Cost Impact by percentage or value:** The cost impact if a risk occurs, defined as either a percentage of the project's planned cost (by percentage) or as a monetary value.

Additional user-defined impacts can be added to track impacts such as Political, Environmental, or Reputation.

Code	Name	Range	Color
H	High	>17	Red
M	Medium	>5	Yellow
L	Low	<=5	Green
N	Negligible		

Table of Risk Threshold Elements

Item	Description
1	Risk Threshold toolbar

Item	Description
2	Risk Threshold work area: Define the risk threshold name, type (Probability, Tolerance, Schedule Impact by percentage or value, Cost Impact by percentage or value, User-Defined Impact), and number of thresholds levels in this work area. Each threshold can have 2 - 9 levels; however, the cost impact, schedule impact, and any user-defined impacts must have the same number of levels for a given risk scoring matrix. In the example above, the Cost Impact by value, Schedule Impact by value, Probability, and Tolerance thresholds are defined for the Harbour Pointe Assisted Living construction project. The Cost Impact and Schedule Impact thresholds are each defined with 5 levels and the Probability threshold is also defined with 5 levels. The risk scoring matrix using these thresholds will have a matrix size of 5 x 5. For each risk scoring matrix, only one threshold for Probability, Tolerance, Schedule Impact, and Cost Impact is allowed. You can add as many user-defined impacts as necessary. You create multiple thresholds of the same type, but with different values, when you create multiple risk scoring matrices.
3	Levels detail window: The details for each level are defined in this window. Define a name for each level and a code, which is a short name or abbreviation for the name. Also, define the range of acceptable values for that level; the range levels could be a percentage value, dollar amount, number of days, or a text string depending on the chosen threshold. You can define a color for each threshold level; however, you should define colors for the tolerance threshold. The colors for the threshold are used to give visual representation in the risk register. The colors for the tolerance threshold are used in the Probability and Impact Diagram (PID) to visually represent the threshold values. More importantly, the colors display in the Score and Score (text) fields on the risk register on the Risks page. This enables you to easily identify where in the risk scoring matrix this risk falls in terms of severity. In the example above, the Tolerance threshold is defined with 3 levels (High, Medium, and Low) and each range is assigned a color. You will see the impact of the color after you create a risk scoring matrix, assign the thresholds to the matrix, and assign a risk scoring method.

Creating Risk Thresholds

Create risk thresholds to use when creating a risk scoring matrix. When creating risk thresholds, you must define the probability threshold, cost impact threshold by percentage or value, schedule impact threshold by percentage or value, and tolerance threshold. You can also define as many user-defined impacts as necessary.

To create risk thresholds:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.

- 3) On the Enterprise Data page, expand **Risks** and click **Risk Thresholds**.
- 4) On the Risk Thresholds page:
 - a. Click **+Add**.
 - b. In the **Name** field, double-click and type a threshold name.
 - c. In the **Type** field, double-click and select a type of risk from the list.
 - d. In the **Levels** field, double-click and select a level number from the list.
- 5) In the Levels detail window, default values are assigned for the **Code**, **Name**, and **Range** values. Use the default values provided, or double-click any field to customize it.

Note: You can define a color for each threshold level to visually represent the values when working the risk register on the Risks page in the Projects section. However, you should define colors for the tolerance threshold. The colors for the tolerance threshold are used to color the Score field on the risk register on the Risks page. This enables you to easily identify where in the risk scoring matrix this risk falls in terms of severity.

- 6) On the Risk Thresholds page, click **Save**.

Tips

- ▶ The *Cost Impact by percentage* and *Schedule Impact by percentage* options allow you to assess risk without having to define absolute values. This enables you to use the same risk scoring matrix across multiple projects.

Modifying Risk Thresholds

If you are going to change the type or level of a threshold that is currently assigned to a scoring matrix, you must first remove the threshold from the risk scoring matrix and assign a new threshold.

To delete a threshold from a risk scoring matrix:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Risks** and click **Risk Scoring Matrices**.
- 4) On the Risk Scoring Matrices page:
 - a. Locate the risk scoring matrix that includes the threshold you are modifying.
 - b. Double-click in the appropriate threshold field.
- 5) In the Select Threshold dialog box, choose a different threshold and click **Select**.
- 6) On the Risk Scoring Matrices page, click **Save**.

To modify a risk threshold:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Risks** and click **Risk Thresholds**.
- 4) On the Risk Thresholds page:

- a. Locate the threshold you are modifying.
- b. Double-click in the field you are modifying and update the value.

Note: If you are modifying the number of levels assigned to a threshold, all data for existing levels are overwritten and replaced with the default values for that level.

- c. Click **Save**.

About Risk Scoring Matrices

A risk scoring matrix is a qualitative analysis tool used to calculate the impact of a risk on a project. A risk scoring matrix includes probability threshold values, cost and impact threshold values, and any additional user-defined impact threshold values, which are all used in the calculation of the risk score. The score is used to give an overall rating of a risk depending on the probability and impact thresholds assessed in the project. The scores are used to help determine if the risk should be addressed during the course of the project, or if the risk does not present a significant impact to the cost or schedule of the project.

Working with Risk Scoring Matrices

Use the **Risk Scoring Matrices** page to create a risk scoring matrix for one or more projects. The inputs to the risk scoring matrix are the risk thresholds, which you create on the **Risk Thresholds** page from the **Enterprise Data** section.

The screenshot shows the Oracle Primavera P6 interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', and 'Resources'. The 'Enterprise Data' section is active, showing a tree view on the left with 'Risk Scoring Matrices' selected. The main area displays a table of matrices and a 'Probability and Impact Diagram'.

Name	Matrix Size	Probability Threshold	Impact Thresholds	Tolerance Threshold	Risk Scoring Method
Harbour Point Risk Scoring Matrix	5 x 5	Harbour Point Probability Threshold	Harbour Point Schedule Threshold, Harbour Point Cost Threshold, Safety Thres...	Harbour Point Tolerance Threshold	Highest Impact
Cordova Risk Scoring Matrix	5 x 5	Cordova Probability Threshold	Quality Threshold (5 level), Cordova Cost Threshold, Cordova Schedule Threshold	Cordova Tolerance Threshold	Average Impact
Tech Projects Risk Scoring Matrix	3 x 3	Tech Projects Probability Threshold	Tech Projects Schedule Threshold, Tech Projects Cost Threshold	Tech Projects Tolerance Threshold	Highest Impact
Maintenance Risk Scoring Matrix	5 x 5	Maintenance Probability	Maintenance Cost Impact, Maintenance Schedule Impact	Maintenance Tolerance	Average Individual Impact

The 'Probability and Impact Diagram' shows a matrix of scores based on Probability (Very High, High, Medium, Low, Very Low) and Severity (Severity 1 to Severity 5). The scores are color-coded: red for high scores (e.g., 18, 20, 24) and green for lower scores (e.g., 6, 7, 8).

Table of Risk Scoring Matrices Elements

Item	Description
1	Risk Scoring Matrices toolbar

Item	Description
2	Risk Scoring Matrices work area: This work area contains all the risk scoring matrices defined for your company. The number of risk scoring matrices you create is determined by risk analysis practices incorporated in your business. You might have one corporate-wide risk scoring matrix that is used for all projects, or you might have several matrices which are used depending on different factors, such as project size. For example, a new development project might require different cost impact and schedule impact threshold values than a project for a new feature development on an existing product. There might also be situations where a project is a joint-venture or is performed by a contractor and the prime owner's matrix must be used. However, for any project, only one matrix is assigned. In the work area above, this company has a need for multiple risk scoring matrices, including a separate risk scoring matrix for the Harbour Pointe Assisted Living construction project. When creating a risk scoring matrix, you choose a matrix size based on the number of levels assigned to your probability and impact thresholds defined on the Risk Thresholds page. Using the Harbour Pointe Risk Scoring Matrix as an example, the risk scoring matrix is 5 x 5. The first 5 represents the number of levels assigned to the probability threshold and the second 5 represents the number of levels assigned to the cost and schedule impact thresholds. Next, choose the risk scoring method to use for risk score calculations.

Item	Description
3	Risk Scoring Matrices detail windows: Description: Describe the risk scoring matrix. Projects: Assign the matrix to one or more projects. Note that only one matrix can be assigned to a single project. If a matrix is not assigned to a project, risks can still be entered in the risk register on the Risks page; however, the probability, cost impact, and schedule impact threshold fields are disabled, and you cannot use the qualitative analysis features of the application. At any time you can create a matrix and assign it to an existing project. Probability and Impact Diagram (PID): The PID is a graphical representation of the selections made in the Risk Scoring Matrices work area. The number of rows and columns is determined by the matrix size. The rows are the probability levels and the columns are the impact levels. The code and name fields for the impact threshold levels are customizable when creating a threshold; therefore, the column labels for the impacts are "Severity <i>n</i>." The number of severity columns reflects the number of levels assigned to the impact thresholds. The color coding indicates the tolerance threshold assigned to the risk scoring matrix. These same tolerance colors are also visible in the Score and Score (Text) fields on the risk register on the Risks page when risk values are entered. Probability: The details of the probability threshold assigned to the matrix needed to perform a qualitative assessment on project risks. This detail window is read-only. To change anything related to the threshold, navigate to the Risk Thresholds page. Impacts: The details for the impact thresholds assigned to the matrix. A cost and schedule impact must be defined for the matrix to perform a qualitative assessment on project risks. An unlimited number of user-defined impact thresholds can be assigned to the matrix. From this detail window, you can add or delete impacts to the matrix; however, you cannot modify the threshold values. To change anything related to the threshold, navigate to the Risk Thresholds page. Tolerance: The details for the tolerance threshold assigned to the matrix. This detail window is read-only. To change anything related to the threshold, navigate to the Risk Thresholds page.

Creating Risk Scoring Matrices

Create a risk scoring matrix to perform qualitative analysis on project risks. Project risk is assessed based on the thresholds defined in the risk scoring matrix.

Before creating a risk scoring matrix, you need to first define risk thresholds.

To create a risk scoring matrix:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Risks** and choose **Risk Scoring Matrices**.
- 4) On the Risk Scoring Matrices page:
 - a. Click **+Add**.
 - b. In the **Name** field, click and type a unique name.
 - c. In the **Matrix Size** field, double-click and click **...Select**.
- 5) In the Select Matrix Size dialog box:
 - a. Choose a threshold level for the **Probability Threshold Level** and **Impact Threshold Level** fields.

Note: You must have already defined thresholds with the number of levels you are assigning to the matrix. If you do not have a threshold with the same number of levels, you will be able to select the matrix size, but you will not be able to add a threshold.

- b. Click **Select**.
- 6) On the Risk Scoring Matrices page, double-click in the **Probability Threshold** field and click **...Select**.
- 7) In the Select Probability Threshold dialog box, choose a probability and click **OK**.
- 8) On the Risk Scoring Matrices page, double-click in the **Schedule Impact Thresholds** field and click **...Select**.
- 9) In the Select Schedule Impact Thresholds dialog box:
 - a. Select a **Schedule Impact** and click **Select**.
 - b. Select any additional impacts and click **Select**.
- 10) On the Risk Scoring Matrices page, double-click in the **Cost Impact Thresholds** field and click **...Select**.
- 11) In the Select Cost Impact Thresholds dialog box:
 - a. Select a **Cost Impact** and click **Select**.
 - b. Select any additional impacts and click **Select**.
- 12) On the Risk Scoring Matrices page, double-click in the **Tolerance Threshold** field and click **...Select**.
- 13) In the Select Tolerance Threshold dialog box, choose a tolerance and click **OK**.
- 14) On the Risk Scoring Matrices page, double-click in the **Risk Scoring Method** field and select a risk scoring method from the list.
- 15) In the Description detail window, type a description of the risk scoring matrix.
- 16) On the Risk Scoring Matrices page, click **Save**.

Assigning a Risk Scoring Matrix to a Project

You need to assign a scoring matrix to a project before it can be used to prioritize risks. Once you assign a scoring matrix to a project, it is available for use from the risk register on the **Risks** page in the **Projects** section.

You can assign a risk scoring matrix to a project from different areas in the application, depending on the tasks you are working on at the time.

- ▶ See **Assigning a Risk Scoring Matrix to a Project from the EPS Page** (on page 264) when setting up a project.
- ▶ See **Assigning a Risk Scoring Matrix to a Project from the Enterprise Data Pane** (on page 264) when defining a risk scoring matrix and applying the matrix to multiple projects.
- ▶ See **Assigning a Risk Scoring Matrix to a Project from the Portfolios Section** (on page 265) when managing a portfolio.

Assigning a Risk Scoring Matrix to a Project from the Enterprise Data Pane

You need to assign a risk scoring matrix to a project before it can be used to prioritize risks. Once you assign a scoring matrix to a project, it is available for use from the risk register on the **Risks** page in the **Projects** section.

You can assign a risk scoring matrix to a project from multiple locations in the application. Use this method when you are defining a risk scoring matrix and need to apply the matrix to one or more projects.

To assign a risk scoring matrix to a project from the Enterprise Data pane:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Risks** and click **Risk Scoring Matrices**.
- 4) On the Risk Scoring Matrices page, select the matrix to assign to the project and click the **Projects** detail window.
- 5) In the Projects detail window, click **Assign...**
- 6) In the Select Project dialog box:
 - a. Select a project and click **Select**.

Note: If the project you selected is assigned to another risk scoring matrix, the threshold values you previously set for the project are removed. You will need to select values using the newly assigned risk scoring matrix.

- 7) On the Risk Scoring Matrices page, click **Save**.

Assigning a Risk Scoring Matrix to a Project from the EPS Page

You need to assign a risk scoring matrix to a project before it can be used to prioritize risks. Once you assign a scoring matrix to a project, it is available for use from the risk register on the **Risks** page in the **Projects** section.

You can assign a risk scoring matrix to a project from multiple locations in the application. Use this method when you are setting up a project or modifying project settings.

To assign a risk scoring matrix to a project from the EPS page:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. Locate the project you want to associate with a risk scoring matrix.
 - b. Double-click in the **Risk Scoring Matrix** field and click .
 - c. In the **Select Risk Scoring Matrix** dialog box, select a matrix and click **OK**.
 - d. On the **EPS** page, click  **Save** (Ctrl+S).

In **Standard View**:

- a. Locate the project you want to associate with a risk scoring matrix.
- b. Double-click in the **Risk Scoring Matrix** field and click **...Select**.
- c. In the **Select Risk Scoring Matrix** dialog box, select a matrix and click **Assign**.
- d. On the **EPS** page, click **Save**.

Tips

- ▶ If the project you selected is assigned to another risk scoring matrix, the threshold values you previously set for the project are removed. You will need to select values using the newly assigned risk scoring matrix.
- ▶ If the **Risk Scoring Matrix** field is not visible, click **View** or **✕Customize View** and select **Columns** then, expand **General** and double-click **Risk Scoring Matrix** to move it to the **Selected Columns** list. Click **OK**.

Assigning a Risk Scoring Matrix to a Project from the Portfolios Section

You need to assign a risk scoring matrix to a project before it can be used to prioritize risks. Once you assign a scoring matrix to a project, it is available for use from the risk register on the **Risks** page in the **Projects** section.

You can assign a risk scoring matrix to a project from multiple locations in the application. Use this method when you are creating or modifying a portfolio.

To assign a risk scoring matrix from the Portfolios section:

- 1) Click **Portfolios**.
- 2) On the **Portfolios** navigation bar, click **Portfolio Analysis**.
- 3) On the **Portfolio Analysis** page:
 - a. Click the **View** field and select a scorecard view from the list.
 - b. Select a project.
 - c. In the **Risk Scoring Matrix** field, double-click and click .
- 4) In the **Select Risk Scoring Matrix** dialog box, choose a risk scoring matrix and click **OK**.

Note: If the project you selected is assigned to another risk scoring matrix, the threshold values you previously set for the project are

removed. You will need to select values using the newly assigned risk scoring matrix.

5) On the **Portfolio Analysis** page, click  **Save**.

Tip

If the **Risk Scoring Matrix** field is not visible, click **Customize**. In the **Customize Scorecard** dialog box, click the **Columns** tab. On the **Columns** tab, expand **General** and double-click **Risk Scoring Matrix** to move it to the **Selected Columns** list. Click **Apply**.

About Risk Categories

Risk categories are a classification of risk types customized to your specific project or business that are used to categorize and organize project risks. Categorizing risks enables you to analyze the types of risks occurring and see trends within the project or across multiple projects. This visibility enables you to more effectively manage risks over the long term.

Creating Risk Categories

Create risk categories and subcategories to define a risk breakdown structure (RBS), which enables you to categorize and organize project risks.

To create a risk category:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Risks** and click **Risk Categories**.
- 4) On the Risk Categories page:
 - a. Select an existing category and click **+ Add**  and select **Add** to create a category at the same level, or select **Add Child** to create a category below the selected level.
 - b. In the **Category** field, double-click and type a unique name.
 - c. Move the risk category to the correct location in the list by clicking  **Row Actions** and selecting **Move Up**, **Move Down**, **Move Left**, or **Move Right**.
 - d. Click **Save**.

Tips

- ▶ On the Risks page to display the Category field, click  **Customize View** on the Risks toolbar and select **Category**. To organize risks for open projects, click  **Group By** or  **Filter By** on the Risks toolbar, depending on your viewing preferences.

About Risk User Defined Fields

User defined fields allow you to create and maintain data specific to your organization. For example, you can track additional activity data, such as delivery dates and purchase order numbers. You can also track additional resource data or project cost-related data, such as profit, variances, and revised budgets. User defined fields are global, so they can be used across all projects in your organization.

Creating Risk UDFs

Create risk user-defined fields (UDFs) to store additional project risk data on the Risks page that is pertinent to your project or business and is not available from the default fields. For example, you might need to include a location field to identify where the risk might occur, or a ranking field to determine the order in which the risks will be handled.

UDFs can be of many types: text, start date, finish date, cost, number, integer, or indicator. Data from UDFs is not used in scoring calculations.

To create a risk UDF:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Risks** and click **Risk UDFs**.
- 4) On the Risk UDFs page:
 - a. Click **+Add**.
 - b. In the **User Defined Field**, double-click and type a name.
 - c. In the **Data Type** field, choose a type from the list.
 - d. Click **Save**.

Tips

- ▶ If you intend to use BI Publisher, avoid using commas when creating data other than Project names. The way that data other than Project names is passed to BI Publisher can cause a comma to be interpreted as a delimiter between data items.

Sharing Enterprise Risk Data with Oracle Prime

After you have configured enterprise risk data you can send that data to Oracle Prime to perform quantitative risk analysis. You can then update P6 with the results of that analysis from Oracle Prime and see the results in the pre and post response pessimistic dates fields and pre and post response bars in the Activities view.

To share Enterprise risk data with Prime, perform the following tasks:

- 1) **Configuring Risk Enterprise Data** (on page 256)
- 2) **Linking P6 and Oracle Prime Applications.** (on page 267)
- 3) **Sending Data to Oracle Prime** (on page 268)
- 4) **Updating Projects With Risk Data From Oracle Prime** (on page 268)

Linking P6 and Oracle Prime Applications.

Perform the steps below to link P6 to Oracle Prime for quantitative risk analysis. This link at the application level allows you to establish links at the project level. When the applications and projects are linked, P6 users can send data to Oracle Prime.

To link P6 and Oracle Prime applications:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Application Settings**.
- 3) On the Application Settings page, click the **Gateway** tab.

- 4) On the **Gateway** tab in the **Primavera Gateway Parameters** section:
 - a. Enter the URL of the Primavera Gateway server in the **API Url** field of the Primavera Gateway Parameters section.
 - b. Enter a Primavera Gateway username in the **Username** field.
 - c. Enter a Primavera Gateway password in the **Password** field.
 - d. Click **Test Connection**.

Note: If the connection test fails, contact your Primavera Gateway administrator.

- e. Enter a Primavera Gateway deployment name into the **P6 Deployment** field.
- 5) On the Gateway tab in the Primavera Prime Integration Parameters section:
 - a. Select a synchronization from the **Export Synchronization** list.
 - b. Select a synchronization from the **Import Synchronization** list.
- 6) Click **Save and Close**.

Note: You need the Edit Application Settings privilege to edit the settings on the Application Settings pane.

Sending Data to Oracle Prime

In Classic View, you can send data to Oracle Prime.

To send data to Oracle Prime:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) In the **Activities** page click the **Actions**  menu and select **Exchange Data** and then select the menu option for sending data to Oracle Prime.

Tips:

- ▶ The option for sending data to Oracle Prime will be available if your administrator has configured the integration options.

Updating Projects With Risk Data From Oracle Prime

In Classic View, once you have performed quantitative analysis of your risk data in Oracle Prime, you can update your P6 project with pessimistic dates for activities.

To update projects with risk data from Oracle Prime:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) In the **Activities** page click the **Actions**  menu and select **Exchange Data** and then select the menu option for updating data from Oracle Prime.

Working with Project Risks

The risk register on the **Risks** page is the main area of the application where you identify and manage risks for a project. Additionally, you can add risks to a project from the **EPS** page, and add risks to a project and assign the risks to activities from the **Activities** page.

Once you add a risk to the risk register, you can perform further analysis on the risk and create one or more risk response plans which include activities to reduce the negative impact of the risk.

Risks of Harbour Pointe Assisted Living Center

ID	Name	Type	Status	Owner	Probability	Schedule	Cost	Score	Exposure
R001	Concrete supply constrained	Threat	Active	Concrete Foundation Subcontractor	H (50% to 70%)	H (20.0d to 40.0d)	L (45,000 to 90,000)	28	40,500
R002	Site access restricted for 2 weeks	Threat	Open	Project Managers	VH (70% or higher)	M (10.0d to 20.0d)	VH (300,000 or higher)	72	382,500
R012	Weather delay due to hurricane	Threat	Proposed	Project Managers	M (25% to 50%)	H (20.0d to 40.0d)	M (90,000 to 150,000)	20	45,000
R004	Poor ground conditions	Threat	Open	Project Managers	L (10% to 25%)	L (5.0d to 10.0d)	L (45,000 to 90,000)	3	11,813
R005	Failed electrical inspection	Threat	Rejected (Closed)	Electrician	VL (Up to 10%)	L (5.0d to 10.0d)	VL (Up to 45,000)	1	1,125
R010	Interior design changes	Threat	Proposed	Project Managers	L (10% to 25%)	M (10.0d to 20.0d)	M (90,000 to 150,000)	6	21,000

Activities

Activity ID	Activity Name	Early Start	Early Finish
EC1090	Building Pad Including UG Utils	01-May-11 12:00 AM	01-May-11 12:00 AM
EC1140	First Floor Masonry Structure	01-May-11 12:00 AM	01-May-11 12:00 AM
EC1170	Second Floor Slab & Collar Beam	01-May-11 12:00 AM	01-May-11 12:00 AM
EC1190	Second Floor Masonry Structure	01-May-11 12:00 AM	01-May-11 12:00 AM
EC1210	Third Floor Slab & Collar Beam	01-May-11 12:00 AM	01-May-11 12:00 AM
EC1240	Third Floor Masonry Structure	02-May-11 08:00 AM	05-May-11 10:40 AM
EC1250	Fourth Floor Slab & Collar Beam	05-May-11 10:40 AM	17-Jun-11 10:40 AM

Table of Project Risks Elements

Item	Description
1	Risks toolbar

Item	Description
2	Risks work area: Risks for all the projects you have open display in the risk register. You can group by field name, such as project name, to view all risks organized by project, or create a filter to view only the risks that interest you. When adding a risk to the risk register, you supply a name for the risk, identify the risk as a threat or an opportunity, identify the current status of the risk, identify the owner of the risk, and then assign the values for probability, schedule, cost, and any other applicable user-defined impacts. The values for probability, schedule, cost, and additional user-defined impacts are used to calculate the risk score. The values for probability and cost are used to calculate risk exposure. Note: If the Probability, Cost, and Schedule fields are disabled, a risk scoring matrix has not been assigned to the project. You can still use the risk register to track your risks; however, you cannot use the qualitative risk analysis features in the application until you create a risk scoring matrix and assign it to the project.
3	Risks detail windows: Response Plans: The area where you add response plans and response plan action items. Activities: The area where you associate scheduled activities in your project to an identified risk. Refer to the example above to see a list of the project activities impacted by risk R001: Concrete supply constrained. Description: The area used to provide a detailed explanation of the risk. Cause: The area used to explain why this risk is occurring. Effect: The area used to describe the impact this risk has on this project. Notes: The area used to capture any additional information regarding the risk. Probability and Impact Diagram: The Probability and Impact Diagram (PID) is a graphical representation of the probability and impact thresholds assigned to the risk scoring matrix associated with the project.

Managing Project Risks

You can perform qualitative analysis on your project risks. Using the tasks listed below, you can identify a risk for your project and assign probability and impact values to this risk to calculate a risk score and risk exposure values for each risk. Additionally, you can assign activities to the risk and create a risk response plan, which can include actions to mitigate the risk.

1) **Creating Project Risks** (on page 271)

- 2) **Assigning a Risk to an Activity** (on page 187)
- 3) **Developing a Risk Response Plan** (on page 276)

Creating Project Risks

Add project risks to capture potential threats or opportunities that might impact your project.

For convenience, you can add risks to projects from different areas in the application, depending on the tasks you are performing at the time.

You can capture risks in the **Projects** section from the **Risks**, **Activities**, or **EPS** pages.

- ▶ Adding Detailed Project-Level Risks - The **Risks** page is the risk register where all risk data for the projects on which you are working is stored. You can customize the page using filters or grouping to view a specific list of project risks. From this page, you can assign probability and impact values to obtain a risk score and risk exposure value, and create risk response plans that include response plan action items to reduce or eliminate the negative impact of the risk. If you previously added risks to a project from the **Activities** page or the **EPS** page, you can use this page to add detailed information about the risk and perform qualitative analysis.
- ▶ Adding Risks to Activities - Use the **Activities** page when you are working in the detailed activity level to quickly add a risk or assign an existing risk to activity. From the **Risks** detail window, you can assign probability and impact values to obtain a risk score and risk exposure value. To view all risks on the project or to create risk response plans, use the **Risks** page.
- ▶ Adding High-Level Project Risks - Use the **EPS** page when you are working at the project level to quickly add a risk to a project. From the **Risks** detail window, you can assign probability and impact values to obtain a risk score and risk exposure value. To perform a more detailed analysis of your risks, such as assigning risks to activities or creating risk response plans, use the **Risks** page.

Adding Detailed Project-Level Risks

Add project risks to capture potential threats or opportunities that might impact your project, and to perform qualitative analysis to reduce or eliminate negative impact on the project.

Note: If a risk scoring matrix is not assigned to the project, you can add general risk information to the Risks page, but you will not be able to enter values for probability, schedule and cost, which are values used to generate the risk score.

To add detailed project-level risks:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Risks**.
- 3) On the **Risks** page, click  **Add a Risk** (Insert).
- 4) If multiple projects are open, select a project from the **Select Project** dialog box and click **Assign**, then click **Close**.
- 5) On the **Risks** page:
 - a. In the **ID** field, click and type an ID for the risk.
 - b. In the **Name** field, click and type the risk name.
 - c. In the **Type** field, double-click and select the type of risk from the list.

- d. In the **Status** field, double-click and select the current status for the risk.
- e. In the **Owner** field, double-click then click .
- 6) In the **Select Owner** dialog box, select an owner for the risk and click **Assign**.
- 7) On the **Risks** page:
 - a. In the **Probability** field, double-click and select a probability from the list.
 - b. In the **Schedule** field, double-click and select a schedule impact from the list.
 - c. In the **Cost** field, double-click and select a cost impact from the list.
 - d. Complete any additional fields on the table that are relevant for this risk, including the **Identified By** and **Identified Date** fields, and any user-defined fields.

Note: To display additional columns, click  **Select Columns** and select the column to add to the table.

- 8) Use the **Cause**, **Description**, **Effect**, and **Notes** detail windows to provide more information about the risk.
- 9) On the **Risks** page, click  **Save** (Ctrl+S).

Tips

- ▶ You can copy existing risks to create new risks. If you copy an existing risk to the same project, all data, including response plans and associated activities, is retained. If you copy an existing risk to a different project, activity associations are removed. If the project does not have the same risk scoring matrix assigned, then the probability and impact fields (schedule, cost, and user defined) are cleared.
- ▶ Click the **Probability and Impact Diagram** detail window to view the risk scoring matrix assigned to the project.

Adding Project Risks to Activities

Add project risks to activities to capture potential threats or opportunities that might impact your project. Use this method if you want to quickly associate a risk to an activity. You can add a new project risk to an activity, or assign an existing project risk to an activity.

To add a new or assign an existing project risk to an activity:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Risks** detail window.

In **Classic View**:

- a. To assign an existing risk to the activity, in the **Risks** detail window click  **Assign** (Insert).
 - In the **Select Risk** dialog box click on a risk and then click **Assign**.
 - Assign any additional risks, and then click **Close**.
- b. To add a new risk to an activity, in the **Risks** detail window click  **Add** (Insert).
 - In the **ID** field, click and type an ID for the risk.
 - In the **Name** field, click and type the risk name.
 - In the **Type** field, double-click and select the type of risk from the list.

- In the **Status** field, double-click and select the current status for the risk.
- In the **Category** field, double-click and select a category from the **Select Risk Category** dialog box, if applicable.
- In the **Owner** field, double-click then click .
- c. In the **Select Owner** dialog box, select an owner for the risk and click **Assign**.
- d. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In Standard View:

- a. To assign an existing risk to the activity, in the Risks detail window click **Assign...**
 - In the **Select Risk** dialog box click on a risk and then click **Assign**.
- b. To add a new risk to an activity, in the **Risks** detail window click **+Add**.

Adding High-Level Project Risks

Add project risks to capture potential threats or opportunities that might impact your project.

Use this method to quickly add a risk to a project. You can enter basic risk information from this page, including ID, Name, Owner, Category, Type, and Status.

To add a high-level project risk:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:

In Classic View:

- a. Click on a project, and then click the **Risks** detail window.
- b. In the **Risks** detail window:
 - Click  **Add** (Insert).
 - In the **ID** field, click and type an ID for the risk.
 - In the **Name** field, click and type the risk name.
 - In the **Type** field, double-click and select the type of risk from the list.
 - In the **Status** field, double-click and select the current status for the risk.
 - In the **Category** field, double-click, click , then select a category from the **Select Risk Category** dialog box, if applicable.
 - In the **Owner** field, double-click then click .
- c. In the **Select Owner** dialog box, select an owner for the risk and click **Assign**.
- d. On the **EPS** page, click  **Save** (Ctrl+S).

In Standard View:

- a. Click on a project, and then click the **Risks** detail window.
- b. In the **Risks** detail window:
 - Click **+Add**.
 - In the **ID** field, click and type an ID for the risk.

- In the **Name** field, click and type the risk name.
 - In the **Type** field, double-click and select the type of risk from the list.
 - In the **Status** field, double-click and select the current status for the risk.
 - In the **Category** field, double-click, click **...Select**, then select a category from the **Select Risk Category** dialog box, if applicable.
 - In the **Owner** field, double-click then click **...Select**.
- c. In the **Select Owner** dialog box, select an owner for the risk and click **Assign**.
 - d. On the **EPS** page, click **Save**.

Assigning a Risk to an Activity

Assign a risk to an activity to explicitly identify the activity impacted by the risk.

You can assign a risk to an activity while you are adding project risks on the **Risks** page or while managing your activities on the **Activities** page.

To assign a risk to an activity from the Risks page:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Risks**.
- 3) On the **Risks** page, click a risk.
- 4) Click the **Activities** detail window and click  **Assign Activities**.
- 5) On the **Select Activity** dialog box:
 - a. Select an activity and click **Assign**.
 - b. Select any additional activities impacted by the risk and click **Assign**.
 - c. Click **Close**.
- 6) On the **Risks** page, click  **Save** (Ctrl+S).

To assign a risk to an activity from the Activities page:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.

In **Classic View**:

 - a. On the **Activities** page, select the activity you want to assign a risk.
 - b. On the **Risks** detail window, click  **Assign** (Insert).
 - c. On the **Select Risk** dialog box:
 - Select a risk and click **Assign**.
 - Click **Close**.
 - d. On the **Activities** page, click  **Save** (Ctrl+S).

In **Standard View**:

- a. On the **Activities** page, select the activity you want to assign a risk.
- b. On the **Risks** detail window, click **Assign...**
- c. In the **Select Risk** dialog box select a risk and click **Assign**.
- d. On the **Activities** page, click **Save**.

About Risk Response Plans

Response planning allows you to identify and document methods you might use to manage project risks. When you identify an area with a risk, create a risk response plan to determine what actions could be taken to promote the most favorable outcome.

Working with Risk Response Plans

The **Response Plans** detail window is the area in the risk register where you create plans for handling the identified risks. Once you have identified which project risks need further action, create a response plan and assign response plan action items for each risk to reduce the negative impact on the project.

The screenshot displays the Oracle Primavera P6 interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', and 'Resources'. The 'Risks' tab is active, showing a list of risks for 'Harbour Pointe Assisted Living Center'. Below this, the 'Response Plans' detail window is open for risk R001, 'Concrete supply constrained'. The window shows a table of response plans with columns for ID, Name, Response Type, Owner, Status, Start, and Finish. Two response plans are listed: R001-RP01 (Accept) and R001-RP02 (Reduce). The 'Active' checkbox is checked for R001-RP02.

ID	Name	Type	Status	Owner	Probability	Schedule	Cost	Score	Score (Text)	Exposure
R001	Concrete supply constrained	Threat	Active	Concrete Foundation Subcontractor	H (50% to 70%)	H (20.0d to 40.0d)	L (45,000 to 90,000)	28	H - H	40,500
R006	Weather delay due to unusually ...	Threat	Active	Project Managers	H (50% to 70%)	M (10.0d to 20.0d)	VL (Up to 45,000)	14	H - M	13,500
R003	New roof coating cuts roof install...	Opportun...	Open	Roofing Subcontractor	H (50% to 70%)	M (10.0d to 20.0d)	VL (Up to 45,000)	14	H - M	13,500
R011	Window manufacturing delay	Threat	Proposed	Glass & Glazing Subcontractor	L (10% to 25%)	H (20.0d to 40.0d)	L (45,000 to 90,000)	12	L - H	11,813
R004	Poor ground conditions	Threat	Open	Project Managers	L (10% to 25%)	L (5.0d to 10.0d)	L (45,000 to 90,000)	9	L - L	11,813
R010	Interior design changes	Threat	Proposed	Project Managers	L (10% to 25%)	M (10.0d to 20.0d)	M (90,000 to 150,000)	6	L - M	21,000
R012	Weather delay due to hurricane	Threat	Proposed	Project Managers	M (25% to 50%)	H (20.0d to 40.0d)	M (90,000 to 150,000)	20	M - H	45,000

Active	ID	Name	Response Type	Owner	Status	Start	Finish
☐	R001-RP01	Spend contingency funds to cover higher rates	Accept				
☒	R001-RP02	Contract with alternative suppliers	Reduce			03-Jan-11 12:00 AM	11-Feb-11 12:00 AM
☐	R001-RP02-RA01	Identify alternative suppliers			Sanctioned	03-Jan-11 12:00 AM	07-Jan-11 12:00 AM
☐	R001-RP02-RA02	Post RFP			Sanctioned	10-Jan-11 12:00 AM	28-Jan-11 12:00 AM
☐	R001-RP02-RA03	Select and issue contract			Sanctioned	31-Jan-11 12:00 AM	11-Feb-11 12:00 AM

Table of Risk Response Plan Elements

Item	Description
1	Response Plans toolbar
2	Response Plan rows: Create one or more response plans while you are in the planning phase and indicate the response type. When you have analyzed your response options, choose one response plan by selecting the Active option next to the appropriate response plan. In the example above, two response plans have been created for the <i>Concrete supply constrained</i> risk. The first plan is to accept the risk and take no action; the second plan is to reduce the impact of the risk by contracting with alternative suppliers. The second plan has been selected as the plan of choice.

Item	Description
3	Response Action Item rows: Each risk response plan can have multiple response plan action items. Response action items are additional activities you perform to reduce the impact of the risk. For each response action item, assign the probability, schedule impact, cost impact, and any additional user-defined impacts, which are based on the outcome of the action item, to obtain a post-mitigated score. In the example above, three activities are assigned to the risk plan. The risk score will not significantly decrease until all three response items are complete. By taking action on this risk and creating a response plan, the impact of this risk can be significantly reduced.

Developing a Risk Response Plan

Once you have identified a risk for your project, you can then create a risk response plan to help manage the project risk. A risk response plan includes a name for the plan and response plan action items. You can create multiple risk response plans for a risk each with multiple response action items. When you determine which plan will best meet the project needs, select the **Active** option next to the appropriate response plan. One response plan must always be active.

To develop a risk response plan, complete the following tasks:

- 1) **Adding Risk Response Plans** (on page 276)
- 2) **Adding Risk Response Plan Action Items** (on page 277)
- 3) **Assigning Activities to Risk Response Plan Action Items** (on page 277)

Adding Risk Response Plans

Add one or more response plans to a risk to plan alternative activities that might reduce the probability of a risk occurring, or to reduce the impact of the risk.

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Risks**.
- 3) On the **Risks** page, click a risk, and then click the **Response Plans** detail window.
- 4) On the **Response Plans** detail window:
 - a. Click  **Add a Response Plan** (Insert).
 - b. In the **ID** field, double-click and type a response plan ID.
 - c. In the **Name** field, double-click and type a name for the new response plan.
 - d. In the **Response Type** field, double-click and select a response type from the list.
- 5) On the **Risks** page, click  **Save** (Ctrl+S).

Note: After you decide which response plan you are implementing, select the **Active** option next to the appropriate response plan.

Adding Risk Response Plan Action Items

Each risk response plan can include multiple response plan action items.

To add a risk response plan action item:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Risks**.
- 3) On the **Risks** page, click on a risk, and then click the **Response Plans** detail window.
- 4) Repeat the following for each response action you want to add to a risk response plan:
 - a. On the **Response Plans** detail window:
 1. Click on the response plan for which you are adding a response action and click  **Add a Response Action**.
 2. In the **ID** field, double-click and type an ID for the response action item.
 3. In the **Name** field, double-click and type a name for the response action item.
 4. In the **Owner** field, double-click and click .
 - b. On the **Select Owner** dialog box, select a name and click **Assign**.
 - c. On the **Response Plans** detail window:
 1. In the **Status** field, double-click and select a status from the list.
 2. In the **Start Date** field, double-click and select a start date from the calendar. This is an optional field. If you assign an activity to the response action, the activity date and total cost for the activity will override the values you just entered.
 3. In the **Probability** field, double-click and select a probability based on the response action.

Note: If a risk scoring matrix is not assigned to your project, the **Probability**, **Schedule**, and **Cost** fields are disabled.

4. In the **Schedule** field, double-click and select a schedule impact based on the response action.
 5. In the **Cost** field, double-click and select a cost impact based on the response action.
 6. If there are any user-defined impact fields, double-click in the field and select an impact based on the response action.
- 5) On the **Risks** page, click  **Save** (Ctrl+S).

Note: After you decide which response plan you are implementing, select the **Active** option next to the appropriate response plan.

Assigning Activities to Risk Response Plan Action Items

Existing activities can be assigned to a response plan action item to identify the activities necessary to respond to the risk. If you need a new activity for the response action, first create that activity, then assign it to a response plan action item.

The cost values for the assigned activity are used in the cost calculations for the response plan, and the activity start and finish dates are displayed in the response plan.

To assign an activity to a risk response plan action item:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Risks**.
- 3) On the **Risks** page, click a risk and then click the **Response Plans** detail window.
- 4) On the **Response Plans** detail window:
 - a. Expand the appropriate risk response plan and click on the response plan action item for which you are adding an activity.
 - b. In the **Activity** field, double-click and click .
- 5) On the **Select Activity** dialog box, click the activity and click **Assign**.

Note: If the **Activity** field is not displayed, click  ▾ **Select Columns** and click **Activity**.

- 6) On the **Risks** page, click  **Save** (Ctrl+S).

About Documents

A document is a file or work product that you create and add to your Primavera work environment. The application provides document management capabilities that enable you to store, organize, manage, and access documents in a secure environment. The available document management functionality depends on your configuration. When the content repository is configured, the complete set of advanced document management capabilities is available, including check in, check out, and document reviews. When the content repository is not configured, a limited set of document management features is available, such as adding, deleting, and relating items to documents.

When an optional content repository is installed, P6 supports up to three general classes of documents: project, private, and workgroup. Project documents are documents that you relate to a project via P6. Only users with the necessary securities can edit project documents. Private documents are documents that you add to P6 for your own use. Private documents are not associated with any project and are available only to you. Workgroup documents are documents that are added to a specific project workgroup. These documents are available only to members of the workgroup.

When the content repository is not configured for use with P6, you can perform limited actions on project documents only, and private and workgroup documents are not available.

Working with Documents without the Content Repository

Project documents are documents that a user relates to a project. You can work with project documents from the **Documents** page or the **Project Documents** portlet on the **Workspace** page.

From the Documents page or the Project Documents portlet, you can:

- ▶ **Add documents to a project** - You can add a document from a public and/or a private location. To enable project team members to open a document from the Public Location, make sure to store the document on a publicly accessible network server. You can store a personal copy of the document in the Private Location. For example, you can use this area to store the original copy of the document if you expect team members to update the public copy.
- ▶ **Open and edit project documents** - Click Open to view and edit the document. Since the document is stored on your network server, any saved changes will be visible to the next person who opens the document.
- ▶ **Track document versions** - You can set the version number each time you update the document if version tracking is important for the document.
- ▶ **Related items to the project document** - You can associate activities or WBSs, issues, or other documents to your project document. This enables you to see how a document relates to the project and where to find additional information.

The availability of a document and the actions you can perform on the document depend on several factors:

- ▶ Project documents are available only to users who have access to the corresponding project.
- ▶ The security policy of a project document determines which actions you can perform on that document; for example, you might only be able to view a document.

Note: Documents cannot be used with project templates.

Adding Documents to a Project without the Content Repository

In standard P6 configurations without the optional content repository, you can add project documents directly from your computer or a network server to the project. These documents are available to everyone who has access to the project.

To add a document to a project:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page:
 - a. Click on the project name.
 - b. Click  **Add Document**.
- 4) In the **Upload** dialog box, click .
- 5) In the **Open** dialog box:
 - a. Navigate to and select a file.
 - b. Click **Open**.
- 6) In the **Upload** dialog box, click **Upload**.

Tips

- ▶ You cannot add documents to template projects.
- ▶ You can add documents to a project from the **Project Documents** portlet of the **Workspace** page.

Configuring Document Details without the Content Repository

You can view and edit detailed information for documents you have privileges to modify.

To configure document details:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page:
 - a. Expand a project and select a document.
 - b. Click the **General** tab and configure the fields, options, and lists as necessary.
 - c. (Optional) Click the **Description** tab and enter a description in the field.
 - d. Click the **Related Items** tab to assign related items to the document.
 - e. Click **Save**.

Tip

You can also click **Edit Details** in the **Project Documents** portlet of the **Workspace** page to access the **Document Details** dialog box.

Assigning Related Items to Documents without the Content Repository

You can assign related activities, WBSs, issues, and documents to a document.

To assign related items to a document:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page:
 - a. Expand a project and select a document.
 - b. Click the **Related Items** tab.
- 4) On the **Related Items** tab:
 - a. To relate activities or WBSs, click  **Relate Activities or WBS** and select activities or WBSs from the **Select an Activity or WBS** dialog box.
 - b. To relate issues, click  **Relate Issues** and select issues from the **Relate Issue** dialog box.
 - c. To relate documents, click  **Relate Documents** and select documents from the **Relate Document** dialog box.
 - d. Click **Save**.

Tips

- ▶ You can also click **Edit Details** in the **Project Documents** portlet of the **Workspace** page to access the **Related Items** tab of the **Document Details** dialog box.
- ▶ Documents assigned to activities are visible to team members using P6 Team Member.

Sending Email about Documents without the Content Repository

You can send Email about a project document that includes basic details and a bookmark link to the document.

To send a Email about a document:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page:
 - a. Expand a project and select a document.
 - b. Click  **Email Document Details**.
- 4) In the **Email** dialog box:
 - a. Edit the recipient list, message, and subject as needed.
 - b. Click **Send Email**.

Tips

- ▶ You must have an Email address associated with your user profile to send an Email.
- ▶ You can also send document Emails from the **Project Documents** portlet of the **Workspace** page.

Assigning Documents to Activities

You can assign relevant documents to activities, projects, and WBSs.

To assign documents:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page, select an activity and click the **Documents** detail window.

Note: To assign a document to a project or WBS, select a project or WBS in place of an activity.

In **Classic View**:

- a. In the **Documents** detail window, click  **Assign** (Insert).
- b. In the **Select Document** dialog box, assign documents and click **Close**.
- c. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. In the **Documents** detail window, click **Assign....**
- b. In the **Select Document** dialog box, assign documents and click **Assign**.
- c. On the **Activities** page, click **Save**.

Working with Documents with a Content Repository

There are three types of documents: project, private, and workgroup. P6 supports document management features for project documents. When the optional content repository is installed, P6 also supports private and workgroup documents.

Project documents are documents that a user relates to a project. You can work with project documents from the **Documents** page, the **Project Documents** portlet on the **Workspace** page, or the **Documents** portlet on the **Workgroup Workspace** page. It is also possible to convert a project document to a private document.

You can add private documents for your own use. Private documents are not associated with any project and are available only to you. You can add private documents to the **My Documents** portlet on a dashboard. All private documents are stored in the **My Documents** portlet on the **Private Documents** tab.

Workgroup documents are added to a specific project workgroup, which can be thought of as a subset of a project. These documents are available only to viewers of the workgroup. On the **Workgroup Workspace** page, workgroup documents are stored on the **Workgroup** tab of the **Documents** portlet. Generally, users who have rights to a project can see a workgroup and its contents.

The content repository functionality provides advanced document management capabilities. With advanced functionality, you can use document version control features to manage shared access to documents, organize project documents into a folder hierarchy structure, and start or participate in document reviews.

Specifically, you can:

- ▶ Download documents
- ▶ Check in, check out, and undo check out documents
- ▶ Search for documents
- ▶ View a document's history
- ▶ View a document's versions
- ▶ Add, delete, and rename project folders
- ▶ Move project documents to a different folder location
- ▶ Start a document review
- ▶ Terminate a document review
- ▶ Review a document
- ▶ Send Email about a document

The availability of a document and the actions you can perform on the document depend on several factors:

- ▶ Project and workgroup documents are available only to users who have access to the corresponding project or workgroup. Private documents are available only to the person who adds them.
- ▶ The security policy of a project document determines which actions you can perform on that document; for example, you might only be able to view a document.

Note: Documents cannot be used with project templates.

About the Document Content Repository

The content repository allows users to collaboratively share and manage documents in the application. The document management functionality available to you depends on your configuration. When the content repository is configured, the complete set of advanced document management capabilities is available, including check in, check out, and document reviews. When the content repository is not configured, a limited set of document management features is available, such as adding, deleting, and relating items to documents.

Repository storage

Your content repository stores documents created in P6 in a folder reserved for these documents. This folder is referred to as your P6 repository. Depending on your access privileges and configured content repository, you can access documents that were created outside P6. These documents are stored in their own folders in the content repository.

Repository authentication

The application offers two content repository authentication modes. Authentication can be configured for either single or multiple user authentication. In single user authentication mode, all users access the repository using a single administrator user login that is set during repository configuration. In multiple user authentication mode, each user is authenticated based on their individual login.

Single user authentication mode is useful when you want users to have full access to the content repository through P6 without having to maintain an equivalent list of users for both P6 and the repository. This allows a repository administrator to maintain one set of credentials for the repository. Single user authentication is also useful for quickly setting up test repositories that can be accessed by testers with minimal fuss.

Multiple user authentication mode is the default mode. Multiple user authentication mode provides increased security by restricting content repository access on an individual user basis. Because it uses native auditing fields it also allows a clear audit of who has created and modified files.

Creating Document Templates

If P6 is configured to use the content repository, you can create document templates that you can use as a foundation when adding new documents.

To create document templates:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page, click the **Project** tab.
- 4) On the **Project** tab, select a project and click  **Add Options Create New Template**.
- 5) In the **Select File** dialog box, select a file and click **Open**.
- 6) On the **Project** tab, click the **General** tab.

- 7) On the **General** tab:
 - a. Enter a name in the **Title** field.
 - b. Select a policy from the **Security Policy** list.
 - c. Click **Save**.

Tips

- ▶ Select the **Template Document** option to make this document a template.
- ▶ Types of policies:
 - ▶ **Read Only**: The folder is not editable by other users.
 - ▶ **Shared**: The folder can be viewed, moved, edited, and deleted by other users.
 - ▶ **Personal**: The folder is hidden from other users.
- ▶ You can also create document templates from the **Documents** portlet of the **Workgroup Workspace** page, the **Project Documents** portlet of the **Workspace** page, or the **My Documents** portlet of the **Dashboards** page.

Copying Documents from Existing Templates

If P6 is configured to use the content repository, you can copy documents from templates to add a new document based on an existing template.

To copy documents from templates:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page, click the **Project** tab.
- 4) On the **Project** tab, select a project and click  **Add Options Copy from existing template**.
- 5) In the **Select a Template to copy from** dialog box, select a template and click **OK**.
- 6) On the **Project** tab:
 - a. Click the **General** tab and enter a name in the **Title** field.
 - b. Click and configure each tab as necessary.
 - c. Click **Save**.

Tips

- ▶ The **Select a Template to copy from** dialog box displays all the template documents that exist for the project.
- ▶ Types of policies:
 - ▶ **Read Only**: The folder is not editable by other users.
 - ▶ **Shared**: The folder can be viewed, moved, edited, and deleted by other users.
 - ▶ **Personal**: The folder is hidden from other users.
- ▶ You can also create document templates from the **Documents** portlet of the **Workgroup Workspace** page, the **Project Documents** portlet of the **Workspace** page, or the **My Documents** portlet of the **Dashboards** page.

Adding Documents to a Project and Storing Them in the Content Repository

You can add documents from your computer or a network server to the content repository and designate them as private, read-only, or shared within the current project. When you add shared documents, they are ready for document reviews.

Note: This topic assumes that you have setup the optional content repository.

To add a document to a project and store that document in the content repository:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page, click the **Project** tab.
- 4) On the **Project** tab:
 - a. Expand a project.
 - b. (Optional) Expand one or more folders. If necessary, create a folder. See the related topics.
 - c. Click  **Add Options** ▶ **Add Document**.
- 5) In the **Select File** dialog box:
 - a. Select a document.
 - b. Click **Open**.
- 6) On the **Project** tab:
 - a. Click any of the five tabs and complete the data fields.
 - b. Click **Save**.

Tips

- ▶ You can complete all available document management functions on the copy, which has no relationship to the original document.
- ▶ To add a document to a folder, select the folder before you click the **Add Options** menu. You cannot add a document to a read-only folder.
- ▶ At any time, you can privatize documents that you added to the application. To make a document private, select the document in the **Projects Documents** portlet or on the **Documents** page, click **Access Level Options/Make Private**.
- ▶ You can also add public documents from the **Project Documents** portlet of the **Workspace** page, the **Documents** portlet of the **Workgroup Workspace** page, or the **My Documents** portlet of the **Dashboards** page.

Adding Documents to a Project from the Content Repository

In addition to adding documents *to* the repository, you can also add them to projects *from* the content repository. When you add an existing repository document you can decide to copy it for a fresh start within the new assigned project or simply link to it.

Note: This topic assumes that you have setup the optional content repository.

To add a document from the repository and copy it or link it to a project:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page, click the **Project** tab.
- 4) On the **Project** tab:
 - a. Expand a project.
 - b. (Optional) Expand one or more folders. If necessary, create a folder. See the related topics.
 - c. Click  **Add Options** ▶ **Add from content repository**.
- 5) In the **Select Document** dialog box:
 - a. Select a document. If necessary, expand any folders or use the search field.
 - b. Select the **Copy selected document** or **Link to selected document** option.
 - c. Click **OK**.
- 6) On the **Project** tab:
 - a. Click any of the five tabs and complete the data fields.
 - b. Click **Save**.

Tips

- ▶ Add a copy when you want project members to change the new document. Add a link to a content repository document when you want to preserve the original document.
- ▶ The link displays in the folder you selected in your document view, indicating that you have created a link to the document in its location in the content repository.
- ▶ You can also link to repository documents from the **Documents** portlet of the **Workgroup Workspace** page, the **My Documents** portlet of the **Dashboards** page, and the **Project Documents** portlet of the **Workspace** page.

Configuring Document Details

If P6 is configured to use the content repository, you can view and edit detailed information for private documents, workgroup documents, and documents you have privileges to modify.

To configure document details:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page, click the **Project** tab.
- 4) On the **Project** tab:
 - a. Expand a project and select a document.
 - b. Click the **General** tab and configure the fields, options, and lists as necessary.
 - c. (Optional) Click the **Description** tab and enter a description in the field.
 - d. Click the **Related Items** tab to assign related items to the document.

- e. Click **Save**.

Tips

- ▶ You can also click **Edit Details** in the **My Documents** portlet of the **Dashboards** page, the **Project Documents** portlet of the **Workspace** page, or the **Documents** portlet of the **Workgroup Workspace** page to access the **Document Details** dialog box.

Assigning Related Items to Documents

You can assign related activities, WBSs, issues, and documents to a document.

To assign related items to a document:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page, click the **Project** tab.
- 4) On the **Project** tab:
 - a. Expand a project and select a document.
 - b. Click the **Related Items** tab.
- 5) On the **Related Items** tab:
 - ▶ To relate activities or WBSs, click  **Relate Activities or WBS** and select activities or WBSs from the dialog box.
 - ▶ To relate issues, click  **Relate Issues** and select issues from the dialog box.
 - ▶ To relate documents, click  **Relate Documents** and select documents from the dialog box.
- 6) On the **Project** tab, click **Save**.

Tips

- ▶ You can also click **Edit Details** in the **My Documents** portlet of the **Dashboards** page, the **Project Documents** portlet of the **Workspace** page, or the **Documents** portlet of the **Workgroup Workspace** page to access the **Related Items** tab of the **Document Details** dialog box. Expand the **Related Items** section on the **Details of** page of the **Documents** page to assign related items to documents when your content repository is not configured.
- ▶ Documents assigned to activities are visible to team members using P6 Team Member.

Checking Out Documents

Check out a document to save a copy to your local machine or another specified location. Checking out a document locks the document to prevent others users from making simultaneous updates to it. When a document is checked out, users can still view and download the document, but they cannot modify, delete, or check it out.

To check out a document:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page, click the **Project** tab.
- 4) On the **Project** tab, select a project and click  **Check Out options**  **Check out**.

- 5) In the **Check Out Document** dialog box, click **Check Out document to** .
- 6) In the **Save As** dialog box, select a location and click **Save**.
- 7) In the **Check Out Document** dialog box:
 - a. Select or clear the option to determine if you want the document to automatically open after it is checked out.
 - b. Click **Check Out**.

Tips

- ▶ To undo a check out, click **Undo Check Out** on the **Check Out options** menu.
- ▶ When an item is checked out, it will have a  green check mark beside it.
- ▶ The content repository must be configured for use with P6 to enable the functionality described in this topic.
- ▶ You can also check out documents from the **My Documents** portlet of the **Dashboards** page, the **Documents** portlet of the **Workgroup Workspace** page, and the **Project Documents** portlet of the **Workspace** page.

Checking In Documents

Check in a document when you are finished with it. You must check in a document to lift the lock that a check out places on a document.

To check in a document:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page, click the **Project** tab.
- 4) On the **Project** tab, select a checked out document and click  **Check Out options**  **Check in**.
- 5) In the **Check In Document** dialog box:
 - a. Click **Select Document**  and verify that the path to the document is correct.
 - b. Click the **Comments** field and enter any comments you want to include with the document.
 - c. Select the **Delete Local Files** option if you want the application to automatically delete the document from your local drive or other location.
 - d. Click **Check In**.

Tips

- ▶ When an item is checked out, it will have a  green check mark beside it.
- ▶ The content repository must be configured for use with P6 to enable the functionality described in this topic.
- ▶ You can also check out documents from the **My Documents** portlet of the **Dashboards** page, the **Documents** portlet of the **Workgroup Workspace** page, and the **Project Documents** portlet of the **Workspace** page.

Sending Email about Documents

You can send Email for a project or workgroup document that includes basic details and a bookmark link to the document.

To send document Emails:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page, click the **Project** tab.
- 4) On the **Project** tab, select a document and click  **Email Document Details**.
- 5) In the **Email** dialog box:
 - a. Edit the recipient list, message, and subject as needed.
 - b. Click **Send Email**.

Tips

- ▶ You must have an Email address listed in you user profile to send an Email.
- ▶ You can also send document Emails from the **Documents** portlet of the **Workgroup Workspace** page, the **Project Documents** portlet of the **Workspace** page, the **My Documents** portlet of the **Dashboards** page, or the **Documents** page (without the content repository).

Assigning Documents to Workgroups

Assign documents to a workgroup if they are related to the content the workgroup covers.

To assign documents to a workgroup:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page, click the **Project** tab.
- 4) On the **Project** tab:
 - a. Expand a project and select a document.
 - b. Click  **Access Level Options**  **Assign to Workgroup**.
- 5) In the **Select Workgroup** dialog box, select a workgroup and click **OK**.

Tips

- ▶ The **Assign to Workgroup** option is disabled if the document is already assigned to a workgroup.
- ▶ You can only assign documents to workgroups of the selected project.

Creating Document Folders

If P6 is configured to use the content repository, you can create document folders as a method of document organization in a project.

To create document folders:

- 1) Click **Projects**.

- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page, click the **Project** tab.
- 4) On the **Project** tab, select a project to which you will add the folder and click  **Add Options**  **Add Folder**.
- 5) In the **Add Folder** dialog box:
 - a. Enter a name in the **Folder Name** field.
 - b. Select a policy from the **Security Policy** list.
 - c. Click **OK**.

Tips

- ▶ Types of policies:
 - ▶ **Read Only**: The folder is not editable by other users.
 - ▶ **Shared**: The folder can be viewed, moved, edited, and deleted by other users.
 - ▶ **Personal**: The folder is hidden from other users.
- ▶ You can also create document folders from the **Documents** portlet of the **Workgroup Workspace** page, the **Project Documents** portlet of the **Workspace** page, or the **My Documents** portlet of the **Dashboards** page.

About Document Reviews

A document review is a process in which a specific version of a document is assigned to one or more people to review. At some organizations, reviews represent a helpful way of sharing information and gathering specific comments or feedback from others. At others, this type of collaboration is required as part of a quality process or compliance directive.

Initiate a review when you have a document that requires the approval of one or more people. For example, you might have a new document that requires that four other members of your department review it. Before making the document available to all members of the project, you have each department member review the document for accuracy.

Note: Document reviews require installation of the content repository with P6. Contact your P6 for more information.

When starting a document review, you can specify reviewers and select a review type. These review types determine the approval requirements and reviewer sequence:

Anyone May Review: Enables any of the listed reviewers to approve or reject the document version. Once one reviewer approves it, the review status changes to Review Approved; once one reviewer rejects it, the review status changes to Review Rejected.

Everyone Must Review: Requires each listed reviewer to respond to the document review to complete it. To change the review status to Review Approved, all reviewers must approve the document. To change the review status to Review Rejected, only one reviewer needs to reject the document.

Everyone Must Review in Sequence: Requires each listed reviewer to respond to the document review in a designated sequence to complete it. To change the review status to Review Approved, all reviewers must approve the document. To change the review status to Review Rejected, only one reviewer needs to reject the document. Once one reviewer rejects the document, the review is complete.

Reviewing Documents

If you have P6 installed with configured workflow and content repositories, you can start or participate in a document review.

Select one of the links below based on whether you are starting or participating in the review:

- ▶ **Creating Document Reviews** (on page 291)
- ▶ **Participating in Document Reviews** (on page 292)

Creating Document Reviews

If you have the optional content repository installed with P6, you can initiate a document review.

To create a document review:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page, click the **Projects** tab.
- 4) On the **Projects** tab:
 - a. Select the document you want reviewed.
 - b. Click  **Start Review**.
- 5) In the **Start Review** dialog box:
 - a. Enter a value in each required field.
 - b. Click  **Assign Reviewers** and select one or more reviewers from the dialog box.

Note: If you select the review type **Everyone Must Review In Sequence**, use the **Up** and **Down** arrows to arrange the sequence of reviewers.

- c. (Optional) Click  **Due Date** and select a date by which the reviewers must complete the review.
- d. Click **Create Review**.

Tips

- ▶ Reviews you have initiated appear on the **My Reviews** tab of the **Document Reviews** portlet on the dashboard. Click **Edit Details**, and view a list of all reviewer responses, review details, and the names of reviewers who have not yet responded to the review. Once the review is complete, the document no longer appears in the **Document Reviews** portlet. You can subsequently access details for the completed review from the **Document Details** dialog box.
- ▶ If the **Start Review** button is disabled, this indicates one of the following conditions exists, preventing the start of a new review:
 - ▶ The current version of the document is in review or has been reviewed

- ▶ A previous version of the document is in review
- ▶ Multiple documents are selected (You can send only one document for review at a time)
- ▶ The project or document is already checked out for exclusive use
- ▶ The document's **Security Policy** is set to **Personal**
- ▶ You do not have the appropriate privileges
- ▶ A template is open
- ▶ You can also create document reviews from the **Project Documents** or **Communication Center** portlets of the **Workspace** page or the **My Documents** portlet of the **Dashboards** page.

Participating in Document Reviews

If you have configured the optional *Content Repository* with P6, and you are assigned as a reviewer for a specific document, you can review documents from the **Document Reviews** portlet on a dashboard. As a reviewer, you can access review details, add comments or attachments, and approve or reject the document.

To respond to a document review:

- 1) Click **Dashboards**.
- 2) On the Dashboards page, select a dashboard.
- 3) On the dashboard, expand the **Document Reviews** portlet and click the **Action Required** tab.
- 4) On the **Action Required** tab:
 - a. Select a document to review.
 - b. Click  **View** to view the document.
 - c. Click  **Details** to view attachments and comments from previous reviewers.
 - d. Click  **Approve** or  **Reject**.
- 5) In the **Approve Document Review** or **Reject Document Review** dialog box:
 - a. Enter any supporting comments.
 - b. Attach any supporting documents.
 - c. Click **Approve** or **Reject**.

Tips

- ▶ If the review type is set to **Everyone Must Review in Sequence**, the review will not appear in subsequent reviewers' **Action Required** portlets until the document has been approved by the previous reviewer.
- ▶ If the **Document Reviews** portlet is not available, configure dashboard content in order to add it to the dashboard.

Terminating Document Reviews

You can terminate document reviews that you initiated.

To terminate a document review:

- 1) Click **Dashboards**.
- 2) On the Dashboards page, select a dashboard.

- 3) On the dashboard, expand the **Document Reviews** portlet.
- 4) In the **Document Reviews** portlet, click the **My Reviews** tab.
- 5) On the **My Reviews** tab:
 - a. Select the name of the document review you want to terminate.
 - b. Click  **Terminate**.

Tips

Configure dashboard content to add a portlet to the dashboard if it is not available.

Searching for Documents

If the content repository is installed and configured, you can search for documents using a basic search with keywords and operators or you can conduct an advanced search and construct more complex search queries for documents.

To search for documents:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page, click the **Project** tab.
- 4) On the **Project** tab, click  **Search**.
- 5) In the **Document Search** dialog box:
 - a. Enter keywords in the **Search Text** field.
 - b. If you want to search document contents, select the **Search title and contents** option.

Note: If this option is switched off, P6 will search only against document titles.

- c. Enter a value in the **Limit results to (maximum 100)** field to specify a limit on the number of search results.
- d. If you want to search by author or creation date, click the **Advanced** button and in the **Advanced Search Options** section:
 - If you want to search by author, expand the **Search by Person** section and configure the **Author** list.
 - If you want to search by document creation date, expand the **Search by Date** section and configure the option and fields.

Notes:

- If you choose to search by both author and date, only documents which were created by the selected people between the selected dates are returned. If you need to search for documents created by specific people or between specific dates, run two separate searches.
 - When using the Advanced search, you can only search the most recent versions of documents.
-

- e. Click **Search**.

Tips

- ▶ From a dashboard, you can search your private documents, and all project documents to which you have access. From a workgroup, you can search all documents that belong to the workgroup, and all other documents in that project.
- ▶ To reset all the settings in the Document Search dialog box, click the Clear Criteria button. To clear the list of documents on the Documents page, click  ▾ **Search Options** and choose **Clear Search Results**.

Viewing Documents

If P6 is configured to use the content repository, you can view public documents or your private documents. If you belong to a workgroup, you can also view workgroup documents.

To view documents:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page, click the **Project** tab.
- 4) On the **Project** tab:
 - a. Expand a project and select a document.
 - b. Click  ▾ **View Options**  **View**.
- 5) In the **Opening** dialog box, select the **Open with** option to open the file or select the **Save File** option to save the file to your computer and click **OK**.

Tips

- ▶ If P6 is configured with a content repository and you have the appropriate privileges, you can view documents with AutoVue from the **Documents** detail window of the **Activities** page.
- ▶ You can also view documents from the **Documents** detail window of the **Activities** page, the **Project Documents** portlet of the **Workspace** page, or the **My Documents** portlet of the **Dashboards** page.

Downloading Documents

If P6 is installed with a configured content repository and workflow repository, you can download a read-only copy of a document to your local machine or another specified location.

Downloading enables you to keep a personal copy of the document and make modifications to it in the document's native application. Any changes you make to the document are saved locally and do not affect the original document in P6.

To download documents:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Documents**.
- 3) On the **Documents** page, select the **Project** tab.
- 4) On the **Project** tab, expand a project, select a document, and click  ▾ **View Options**  **Download**.
- 5) In the **Download Document** dialog box:

- a. Click the **Path** field and enter a path or click  and select a download location from the dialog box.
- b. Select the **Open Document** option if you want the document to open automatically after it is saved.
- c. Click **Download**.

Tips

- ▶ You can also download documents from the **My Documents** portlet of the **Dashboards** page, the **Project Documents** portlet of the **Workspace** page, and the **Documents** portlet of the **Workgroup Workspace** page.

About Workflows

A workflow is an automated business process that routes information and tasks between participants according to a defined set of procedures or rules designed to coordinate a specific business goal. Workflows are primarily characterized by their level of procedural automation involving one or more dynamic related series of processes, and their combination of human and machine-based tasks involving interaction with software and systems.

The following industry segments, marked by relatively high office labor costs and transaction volume, have demonstrated successful workflow implementations:

- ▶ Insurance
- ▶ Banking
- ▶ Legal
- ▶ General & Administrative
- ▶ Design
- ▶ Engineering
- ▶ Manufacturing

Business process modeling and workflow automation allow transactions to be conducted electronically without the need for manual intervention such as conducting certain validations or re-keying data. When workflow IT systems are processing repetitive, mundane, and often error-prone work, talented staff resources become available to handle activities that add real value to the enterprise.

Working with Workflows in P6

You can use workflows to route business processes such as project initiation requests through your organization to gather information and visibility before a go/no go decision is made. Template data, routing designators, and approval rules can be set for each stage of a workflow. To illustrate these options, pretend we have a workflow involving five key approval managers. You can define the workflow such that all five must approve and even specify a particular sequence, if any. A much more relaxed approval rule would require only one out of the five to approve. The following are just some example of how you can use workflows.

Workflows are defined, deployed, and configured in BPM where your workflow designer defines the workflow tasks involved and assigns them to specific users, roles, or groups. Then, in P6, a business need kicks off an instance of the workflow and its required tasks are automatically routed to their users, roles, or groups.

When a specific user or any user assigned to a role or group logs into P6, the Workflows portlet on their dashboard will display their relevant tasks at this stage of the workflow, as authenticated by BPM. As a workflow participant, you can select a task in the workflow instance and claim ownership for it. This means you will be responsible for performing the task. The application refreshes itself to show only the actions permitted for this stage of the workflow for you (the currently logged in user).

After your administrator sets up BPM for P6, they can configure a dashboard to display the Workflows portlet. The following list represents a list of the key Workflow elements that you can observe in the portlet depending on your configuration.

- ▶ **Action Required Tab:** This tab shows the tasks that are important to you (the currently logged in user).
- ▶ **My Workflows Tab:** This tab enables you to view all workflows according to role and status filters you can set.
- ▶ **Initiate a Workflow:** Click Initiate a Workflow to start a new instance of a workflow based on a predesigned template.
- ▶ **BPM Workspace:** Use the BPM Workspace to update the progress of tasks, initiate a change, request a project, and retrieve project information. You are also able to apply a bulk action to multiple work items.

Note: If SSO authentication is not configured with BPM, you must log into BPM in the resulting window, close that window, and then return to P6 and click _ View Form again. This procedure is required whenever your BPM session expires.

- ▶ **Sample Workflow:** A basic workflow image with tasks for a business user, two project offices, and a project manager.
- ▶ **Workflow History:** View a chronological sequence of all the previous actions, users, and stages in the current workflow.

Participating in Workflows

All workflow tasks requiring your participation are listed in the **Action Required** tab of the **Workflows** portlet on a dashboard. For example, you might be asked to evaluate new project initiatives as part of a new project evaluation workflow.

The process form that accompanies each workflow task is based on the workflow type and stage, so the information displayed might vary each time you perform this task.

Note: The **Workflows** portlet requires installation of BPM. See your administrator.

To review a workflow task:

- 1) Click **Dashboards**.

- 2) On the **Dashboards** page, select a dashboard.
- 3) On the dashboard, expand the **Workflows** portlet.
- 4) In the **Workflows** portlet, click the **Action Required** tab.
- 5) On the **Action Required** tab, select a task and click  **View Form**.

Notes:

- If using BPM 11g (which always uses secure sign-on or SSO authentication) or if using BPM 10g with SSO configured, you will see the form in a new window. If SSO authentication is not configured with BPM 10g, you must log into BPM in the resulting window, close that window, and then return to P6 and click  **View Form** again. This procedure is required whenever your BPM session expires.
 - For workflow tasks with no associated form, this icon is disabled. To perform an action on a workflow task with no associated form, log into BPM and use the available menus, buttons, and other options on the form. It is also possible to design a solution using the P6 Integration API.
-

- 6) On the **BPM Workflow Form** dialog box, select an action to perform or review the resulting form or message. The title and available screen elements of this form vary depending on the selected workflow, stage, task, and steps.
- 7) Click **Submit**, **Save**, or a similar command to complete the action required for this particular workflow task.

P6 Overview

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Customizing the P6 User Experience

P6 includes sophisticated layers of security, view, and customization features designed to control access and structure the collaborative experience of your entire team while also allowing users to individually customize views and format their data. Periodically perform the sequence of steps below for each user to optimize their experience.

When customizing your user experience, consider the following questions. These checks may be performed in whole or in part, and in any sequence. The order shown here is not mandatory. These items simply provide a basic checklist when examining your interaction with the application.

- ▶ **Do I have the right module access settings?** This determines which main modules of the solution you can access, such as Portfolios, Reports, P6 Professional, and P6 EPPM Web Services.
- ▶ **Do I have the right user interface view?** This determines which main pages in the application you can access. Your administrator may assign you to an optional role-specific *user interface view* that corresponds to your assignments and work processes. A group of users with similar roles will often be assigned the same user interface view. You can edit your own personal view settings on the **My Preferences** page.
- ▶ **Do I have the right security profiles?** This determines what functions you can perform. Your administrator will likely assign you to a role-specific *global security profile* and *project security profile* that corresponds to your assignments and work processes. A group of users with similar roles will often be assigned the same security profile.
- ▶ **Do I have the right OBS (project) access settings?** This determines which projects are available to you based on your assigned responsible manager.
- ▶ **Do I have the right global preferences?** This determines the general formatting and preferred settings of data across the application. For example, you can specify the currency and date format you want to use. Even though you can customize these preferences, it is recommended that teams make choices aligned with team goals.
- ▶ **Do I have the right application settings?** This determines how P6 information is handled and appears for all users. For example, the default hours per time period, ID string lengths, integration links, and other default settings.
- ▶ **Do I have the current page customized to fit my needs?** There are two main ways to customize a page, detailed below.

- ▶ **Customizable Page-Specific Views:** Certain pages of the application provide a standard mechanism for configuring shared views and customizing individual views. These include Activity, EPS, Resource Assignment, and portfolio views in portlets or on the Portfolio Analysis page. They provide common ways to view and work with data on their respective pages of application. Instead of manually adjusting the current page, you can simply switch the applied view.
- ▶ **On-Screen Controls:** Manually invoke the customization features provided on each page. Throughout the application, these features are available through **Customize** links or other context-specific toolbars and options displayed on the page. Examples of screen customization follow:
 - Generally speaking, within all pages, you can hide, show, expand and collapse elements as needed. In some pages, you can drag items such as columns or detail window tabs to order them as needed.
 - The **Activities** page and **Portfolio Capacity Planning** page, for example, offer extensive options that enable you to retrieve, organize, and chart data according to your specific requirements.
 - In the **Issues** portlet, you can filter, group, and chart issues as well as choose the data details to display.
 - You can customize dashboards to display the portlets you want and to specify how you want to organize them within the workspace. The dashboard filtering feature lets you focus on information related to a single project or all projects associated with a specific portfolio or project code. If you have the required privileges, you can customize the workspace and workgroups associated with a project.

About the User Interface

The application's user interface consists of familiar screen controls such as pages, tabs, and dialog boxes, data entry controls, buttons, and links appearing in a standard web browser.

Note: Your access to data and ability to interact with the user interface are controlled by various security features.

Working with the P6 User Interface

The user interface presents familiar screen elements you manipulate in your web browser. They include all of the following common types of user interface objects and several more special objects not listed:

- ▶ pages
- ▶ tabs
- ▶ dialog boxes
- ▶ detail windows
- ▶ portlets
- ▶ fields
- ▶ lists
- ▶ buttons

- ▶ links
- ▶ tables
- ▶ charts
- ▶ calendars

Refer to the sample images below to orient yourself with the P6 graphical user interface inside your web browser.

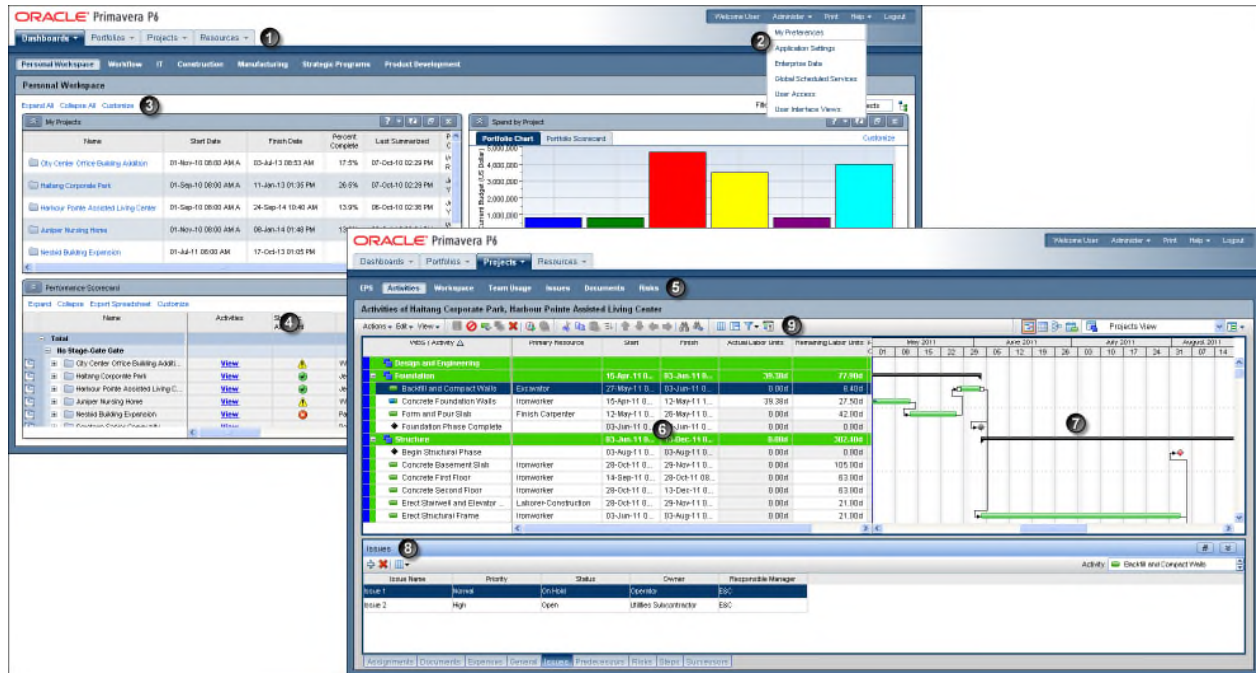


Table of Common User Interface Elements

Item	Description
1	P6 navigation bar: This bar is always visible and shows buttons representing your access to dashboards and any of the main modules of the application. Use it to navigate to the pages and menus in the dashboards, portfolios, projects, resources, or reports sections of the application.
2	Administer menu: This menu offers access to My Preferences for all users. Application administrators will also have access to one or more of the following menu items: application settings, enterprise data, global scheduled services, user access, user interface views, or user sessions.
3	Personal Workspace dashboard: This default dashboard displays the portlets you have selected that are important to your work goals. In this example, notice the familiar hyperlinks including Customize which you can click to configure the dashboard for use by you or multiple users. Notice too that Personal Workspace is the name for the tab you click to open this dashboard, since more than one dashboard appears on this page.

Item	Description
4	Scorecard portfolio view portlet: In this example, the user has customized this dashboard by adding a portfolio view of type scorecard within its own portlet. The portlet also shows color-coded indicators in the scorecard and can be further customized to suit work goals. The colors of a bar chart or histogram are also visible in the Spend by Project portfolio view portlet.
5	Projects navigation bar: This bar shows icons representing pages determined by your assigned user interface view and any custom preferences you made. Similar bars can be found under the Portfolios, Projects, and Resources sections.
6	Activity Table: One of the central work areas of the entire application, this table allows you to customize its columns (fields), color-coded grouping bands, and sort options, and of course apply filters.
7	Activity Gantt chart: Shown adjacent to the Activity Table, the Activity Gantt chart represents your schedule and offers robust customizable project management features including drag and drop editing, timescale, progress lines, relationship lines, spotlights, bar necking, and helpful mouseover tips.
8	Issues detail window: To gather the related details associated with a particular item in certain tables, the application often provides one or more detail windows in a series along the bottom. On pages supporting applied views, you can determine which detail windows are shown or hidden with your view.
9	Toolbars: In this example, the Activities toolbar is shown. There are hundreds of toolbars throughout the application made up of over 400 icons. The Activities , EPS , and Resource Assignments toolbars in the application also feature their own Actions , Edit , and View menus.

Note: Your Administrator can provide a URL to access the Standard View of the Activities Page directly after logging into the system.

About Screen Controls

As is typical with enterprise software, the application's main pages present more detail the further the user navigates within them. The following types of screen controls will appear:

- ▶ Pages
- ▶ Tabbed Pages or simply, Tabs
- ▶ Detail Windows
- ▶ Dialog Boxes
- ▶ Portlets
- ▶ Notification Button

Working with the Main Menus

The main menus of P6 are located in the title bar and navigation bar. The menus are:

- ▶ **Dashboards** ▼
- ▶ **Portfolios** ▼
- ▶ **Projects** ▼
- ▶ **Reports**
- ▶ **User** ▼
- ▶ **Help** ▼

You can click each main menu directly on its icon or text to execute its default command; however, you must click only on the triangle portion ▼ of the menu for the additional Dashboard, Portfolio, or Project menu items to appear. If no triangle appears next to the menu, this indicates your user interface view settings do not include access to its menu items.

In all of the main menus except Help and Reports, your assigned user interface view and your view settings on the My Preferences page determine which menu items appear, if any. The portfolios and projects menus also display a list of your most recently used portfolios and projects.

Each menu item will take you to another page or dialog box. If the first page for projects or portfolios is already open, and you select one of the most recently used items in the menu, it will open the selected projects or portfolios and refresh the page.

The sample image below demonstrates what you might see in your main menus. You can configure available main menu items on the User Interface View Details page, available from the Administration tab.

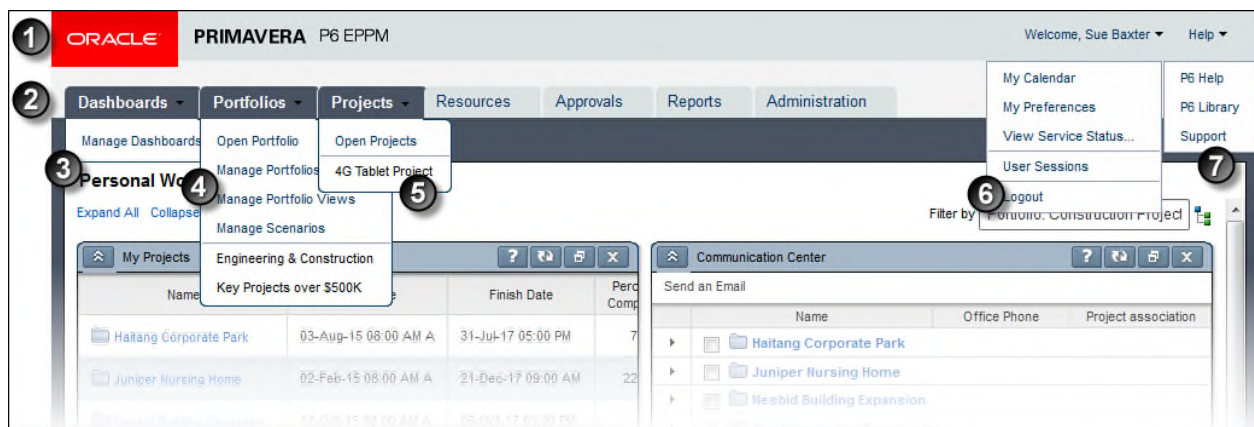


Table of P6 Main Menus

Item	Description
1	P6 title bar: Located in the P6 title bar, the User menu provides links to related pages based on your view settings and personal preferences. The Help menu items are standard and cannot be changed.

Item	Description
2	P6 navigation bar: Located in the P6 navigation bar, each menu opens up additional pages within the section it represents. The Dashboards, Portfolios, and Projects menus provide links to related pages based on your view settings and personal preferences. The menus for portfolios and projects also display links to your most recently used items.
3	Dashboards menu: Provides links to manage dashboards.
4	Portfolios menu: Provides links to open and manage portfolios, views, and scenarios. This example also shows two recently used portfolios, Engineering & Construction, and Key Projects over \$500K.
5	Projects menu: Provides links to open projects. This example also shows a recently used project, 4G Tablet Project.
6	User menu: Assuming all its menu items are configured, this menu provides links to adjust your own calendar and personal preferences. In addition, it can also display links to the View Service Status and User Sessions pages. This is also the location of the Logout option.
7	Help menu: A fixed menu providing links to the Online Help, P6 Library of documents available online, and the Oracle Primavera Customer Support website. If so configured, the Help menu can also provide links to multimedia tutorials powered by Oracle UPK technology.

About the Most Recently Used List

As you work, when you click the **Portfolios** ▼ or **Projects** ▼ menu, by default P6 displays the five most recently used items, with the item you most recently opened listed first.

Note: Your administrator can increase the list of most recently used items to a maximum of ten.

The most recently used projects include individual projects or project groups (EPS nodes, portfolios, or project code values). The most recently used portfolios include project groups.

Projects are not added to the most recently used projects list when you create a project, initiate a project request, or open a random set of projects (for example, projects from multiple portfolios, but not the full portfolio itself). Projects you access from portlets are added to the list, unless you access only activity detail information (such as activity notebooks or documents) directly from a portlet.

Working with Tables

Tables appear throughout the application to not only display information, but also to allow you to modify it, as permitted. The following general features are common to most tables.

Table of Common Table Features

Item	Description
1	Sort Order Indicators: Indicates the column you have selected to sort the rows. Each time you click a column header, the sort order toggles from ▲ ascending order, to ▼ descending order, and, for some tables, it cycles back to unsorted order (the original order in which the entries were created).
2	Grouping Levels: Many tables group related rows into hierarchical levels you can click through to expand or collapse. Some tables use colored bands to help you view these levels.
3	Selection Highlighting: The currently selected row is highlighted for you. You can directly click and drag to select one or more entries. Hold down the Ctrl key as you mouse click rows to select more than one. Hold down Shift as you click two entries to select all contiguous rows.
4	Changed Data Icons: When rows change in a table, three color-coded icons are used to signal the type of change that has occurred. A 🟡 gold icon indicates a pending change, a 🟢 green icon indicates a new entry, and a 🔴 red icon indicates an error.

5	Data Entry Features: Tables allow you to directly edit data with convenient controls to assist you in entering the right type of data. For example, a date field will display a calendar.
6	Column Resizing: You can directly drag to resize column widths.
7	Column Configuration: On most pages, a convenient  Columns icon allows you to select which columns are shown or hidden in the table.
8	Column Order: You can directly drag and drop column headings to customize your tables.

About Columns (Fields)

Fields hold data. They generally either allow you to enter values or just display the field's current value (called a *read-only field*). Pages with tables often permit you to configure the fields that make up the columns of the table.

Columns allow you to view different elements of data about activities. In **Classic View** you can create different views containing different columns and you can sort your view by up to five different columns. If you need to change data in a column, in **Classic View** you can use Replace to change some or all entries matching your search criteria if you have rights to edit the data in that column and the column does not require you to select data from a list.

The list of columns available for you to add to a view may depend on the circumstances. For example, some baseline fields (such as actual baseline cost fields, and many baseline date fields) can only be added to the view if you have assigned a baseline to the project (rather than using the current project as the baseline).

Customizing Column Names on the Activities, EPS, or Assignments Pages

In Classic View, you can customize the names of columns in the tables of the Activity, EPS, and Resource Assignment views.

To customize column names:

- 1) Click **Projects** or **Resources**.
- 2) On the **Projects** navigation bar, click **Activities** or **EPS**, or on the **Resources** navigation bar, click **Assignments**.
- 3) On the **Activities**, **EPS**, or **Assignments** page:
 - a. Right click a column heading.

Note: You cannot customize the name of the left-most column in a view.

- b. Click **Rename Column**.
- 4) In the **Rename Column** dialog box, enter a name in the **New name** field and click **OK**.
 - 5) Click the **View**  menu and select  **Save View**.

Tips

- ▶ When you customize a column name in **Classic View**, you can save the customized name as part of the view. The Select Columns, Group, Sort, Filter and Activity Network Options dialog boxes will also show the customized column name while you have that view open. Other views will show the default column name. To see the default name of a customized column, right click the column heading and click **Rename Column**.
- ▶ All users who have access to the view will see the customized column name.

Showing or Hiding Columns in a Table

When the list of available fields or columns for a table is relatively short, indicated by the presence of the Select Columns icon and field list in the toolbar, use it to show and hide the columns that appear.

To show and hide columns:

In **Classic View**:

- 1) On the toolbar, click  **Select Columns**.
- 2) From the resulting list of fields or columns:
 - a. Select an available column (not checked) to immediately display it in the table.
 - b. Select a currently visible column (checked) to immediately hide it in the table.
- 3) Click **View**  and select  **Save View**.

In **Standard View**:

- 1) Click  **Customize View**.
- 2) Click the **Columns** tab.
- 3) From the resulting list of fields or columns:
 - a. Select an available column to display it in the table.
 - b. Select a currently visible column to hide it in the table.
- 4) Click **Save and Apply**.

Note: You might have to scroll to the right end of a table to see all the columns.

Selecting Items from a List of Available Items

When the list of available projects, fields, columns, or values for a list, table, view, scorecard, or other entity is relatively long, follow these common steps to configure the fields or values you want. Essentially, you move the items you want from the *available* side to the *selected* side.

These steps apply in several areas of the application and you should be familiar with them. For example, perform these steps when selecting projects or templates in the **Open Projects** dialog box, when configuring the fields to display as columns in a table, on a detail tab in the Activity or EPS pages, or when assigning individual users to a user interview view.

To select projects, fields, columns, or values:

- 1) In the **Available Items** list, click an entry to select it. If arranged in a hierarchy, click  **Expand** to view the grouping of items. Hold down the **Ctrl** key as you click to select individual items or press the **Shift** key to extend your selection to an entire block of items including the first and last items you clicked.
- 2) Click  or double-click each item to add them to the **Selected Items** list. This is the list of selected fields or values you want to appear in your customized list, table, view, scorecard, or other entity.
- 3) To remove items, select them in the **Selected Items** list and click  or double-click them. If you need them again, the items are available in the list of available items.
- 4) In the **Selected Items** list, if applicable, adjust the order of appearance of your items:
 - a. Click  to advance the item up or to the left in a table.
 - b. Click  to advance the item down or to the right in a table.
- 5) If applicable, click **Save**, **Save and Close** or **OK**.

Tip

- ▶ You can add new columns where you need them by first selecting a column in the **Selected Columns** list. When you add columns to the list, they will be added directly below the column you selected.
- ▶ You can also directly click and drag columns in tables to configure their order of appearance.

Working with Toolbars

Throughout the application, pages, tabs, portlets, detail windows, and dialog boxes provide access to essential commands in toolbars. Most toolbars are static, however, the ones on the Activities, EPS, and Resource Assignment pages can be moved and customized.

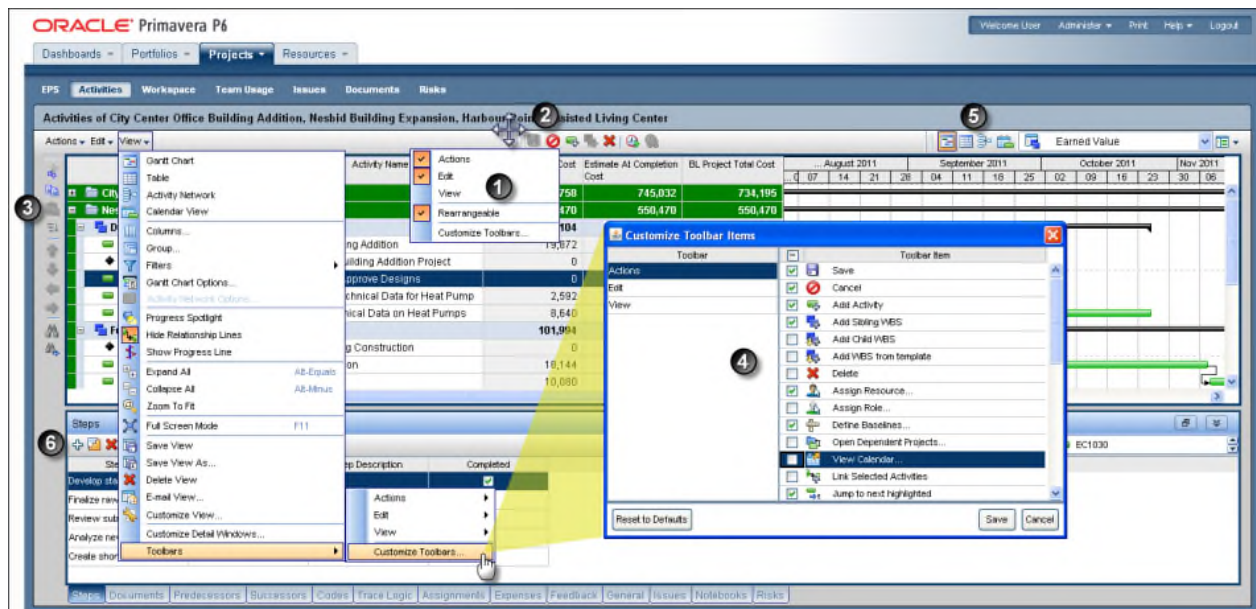


Table of Toolbar Elements

Item	Description
❶	Toolbar shortcut menu: Right-click within blank space on this panel to select the toolbars you want in your customized view. You can also select Rearrangeable or Customize Toolbars , both described below.
❷	Rearrangeable toolbar: Click and hold the mouse button down on the toolbar's edge until you see the move cursor. Then, drag to position the toolbar wherever it is needed.
❸	Docked toolbar: In this example, the user has dragged the Edit toolbar from its typical location on top to the page's left edge until it snaps into a vertically-oriented position.
❹	Customize Toolbar Items dialog box: In this example, the user has selected Customize Toolbars from the Toolbars submenu of the View menu. On this dialog box, the user has elected to hide options from their Actions toolbar.
❺	Activity View toolbar: This toolbar represents an example where a subset of the commands found under the View menu are presented here in a static or fixed toolbar for convenient access.
❻	Toolbar in a detail window: The Steps detail window, like many other detail windows, has its own fixed toolbar.

Customizing Toolbars

In Classic View, toolbars are made up of icons that represent the commands you can invoke. You can customize the appearance of icons on toolbars and move the toolbars on the following pages only:

- ▶ **EPS** page
- ▶ **Activities** page
- ▶ **Resource Assignments** page

P6 saves any custom settings you make with toolbars. When you return to one of these pages with customizable toolbars, the settings you specified last will be reapplied to the toolbars.

To customize a toolbar:

- 1) Navigate to one of the pages that support toolbar customization.
- 2) From the **View** menu, select **Toolbars** and then select **Customize Toolbars...**
- 3) On the **Customize Toolbar Items** dialog box:
 - a. In the **Toolbar** pane, select a toolbar.
 - b. In the **Toolbar Item** check box list, select the check box for the icons you want to include. Clear the check box for the items you want to hide.

- c. Click **Save**.
- 4) To reposition a toolbar:
 - a. On the page you selected for step 1, right-click in the blank space between toolbars and select **Rearrangeable**.
 - b. Click the grab handle for the toolbar you want to move and drag it to a new position. Supported positions include the left, right, top, or bottom margins of the main work area of the page.

Working with "Select a Value" Dialog Boxes in Classic Views

Throughout the application, certain types of fields require specific types of values. To assist you in selecting from only a constrained list of available choices, the interface will display Select a Value dialog boxes for you to search for and select a specific value appropriate for the current field.

Note: Field lists of values are used when the available choices are manageable (usually, less than 10 values). However, when the number of available choices is large (for example, there might be hundreds of projects), the application will offer Select a Value dialog boxes.

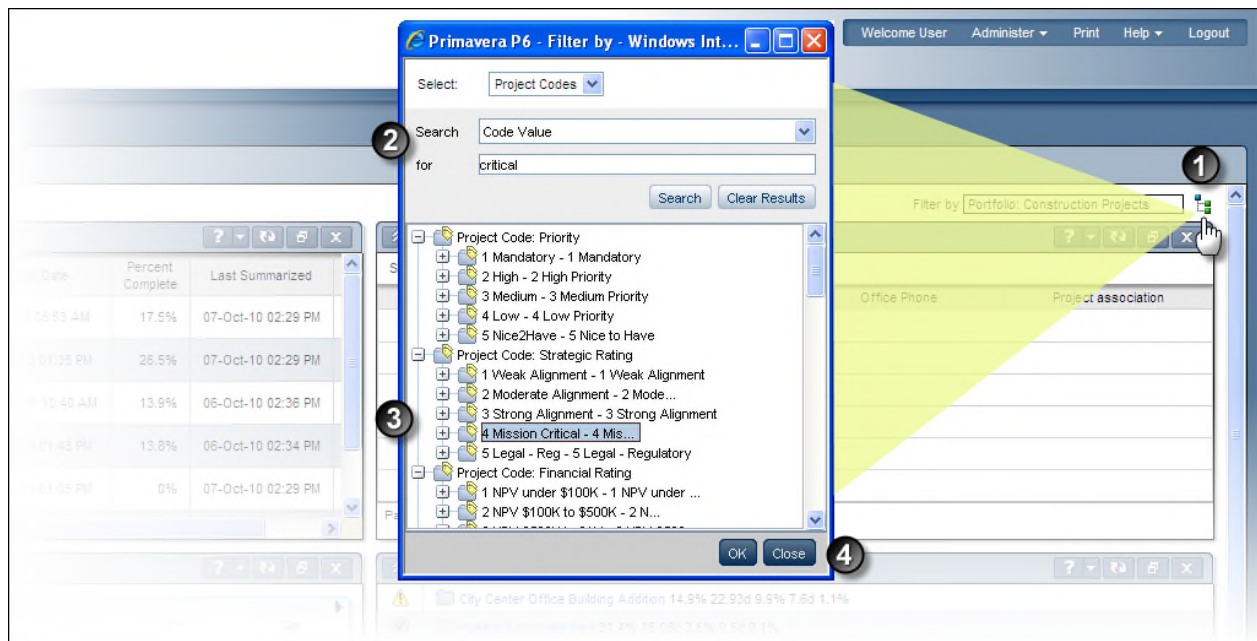


Table 1 of 2: Select a Value Dialog Boxes

Item	Description
1	Select a Value icon: Throughout the application, click  Select a Value to open a selection dialog box.
2	Search Area: The top part of the dialog box contains search controls to help you constrain the values based on your criteria.

Item	Description
3	Results area: The middle part of the dialog box displays the available values based on your search criteria, if any. Make your selection here.
4	Command buttons: The bottom part of the dialog box contains command buttons. Standard buttons include OK or Assign to accept the value you selected, and Close to cancel the operation, close the dialog box, and return to the previous screen.

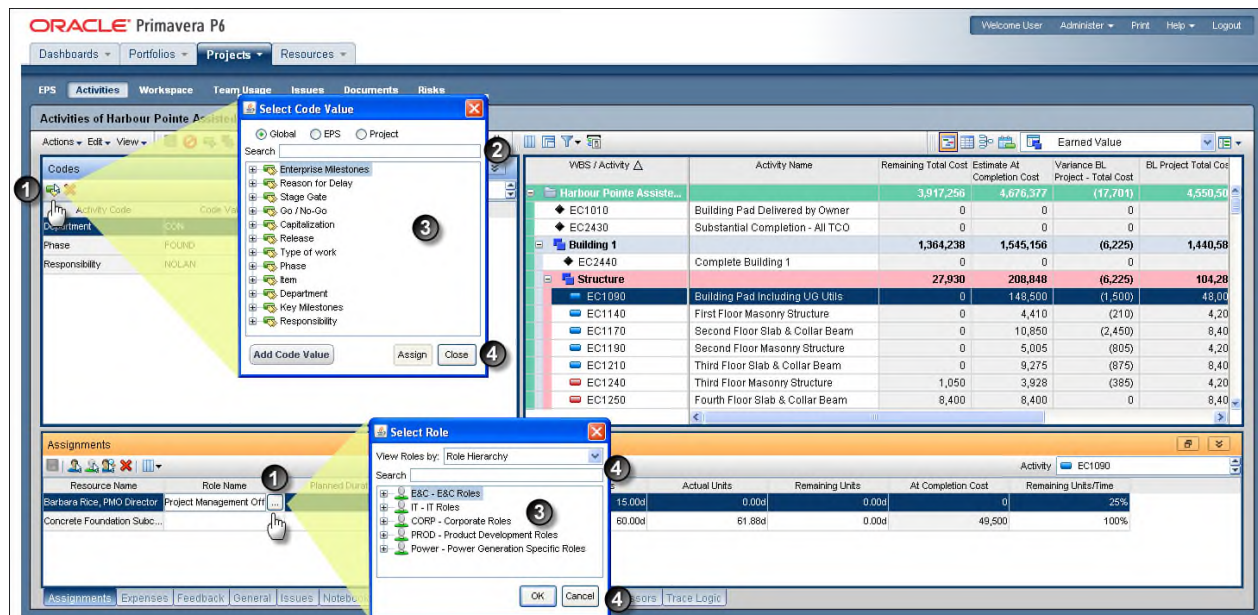


Table 2 of 2: Select a Value Dialog Boxes

Item	Description
1	Selection icons: Similar to the  icon, in these examples, click  or  to choose a particular item.
2	Search Area: The top part of the dialog box contains custom search controls to help you constrain the values based on your criteria. In one example, option buttons are used to constrain Global, EPS, or Project code values.
3	Results Area: The middle part of the dialog box displays the available values based on your search criteria, if any. Make your selection here.
4	Command Buttons: The bottom part of the dialog box contains command buttons. Standard buttons include Assign or OK to accept the value you selected, Close to shut the dialog box after you made assignments, or Cancel to cancel the operation, close the dialog box, and return to the previous screen. Other buttons can also appear in this area.

Selecting Values from "Select a Value" Dialog Boxes

To assist you in selecting from a constrained list of available values, the application will often display *Select a Value* dialog boxes. Use these special dialog boxes to search for potential matching values and select one or more specific values appropriate for the current field.

Note: Although commonly used throughout the application, each dialog box can contain unique options.

To select a value from a **Select a Value** dialog box:

- 1) Enter any search criteria to reduce the number of values shown.
- 2) Select a value in the list. If grouped in a hierarchy, expand a group to view the values.
- 3) Click **OK**, **Select** or **Assign**.
- 4) Repeat these steps to select additional values if necessary.
- 5) When finished, click **Close**.
- 6) If applicable, click **Save**, **Save and Close** or **OK**.

Working with "Select a Value" Dialog Boxes in Standard Views

Throughout the application, certain types of fields require specific types of values. To assist you in selecting from only a constrained list of available choices, the interface will display *Select a Value* dialog boxes for you to search for and select a specific value appropriate for the current field.

Note: Field lists of values are used when the available choices are manageable (usually, less than 10 values). However, when the number of available choices is large (for example, there might be hundreds of projects), the application will offer Select a Value dialog boxes.

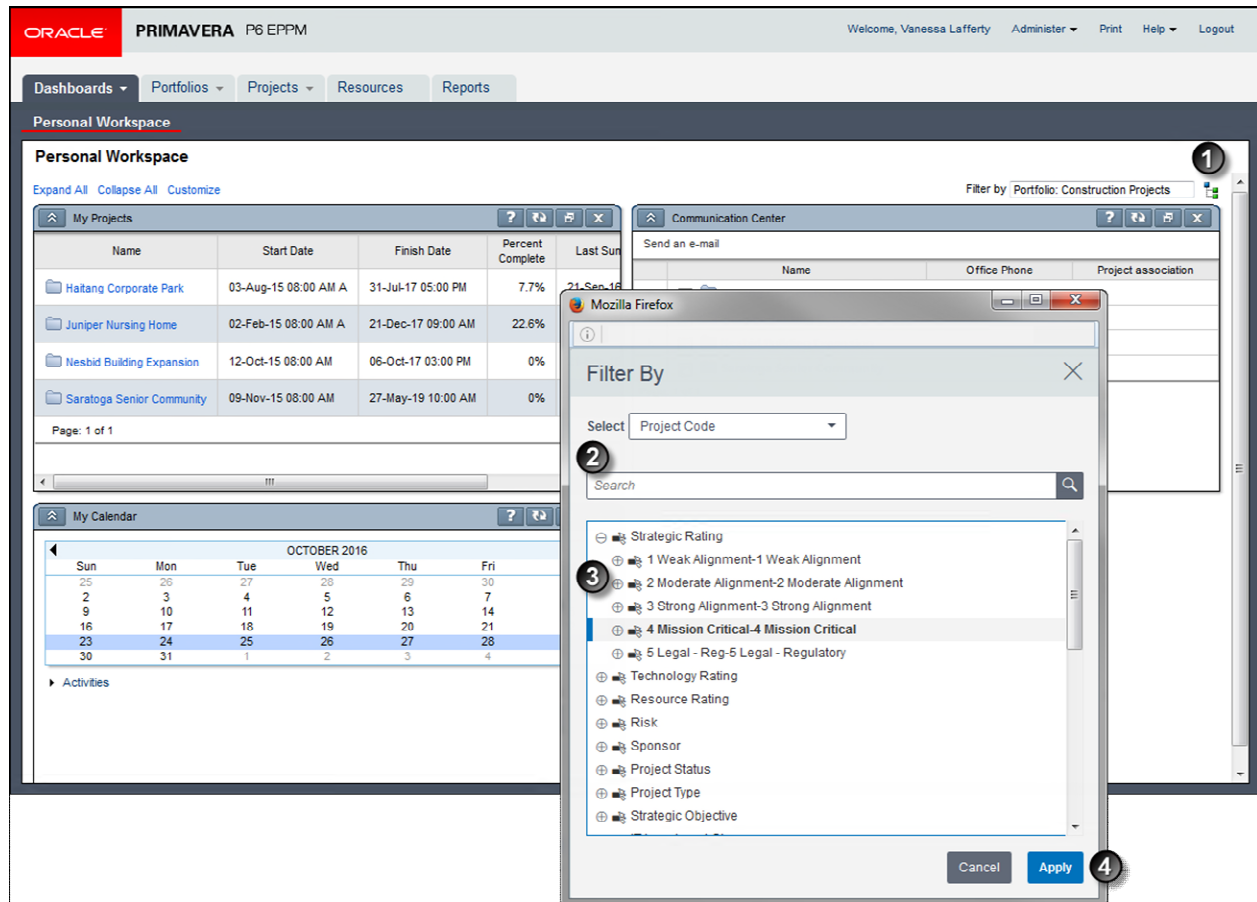


Table 1 of 2: Select a Value Dialog Boxes

Item	Description
1	Select a Value icon: Throughout the application, click  Select a Value to open a selection dialog box.
2	Search Area: The top part of the dialog box contains search controls to help you constrain the values based on your criteria.
3	Results area: The middle part of the dialog box displays the available values based on your search criteria, if any. Make your selection here.
4	Command buttons: The bottom part of the dialog box contains command buttons. Standard buttons include OK , Apply , Select and Assign to accept the value you selected, and Close or Cancel to cancel the operation, close the dialog box, and return to the previous screen.

ORACLE PRIMAVERA P6 EPPM Welcome, Vanessa Lafferty Administer Print Help Logout

Dashboards Portfolios Projects Resources Reports

EPS Workspace Activities Team Usage Issues Risks Documents

Activities of 4G Tablet Project, Project Nano

Views: Default View

ID/Code *	Name *	Start	Finish	Remaining Duration	Activity % Complete	Primary Resource
PROD00414	4G Tablet Project	02-May-16 08...	09-Dec-16 01...			
PD9002	Gate 2 - Second Screen	30-May-16 01...	30-May-16 01...	0.0d	0%	Design Engin...
PD9003	Gate 3 - Go to Development	01-Aug-16 01...	01-Aug-16 01...	0.0d	0%	Design Engin...
PD9004	Gate 4 - Go to Testing	01-Nov-16 10...	01-Nov-16 10...	0.0d	0%	Design Engin...
PD9005	Gate 5 - Go to Launch	20-Dec-16 10...	20-Dec-16 10...	0.0d	0%	Design Engin...
PD9001	Gate 1 - Idea Screen	09-May-16 01...	09-May-16 01...	0.0d	0%	Design Engin...
1	Scoping Stage	02-May-16 08...	09-May-16 01...			
PD1000	Scope New Product Idea	02-May-16 08...	09-May-16 01...	4.5d	0%	Alice Wynn

Download

General Assignments Codes Discussion Documents Expenses Issues Notebooks Relationships Risks Status Steps Update History

+ Add Assign...

ID *	Name	Owner	Category	Type	Status	Project ID	Project Name	Cost	Probability	Sche
Risk-03	Sales Management Buy-in	Peg Ithan	Communication	Threat	Open	PROD00414	4G Tablet Pro...	N (Negligible)	L (Up to 25%)	L (Up to 25%)
Risk-06	External Business Impacts	Larry West	Complexity & I...	Threat	Open	PROD00414	4G Tablet Pro...	M (10,000 to 2...	L (Up to 25%)	M (10,000 to 2...

Select Risk

Search

- Risk-01 - Product/Technological Complexity
- Risk-02 - Staff Turnover
- Risk-03 - Sales Management Buy-in
- Risk-04 - Unrealistic Expectations
- Risk-05 - Product Scope Creep
- Risk-06 - External Business Impacts

Select Owner

View Resources By: Active Resources

Search

ID	Name	Email	Role	Phone	Location
IT	Information Technology Group				
MathisL	Lane Mathis, CIO				
RiceB	Barbara Rice, PMO Director				
LiR	Roy Li				
AbrahamM	Molly Abraham				
WrenJ	Jo Wren				
AndersonG	Glen Anderson, VP Development				
SharpeD	Dan Sharpe				
VincentI	Ian Vincent				
ChopraA	Amit Chopra				
BennettC	Carina Bennett				
ZhuS	Shannon Zhu				
SinghD	Deepak Singh				
CharlesM	Mandy Charles, VP IT Ops				

Close Assign

Cancel Select

Table 2 of 2: Select a Value Dialog Boxes

Item	Description
1	Selection icons: Similar to the  icon, in these examples, click Assign... or ...Select to choose a particular item.
2	Search Area: The top part of the dialog box contains custom search controls to help you constrain the values based on your criteria.
3	Results Area: The middle part of the dialog box displays the available values based on your search criteria, if any. Make your selection here.
4	Command Buttons: The bottom part of the dialog box contains command buttons. Standard buttons include OK , Apply , Select and Assign to accept the value you selected, Close to shut the dialog box after you made assignments, or Cancel to cancel the operation, close the dialog box, and return to the previous screen. Other buttons can also appear in this area.

Selecting Values from "Select a Value" Dialog Boxes

To assist you in selecting from a constrained list of available values, the application will often display *Select a Value* dialog boxes. Use these special dialog boxes to search for potential matching values and select one or more specific values appropriate for the current field.

Note: Although commonly used throughout the application, each dialog box can contain unique options.

To select a value from a **Select a Value** dialog box:

- 1) Enter any search criteria to reduce the number of values shown.
- 2) Select a value in the list. If grouped in a hierarchy, expand a group to view the values.
- 3) Click **OK**, **Select** or **Assign**.
- 4) Repeat these steps to select additional values if necessary.
- 5) When finished, click **Close**.
- 6) If applicable, click **Save**, **Save and Close** or **OK**.

Working with Data in P6

The application's data entry controls are convenient and easy to use.

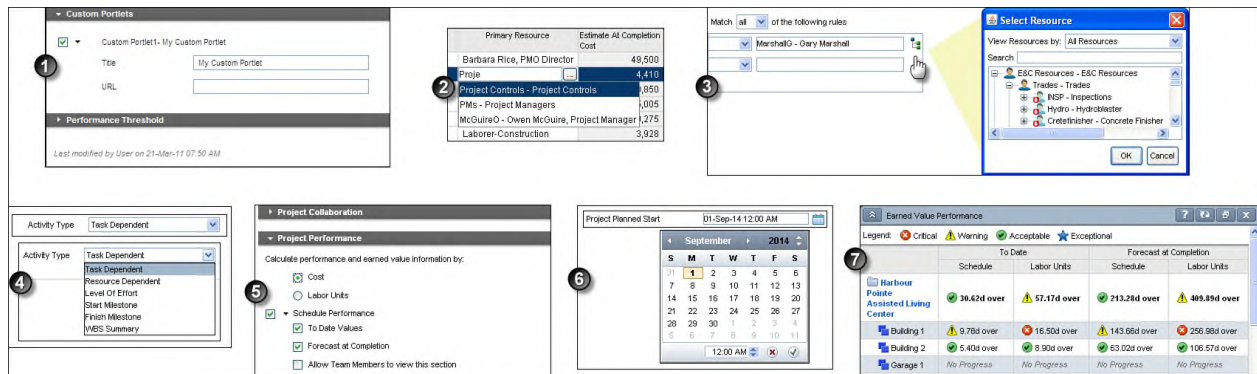


Table of Common Data Entry Controls

Item	Description
1	Expandable sections: Often times a screen will reduce visual clutter by hiding its fields and other controls. Expand these regions to show its fields. In the sample image, we say that the Custom Portlets section is <i>expanded</i> or opened, and the Performance Threshold section is <i>collapsed</i> or closed. Also of note, you can directly modify the Title field but the Last modified by field information is <i>read-only</i>. Note: Data you enter can later become read-only for you or other users.
2	Auto-Complete: Also known as <i>type-ahead</i>. As you type in a field that must be assigned a value from a pre-defined list of acceptable values, the closest single matching value is automatically selected for you. If multiple values match your typed input, they appear in a list. To select a value, click one or press the up or down arrow keys on your keyboard and then press Enter.
3	Select a Value from an Extended List: Click  to select a field value from a <i>Select a Value</i> dialog box listing only valid values. You cannot type in your own entry in fields where the Select from Value List icon appears. This convention is used whenever a field's value must be logically constrained and validated against a pre-defined set of values. To illustrate this point, consider the following example. You can type whatever you want in a Name field for a new item you are creating; however, in a User field, you <i>must</i> enter a valid user.
4	Select a Value from a Short List: In this example, the Activity Type field is shown at rest. Below that, after the user has selected the field's list, its values appear. For these kinds of fields, you will see references in the documentation to selecting a value from the Activity Type list.
5	Options: For simplicity's sake, both radio buttons and check boxes are referred to as <i>options</i>.
6	Dates: You can type a date in a valid format directly into a date field. Or, you can select a date, including the time, from a small pop-up calendar.

Item	Description
7	Indicators: To help you readily identify the meaning of a given metric, these color-coded graphics appear. You can also define your own custom user-defined indicators.

Working with Detail Windows

When additional details about an item are necessary, rather than clutter the main work area, the application will often use subordinate tabbed panels called detail windows. Detail windows supplement their parent pages with related data and often include their own toolbars. These special windows allow you to:

- ▶ minimize them to a series of tabs
- ▶ float, drag and drop, and freely resize them
- ▶ tile them, or align them as overlapping tabs
- ▶ dock or pin them (when docked, allowable placement includes bottom, left, and right of the current work area)

When you customize the detail windows on the EPS, Activities, or Assignments pages, P6 prompts you to save the settings with the current view.

Note: Visual clues guide you when docking floating panels. As you click the titlebar and drag it within the work area, a gray rectangular outline indicates the panel will "snap to" this available location.

The screenshot displays the Oracle Primavera P6 interface with several detail windows open. The main window shows the 'Activities of Harbour Pointe Assisted Living Center' page. A detail window titled 'Expenses' is open, showing a table with columns: Expense Item, Planned Units, Price/Unit, and Planned Cost. Another detail window titled 'WBS / Activity' is open, showing a tree view of activities. A third detail window titled 'Steps' is open, showing a table with columns: Step Name, Step Weight, Step Description, and Completed. The interface includes a top navigation bar with tabs for Dashboards, Portfolios, Projects, and Resources. The left sidebar shows a tree view of the project structure. The bottom status bar indicates the current activity is EC1090. Numbered callouts (1, 2, 3, 4, 5) highlight specific features: 1 points to the 'Steps' window, 2 points to the 'Expenses' window, 3 points to the 'WBS / Activity' window, 4 points to the 'Assignments' window, and 5 points to the 'Steps' window.

Table of Key Detail Window Elements

Item	Description
❶	A series of detail windows: In this example, the three detail windows for Steps, Documents, and Issues appear in a series aligned at the bottom of the page with their titles shown in tabs.
❷	Floating detail window: The user has dragged and dropped the Expenses detail window to a position where it appears to be floating above the rest. Click the Restore button in the titlebar to make the window go back with its siblings.
❸	Docked detail windows: The Assignments and Trace Logic detail windows have been docked or pinned by the user to the space immediately to the left of the main work area.
❹	Minimized detail window: The Codes detail window has been minimized. This means it occupies the smallest amount of space on the page and only its name appears in a tab. In this particular example, it also happens to be minimized to a position along the left edge of the page. Typically, detail windows are minimized along the bottom. Click a minimized detail window tab to view the full detail window again.
❺	Detail window titlebar icons: Click these icons to Float, Restore, and Minimize detail windows individually or collectively as a series. This detail window also features an Activity selector providing a convenient way to advance up or down the rows in the Activity Table.

About Dashboards, Workspaces, and Workgroups

P6 provides three types of user-customizable pages you can use to monitor and share concise snapshots of data in a single place without having to navigate to other sections of the application. They are:

- ▶ Dashboards
- ▶ Project Workspaces
- ▶ Workgroups (a workspace within the project workspace)

You can customize the content and layout of each dashboard, workspace, and workgroup to display related data inside smaller windows called *portlets*. Portlets provide the means for adding, editing, and viewing up-to-date information about portfolio, project, resource, workflow, document, and personal data. They provide a single location for collaborating with other users.

You can have multiple dashboards and workgroups; however, each project has just one project workspace.

About Portlets

Portlets are small expandable windows representing a specific theme or particular subject matter. They are only available on dashboards, project workspaces, or workgroup pages. Portlets provide a concise way to organize, present, and assess project data within a single page and also offer tools for adding, modifying, and personalizing portfolio, project, and resource data. Portlets on shared dashboards or workspaces provide a centralized place for collaborating with other users.

The same portlet might display information differently depending on the page on which it appears. On a dashboard, portlets display data based on association, ownership, or applied filters. On a project workspace, portlets reflect data for the open project. On a workgroup workspace, portlets show information belonging to that workgroup.

About Data Entry Controls

Data Entry Controls: P6 provides easy-to-use controls for entering data. To assist you in choosing the right types of values, fields will sometimes present dialog boxes or calendars for selecting from a pre-defined list of values or dates. Familiar value lists help narrow choices and enforce consistency. You'll also recognize standard options (a term used for both check boxes and option buttons or radio buttons), tables, spreadsheets, Gantt charts, calendars, and other on-screen controls. Where you can select multiple options, you can hold down Shift while clicking to select a contiguous group of items, or hold down Ctrl while clicking to select individual items.

Printing Pages Using P6 Printing Tools

Available on most pages within the application, the printing tools and options provided with the user interface offer the best options and output. It is recommended that you use the Print Preview feature before generating actual output.

To print application pages:

- 1) Navigate to the specific page or tab and customize the view to meet your data requirements.

In **Classic View**:

- a. Click the **Actions**  menu and select  **Print Preview** to preview the printed output.
- b. If you wish, in the Print Preview toolbar, adjust the preview using the commands provided. For example, click  **Portrait** to orient output to a standard tall page, or click  **Landscape** to orient output to a wide page. Print Preview functionality is not available in Standard views.
- c. To refine the output, click  **Page Setup**.
- d. In the **Page Setup** dialog box, you can choose to adjust the following settings and then click **OK**:
 - Click the **Page Layout** tab to set the page orientation, margins, and paper size.
 - Click the **Header/Footer** tab to select pre-defined headers and footers, or define your own.
 - Click the **Sheet** tab to set:
 - The date range to be printed.

The number of pages wide you wish the output to cover.

The number of columns to be printed.

The scale for the activity table, which determines what proportion of the page the table will use.

Whether you would like the table to be printed on all pages.

Whether you want to print the gradient

Note: Selecting this option will allow the graduated shading on Gantt chart bars to print, but may slow the printing process, particularly when printing to PDF format. To improve printing performance you can choose to print the Gantt chart bars with a solid color fill by switching off the **Print with gradient** option.

The tiled page order.

- e. In the toolbar, click  **Print** to send the output to your default printer.
- f. In the **Print** dialog box, click **OK** to print the output.

In **Standard View**:

- a. Click  **Print**
- b. In the **Print** dialog box, click **OK** to print the output.

Tips

- ▶ If the application printing tools are not available for the specific page or view you want to print, you might be able to print the page using your web browser; however, this method can never be guaranteed and might produce substandard results.
- ▶ In the Classic View of the Activities page, you can define a rolling date range for the view using reference dates. For example to print a Month Ahead forecast, set the Start to Current Date and the Finish to Current Date plus one month. The rolling date range is saved as part of the view.
- ▶ The **Print Preview** dialog box for the **Portfolio Analysis** page includes special options.
- ▶ The Gantt chart only prints if it is showing in the view.

Printing Pages Using Your Web Browser

Because P6 runs inside your web browser, you can print data using your browser's **Print** command. For example, in Microsoft Internet Explorer, choose **Print** from the **File** menu. P6 application pages also feature a **Print** link you can click. In addition, many pages also include separate Print icons in a toolbar.

Note: Whenever they are available, the printing commands provided by the application offer the best options and output. It is also recommended that you always use the Print Preview feature before generating actual output.

To print data:

- 1) On any page that supports printing, select your browser's **Print** item.
- 2) In the resulting **Print** dialog box for your operating system, choose a printer and click **OK** to print.

Tips

- ▶ To refine the output, use the options available in your browser's **Print Preview** and **Page Setup** dialog boxes.
- ▶ The Gantt chart only prints if it is showing in the view.

Managing Project Portfolios

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About Portfolios

A portfolio is a collection of projects. Group projects into portfolios so you can easily view data from more than one project at a time. For example, you might filter a dashboard by a portfolio to view a wide range of information for multiple related projects at one time.

In a more strategic sense, you should group projects and programs together to facilitate the effective new product development and management of those projects to optimize your organization's success at meeting business objectives.

Using portfolios, you can review summary data and status information for the group as a whole or for individual projects in a portfolio.

You can create portfolios for your own use or for sharing with other users. You can also create global portfolios, which are available to all users.

Portfolio views, such as pie charts, enable you to visually compare portfolios. For example, compare costs for all projects in region A (one portfolio) vs. region B (another portfolio).

Historical snapshots of grouped project data, called scenarios, aid in your analysis of project groups on the Portfolio Analysis and Capacity Planning pages.

Working with Portfolios

To begin using the analysis features in the portfolios section, you must already have created and updated multiple projects. Begin your work in the portfolios section by creating and configuring at least one portfolio. It's also possible for another user to create one and share it with you. Over time, your team will create additional portfolios, views, and scenarios in order to perform comparative analysis, obtain status and ROI, and perform other operations.

When creating a portfolio, decide whether you want to hand pick the projects that it will comprise, or if you want the application to create and periodically update the set of projects in your portfolio based on your filter criteria. Either way, you can change these settings at any time.

Note: An administrative option is available to increase or decrease the

refresh interval for filtered portfolios. A portfolio will be refreshed when you view its projects in either a dashboard or portfolio view, if it has not been refreshed within the interval specified in the *Filter Portfolio Stale Period* as described in the *P6 EPPM System Administrator's Guide*.

Creating Portfolios

Perform these steps to create a new group of projects called a portfolio. When creating a portfolio, decide whether you want to hand pick the projects that it will comprise (manual), or if you want the application to create the set of projects in your portfolio based on your filter criteria (automatic). Either way, you can change these settings at any time.

To create a portfolio:

- 1) From the **Portfolios**  menu, select **Manage Portfolios**.
- 2) In the Manage Portfolios dialog box:
 - a. Click  **Row Actions** and select **Add**.
 - b. In the **Name** field, enter a unique portfolio name.
 - c. Select **Manual** or **By Filter**.
 - If you selected Manual, add the projects you want to include from the Available Projects list to the Selected Projects list.
 - If you selected By Filter, enter your filter criteria.
 - d. Configure access to the portfolio by making a selection from the **Available to** list.
 - To restrict access to the new portfolio to only you, select **Current User**.
 - To designate a global portfolio, select **All Users**.
 - To restrict access to only another user, select **Another User**, and search for the user to assign or select **...Select**.
 - e. Click **Save**.

Tips

- ▶ There are two alternate ways to create a portfolio:
 - ▶ Click Portfolios, click Portfolio Analysis, and then select a scorecard in the View field. From the toolbar, click Create Portfolio from Selected Projects.
 - ▶ Click Portfolios, click Capacity Planning, and then click Create Portfolio from Selected Projects.

Opening Portfolios

When working in the portfolios section of the application, it is important to open only the project group you want to include in the various work areas. You can specify these project groupings by EPS, portfolio, or project code. You can open a portfolio in any of the following ways:

To open a portfolio:

- 1) Click the **Portfolios**  menu and choose **Open Portfolio**.
- 2) In the **Open Portfolio** dialog box

- a. Select a grouping method on the **Organize By** list.
- b. Expand the resulting groups to select the entry representing the projects you want to open collectively as a portfolio.
- c. Click **Open**.

Tips:

- ▶ To re-open the last portfolio you were working with, click **Portfolios**.
- ▶ To open another recently used portfolio, click the **Portfolios**  menu and choose the portfolio from the list.

Creating Projects While Working with Portfolios

Generally, you create projects while working in the Projects section of the application. However, you can also create a project while viewing a portlet in the Dashboards section or analyzing a portfolio in the Portfolios section. Refer to the tasks below:

- ▶ **Creating Projects in a Portfolio View Scorecard Portlet** (on page 325)
- ▶ **Creating Projects on the Portfolio Analysis Page** (on page 326)

Creating Projects in a Portfolio View Scorecard Portlet

Generally, you create projects while working on the **EPS** page in the Projects section of the application. However, it is also possible to create what-if projects while viewing a portfolio view scorecard portlet on a dashboard.

To create a project in a portfolio view scorecard portlet:

- 1) Click **Dashboards**.
- 2) On the **Dashboards** page, click a dashboard.
- 3) On the dashboard, locate your portfolio view scorecard portlet's titlebar and click  **Click here to maximize or minimize this section** to expand and maximize it.
- 4) In the expanded and maximized portfolio view scorecard portlet:
 - a. Select a project row.
 - b. Click **Add**.
- 5) For the first project you create, if defaults are not already set, the **Add Project** dialog box appears:
 - a. Select a default **Parent EPS** element.
 - b. Select a default **Responsible Manager**.
 - c. Click **Select**.
- 6) In the portfolio view scorecard portlet:
 - a. Select your new project row by clicking on it in the **Name** column.
 - b. Enter a name for your new project to replace the default name.
 - c. Click **Save**.

Tips

- ▶ When you create a project from a scorecard on a dashboard, the project is automatically added to the filter currently associated with the dashboard. However, if the dashboard is filtered by a global portfolio and you do not have the required security privilege to edit global portfolios, the new project is removed from the scorecard when you click **Save**.
- ▶ You can change the **Project Status** field on the **General** detail window of the **EPS** page. For example, you may later want to change a project from *What If* to *Planned* status.

Creating Projects on the Portfolio Analysis Page

Generally, you create projects while working on the **EPS** page in the Projects section of the application. However, it is also possible to create what-if projects while analyzing portfolios. During the process of evaluating a portfolio, you will often want to capture a new project idea.

To create a project on the portfolio analysis page:

- 1) Click **Portfolios**.
- 2) On the **Portfolios** navigation bar, click **Portfolio Analysis**.
- 3) On the **Portfolio Analysis** page:
 - a. Make sure you are working with the primary portfolio (at top or left) and not the comparison set for the next steps.
 - b. In the **Scenario** list, select a scenario for your analysis.
 - c. In the **View** list, select a portfolio view scorecard.
 - d. In the scorecard, select a row where you want to add a new project.
 - e. Click  **Add Project**.
- 4) For the first project you create, if defaults are not already set, the **Add Project** dialog box appears:
 - a. Select a default **Parent EPS** element.
 - b. Select a default **Responsible Manager**.
 - c. Click **Select**.
- 5) On the **Portfolio Analysis** page, click  **Save**.

Tip

You can change the what-if project's **Project Status** field value on the **General** detail window of the **EPS** page. For example, you may later want to change a project from *What If* to *Planned* status.

Assigning Projects to a Portfolio

When comparing portfolios on the Portfolio Analysis page, you can assign a project to the selected portfolio in either half of the page.

To assign a project to the selected portfolio:

- 1) Open a portfolio in the **Portfolios** section using one of the following methods:
 - ▶ Click **Portfolios** to open the last portfolio you were working with.

- ▶ Click the **Portfolios**  menu and choose one of the most-recently used portfolios.
 - ▶ Click the **Portfolios**  menu and choose **Open Portfolio** to select a group of projects by portfolio type, EPS node, or project code.
- 2) On the **Portfolios** navigation bar, click **Portfolio Analysis**.
 - 3) On the **Portfolio Analysis** page:
 - a. In either work area, choose a scorecard portfolio view from the **View** list.
 - b. In the same work area, select *<Latest Data>* from the **Scenario** list.
 - c. In the same work area, click  **Assign a Project to this Portfolio**
 - 4) In the **Select Project** dialog box select a project and then click **Assign**.
 - 5) Click  **Save**.

Tips

- ▶ You cannot assign a project to a portfolio when displaying a scenario; you must select *<Latest Data>*.
- ▶ The selected portfolio must be manually-administered; you cannot assign a project to a filtered portfolio.

Defining Performance Thresholds

To help you assess the relative performance, earned value, index calculations, and other metrics for a WBS, project, or portfolio, you can set performance thresholds. These thresholds capture the current calculations, variances, and metrics and re-route them into one of four ranges or "buckets" as follows:

- ▶  **Exceptional**: Indicates that a WBS, project, or portfolio is exceeding expectations.
- ▶  **Acceptable**: Indicates that a WBS, project, or portfolio is performing within an expected range.
- ▶  **Warning**: Indicates that a WBS, project, or portfolio needs attention and is performing below expectations.
- ▶  **Critical**: Indicates that a WBS, project, or portfolio requires significant corrective action.

The threshold values you set for a project apply to all users viewing metrics for that project from the Workspace page and Portfolios pages. You have the option of overriding these thresholds for your own use on a personal dashboard. Both sets of steps are detailed below.

To define performance thresholds for a project:

- 1) Click **Projects**  and select **Open Projects**.
- 2) In the Open Projects dialog box, select one or more projects by name, code, EPS, or portfolio. Click **OK**.
- 3) On the Projects navigation bar, click **Workspace**.
- 4) On the Workspace page, click **Customize**.
- 5) On the Workspace Details page:
 - a. Expand the **Performance Threshold** section and then expand **Performance, Earned Value, and Index**.

- b. For each parameter, shown with its color-coded visual indicator, enter a threshold value. For lists, select a value from the list.
 - c. Click **Save and Close**.
- 6) If you opened more than one project, select the next project in the Select Project list and repeat these steps after clicking Customize.

To define your own performance thresholds:

- 1) Click the **User** menu and select **My Preferences**.
- 2) On the My Preferences page, click **Global** tab.
- 3) On the Global tab:
 - a. Expand the **Performance Threshold** section and then expand **Performance, Earned Value, and Index**.
 - b. For each parameter, shown with its color-coded visual indicator, enter a threshold value. For lists, select a value from the list.
 - c. Click **Save and Close**.

Tips

If any logical constraints are not satisfied by your selections, a message appears at the top of the page. For example, if you set a warning to 25 days late, a critical threshold cannot be set to 10 days late; logical constraints require that critical thresholds be greater than warning thresholds. Correct the thresholds and try saving again.

Portfolio Views

About Portfolio Views

A portfolio view is a scorecard or chart providing high-level information spanning an entire group of projects. Portfolio views can appear in an individual user's personal dashboard or shared among multiple users in shared dashboards. They are also used when comparing portfolios on the **Portfolio Analysis** page.

Working with Portfolio Views

Each user's personal portfolio views and any global portfolio views appear on the **Portfolio Views** page. From this page, you can manage views in your choice of scorecard, bubble or pie chart, or one of three types of bar charts or histograms as detailed below:

- ▶  **Scorecard:** Similar to tables or spreadsheets, you can display the columns you want in scorecards on the Portfolio Analysis page, the Capacity Planning page, or the Portfolio View portlet. To assist with more sophisticated analysis on a set of projects, you can also use a scorecard to conduct a waterline analysis. A waterline is a visual modeling tool that ranks projects into two separate groups by sorting and applying a constraining limit. Scorecards also permit you to edit some of their fields.

- ▶  **Bubble Chart:** A bubble chart displays four project data fields. The X-axis represents the values from one data field, the Y-axis represents a second field, the size of the bubble represents a third, and the field selected for grouping the data represents a fourth field. A bubble chart is useful when you want to analyze three independent project variables at one time, grouped by a fourth set of values.
- ▶  **Pie Chart:** A pie chart is a circular chart divided into proportional slices, where each slice represents its contribution to the whole. The size of the slice represents the value of the selected data field. A pie chart is useful for analyzing relative parts of a whole.
- ▶  **Basic Histogram:** A basic histogram lets you analyze project data in a vertical bar chart format. You can select a project data field to display on the X-axis and another field to display on the Y-axis of the chart; typically, the X-axis represents categorical data, and the Y-axis represents individual data values.
- ▶  **Side-by-Side Histogram:** A histogram where categorized data can be grouped, side-by-side, to assist with comparisons. A side-by-side histogram chart is useful when analyzing relative parts of a whole. For example, use a side-by-side histogram to analyze original budget based on project status.
- ▶  **Stacked Histogram:** A more sophisticated version of the histogram, where categorized data is grouped, or stacked, to assist with comparisons. A stacked histogram is useful when analyzing relative parts of a whole.

Creating Portfolio Views

When creating portfolio views, specify the scorecard or chart type, the project information you want to appear, and the users who will have access to the view. Portfolio view types include scorecard, bubble chart, pie chart, and three types of histograms (basic, side-by-side, and stacked).

To create a portfolio view:

- 1) Click the **Portfolios**  menu and choose **Manage Portfolio Views**.
- 2) On the **Portfolio Views** page, click **Create View**.
- 3) On the **Create View** dialog, decide if your new view should be entirely new or based on an existing view.
 - ▶ To create an entirely new view, expand **New Portfolio View**, select a chart type, and click **OK**.
 - ▶ To create a new view based on an existing view, expand **Existing View**, select one from the expanded user and global views shown and click **OK**.
- 4) On the **Create Portfolio View** page, expand any collapsed groupings, complete the required fields, and specify any additional details about the view. The fields on the Create Portfolio View page automatically adjust based on the value you select for the **Type** field.

5) Click **Save**.

Tips

- ▶ You can save a portfolio view as a scenario and save a scenario as a portfolio view.
- ▶ You can use any of these alternate methods to create a portfolio view:
 - ▶ Click **Portfolios**, click **Portfolio Analysis**, and then click **Create Portfolio View**.
 - ▶ Click **Portfolios**, click **Portfolio Analysis**, configure a particular view or scenario, and then click **Save As**.
 - ▶ Click **Dashboards**, select a dashboard, and then click **Customize**. In the Portfolio Views group, click **Add**. Using this method, your new view appears in the Portfolio View portlet with the title you assigned to it.

Working with Portfolio View Scorecards



A scorecard is a type of portfolio view you can use to analyze project data in a table with projects in rows and up to 30 data fields in columns. You can display scorecards on the Portfolio Analysis page, the Capacity Planning page, and the Portfolio View portlet, and choose the columns of information you want to display. A scorecard is beneficial when you want to analyze data in a spreadsheet-type format.

To assist with more sophisticated analysis of a set of projects, you can also use a scorecard to conduct a waterline analysis. A waterline is a visual modeling tool that ranks projects into two separate groups by sorting and applying a constraining limit.

It is also possible to edit some global and project data in a scorecard, such as project codes, user-defined fields, and responsible manager. Additionally, you can add projects with default data and delete projects directly from a scorecard.

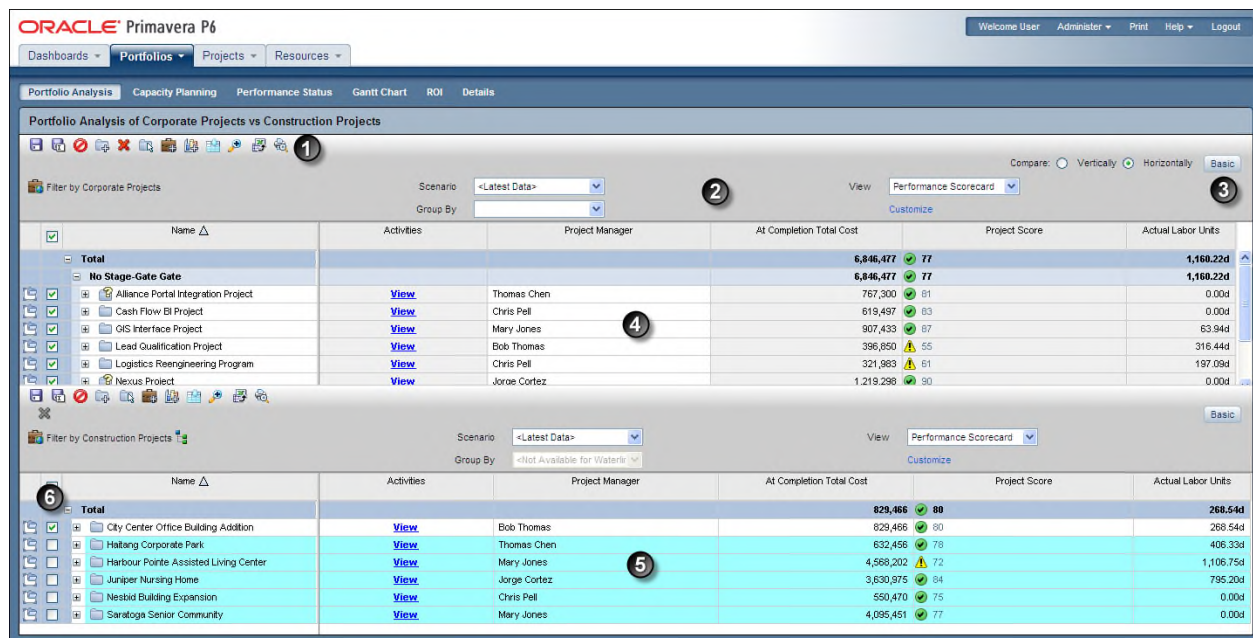


Table of Key Scorecard Elements

Item	Description
1	Portfolio Analysis toolbar.
2	Portfolio Analysis settings area.
3	More/Basic icons: Click More to display more options in the Portfolio Analysis settings area. Click Basic to hide the additional settings.
4	Scorecard work area: The first scorecard will appear in this upper work area.
5	Scorecard work area: The second scorecard will appear in this lower work area. In this example, the user has customized the view with a waterline. Use a waterline to analyze a project group by sorting projects into two separate groups based on a defined sorting and constraint limit. Projects above the waterline, displayed with a white background, are those that fall outside the constraint limit value; all other projects, displayed with a light blue background, appear below the waterline.
6	Project Selection options: Select an option to add a project's data to the cumulative Total line.

Note: To support comparative analysis, the Portfolio Analysis work area

is divided into two parts. The elements above generally appear within both parts.

More About Scorecards

You can save the same scorecard view used on the Portfolio Analysis page and display it in private or share it later in a portlet on a dashboard.

Note: The application also makes use of general tables of data also referred to sometimes as scorecards; however, they are not the same as your individually named portfolio view scorecards.



Table of Related Scorecards

Item	Description
1	Dashboard: The Personal Workspace dashboard. You can show portfolio views on private, multi-user, or global dashboards.
2	Scorecard in a portlet: The Budgetary Scorecard displays in a portlet on a dashboard. This example demonstrates a named portfolio view scorecard.
3	 Click here to maximize or minimize this section icon: Click to maximize and expand the scorecard. Additional command links will appear at the top of this portlet when it is maximized.
4	Scorecard on the Capacity Planning page: This example demonstrates a general table format also referred to as a scorecard; however, this is not a named portfolio view scorecard.

Working with Portfolio View Bubble Charts



In addition to plotting data along the x-axis and y-axis, bubble charts also adjust the relative size of each entity's bubble or circle to depict a third value, and they group the data by still a fourth value.

Example: Sheila wants to compare the projects in the *Engineering & Construction* portfolio with those in *Energy Services*. She navigates to the **Portfolio Analysis** page and customizes the portfolio views, filters, scenarios, and bubble chart options shown below. She sets *Original Budget* to display on the x-axis and *At Completion Total Cost* on the y-axis. Next, she selects *Remaining Total Cost* as the **Bubble Size** and sets the **Group by** list to *Project*. When the chart appears, each bubble represents a single project; the size of the bubble represents the *Remaining Total Cost* value for the project; the bubble's position on the x-axis represents its *Original Budget* value for the project; and the bubble's position on the y-axis represents the *At Completion Total Cost* value for the project. Sheila configures a second bubble chart to display these settings for another portfolio. The chart data is again grouped by project.

Note: To support comparative analysis, the Portfolio Analysis work area is divided into two nearly identical parts with the key difference being the data that appears in each part. The elements below appear within each part.

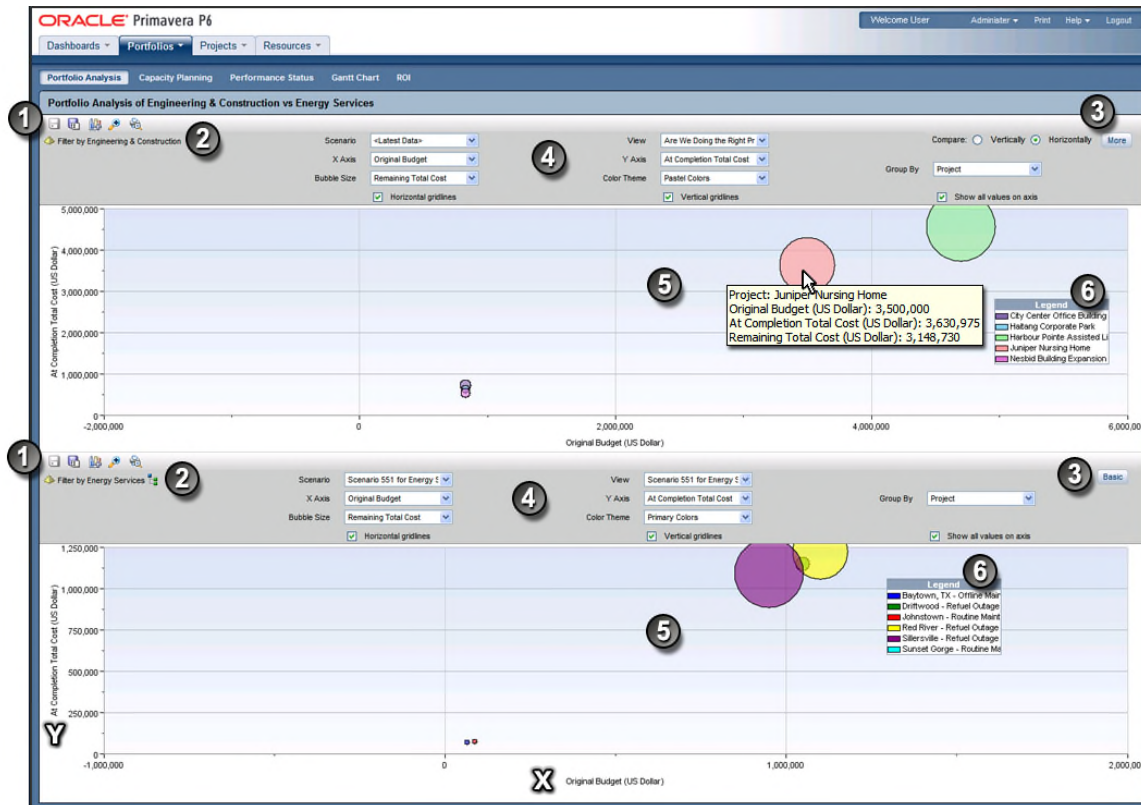
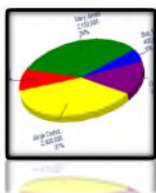


Table of Key Bubble Chart Elements

Item	Description
1	Portfolio Analysis toolbar: Use this toolbar to create and save portfolio views, scenarios, magnify the chart, or print.
2	Filter: The currently applied filter appears above each chart. The top chart's filter is determined by the portfolio you currently have open. You can set the bottom chart's filter by clicking Filter By . In this example, the top portfolio is being compared with the bottom portfolio.
3	More/Basic buttons: Click More to display more options in the Portfolio Analysis Settings area. Click Basic to hide the additional settings.
4	Portfolio Analysis settings area: Use these settings to specify the data and formatting to use in the charts.

Item	Description
5	Bubble Chart: Your chart will appear in this section. Mouse over a bubble to view its source data.
6	Legend: Based on the Group By field, each item in the legend is assigned a color from the selected Color Theme palette.

Working with Portfolio View Pie Charts



A pie chart is a circular chart divided into slices, where each slice represents a particular group. The size of the slice represents the value of the selected data field, relative to the group's total value. A pie chart is useful for analyzing relative parts of a whole.

Example 1: You can create a pie chart to analyze the at completion total cost for projects, based on project status. To do this, customize the chart and select At Completion Total Cost as the data field, then choose to group by Project Status. When the chart displays, each slice represents a single project status (e.g., Planned, Active, Inactive, What If); the size of the slice represents the At Completion Total Cost value for all projects assigned the project status.

Example 2: The pie chart below shows **Current Budget** in slices representing **Location**.

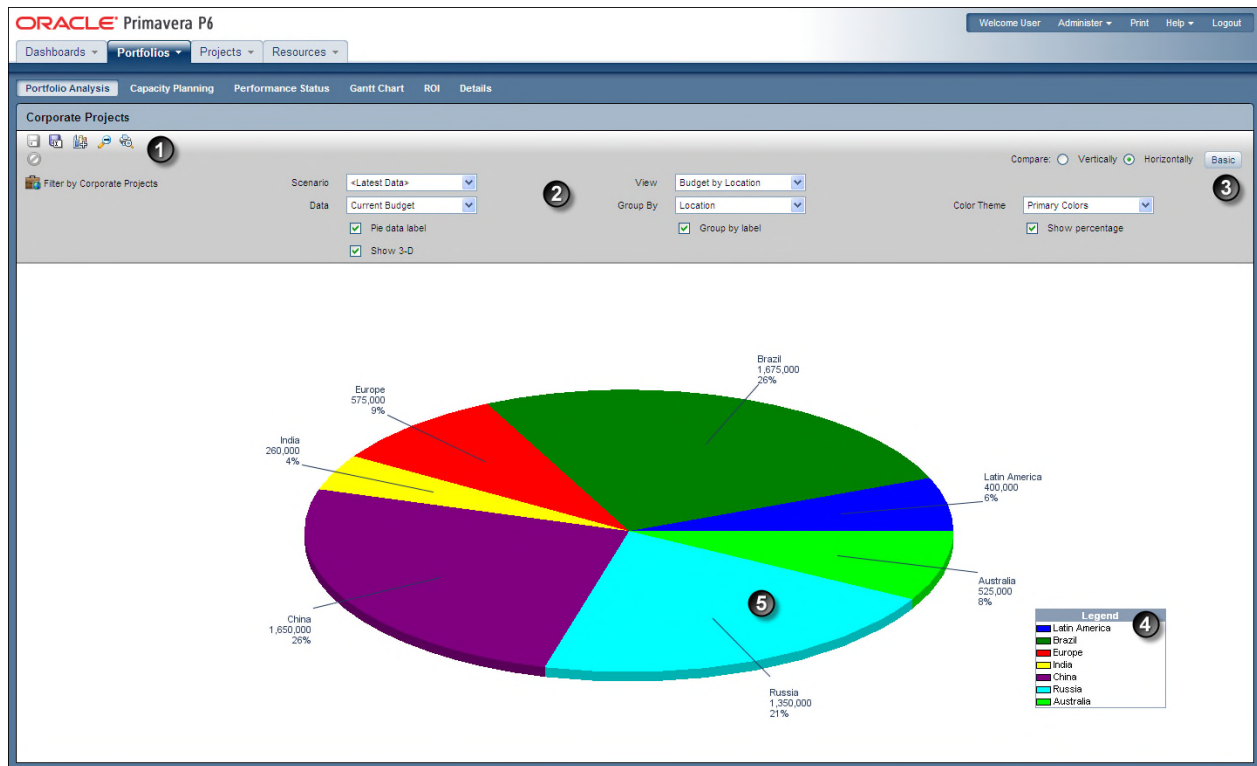


Table of Common Pie Chart Elements

Item	Description
1	Portfolio Analysis toolbar.
2	Portfolio Analysis settings area.
3	More and Basic buttons: Click More to display more options in the Portfolio Analysis Settings area. Click Basic to hide the additional settings.
4	Legend: Based on the Group By field, each item in the legend is given a color based on the selected color theme.
5	Slice: Each data group's proportionate contribution to the total is represented by a color-coded wedge or piece of the pie. In the example, this slice represents Russia's value of 163,385 which equates to 21% of the Current Budget by Location .

Working with Portfolio View Histograms



Histograms render data into multi-colored bars with relative sizes to help you make fast comparisons. Three similar types of histograms are available: basic, side-by-side, and stacked.

Example: Todd wants to analyze current budget values for each project in the *Corporate Projects* portfolio. He also wants to compare this data to the **BL Total Cost** for the current project phase. He navigates to the **Portfolio Analysis** page and customizes the portfolio views, filters, scenarios, and histogram chart options shown below. He sets **Project** to appear on the x-axis and **Current Budget** on the y-axis. When the chart appears, each bar represents a project; the size of the bar represents the **Current Budget**. He configures a second histogram to display the **Current Phase** on the x-axis and **BL Total Cost** on the y-axis.

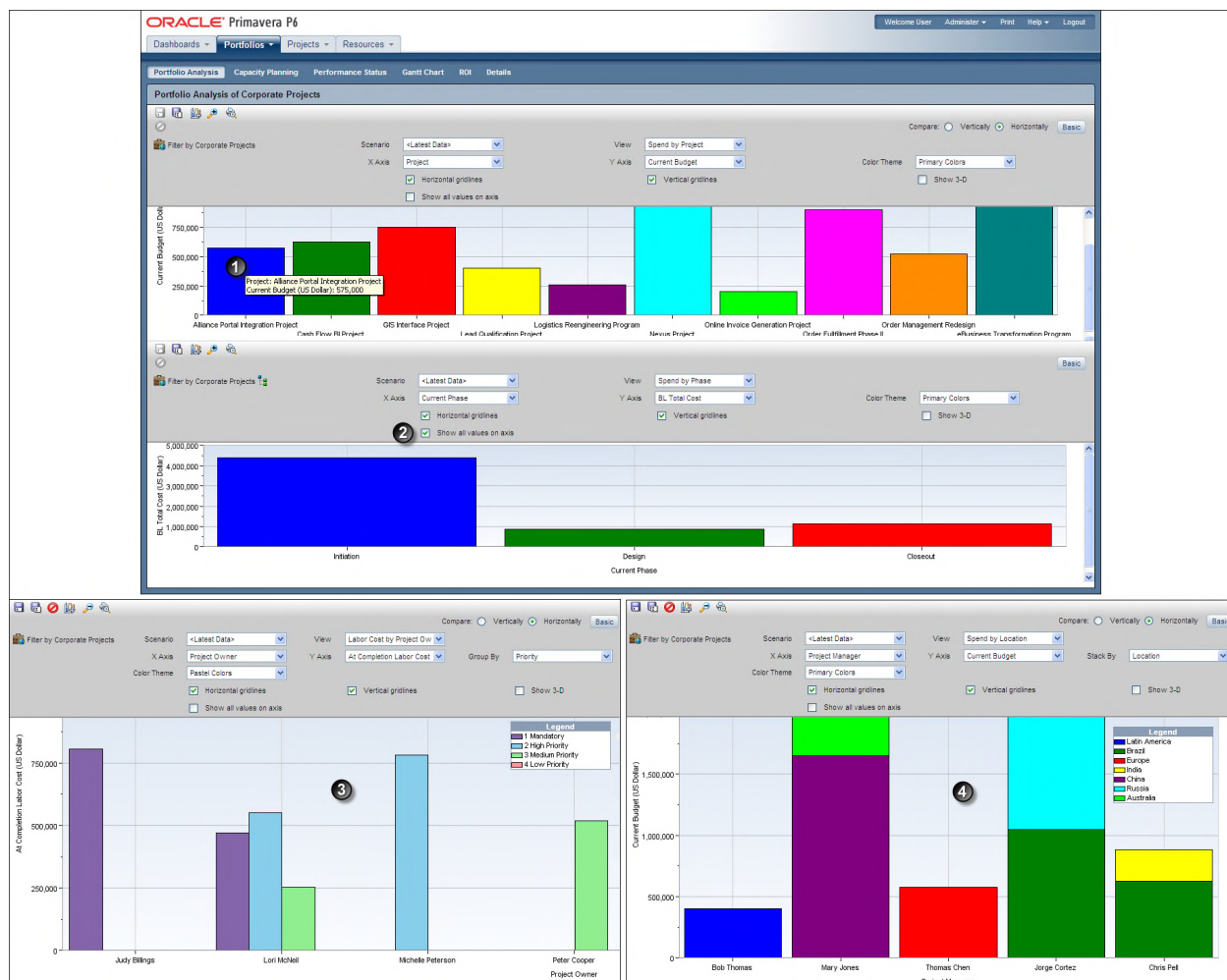


Table of Key Histogram Elements

Item	Description
❶	Tooltip: Mouse over a bar to view a summary.
❷	Show all values on axis: Select this option to include all values on the x-axis and not just values with data.
❸	Side-by-Side Histogram: The Group By field is added. In this example, At Completion Labor Cost is tracked along the y-axis for each Priority grouped by Project Owner along the x-axis.
❹	Stacked Histogram: The Stack By field is added instead of the Group By field. In this example, the Current Budget is graphed for each Project Manager . The data is stacked by location.

About Portfolio Scenarios

Scenarios are snapshots of historical project data at a given point in time. You can use them to compare against the latest summarized data, or to compare to other scenarios.

About What-if Analysis

Rooted in business management principles of sound decision theory (*which option should we pursue?*) is the what-if analysis technique aimed at assessing the results and impacts of potential scenarios. Its name stems from the question, "*What if* the scenario actually came to fruition?"

Use what-if scenarios and what-if projects to determine the impact different costs or investments have on business goals. Unanticipated adversities can make a business or project unstable and proactive handling of these uncertainties is required. With what-if scenario analysis, your organization can evaluate the feasibility of completing the project under unfavorable conditions, prepare contingency and response plans to avoid or overcome the worst scenario, and mitigate the impact of uncertain or unexpected situations.

P6 portfolio scenarios help you calculate multiple project costs or durations and compare different sets of assumptions about project activities. Sample scenarios might include the following:

- ▶ What if we extend the duration of a particular project phase?
- ▶ What if regulatory changes require us to invest more in certain areas?
- ▶ What if the price of a critical component increases to unsustainable levels?
- ▶ What if a crucial part is delayed?

Working with Portfolio Scenarios

Use scenarios to compare against the latest summarized data, or to compare to other scenarios. The list of available scenarios includes scenarios you have access rights to view that are associated with the open project group. As you modify the data displayed on the tab (for example, you change the type of Capacity Planning chart you want to view or change the list of selected projects and roles), you can create new scenarios or save changes to the view to further assist you in role planning.

Creating Portfolio Scenarios

Create portfolio scenarios to capture a specific state you can later use for what-if analysis.

To create a portfolio scenario:

- 1) Open a portfolio in the **Portfolios** section using one of the following methods:
 - ▶ Click **Portfolios** to open the last portfolio you were working with.
 - ▶ Click the **Portfolios**  menu and choose one of the most-recently used portfolios.
 - ▶ Click the **Portfolios**  menu and choose **Open Portfolio** to select a group of projects by portfolio type, EPS node, or project code.
- 2) On the **Portfolios** navigation bar, click **Portfolio Analysis**.
- 3) On the **Portfolio Analysis** page:
 - a. In the **View** list, select a portfolio view. If you need to create a view, click  **Create Portfolio View**.
 - b. Configure the current view in the lower work area by performing any of the following optional steps.
 1. Click  **Filter by** to filter the current view by EPS, portfolio, or project code.
 2. In the **Scenario** list, select an existing scenario.
 3. Click **More** and make your selections on the settings area.
 4. Click  **Save As**.
- 4) In the **Save As** dialog box, enter a **Title**, choose the **New Scenario** option, and click **Save**.

Tips

Another way to create a scenario is to click **Capacity Planning**, configure the options on that page, and then click **Save As**.

Capacity Planning

About Capacity Planning

Executives, managers, and planners tasked with managing a portfolio of existing projects and new opportunities in the pipeline need a way to evaluate both active and proposed projects to answer one essential question: *Do we have the resource capacity to successfully complete all the work?* The Capacity Planning process helps answer this question. It reveals when your organization is over or under allocated. Decisions to proceed, delay, freeze, or terminate projects can then be made.

Working with the Capacity Planning Page

Use the Capacity Planning page to perform *What-if* analysis, graphically change project forecast dates, and apply waterline analysis techniques to assist with critical, executive-level decision making. Before assessing capacity or demand on resources, create resource and role estimates for each project. During your analysis, you can create and update scenarios that provide varying snapshots of project and role allocation data. After conducting your analysis, you can create new portfolios containing only the projects that meet your planning criteria.

When you choose to display a stacked histogram, area chart, or spreadsheet, the Capacity Planning chart displays the total at completion units or costs over time for the combination of selected roles and projects. Each of these charts contains the same information in different formats with a data stacking option for the projects and roles you select.

When you choose to display a net availability chart, the chart displays each selected role's under- or over-allocated units over time for the currently selected projects. The limit line is always placed at zero. If the total units for a role equals the limit, no bar is displayed for that role. Bars placed above the limit line indicate net under-allocation for the associated role during the displayed time period; bars placed below the limit line indicate net over-allocation for the associated role during the displayed time period.

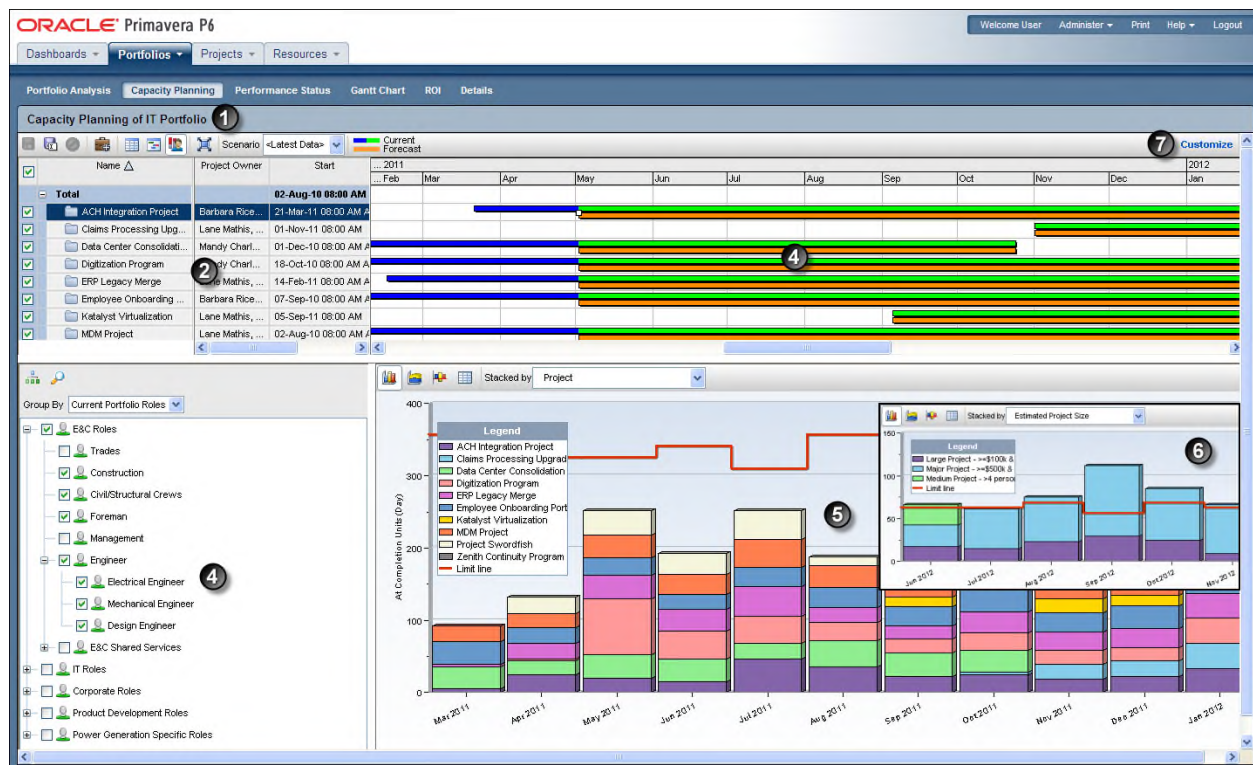


Table of Key Capacity Planning Page Elements

Item	Description
1	Navigation: Before you begin, first open the portfolio you want to work with. After clicking Capacity Planning , remember to click  Show Capacity Planning Chart in the toolbar. This displays the four (4) main screen areas used in capacity planning.
2	Scorecard: Use this table to analyze, sort, and select projects. Only the projects you select in the option column appear in the Capacity Planning chart. Note: The scorecard on this page is not related to the set of defined portfolio view scorecards.
3	Gantt chart: View current and forecast schedules. Drag the bars to adjust the Capacity Planning chart data.
4	Role Selection Area: Select the options for the roles you want to include in the Capacity Planning chart.

Item	Description
5	Capacity Planning Chart (Under-Allocated): View role allocation as a stacked histogram, area chart, net availability chart, or spreadsheet.
6	Capacity Planning Chart (Over-Allocated): Customize the chart to show a limit line representing the maximum capacity of all resources for the currently selected roles by timescale period.
7	Customize Capacity Planning Chart: Customize the columns, grouping, waterline, or chart options. You can customize the chart to display units or costs, a limit line, and an allocation limit line. You can also choose to show data for all projects in the database (except what-if projects), rather than for the projects you select in the scorecard. If you elect to view costs, but do not have the required security privileges to view costs for any project in the selected project group, the Capacity Planning chart does not display any data. This option is not available for the net availability chart because the chart displays only units.

Note: The net availability charts are often the best place to begin a resource capacity or demand analysis since they represent a streamlined birds-eye view. These charts include all related projects and roles in a single view allowing you to expand or drill down into only the roles with perceived problems.

Analyzing Role Allocation (Capacity Planning)

You can analyze role allocation over time for one or more projects on the Capacity Planning page. Using multiple chart formats and role groupings, you can identify areas of under-allocation or over-allocation. Using scenarios, you can also perform what-if analysis.

To analyze role allocation:

- 1) Open a portfolio in the **Portfolios** section using one of the following methods:
 - ▶ Click **Portfolios** to open the last portfolio you were working with.
 - ▶ Click the **Portfolios**  menu and choose one of the most-recently used portfolios.
 - ▶ Click the **Portfolios**  menu and choose **Open Portfolio** to select a group of projects by portfolio type, EPS node, or project code.
- 2) On the **Portfolios** navigation bar, click **Capacity Planning**.
- 3) On the **Capacity Planning** page:
 - a. Click  **Show Capacity Planning Chart** to display the scorecard (top left), Gantt chart (top right), role selector (bottom left), and Capacity Planning chart (bottom right).
 - b. (Optional) Choose to complete any number of the following optional sub-steps:
 1. Click **Customize** to set column, grouping, sorting, waterline, and other chart options.

2. Click the **Scenario** list to apply a scenario. Select **<Latest Data>** to display the latest summarized data for the project group.

Note: If you customize the Capacity Planning page to display allocation data for all projects in the database (rather than for selected projects only), you cannot apply a scenario.

3. In the **scorecard** (top left), mark or clear the check box next to each project to include or exclude the project's data in the Capacity Planning chart. Data in the Capacity Planning chart is updated to reflect your changes.
4. In the **role selector** (bottom left), click  **Group Roles By** or  **Search** to pinpoint the roles you want to analyze in the chart. Mark or clear the check box next to each role to include or exclude the role's allocation data in the Capacity Planning chart. Role data is immediately updated in the chart.

Note: When grouped by *Current Portfolio Roles* or *Role Team*, all child roles are automatically selected when you select a parent role.

5. In the **Capacity Planning chart** (bottom right) toolbar, select a chart or spreadsheet format, and then choose how you want to stack the chart (by project, role, project code, or staffed versus unstaffed units or costs).
6. Drag your mouse over a color-coded section of the chart to view the capacity data for that section.
7. Click  **Save**.

Using Reports

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About Reports

Reports are collections of meaningful data saved in a common file format, designed according to a particular template, and delivered to the right recipients. As permitted, you can use the set of sample BI Publisher reports or additional reports created by your administrator.

Notes:

- Project, enterprise, and other types of global data for reports must be automatically or manually published to ensure up-to-date information. *See: Publishing P6 Data (on page 414).*
- The BI Publisher sample reports were designed to be run against the small data set included in the sample database. These reports are provided as an example of the product's capability only. Oracle provides no guarantee, implied or explicit, that the BI Publisher sample reports will run against your database or will produce meaningful data when they are run against your database. You may modify the BI Publisher sample reports to suit your own data set, including adding filter criteria to limit data output or changing filter criteria to suit your data. You need a full BI license to modify sample reports.

You can elect to run a report in one of two ways:

- 1) **On-demand:** This type of report generation has many other names, including ASAP, instant, ad-hoc, and "on the fly". As these names imply, the application accepts various input criteria from you in real time and then generates and delivers the selected report to an email address, or prompts you to save or open the file depending on output type.
- 2) **Scheduled:** This type of report generation requires that you first configure the options and other details necessary to generate the report, but doesn't actually generate the report output until the scheduled day and time. You can also generate previously scheduled reports on-demand.

Notes:

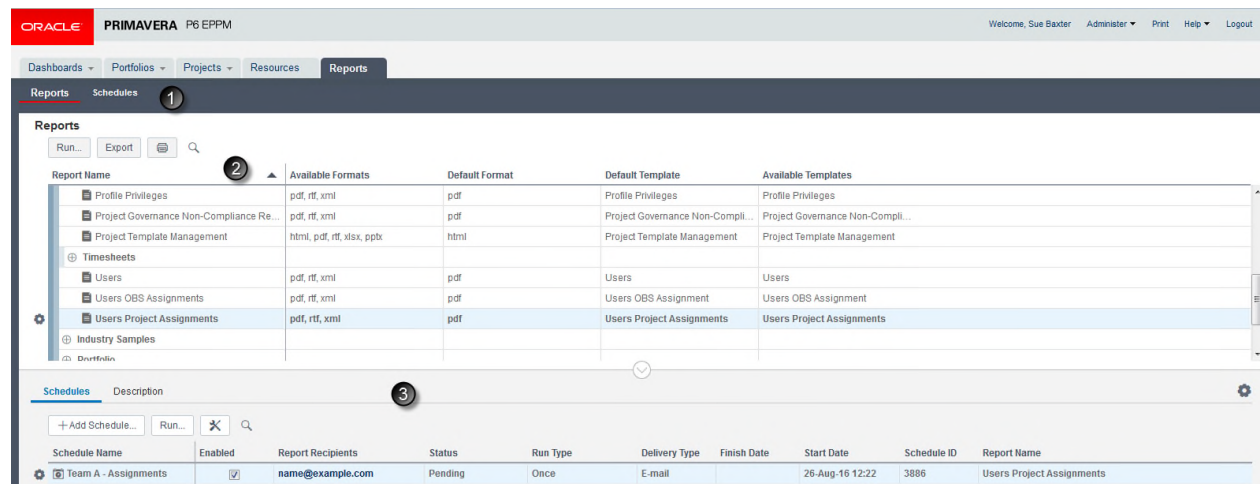
- Your ability to run and schedule reports comes from security settings managed in BI Publisher. P6 user access settings determine what, if anything, you will see. For example, to view overhead codes in a

Timesheet Report, you need module access for the Reports section of the application as well as resource access for the resources included in the report. Contact your administrator for more information.

- To see the **Reports** page login as a user with module access to **Enterprise Reports**.

Working with Reports

The reports section of the application hosts an array of reports integrated with BI Publisher. The role assigned to you determines the extent of your permissions when using reports in P6.



Reports Screen Elements

Item	Description
1	Reports tab: The Reports tab displays the list of reports you have access to run. Run a report on-demand, or use the Schedule detail window to schedule a report run. The remaining screen element descriptions in this table provide more details on the Reports view. Schedules tab: The Schedules tab displays the list of all reports you have scheduled to run, organized by run frequency (Once, Daily, Weekly, Monthly). You can suspend or activate the report run by deselected or selecting the Enabled option. Click on a report schedule name and view an explanation of the report in the Description detail window.
2	Reports tab work area: Reports are listed by name and grouped by folder. The report list, group names, and hierarchical structure are defined in BI Publisher. Your P6 administrator can remove sample reports and create additional reports for your use. From this page, you can view report details including the file formats available for each report. You can also run a report on-demand or print a list of reports in your view.

Item	Description
3	Reports tab detail windows: Schedules detail window: This detail window lists all the scheduled report runs for the selected report. Use this detail window to add a new scheduled report run, suspend or activate a report run by selecting or clearing the Enabled option, and view the history of report runs. You can also run a scheduled report on-demand from this window. Description detail window: This detail window provides an explanation of the report.

Scheduling Reports

Perform these steps to schedule reports and configure report delivery settings.

To schedule a report:

- 1) Click **Reports**.
- 2) On the **Reports** page:
 - a. Click the **Reports** tab.
 - b. Select a report, and then click the **Schedule** detail window.
- 3) In the **Schedule** detail window, click **Add Schedule....**

Note: You can also schedule a new report using an existing report schedule click **⚙️ Row Actions** and then click **Duplicate**.

- 4) In the **Add Schedule** dialog box, click the **Options** tab.
- 5) On the **Options** tab:
 - a. In the **Schedule Name** field, enter a name that identifies the report schedule.
 - b. In the **Template** list, choose a template to apply to the report.
 - c. In the **Output Format** list, choose a file format for the delivery of the report.
 - d. Next to the **Delivery Type** field, click **✉️ Send Email** and enter or select email addresses for the intended report recipients.
 - e. In the **Notification** section, choose to send yourself status notification of the report run.
- 6) In the **Add Schedule** dialog box, click the **Parameters** tab.
- 7) On the **Parameters** tab:
 - a. Specify values for the parameters in the **Field Name** column. You can enter values directly in the field or double-click in the field and click **...Select** to open a selection dialog box.

-
- **Notes:**
 - When selecting project parameters, if you choose to add an EPS to the **Selected Projects** list, only the projects directly under the EPS are added. If additional EPS elements are under the parent EPS,

these projects will not automatically be included in the report; however, you can select additional EPS elements and add them to the **Selected Projects** list.

- To avoid system performance issues, be as specific as possible when entering values for reports. Narrow down your choices to include only what is absolutely necessary.

8) In the **Add Schedule** dialog box, click the **Schedule** tab.

9) On the **Schedule** tab:

- a. Select a recurrence pattern from the **Run** list.

Note: If a report is scheduled to run every Monday for 10 weeks and only 2 weeks have passed, the status for the scheduled report run remains *Pending* until all 10 instances of the report have run.

- b. Complete the fields shown. The screen elements in this section are dynamically updated based on your selection in the **Run** list.

For example, for Daily scheduled jobs, enter the **Start Date**, **Finish Date**, **Run Time**, and select one or more days for the report to run.

10) In the **Add Schedule** dialog box, click **Add**.

Running Reports On-Demand

Perform these steps to configure report settings and immediately run a report.

To run a report on-demand:

1) Click **Reports**.

2) On the **Report** page:

- a. Click the **Reports** tab.
- b. Select a report.
- c. Click **Run....**

3) In the **Run Report** dialog box:

- a. In the **Schedule Name** field, enter a name for the report.
- b. In the **Template** list, choose a template to apply to the report.
- c. In the **Output Format** list, choose a file format for the delivery of the report.
- d. In the **Delivery Type** list, choose to have the report sent through email or display the file immediately.
 - If you chose **Email**, click  **Send Email** and enter or select email addresses for the intended report recipients.
 - If you chose **File**, the report will display after you click **Run**.
- e. If you chose **Email**, in the **Notification** section, choose to send yourself a status notification of the report run.
- f. In the **Report Parameters** section, specify values for the parameters in the **Field Name** column. You can enter values directly in the field or double-click in the field and click **...Select** to open a selection dialog box.

- **Notes:**
- When selecting project parameters, if you choose to add an EPS to the **Selected Projects** list, only the projects directly under the EPS are added. If additional EPS elements are under the parent EPS, these projects will not automatically be included in the report; however, you can select additional EPS elements and add them to the **Selected Projects** list.
- To avoid system performance issues, be as specific as possible when entering values for reports. Narrow down your choices to include only what is absolutely necessary.

g. Click **Run**.

Viewing the Report Run History

Perform these steps to view the list of all runs for the selected report schedule since the last history deletion.

Note: The run history is only captured for scheduled reports, or on-demand reports delivered by Email.

To view the report run history:

- 1) Click **Reports**.
- 2) On the **Reports** page:
 - a. Click the **Reports** tab.
 - b. Select a report, and then click the **Schedule** detail window.
- 3) In the **Schedule** detail window, select a schedule name.
- 4) Select **Row Actions** and click **View History**.
- 5) On the **History** dialog box, review the recent report runs.
 - ▶ To clear the history, click **Clear History**.
 - ▶ Click **Save** or **Cancel** to close the **History** dialog box.

Sample BI Publisher Reports

The following sample BI Publisher reports are available with P6. You can use these reports to display various types of project and portfolio data. Your administrator can modify the list of reports available for your use, including removing the sample reports or adding additional reports to your view.

Note: The BI Publisher sample reports were designed to be run against the small data set included in the sample database. These reports are provided as an example of the product's capability only. Oracle provides no guarantee, implied or explicit, that the BI Publisher sample reports will run against your database or will produce meaningful data when they are run against your database. You may modify the BI Publisher sample

reports to suit your own data set, including adding filter criteria to limit data output or changing filter criteria to suit your data. You need a full BI license to modify sample reports.

Activity

Report Name	Description	Parameters
Activities That Can Work (on page 358)	Displays activities whose predecessors are all complete and which are ready to start for the project. Also displays all the predecessor activities for each of the activities listed.	Project ID
Activity Look Ahead (on page 359)	Displays activities, along with their dates and status, occurring within specified weeks for the selected projects.	Project ID, Number of Weeks
Activity Relationships (on page 360)	Lists the activities for the selected projects along with their predecessors and successors. Report includes relationship type and lag along with dates and float of the related activities.	Project ID
Calendar (on page 361)	Produces an Excel file showing activities, days, and times in a format similar to a Gantt Chart.	Project ID, Start Date, Number of Days
Cross Project Relationships (on page 362)	Lists the projects and associated activities that are predecessors or successors to the selected project, providing visibility into cross project impacts.	Project ID
Duration Analysis (on page 363)	Compares planned and actual duration of the activities for the selected projects along with upper and lower thresholds to analyze duration estimates.	Project ID
Schedule Report with Notebooks (on page 364)	Provides a list of activities for the selected projects along with all associated notebook topics.	Project ID

Administrative

Report Name	Description	Parameters
Activity Code Assignments - EPS (on page 365)	Lists the projects with the selected EPS node and shows the EPS Activity Code assignment counts for each project.	EPS ID, EPS Activity Code Specify the EPS Activity Code before selecting the EPS ID.
Activity Code Assignments - Global (on page 366)	Lists projects and shows the Global Activity Code assignment counts for each project.	Global Activity Code
Activity Code Assignments - Project (on page 367)	Lists projects and shows the Project specific Activity Code assignment counts for each project.	Project ID, Project Activity Code Specify the Project Activity Code before selecting the Project ID.
Audit Data - All (on page 368)	Lists the date and time from which and to which audit data is presented and the audit date. Also lists the time the change was made, the application from which the change was initiated, the username which changed the table, and information about the changes made for each change recorded by the auditing feature including the primary key, database column, old and new values, and the operation for each table that was changed.	User, Start Date, End Date Specify the tables to be audited.

Audit Data - Project (on page 369)	Lists the Project Name and Project ID selected for the report the date and time from which and to which audit data is presented and the audit date. Also lists the time the change was made, the application from which the change was initiated, the username which changed the table, and information about the changes made for each change recorded by the auditing feature including the primary key, database column, old and new values, and the operation for each table that was changed.	Start Date, End Date, Project ID Specify the tables to be audited.
Calendar Use (on page 370)	Lists all Global, Project, and Resource calendars, including identification of the projects and resources using each calendar.	NA
Profile Privileges (on page 371)	Lists the privileges that are enabled for each global and project-level security profile.	NA
Project Governance Non-Compliance Report (on page 372)	Lists core project-level settings for each project, highlighting setting values that are not compliant.	Project ID
Project Template Management (on page 373)	Lists all project templates along with status, division, and added by person and date.	NA
Users (on page 375)	Lists all users and their personal name along with their associated resource and global security profile.	NA
Users OBS Assignments (on page 376)	Displays all OBS elements along with the corresponding security profile assigned to selected users.	User Name
Users Project Assignments (on page 374)	Displays OBS elements along with the corresponding security profile, EPSs, and Projects assigned to selected users.	User Name

Timesheets	Description	Parameters
<i>Timesheets Status with Notes</i> (on page 377)	Lists timesheets for resources along with the status, submitted and reviewed dates, name of the last reviewer, and associated timesheet notes.	Number of Weeks
<i>Timesheets Status without Notes</i> (on page 378)	Lists timesheets for resources along with the status, submitted and reviewed dates, and name of the last reviewer.	NA
<i>Timesheets with Detailed Hours</i> (on page 379)	Lists timesheets for the specified date range. For each timesheet, the activities and detailed hours per day are provided.	Start Date, End Date

Industry Samples - Utilities - Online

Report Name	Description	Parameters
<i>Discrepancy Report</i> (on page 380)	Provides a list of activities which are completed according to the schedule, but where the Work Order is not complete. For each activity, the report lists the ID and Name (as Title), Actual Start, Actual Finish, and the following User Defined Fields: Dpt, Sys, Status, WO, and WO Type.	Project ID
<i>High Risk Look Ahead</i> (on page 381)	Provides a list of high risk activities for a specified number of days from the data date. For each activity, the report lists the ID and Name (as Title), Start, Finish, Remaining Duration, Critical, the following User Defined Fields: Dpt, Sys, Equip ID, WO Type, and WARM.	Project ID, Number of Days
<i>T-Week Hit List</i> (on page 382)	Provides a list of activities that are on hold, listing the Activity ID, Activity Name (as Title), Start, Finish, Remaining Duration, and the following User Defined Fields: Dpt, Sys, Equip ID, Status, WO, and WO Type.	Project ID, T-Week

<i>T-Week Look Ahead</i> (on page 383)	Provides a list of activities for the specified T-week, listing the Activity ID, Activity Name (as Title), Start, Finish, Remaining Duration, and the following User Defined Fields: Dpt, Sys, Equip ID, WO, Status, Pri, WO Type, Crit, WARM, and SAP. See or an example.	Project ID, T-Week
<i>Weekly Resource Loading</i> (on page 384)	Shows the week name, T-Week, Resource name, Scheduled Hours, Available Hours, and Scheduled shown as a percentage of Available.	Project ID, Resource ID

Industry Samples - Utilities - Outage

Report Name	Description	Parameters
<i>Critical Path Report</i> (on page 385)	Provides a list of activities in the selected project which are critical for a given number of days. Enter parameters at runtime to define critical (by supplying a maximum Total Float) and a date range (the number of days from the data date). For each critical activity, the report lists the Activity ID, Activity Name (as Title), Start and Finish dates, Original and Remaining Duration, Total Float, and the following User Defined Fields: Dept, System Equip ID, WO, Stat WOT, Pri, Crit, and Risk.	Project ID, Crit Path+, Number of Days
<i>Outage Look Ahead</i> (on page 386)	Shows a list of activities for the specified number of days from the data date. For each activity, the report shows Activity ID, Activity Name (as Title) Start, Finish, Original Duration, Remaining Duration, Total Float, and the following User Defined Fields: Dept, System Equip ID, WO, Stat WOT, Pri, Crit, and Risk.	Project ID, Number of Days

Variance Report (on page 387)	Shows a list of activities which have a schedule variance for the specified number of days from the data date. For each activity, the report provides Activity ID, Activity Name (as Title), Baseline Start, Baseline Finish, Start, Finish, Variance, Total Float, and the following User Defined Fields: Dept, System Equip ID, and Risk.	Project ID, Number of Days
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Portfolio

Report Name	Description	Parameters
Code Assignments (on page 388)	Provides a list of projects for the specified portfolio along with the code values assigned for the selected project code.	Project Code, Portfolio Name
Investment Alignment Chart (on page 389)	Displays a bubble chart that plots selected projects against their strategic and financial rating with the bubble size representing the At Completion Cost.	Project ID
Portfolio Counts (on page 390)	Provides a count of all projects and activities within the selected portfolio. In addition, two pie charts display the number of open and closed issues and risks.	Portfolio Name
Project Portfolio Review (on page 391)	Identifies issues and risks within the selected portfolio and groups them by project. Includes status and priority of the issue or risk along with project-level information.	Portfolio Name

Project

Report Name	Description	Parameters
Baseline Projects Summary (on page 391)	Displays all of a project's baselines including the date the baselines was added, original and current budget, planned labor units, and activity counts.	Project ID

Document Assignments (on page 392)	Provides a list of all documents assigned to activities and WBSs within the specified project, grouped by document category.	Project ID
Issues (on page 393)	Lists all issues identified for the selected projects, grouped by status. The issue details include priority, criticality, and issue description, if provided.	Project ID
Project Earned Value (on page 394)	Displays planned value, actual total cost, earned value, and estimate to complete as periodic and cumulative charts and pivot tables.	Project ID, Start Date, End Date
Project Plan Hierarchy (on page 395)	Displays the project plan which lists all WBSs and activities for the selected project. The activity details include the status, start and finish dates, and the associated activity steps.	Project ID
Project Status Report (on page 396)	Provides a project overview that includes project code values, project costs, issues, risks, status of the milestones, and a list of notebook topics.	Project ID, Project Status
Qualitative Risk Report (on page 397)	Reports on all risks for the select projects. Includes risk information, risk impact assessment, impacted activities, and risk response plans.	Project ID
Risk Scoring (on page 398)	Report of the project risk scoring matrix. Includes threshold definitions grouped by type (Probability, Schedule, Cost, User-defined, and Tolerance) and numeric and alphanumeric probability and impact diagrams (PIDs).	Project ID
S Curve (on page 401)	Displays the originally planned hours, additional work, and work achieved as planned in a bar chart and table.	Project ID, Report Date, Milestone Date

Weekly Schedule Performance (on page 402)	Compares the activity actual finish date to the baseline finish date. Activities are grouped by week and project. The report displays information starting four weeks prior to the date set in the report parameters.	Project ID, 4 Weeks Prior To: <date>
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Resource

Report Name	Description	Parameters
Activity Resource Assignments (on page 403)	Lists resources assigned to each activity in the selected projects. Information includes start and finish dates along with duration.	Project ID
High Level Planning Assignments (on page 404)	A nine month look ahead of high level resources and roles assigned to the selected projects through the resource planning spreadsheet. Information includes effort, commitment status and dates.	Project ID
Limit Line (on page 405)	Displays actual units, remaining units, over allocated units, and limit for a Resource.	Resource ID, Start Date, End Date
Resource Code Assignments (on page 406)	Displays a list all resource codes and resource code values along with the resources assigned to each code value.	NA
Resource Role Associations (on page 407)	Displays a list of all roles in the system and the resources assigned to each role. The primary role and proficiency level are identified for each resource.	NA
Resource Role Skill Sets (on page 408)	Lists all resources along with their assigned roles. The primary role and proficiency level are identified for each role.	NA
Resource Stacked Histogram (on page 409)	Displays a stacked bar chart showing planned units by month and by project.	Project ID, Resource ID, Start Date, End Date

Activity Reports

Activities That Can Work

Figure 1: Activities That Can Work

Baytown, TX - Online Maintenance Work					
Activities with All Predecessors 100% Complete					
Name	Relationship	TF	OD	Start	Status
		Lag	FF	RD	
PM FI-984, 31 RHR PUMP INDIVIDUAL RECIRCULATION (70332400ZZ)			35.2 35.2		Not Started
ADJUST LIMIT SWITCH ON RC-AOV-549-33/O (80161700ZZ)			1 1		Not Started
MANAGEMENT APPROVAL TO EXCEED COLD SHUTDOWN (FO50012)			40 40		Not Started
RETEST FT-926A, SAFETY INJECTION LOOP 3 FLOW (A1030)			8 8		Not Started
SIGNOFF BY MANAGERS FOR COLD SHUTDOWN AP 9.4 (FO49.4CSD)			1 1		Not Started
REPLACE HYDROGEN WITH AIR PER SOP-TG-1 (FO20010)			1 1		Not Started
PM LCV-1127C, HEATER DRAIN TANK BYPASS TO (70566300ZZ)			16 16		Not Started

Description

Displays a table showing the Name, Relationship Lag, Total and Free Float, Original and Remaining Duration, Start and Finish Dates and Status for every activity which has predecessors or whose predecessors are all complete.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.

- b. Expand the **P6Reports** folder.
- c. Expand the **Activity** folder.
- d. Click **Activities That Can Work**.

Activity Look Ahead

Figure 2: Activity Look Ahead

Activity Look Ahead					
Activity Name(ID)	Status	Critical	Percent Complete	Start	Finish
Explore Opportunity(IT1000)	Not Started	Y	0	02/29/2012	03/02/2012
Define Project Charter(IT1010)	Not Started	Y	0	03/05/2012	03/09/2012
Create Plans(IT1020)	Not Started	Y	0	03/09/2012	03/22/2012
Project Start Milestone(IT9001)	Not Started	Y	0	03/02/2012	03/02/2012

Description

Displays activities, along with dates and status, occurring within specified weeks for the selected projects.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Activity** folder.
 - d. Click **Activity Look Ahead**.

Activity Relationships

Figure 3: Activity Relationships

Activity Relationships					
Name	Relationship	TF	OD	Start	Status
	Lag	FF	RD	Finish	
Explore opportunity (CP1000)			40	05/02/2011	
(Activity)			0	05/02/2011	
Successor	Finish to Start		0	05/02/2011	Completed
Funding Awarded (CP9001)	0		0	05/02/2011	
Predecessor	Finish to Start		0	05/02/2011	Completed
Funding Awarded (CP9001)	0		0	05/02/2011	
Define reengineering opportunities (CP1010)			40	05/02/2011	
(Activity)			0	05/02/2011	
Successor	Finish to Start		60	05/02/2011	Completed
Identify enabling technologies * (CP1020)	0		0	05/02/2011	

Description

Lists the activities for the selected projects along with their predecessors and successors. Report includes relationship type and lag along with dates and float of the related activities.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Activity** folder.
 - d. Click **Activity Relationships**.

Calendar

Figure 4: Calendar

		Production Schedule																							
		(January 1, 2013 - January 30, 2013)																							
Date	Activity ID	12 AM	1 AM	2 AM	3 AM	4 AM	5 AM	6 AM	7 AM	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM	8 PM	9 PM	10 PM	11 PM
Tue, Jan 1	EC2000																								
	EC2030																								
	EC2070																								
	EC2120																								
	EC2150																								
	EC2170																								
	EC2200																								
	EC2210																								
	EC2080																								
	EC2250																								
	EC2280																								
	EC2290																								
	EC2260																								
	EC2240																								
	EC2310																								
	EC2340																								
	EC2330																								
Wed, Jan 2	EC2000																								
	EC2030																								
	EC2070																								
	EC2120																								
	EC2150																								
	EC2170																								
	EC2200																								
	EC2210																								
	EC2080																								

Description

Produces an Excel file which shows activities working on each of the days in the range selected in a format similar to a Gantt Chart.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Activity** folder.
 - d. Click **Calendar**.

Cross Project Relationships

Figure 5: Cross Project Relationships

Cross Project Relationships	
Project Name / Activity Name (Critical, Relationship Type, Driving, Lag)	
Predecessor Projects impacting Johnstown - Routine Maintenance Work	
Sunset Gorge - Routine Maintenance Work / UNIT AT 100% POWER (No, Start to Start, No, 0)	
Sunset Gorge - Routine Maintenance Work / SIGNOFF BY MANAGERS FOR SYNC TO GRID AP 9.4 (No, Start to Start, No, 0)	
Successor Projects impacted by Johnstown - Routine Maintenance Work	
Baytown, TX - Offline Maintenance Work / RCS AT OPERATING TEMPERATURE (Yes, Start to Start, Yes, 0)	

Description

Lists the projects and associated activities that are predecessors or successors to the selected project, providing visibility into cross project impacts.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Activity** folder.
 - d. Click **Cross Project Relationships**.

Duration Analysis

Figure 6: Duration Analysis

Duration Analysis					
Activity	Planned Duration	Actual Duration	High Estimate (25%)	Low Estimate (20%)	Variance %
Set Heat Pump	96	0	120	77	0
Touch-up and Clean-up	19	0	24	15	0
Review and Approve Flooring	224	256	280	179	114
Review Technical Data on Heat Pumps	216	232	270	173	107
Rough-In Plumbing/Piping	19	0	24	15	0
Concrete Foundation Walls	192	0	240	154	0
Form/Pour Concrete Footings	184	0	230	147	0
Assemble Brick Samples	0	0	0	0	0

Description

Compares planned and actual duration of the activities for the selected projects along with upper and lower thresholds to analyze duration estimates.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Activity** folder.
 - d. Click **Duration Analysis**.

Schedule Report with Notebooks

Figure 7: Schedule Report with Notebooks

Schedule Report with Notebooks					
Activity	Activity Status	BL1 Start	Start	BL1 Finish	Finish
Design Building Addition(EC1000)	Completed	11/01/2010	11/01/2010A	01/17/2011	01/19/2011A
Start Office Building Addition Project(EC1010)	Completed	11/01/2010	11/01/2010A	11/01/2010	11/01/2010A
Review and Approve Designs(EC1030)	Completed	01/17/2011	01/17/2011A	01/31/2011	02/17/2011A
Assemble Brick Samples(EC1040)	Completed	03/01/2011	02/17/2011A	03/01/2011	02/17/2011A

Description

Provides a list of activities for the selected projects along with all associated notebook topics.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Activity** folder.
 - d. Click **Schedule Report With Notebooks**.

Administrative Reports

Activity Code Assignments - EPS

Figure 8: Activity Code Assignments - EPS

EPS Activity Code Assignments			
EPS ID: Energy			
EPS Name: Energy Services			
Activity Code			Count
CREW			1
Project Name: Red River - Refuel Outage		Project ID: NRG00950	
<u>Code Value</u>	<u>Code Description</u>		<u>Count</u>
CREW	Crew Description		1
Activity Code			Count
Foreman			97
Project Name: Springfield - Refuel Outage		Project ID: NRG01000-1	
<u>Code Value</u>	<u>Code Description</u>		<u>Count</u>
BA	Bill Anderson		22
HD	Henry Davis		32
MW	Mark White		28
SW	Steve Williams		15
Activity Code			Count
Project Manager			76
Project Name: Springfield - Refuel Outage		Project ID: NRG01000-1	
<u>Code Value</u>	<u>Code Description</u>		<u>Count</u>
DJ	Dave Jones		27
JS	Joe Smith		14
MJ	Mike Johnson		35

Description

Provides a list of EPS level Activity Codes showing the number of assignments for each value of each code broken down by project.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Administrative** folder.
 - d. Click **Activity Code Assignments - EPS**.

Activity Code Assignments - Global

Figure 9: Global Activity Code Assignments

Global Activity Code Assignments			
Activity Code			Count
Work Order Type			269
Project Name: Baytown, TX - Online Maintenance Work		Project ID: NRG00870-1	
<u>Code Value</u>	<u>Code Description</u>		<u>Count</u>
CM	Corrective Maintenance		19
DM	Deficient Maintenance		38
OM	Other Maintenance		42
PM	Preventative Maintenance		39
Project Name: Springfield - Refuel Outage		Project ID: NRG01000-1	
<u>Code Value</u>	<u>Code Description</u>		<u>Count</u>
CM	Corrective Maintenance		18
DM	Deficient Maintenance		35
OM	Other Maintenance		41
PM	Preventative Maintenance		37

Description

Provides a list of Global Activity Codes showing the number of assignments for each value of each code broken down by project.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Administrative** folder.
 - d. Click **Activity Code Assignments - Global**.

Activity Code Assignments - Project

Figure 10: Project Activity Code Assignments

Project Activity Code Assignments		
Project ID: NRG00920		
Project Name: Buckingham - Nuclear Outage Work		
Activity Code		Count
Crew		139
<u>Code Value</u>	<u>Code Description</u>	<u>Count</u>
AM001	MGM Review	4
EM001	Elect Maint - Global Crew	3
HP001	Health Physics - Global Crew	1
IC001	Departmental - Global Crew	17
ICJB1	Contractors Days	1
ICJB5	IC Days - Global	2
MM001	(MECH/ELEC) - Global Crew	5
MMBP1	Bill Petrosi	2
MMFL1	Fausto Lord	1
MMJA1	Jack Arcate	1
OP001	Operations - Global Crew	96
OPTG1	Operations Test Group	6

Description

Provides a list of Project Activity Codes showing the number of assignments for each value of each code.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Administrative** folder.
 - d. Click **Activity Code Assignments - Project**.

Audit Data - All

Figure 11: Cross Project Relationships

Audit Data for All Tables

ORACLE®

PRIMAVERA

From: 2015-05-07T00:00:00.000+05:30To: 2015-05-28T00:00:00.000+05:30

Audit Date27-05-2015

Table NameTASK

Time	Application	User	Primary Key(s)	DB Column	Old Value	New Value	Operation
11:46:54	P6WebApp	admin	102887	task_id		102887	I
11:46:54	P6WebApp	admin	102887	proj_id		4408	I
11:46:54	P6WebApp	admin	102887	wbs_id		25306	I
11:46:54	P6WebApp	admin	102887	clndr_id		5829	I
11:46:54	P6WebApp	admin	102887	est_wt		1.00	I
11:46:54	P6WebApp	admin	102887	phys_complete_pct		0.00	I
11:46:54	P6WebApp	admin	102887	rev_fdbk_flag		N	I

Description

Lists the date and time from which and to which audit data is presented and the audit date. Also lists the time the change was made, the application from which the change was initiated, the username which changed the table, and information about the changes made for each change recorded by the auditing feature including the primary key, database column, old and new values, and the operation (insert, delete, or update) for each table that was changed.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Administrative** folder.
 - d. Expand the **Audit** folder.
 - e. Click **Audit Data - All**.

Audit Data - Project

Figure 12: Cross Project Relationships

Audit Data for Project


PRIMAVERA

Project Name: Harbour Pointe Assisted Living CenterProject ID: EC00610

From: 2015-05-19T00:00:00.000+05:30To: 2015-05-30T00:00:00.000+05:30

Audit Date: 27-05-2015

Table Name: TASK

Time	Application	User	Primary Key(s)	DB Column	Old Value	New Value	Operation
11:46:54	P6WebApp	admin	102887	act_equip_qty		0.000000	I
11:46:54	P6WebApp	admin	102887	act_max_drtn		0.000000	I
11:46:54	P6WebApp	admin	102887	act_min_drtn		0.000000	I
11:46:54	P6WebApp	admin	102887	act_prob_drtn		0.000000	I
11:46:54	P6WebApp	admin	102887	act_this_per_equip_qty		0.000000	I
11:46:54	P6WebApp	admin	102887	act_this_per_work_qty		0.000000	I

Description

Lists the Project Name and Project ID selected for the report the date and time from which and to which audit data is presented and the audit date. Also lists the time the change was made, the application from which the change was initiated, the username which changed the table, and information about the changes made for each change recorded by the auditing feature including the primary key, database column, old and new values, and the operation (insert, delete, or update) for each table that was changed.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Administrative** folder.
 - d. Expand the **Audit** folder.
 - e. Click **Audit Data - Project**.

Calendar Use

Figure 13: Calendar Use

Calendar Use			
Calendar Name			
5x10_modified (Default Calendar)			
Project ID	Project Name	Resource ID	Resource Name
NRG00950	Red River - Refuel Outage	Selcuk Gulderen	New Resource Name
NRG00940	Sillersville - Refuel Outage	TST1	Test Settings 1
NRG00910	Driftwood - Refuel Outage	TST2	Test Settings 2
Gates	Gates	GMP	GMP
NEWPROJ-1	(New Project)	OSTRUCT	Overhead structure
RGBU-Proj	RGBU Test Project	PDP403PP	Pine Pole
GMP	GMP	GDPGA	Pole ground assembly

Description

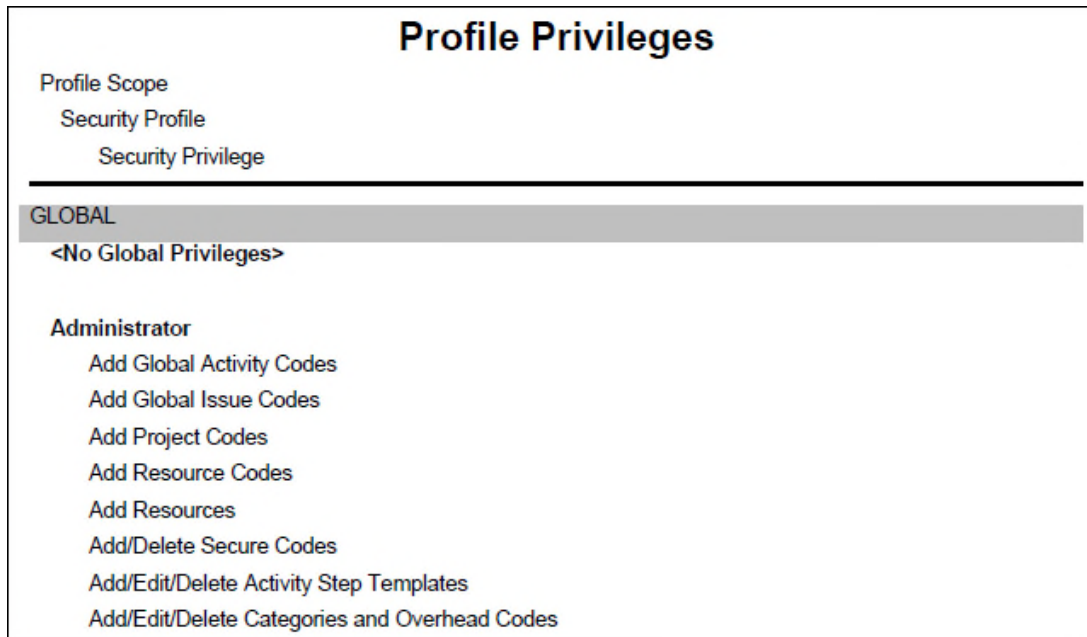
Lists all global, project, and resource calendars, including identification of the projects and resources using each calendar.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Administrative** folder.
 - d. Click **Calendar Use**.

Profile Privileges

Figure 14: Profile Privileges



Description

Lists the privileges that are enabled for each global and project-level security profile.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Administrative** folder.
 - d. Click **Profile Privileges**.

Project Governance Non-Compliance Report

Figure 15: Project Governance Non-compliance Report

Project Governance Non-Compliance Report						
	Activity Default Duration Type	When updating units or costs	Link Actual to date and actual this period	Allow Negative Actual Units	Resource can edit assignment % complete	Primary Resource can mark Activity Complete
Desired Project Settings	Fixed Duration & Units/Time	No	Yes	Yes	No	Yes
Rural Office Building Addition	Fixed Duration & Units	No	Yes	No	No	Yes
Saratoga Senior Community - B3	Fixed Duration & Units/Time	No	Yes	No	Yes	Yes

Description

Lists core project-level settings for each project, highlighting setting values that are not compliant.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Administrative** folder.
 - d. Click **Project Governance Non-Compliance Report**.

Project Template Management

Figure 16: Project Template Management

Project Template Management					
Template Name	Status	Type	Division	Added By	Date Added
Order Fulfillment Phase II	Active		Plastics	admin	1/25/2010
GIS Interface Project	Active		Wireless	admin	1/25/2010
Online Invoice Generation Project	Active		Specialty Chemicals	admin	1/25/2010
Alliance Portal Integration Project	What-If		Energy Services	admin	1/25/2010
Lead Qualification Project	Active		Media & Entertainment	admin	1/25/2010
Order Management Redesign	Active		Network Operations	admin	1/25/2010
Nexus Project	What-If		Specialty Chemicals	admin	1/25/2010

Description

Lists all project templates along with status, division, and added by person and date.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Administrative** folder.
 - d. Click **Project Template Management**.

Users Project Assignments

Figure 17: User Project Assignments

Users Project Assignments	
Name (count)	
biz Business User (1)	
OBS Name	Security Profile
Enterprise	<Project Superuser>
EPS	
All Initiatives(Enterprise),Project Templates(Templates),	
Project	
exec Executive (1)	
OBS Name	Security Profile
Enterprise	<Project Superuser>
EPS	
All Initiatives(Enterprise),Project Templates(Templates),	
Project	

Description

Displays OBS elements along with the corresponding security profile, EPSs, and Projects assigned to selected users.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Administrative** folder.
 - d. Click **Users Project Assignments**.

Users

Figure 18: Users

Users			
Login Name	Personal Name	Resource	Global Profile
admin	admin	MathisL	<Admin Superuser>
biadmin	biadmin	Trades	<Admin Superuser>
user01	user01	Product Dev	<Admin Superuser>
user02	user02		<Admin Superuser>

Description

Lists all users and their personal name along with their associated resource and global security profile.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Administrative** folder.
 - d. Click **Users**.

Users OBS Assignments

Figure 19: User OBS Assignment

Users OBS Assignment		
Name (count)		
User Name	OBS Name	Security Profile
biz Business User (1)		
	Enterprise	<Project Superuser>
exec Executive (1)		
	Enterprise	<Project Superuser>
pm Project Manager (1)		
	Enterprise	<Project Superuser>
pmo PMO (1)		
	Enterprise	<Project Superuser>
rm Resource Manager (1)		
	Enterprise	<Project Superuser>

Description

Displays all OBS elements along with the corresponding security profile assigned to selected users.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Administrative** folder.
 - d. Click **Users OBS Assignments**.

Timesheets

Timesheets Status with Notes

Figure 20: Timesheets Status with Notes

Timesheets Status with Notes					
04/03/2011 to 04/09/2011					
Resource ID	Resource Name	Submitted Date	Last Reviewer	Reviewed Date	Status
ITCon	IT Consultant	08/12/2010	rm	08/12/2010	Approved
Notes History					
12-Aug-2010: IT Consultant					
On Monday, I had to go to corporate offices to talk to Stan.					
VincentI	Ian Vincent	08/12/2010	rm	08/12/2010	Approved
Notes History					
12-Aug-2010: Ian Vincent					
On Thursday I spent 3 hours helping production support with issues on the customer portal page.					
WrenJ	Jo Wren	08/12/2010	rm	08/12/2010	Approved
ZhuS	Shannon Zhu	08/12/2010	rm	08/12/2010	Approved

Description

Lists timesheets for resources along with the status, submitted and reviewed dates, name of the last reviewer, and associated timesheet notes.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Administrative** folder.
 - d. Expand the **Timesheets** folder.
 - e. Click **Timesheets Status with Notes**.

Timesheets Status without Notes

Figure 21: Timesheets Status without Notes

Timesheets Status without Notes					
08/7/2010 to 08/14/2010					
Resource ID	Resource Name	Submitted Date	Last Reviewer	Reviewed Date	Status
ITCon	IT Consultant	08/12/2010	rm	08/12/2010	Rejected
VincentI	Ian Vincent	08/12/2010	ian		Active
JohnS	John Smith	08/13/2010	rm	08/13/2010	Rejected
JoeP	Joe Programmer	08/12/2010	ian	08/12/2010	Approved
SupportS	Support Staff	08/11/2010	ss	08/13/2010	Rejected
ZhuS	Shannon Zhu	08/12/2010	rm	08/12/2010	Approved
ChenM	Ming Chen	08/12/2010	rm		Active

Description

Lists timesheets for resources along with the status, submitted and reviewed dates, and name of the last reviewer.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Administrative** folder.
 - d. Expand the **Timesheets** folder.
 - e. Click **Timesheets Status without Notes**.

Timesheets with Detailed Hours

Figure 22: Timesheets with Detailed Hours

Timesheets with Detailed Hours										
IT Consultant (ITCon) from 4/3/2011 to 4/9/2011										
STATUS: Approved										
Project Name	Activity (ID)	Role ID	Sun 04-03	Mon 04-04	Tue 04-05	Wed 04-06	Thu 04-07	Fri 04-08	Sat 04-09	Total
Project Swordfish	Define Business Requirements * (IT1030)	PM			1 0		1 0			2 0
Project Swordfish	Define System Requirement (IT1040)	PM				3 0	1 0	4 0		8 0
ERP Legacy Merge	Define Project Charter (IT1010)	PM		2 0	2 0			2 0		6 0
ERP Legacy Merge	Create Plans (IT1020)	PM			3 0	1 0				4 0
Digitization Program	Create Plans (IT1020)	PM		2 0	2 0	2 0	4 0			10 0
	General & Accounting (G&A)			4 0						4 0
	Help Desk (Help Desk)					2 0	2 0	2 0		6 0
Total Regular:				8	8	8	8	8		40
Total Overtime:				0	0	0	0	0		0

Description

Lists timesheets for the specified date range. For each timesheet, the activities and detailed hours per day are provided.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Administrative** folder.
 - d. Expand the **Timesheets** folder.
 - e. Click **Timesheets with Detailed Hours**.

Industry Samples**Utilities****Online***Discrepancy Report**Figure 23: Discrepancy Report*

Discrepancy Report									
Data Date: 06/02/13 00:00									
Springfield - Online Maintenance Work									
ACT ID	Dpt	Sys	Equip ID	Title	Actual Start	Actual Finish	Status	WO	WO Type
99001200-01	MM	907	1CD01B	1B EDG Starting Air Compressor: Quarterly PM	04/16/13 07:00	04/16/13 11:00	W	99001200	PM
99001201-01	MM	907	1CD01A	1A EDG Starting Air Compressor: Quarterly PM	04/16/13 07:00	04/16/13 11:00	W	99001201	PM
99001202-01	MM	907	1CD01A	1A EDG Starting Air Compressor: Monthly PM	04/16/13 07:00	04/16/13 11:00	W	99001202	PM
99001203-01	MM	907	1CD01B	1B EDG Starting Air Compressor: Monthly PM	04/16/13 07:00	04/16/13 11:00	W	99001200	PM
99001207-01	ELE	901	1P01C	1C Intake Cooling Water Pump: Filter Replacement	05/23/13 13:00	05/23/13 15:00	W	99001207	PM
99001205-01	MM	901	1P01A	1A Intake Cooling Water Pump:Oil Sample	05/29/13 08:00	05/29/13 10:00	W	99001205	PM
99001206-01	MM	901	1P01B	1B Intake Cooling Water Pump:Oil Sample	05/29/13 08:00	05/29/13 10:00	W	99001206	PM

Description

Provides a list of activities which are completed according to the schedule, but where the Work Order is not complete. For each activity, the report lists the ID and Name (as Title), Actual Start, Actual Finish, and the following User Defined Fields: Dpt, Sys, Status, WO, and WO Type.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Industry Samples** folder.
 - d. Expand the **Utilities** folder.
 - e. Expand the **Online** folder.
 - f. Click **Discrepancy Report**.

*High Risk Look Ahead**Figure 24: High Risk Look Ahead*

High Risk Look Ahead

Number of Days: 30

Data Date: 06/02/13 00:00

Springfield - Online Maintenance Work

ACT ID	Dpt	Sys	Equip ID	Title	Start Dt	Finish Dt	RD	Pri	WO Type	Crit	WARM
99001234-01	ELE	901	1P01A	1A Intake Cooling Water Pump: Motor Inspection	06/03/13 10:00	06/03/13 19:00	8	D	PM		HIGH
99001235-01	ELE	901	1P01B	1B Intake Cooling Water Pump: Motor Inspection	06/17/13 10:00	06/17/13 19:00	8	D	PM		HIGH
99001236-01	ELE	901	1P01C	1C Intake Cooling Water Pump: Motor Inspection	06/19/13 10:00	06/19/13 19:00	8	D	PM		HIGH
99001247-01	ELE	903	MOV-1-1001	AFW Steam Supply MOV From A S/G: Grease Inspection	06/25/13 07:00	06/25/13 14:00	6	D	PM		HIGH
99001248-01	ELE	903	MOV-1-1001	AFW Steam Supply MOV From A S/G: Static Test	06/25/13 16:00	06/26/13 00:00	8	D	PM		HIGH

Description

Provides a list of high risk activities for a specified number of days from the data date. For each activity, the report lists the ID and Name (as Title), Start, Finish, Remaining Duration, Critical, the following User Defined Fields: Dpt, Sys, Equip ID, WO Type, and WARM.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Industry Samples** folder.
 - d. Expand the **Utilities** folder.
 - e. Expand the **Online** folder.
 - f. Click **High Risk Look Ahead**.

T-Week Hit List

Figure 25: T-Week Hit List

Clearance Not Ready

T-0 to T-12

Data Date: 06/02/13 15:00

Springfield - Online Maintenance Work

ACT ID	Dpt	Sys	Equip ID	Title	Start Dt	Finish Dt	RD	Status	WO	WO Type
99001234-01	ELE	901	1P01A	1A Intake Cooling Water Pump: Motor Inspection	06/03/13 10:00	06/03/13 19:00	8	R	99001234	PM
99001254-01	MM	907	1CD01B	1B EDG Starting Air Compressor: Quarterly PM	06/05/13 07:00	06/05/13 11:00	4	R	99001254	PM
99001268-01	MM	904	P03A	A Service Water Pump: Annual PM	06/05/13 07:00	06/05/13 11:00	4	P	99001268	PM
99012452-01	MM	904	P03A	A Service Water Pump: Discharge Isolation Valve Leaking	06/05/13 07:00	06/05/13 14:00	6	P	99001252	DM
99012451-01	MM	904	P03A	A Service Water Pump: IB/OB Oil Change	06/05/13 07:00	06/05/13 16:00	8	R	99001251	DM
99001247-01	ELE	903	MOV-1-1001	AFW Steam Supply MOV From A S/G: Grease Inspection	06/25/13 07:00	06/25/13 14:00	6		99001247	PM
99001263-01	IC	913	PT-1-100A	Replace Pressure Transmitter	06/26/13 07:00	06/26/13 16:00	8	R	99001262	PM
99001249-01	ELE	903	MOV-1-1002	AFW Steam Supply MOV From B S/G: Grease Inspection	07/09/13 07:00	07/09/13 14:00	6		99001249	PM

Description

Provides a list of activities that are on hold, listing the Activity ID, Activity Name (as Title), Start, Finish, Remaining Duration, and the following User Defined Fields: Dpt, Sys, Equip ID, Status, WO, and WO Type.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Industry Samples** folder.
 - d. Expand the **Utilities** folder.
 - e. Expand the **Online** folder.
 - f. Click **T-Week Hit List**.

T-Week Look Ahead

Figure 26: T-Week Look Ahead

T-Week Look Ahead T-1

08/11/2013 to 08/17/2013

Data Date: 08/10/13 00:00

Baytown, TX - Online Maintenance Work

ACT ID	Dpt	Sys	Equip ID	Title	Start Dt	Finish Dt	RD	WO	Status	Pri	WO Type	Crit	WARM	SAP
FO30010				COOLDOWN RCS TO LESS THAN 350 DEGREES (MODE 4)	08/07/13 09:00	08/16/13 18:00	39		-		PM	L		
A1080				31 RHR PUMP INDIVIDUAL RECIRCULATION	08/10/13 01:00	08/11/13 03:00	24				PM	N		
80161700ZZ				ADJUST LIMIT SWITCH ON RC-AQV-549-33/O	08/12/13 08:00	08/12/13 09:00	1		R		PM	L		
FO10011				BREAKER OPEN, START THE OUTAGE	08/12/13 08:00	08/12/13 09:00	1		-		PM	N		
FO20007				PLACE TURBINE GENERATOR ON TURNING GEAR PER	08/12/13 08:00	08/12/13 09:00	1		-		PM	L		
FO20010				REPLACE HYDROGEN WITH AIR PER SOP-TG-1	08/12/13 08:00	08/12/13 09:00	1		-		DM	L		
FO49.4CSD				SIGNOFF BY MANAGERS FOR COLD SHUTDOWN AP 9.4	08/12/13 08:00	08/12/13 09:00	1		-		OM	N		
OPS080017H				HANG SAFETY TAG (PTO) FOR BIT HEADER	08/12/13 08:00	08/12/13 09:00	1		-		OM	N		
A1240				RAISE RX POWER FROM 25% TO 30%	08/12/13 08:00	08/12/13 10:00	2				PM	N		
70172804ZZ				PM 52/RCP33, TRIP CHECKS FOR BREAKERS	08/12/13 08:00	08/12/13 10:00	2		R		PM	L		
FO10009				SECURE SECOND CONDENSATE PUMP	08/12/13 08:00	08/12/13 11:00	3		-		CM	L		
A1170				REPAIR BROKEN SEAL TIGHT ON FT-928A	08/12/13 08:00	08/12/13 12:00	4				DM	C		
FO10008				TRIP GENERATOR, OFF THE GRID	08/12/13 08:00	08/12/13 14:00	5		-		OM	N		
60047201ZZ				RETEST FT-928A, SAFETY INJECTION LOOP 3 FLOW	08/12/13 08:00	08/12/13 17:00	8		I		PM	C		
FO10010				REDUCE REACTOR POWER TO LESS THAN 4% - (MODE 2)	08/12/13 08:00	08/12/13 17:00	8		-		OM	N		

Description

Provides a list of activities for the specified T-week, listing the Activity ID, Activity Name (as Title), Start, Finish, Remaining Duration, and the following User Defined Fields: Dpt, Sys, Equip ID, WO, Status, Pri, WO Type, Crit, WARM, and SAP.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Industry Samples** folder.
 - d. Expand the **Utilities** folder.
 - e. Expand the **Online** folder.
 - f. Click **T-Week Look Ahead**.

Weekly Resource Loading

Figure 27: Weekly Resource Loading

Resource Loading by Week

T-0 to T-18

Data Date: 06/02/13 00:00

Week		Resource	Scheduled	Available	%	Thresholds
06/02/2013	T-0	Electrical Maintenance	28	24	117	
06/09/2013	T-1	Electrical Maintenance	48	24	200	
06/16/2013	T-2	Electrical Maintenance	56	48	117	
06/23/2013	T-3	Electrical Maintenance	32	16	200	
06/30/2013	T-4	Electrical Maintenance	28	24	117	
07/07/2013	T-5	Electrical Maintenance	32	16	200	
07/14/2013	T-6	Electrical Maintenance	56	224	25	

Description

Shows the week name, T-Week, Resource name, Scheduled Hours, Available Hours, and Scheduled shown as a percentage of Available.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Industry Samples** folder.
 - d. Expand the **Utilities** folder.
 - e. Expand the **Online** folder.
 - f. Click **Weekly Resource Loading**.

Outage

Critical Path Report

Figure 28: Critical Path Report

Critical Path Report

Total Float <= 2

Number of Days: 5

Data Date:04/18/13 00:00

Springfield - Refuel Outage

Act ID	Dept	System Equip ID	Title	Start Dt Finish Dt	OD RD	TF	WO	Stat WOT	Pri Crit	Risk
70172304ZZ	IC	000	PM 52/RCP31, TRIP CHECKS FOR BREAKERS	04/18/13 08:00	2	0	90014321	W	N	
				04/18/13 10:00	2			OM		
70172404ZZ	IC	000	PM 52/RCP32, TRIP CHECKS FOR BREAKERS	04/18/13 10:00	38	0		W	L	
				04/24/13 17:00	38			PM		

Description

Provides a list of activities in the selected project which are critical for a given number of days. Enter parameters at runtime to define critical (by supplying a maximum Total Float) and a date range (the number of days from the data date). For each critical activity, the report lists the Activity ID, Activity Name (as Title), Start and Finish dates, Original and Remaining Duration, Total Float, and the following User Defined Fields: Dept, System Equip ID, WO, Stat WOT, Pri, Crit, and Risk.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Industry Samples** folder.
 - d. Expand the **Utilities** folder.
 - e. Expand the **Outage** folder.
 - f. Click **Critical Path Report**.

Outage Look Ahead

Figure 29: Outage Look Ahead

Outage Look Ahead

Number of Days: 30

Data Date: 08/10/13 00:00

Baytown, TX - Online Maintenance Work

Act ID	Dept	System Equip ID	Title	Start Dt Finish Dt	OD RD	TF	WO	Stat WOT	Pri Crit	Risk
FO30010			COOLDOWN RCS TO LESS THAN 350 DEGREES (MODE 4)	08/07/13 09:00 08/16/13 16:00	39 39			- PM	 L	
A1090			SWAP FEEDWATER FROM MANUAL TO AUTOMATIC	08/10/13 01:00 08/10/13 05:00	4 4			OM	N	
A1120			TRANSFER RCS TEMP CONTROL TO STEAM DUMPS	08/10/13 01:00 08/10/13 05:00	4 4			DM	C	
A1080			31 RHR PUMP INDIVIDUAL RECIRCULATION	08/10/13 01:00 08/11/13 03:00	24 24			PM	N	
80161700ZZ			ADJUST LIMIT SWITCH ON RC-AOV-549-33/O	08/12/13 08:00 08/12/13 09:00	1 1			R PM	 L	
FO10011			BREAKER OPEN, START THE OUTAGE	08/12/13 08:00 08/12/13 09:00	1 1			- PM	 N	

Description

Shows a list of activities for the specified number of days from the data date. For each activity, the report shows Activity ID, Activity Name (as Title) Start, Finish, Original Duration, Remaining Duration, Total Float, and the following User Defined Fields: Dept, System Equip ID, WO, Stat WOT, Pri, Crit, and Risk.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Industry Samples** folder.
 - d. Expand the **Utilities** folder.
 - e. Expand the **Outage** folder.
 - f. Click **Outage Look Ahead**.

Variance Report

Figure 30: Variance Report

Variance Report

Project Baseline:NRG01000-1 - B1

Date Added:06/24/13 15:07

Number of Days: 20

Data Date: 04/18/13 00:00

Springfield - Refuel Outage

Act ID	Dept	System Equip ID	Title	BL Start Dt BL Finish Dt	Start Dt Finish Dt	Var	TF	Risk
60788900ZZ	MM	000	REPAIR INTERNAL LEAK FOR VALVE 5EX-FCV-1206	04/25/13 08:00	04/26/13 08:00	-8	168	R
				04/29/13 17:00	04/30/13 17:00	-8		
A1040	OPS	000 LCV-1124	POST WORK TEST AFTER LCV-1124 (AO) CALIBRATION	05/01/13 17:00	05/02/13 01:00	-7	579	R
				05/02/13 02:00	05/02/13 09:00	-7		
70175204ZZ	IC	000	PM 52/HDP31, TRIP CHECKS FOR BREAKERS	05/02/13 08:00	05/03/13 08:00	-8	151	R
				05/02/13 09:00	05/03/13 09:00	-8		
FO30003	OPS	000	ADJUST BORON CONCENTRATION TO HSD XENON FREE	05/02/13 08:00	05/03/13 08:00	-8	148	R
				05/02/13 12:00	05/03/13 12:00	-8		
70174804ZZ	IC	000	PM 52/CP31, TRIP CHECKS FOR BREAKERS	05/02/13 08:00	05/03/13 08:00	-8	146	R
				05/02/13 15:00	05/03/13 15:00	-8		
FO40005	OPS	000	DEPRESSURIZE RCS TO 350 PSIG	05/02/13 08:00	05/03/13 08:00	-8	140	R
				05/03/13 12:00	05/06/13 12:00	-8		

Description

Shows a list of activities which have a schedule variance for the specified number of days from the data date. For each activity, the report provides Activity ID, Activity Name (as Title), Baseline Start, Baseline Finish, Start, Finish, Variance, Total Float, and the following User Defined Fields: Dept, System Equip ID, and Risk.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Industry Samples** folder.
 - d. Expand the **Utilities** folder.
 - e. Expand the **Outage** folder.
 - f. Click **Variance Report**.

Portfolio Reports**Code Assignments***Figure 31: Code Assignments*

Code Assignments			
City Center Office Building Addition			
<u>Business Segment</u>	<u>Current Phase</u>	<u>Project Manager</u>	<u>Strategic Objective</u>
1004050	Design	Thomas	Rev Growth
Commercial Construction	Design	Bob Thomas	Revenue Growth
Baytown, TX - Offline Maintenance Work			
<u>Business Segment</u>	<u>Current Phase</u>	<u>Project Manager</u>	<u>Strategic Objective</u>
1023980	Initiation	Thomas	Reduced Cycle
Energy Services	Initiation	Bob Thomas	Reduced Cycle Time

Description

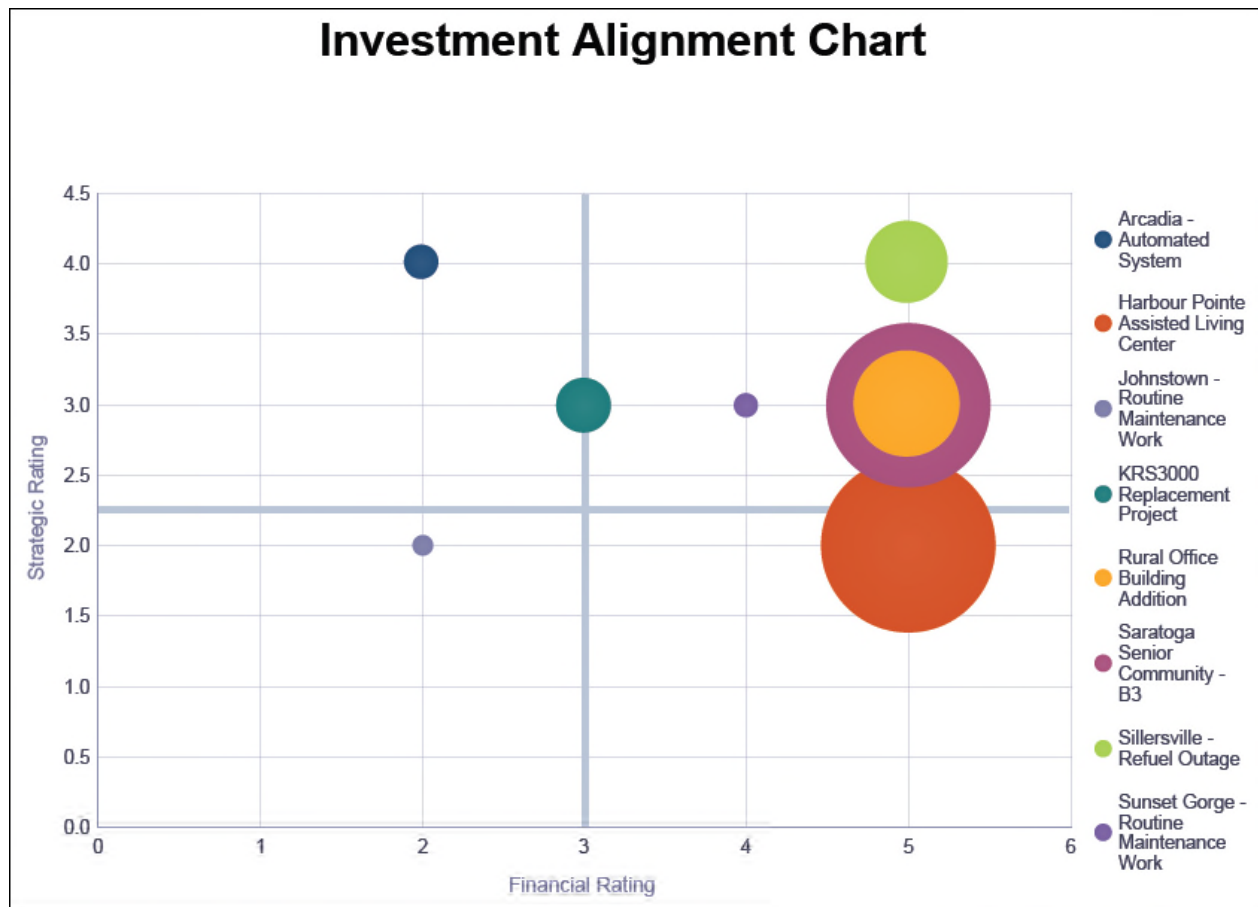
Provides a list of projects for the specified portfolio along with the code values assigned for the selected project code.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Portfolio** folder.
 - d. Click **Code Assignments**.

Investment Alignment Chart

Figure 32: Investment Alignment Chart



Description

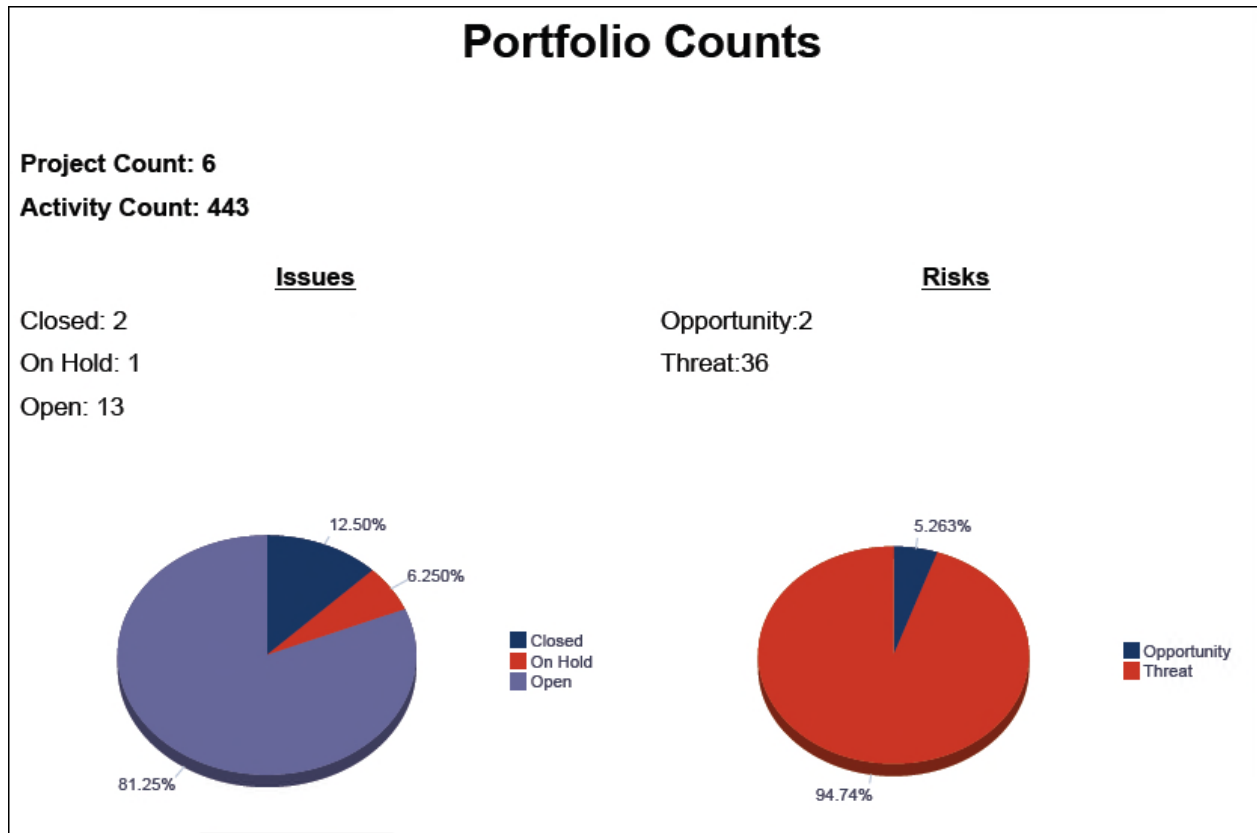
Displays a bubble chart that plots selected projects against their Strategic and Financial Rating with the bubble size representing the At Completion Cost.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Portfolio** folder.
 - d. Click **Investment Alignment Chart**.

Portfolio Counts

Figure 33: Portfolio Counts



Description

Provides a count of all projects and activities within the selected portfolio. In addition, two pie charts display the number of open and closed issues and risks.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Portfolio** folder.
 - d. Click **Portfolio Counts**.

Project Portfolio Review

Figure 34: Project Portfolio Review

Project Portfolio Review					
Project(ID)	Project Manager	Project Location	Current Phase	Planned Start	Data Date
Data Center Consolidation(IT00065)	Chen	Brazil	Design	12/01/2010	05/01/2011
ISSUE		PRIORITY		STATUS	
Design schema changes		Normal		Closed	
Claims Processing Upgrade(IT00112)	Jones	Russia	Initiation	11/01/2011	11/01/2011
ISSUE		PRIORITY		STATUS	
Score change proposed		Low		Closed	
Project Swordfish(IT00351)	Jones	Europe	Initiation	04/04/2011	04/04/2011
ISSUE		PRIORITY		STATUS	
Change in Sponsorship		High		Closed	
Change management training rescheduled		Normal		Closed	

Description

Identifies Issues and Risks within the selected portfolio and groups them by project. Includes Status and Priority of the issue or risk along with project-level information.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Portfolio** folder.
 - d. Click **Project Portfolio Review**.

Project Reports

Baseline Projects Summary

Figure 35: Baseline Projects Summary

Saratoga Senior Community							
Project Baselines							
NAME	DATE ADDED	CURRENT BUDGET	ORIGINAL BUDGET	CURRENT VARIANCE	ACTIVITY COUNT	PLANNED LABOR UNITS	PLANNED LABOR COST
Saratoga Senior Community - B	2/14/10 11:23 AM	\$4,700,000	\$4,700,000	(\$58,550,000.00)	132		
Saratoga Senior Community - B1	7/30/10 3:29 PM	\$4,700,000	\$4,700,000	(\$58,550,000.00)	132		

Description

Lists all the baselines for a project and shows the Baseline name, Date Added, Current Budget, Original Budget, Current Variance, Activity Count, Planned Labor Units, and Planned Labor Cost.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Project** folder.
 - d. Click **Baseline Projects Summary**.

Document Assignments

Figure 36: Document Assignments

Document Assignments			
Document Category			
Activity Name			
Detailed Design Specifications			
Assemble Technical Data for Heat Pump			
Document Title	Deliverable	Work Product	WBS Name
Design	N	N	Design and Engineering
Design Building Addition			
Document Title	Deliverable	Work Product	WBS Name
Design	N	N	Design and Engineering

Description

Provides a list of all documents assigned to activities and WBSs within the specified project, grouped by Document Category.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Project** folder.
 - d. Click **Document Assignments**.

Issues

Figure 37: Issues

Issues				
Status				
Issue	Project ID	Status	Priority	Criticality
Notes				
Open				
Building 2 Subject To Delay	EC00630 - B1	Open	High	High
This is an issue connected with productivity delays on Unit Finishes in Building 1. Building 2 first floor finishes are to be completed by the same subcontractor that is experience delays now. Recommend official correspondence to Finshes Subcontractor and consider augmenting crews in Building 2 to pick-up delay.				
Finish Date Variance (days) is -21d on WBS: Harbour Pointe.2.3	EC00630 - B1	Open	High	High
Finish Date Variance (days) is -21d on WBS: Harbour Pointe.2.4	EC00630 - B1	Open	High	High

Description

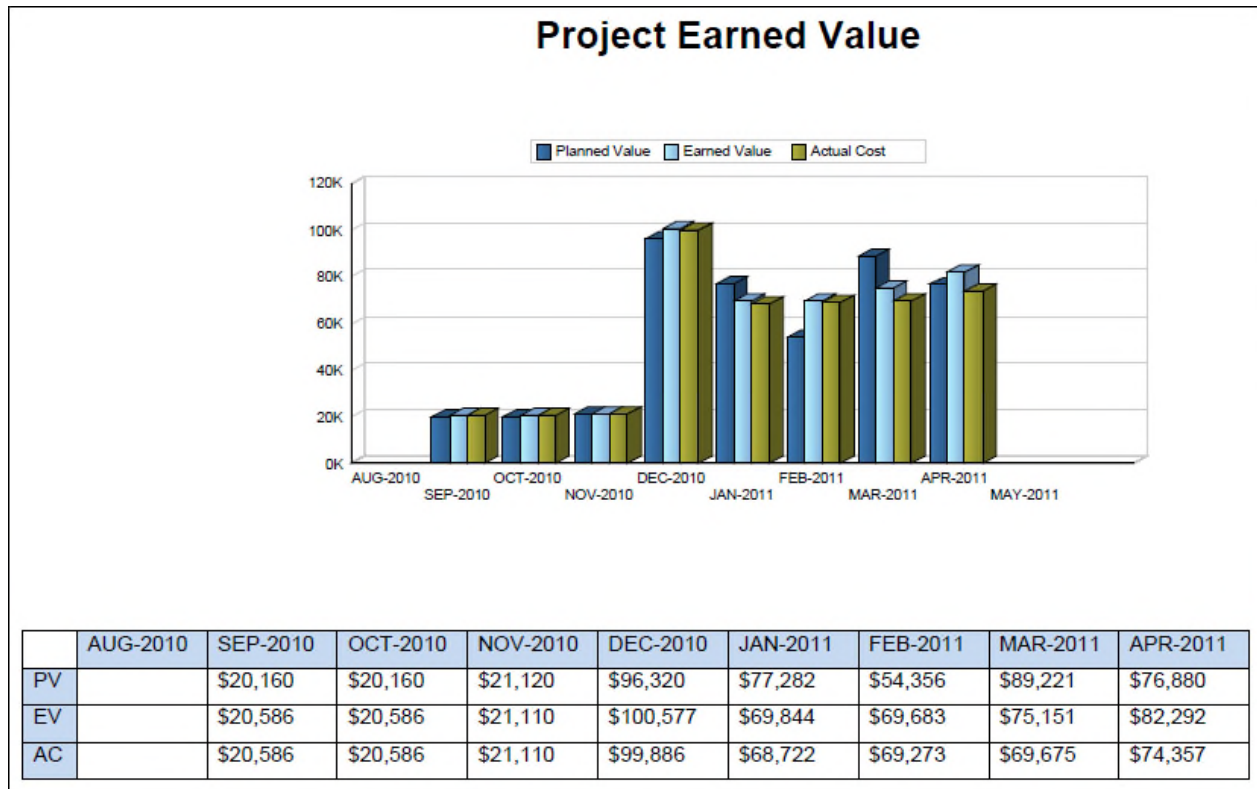
Lists all Issues identified for the selected projects, grouped by Status. The issue details include Priority, Criticality, and issue description, if provided.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Project** folder.
 - d. Click **Issues**.

Project Earned Value

Figure 38: Project Earned Value



Description

Displays monthly Actual Cost, Earned Value, and Planned Value in both a bar chart along with a table for the selected projects.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Project** folder.
 - d. Click **Project Earned Value**.

Project Plan Hierarchy

Figure 39: Project Plan Hierarchy

Project Hierarchy Including Steps				
WBS Code	WBS Code Name			
	Activity Name(ID)	Status	Start	Finish
Saratoga Senior Community - B3	Saratoga Senior Community - B3			
	Building Pad Delivered by Owner (EC1010)	Not Started	06/01/2011	06/01/2011
	Permits Received - Start Site Work (EC1080)	Not Started	06/01/2011	01/05/2015
	Substantial Completion - All TCO (EC2430)	Not Started	01/05/2015	01/05/2015
	Landscape & Irrigation			
	Site Cleanup (EC1600)	Not Started	01/05/2012	03/20/2012
	Landscape & Irrigation (EC2360)	Not Started	10/04/2013	01/05/2015

Description

Displays the project plan which lists all WBSs and activities for the selected project. The activity details include the Status, Start and Finish dates, and the associated activity Steps.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Project** folder.
 - d. Click **Project Plan Hierarchy**.

Project Status Report

Figure 40: Project Status Report

Project Status Report for: Rural Office Building Addition (EC00515-1)

SPONSOR Forsyth	BUSINESS SEGMENT 1004050	PROJECT MANAGER Thomas	CURRENT PHASE Design	LOCATION Europe	
DESCRIPTION Project is for the addition to the office building in center city. This includes design and construct work.					
START 11/01/2010	FINISH 07/03/2013	TARGET FINISH 07/03/2013	% COMPLETE 17.07%	ACTIVITIES COMPLETED 13 of 71	PROJECT SCORE 80
APPROVED BUDGET \$2,064,211	COST TO DATE \$126,428	AT COMPLETION \$1,823,209	COST VARIANCE \$241,002	LABOR TO DATE 2062 h	LABOR VARIANCE 2331.6 h

PRIORITY ISSUES
0 priority of 0 issues

OPEN RISKS
0 open of 0 risks

NOTEBOOKS

MILESTONES

	Date	Status
Assemble Brick Samples	3/1/2011	Completed
Assemble and Submit Flooring Samples	3/1/2011	Completed
Begin Building Construction	3/1/2011	Completed
Begin Structural Phase	11/24/2011	Not Started
Building Addition Complete	7/3/2013	Not Started

Description

Provides a project overview that includes project code values, project costs, Issues, Risks, Status of the milestones, and a list of Notebook Topics.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Project** folder.
 - d. Click **Project Status Report**.

Qualitative Risk Report

Figure 41: Qualitative Risk Report

Project Summary					
Project ID	IT00351		Data Date		
Project Name	Project Swordfish		Finish		
Total Activities	15		At Completion Cost		
Completed	0		Actual Cost to Date	\$0	
In Progress	5		Remaining Total Cost		
Risk Summary					
Total Risks	7	Threats	7	Opportunities	0
Risks by Status					
Proposed	0		Closed (Impacted)	0	
Open	6		Closed (Managed)	0	
Active	1		Closed (Rejected)	0	
Risks by Tolerance Threshold					
High	Medium	Low	Negligible		
3	2	2	0		
ID	NAME				
Risk-01	Technological Complexity				
Type: Threat	Category: Complexity & Interfaces		Status: Open	Owner: CharlesM	
Impacted Activities					
Activity (ID)	Early Start	Early Finish	Actual Start	Actual Finish	
Develop System (IT1060)	06/10/2011	07/08/2011			
Test System (IT1070)	07/07/2011	07/18/2011			
Pre-Response Assessment			Score: 9		
Probability	Schedule	Cost			
High(H)	High(H)	High(H)			

Description

Reports on all risks for the select projects. Includes risk information, Risk Impact Assessment, Impacted Activities, and Risk Response Plans.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Project** folder.

- d. Click **Qualitative Risk Report**.

Risk Scoring

Figure 42: Risk Scoring

Project Summary					
Project ID: MFG00772			Data Date: 04/30/2011		
Project Name: Cordova - Plant Expansion & Modernization			Finish: 05/29/2012		
Total Activities: 134			At Completion Cost: \$1,258,004		
Completed: 51			Actual Cost to Date: \$436,491		
In Progress: 4			Remaining Total Cost: \$821,513		

Risk Summary					
Report Date: 10/08/2010			Open Risks: 1		
Total Risks: 6			Active Risks: 2		
Threats: 5			Rejected (Closed): 1		
Opportunities: 1			Managed (Closed): 1		
Proposed Risks: 1			Impacted (Closed): 0		

Risk by Tolerance Threshold

Very High	High	Low	Very Low	Negligible
1	1	2	2	0

Probability

Very Low	Low	Medium	High	Very High
<=10%	>10%	>30%	>50%	>70%

Impacts

	Very Low	Low	Medium	High	Very High
Schedule	<=40	>40	>80	>160	>320
Cost	<=\$30,000.00	>\$30,000.00	>\$60,000.00	>\$90,000.00	>\$120,000.00
Quality Threshold (5 level)	Substantially meeting the specification	Sufficiently meeting the specification	Non-conformance in minor systems	Non-conformance in major functional systems	Non-conformance in critical systems

Tolerance

Very Low	Low	High	Very High
<=3	>3	>10	>24

Probability and Impact Scoring (PID)
Risk Score is based on: **Highest Impact**

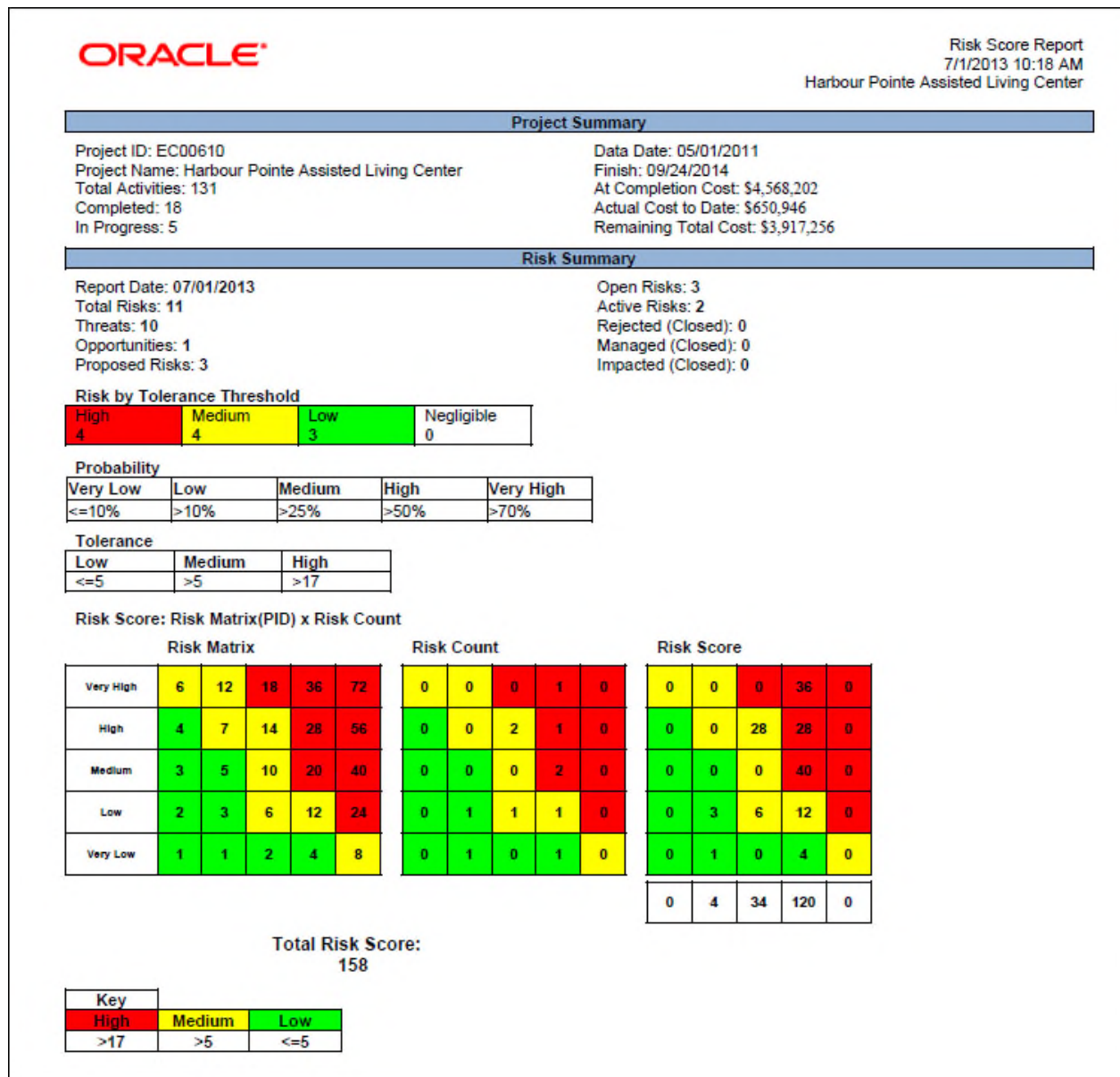
Impact

	Severity 1	Severity 2	Severity 3	Severity 4	Severity 5
Very High	12	24	42	56	72
High	5	14	20	36	56
Medium	4	6	18	20	42
Low	2	4	6	14	24
Very Low	1	2	4	5	12

Key			
Very High	High	Low	Very Low
>24	>10	>3	<=3

Risk Scoring

Figure 43: Risk Scoring (v2)



Risk Scoring (v2)

Description

Choose which version of the report to run from **Template**.

Risk Scoring shows the project risk scoring matrix. Includes threshold definitions grouped by type (Probability, Schedule, Cost, User-defined, and Tolerance) and numeric and alphanumeric probability and impact diagrams (PIDs).

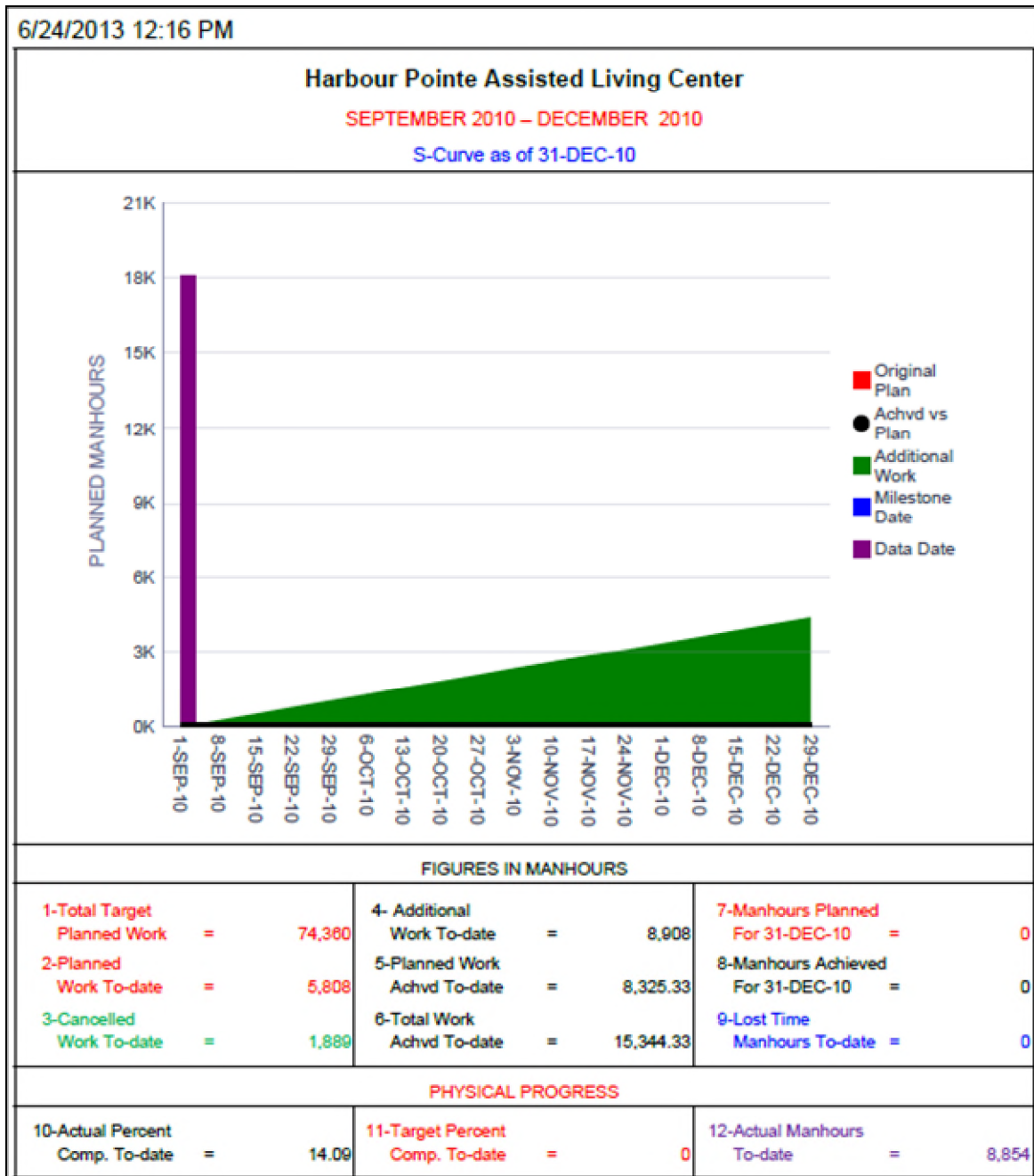
Risk Scoring (v2) shows project risk scoring matrix. Includes threshold definitions grouped by type (Tolerance Threshold, Probability and Tolerance), PIDs for Risk Matrix, Risk Count and Risk Score and Total Risk Score.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Project** folder.
 - d. Click **Risk Scoring**.

S Curve

Figure 44: S Curve



Description

This report consists of a chart and a table. The chart shows Planned Labor Units on the y-axis and date on the x-axis and plots the Original Planned Labor Units, Achieved versus Plan, Additional Work and Milestone Dates. The table gives the Total Target Planned Work, Planned Work To Date, Cancelled Work To Date, Additional Work To Date, Planned Work Achieved To Date, Total Work Achieved To Date, Manhours Planned, Manhours Achieved, Lost Time Manhours To Date, Actual Percent Complete To Date, Target Percent Complete To Date, and Actual Manhours To Date.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Project** folder.
 - d. Click **S Curve**.

Weekly Schedule Performance

Figure 45: Weekly Schedule Performance

Weekly Schedule Performance												
Logistics Reengineering Program												
	9/5/2010			9/12/2010			9/19/2010			9/26/2010		
	Actual	Planned	%	Actual	Planned	%	Actual	Planned	%	Actual	Planned	%
Start	2	2	100	2	2	100	1	1	100	0	0	0
Finish	1	1	100	3	3	100	0	1	0	0	0	0
Assisted Living Facility												
	9/5/2010			9/12/2010			9/19/2010			9/26/2010		
	Actual	Planned	%	Actual	Planned	%	Actual	Planned	%	Actual	Planned	%
Start	12	12	100	0	0	0	1	1	100	0	0	0
Finish	3	3	100	0	0	0	0	0	0	1	1	100

Description

Compares the activity Actual Finish date to the Baseline Finish date. Activities are grouped by week and project. The report will display information starting four weeks prior to the date set in the report parameters.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.

- c. Expand the **Project** folder.
- d. Click **Weekly Schedule Performance**.

Resource Reports

Activity Resource Assignments

Figure 46: Activity Resource Assignments

Activity Resource Assignments																			
Activity (ID)	Duration	Start	Finish																
Design Building Addition (EC1000)	417.6	11/01/2010	01/19/2011																
<table> <tr> <th>Resource Name</th><th>Duration</th><th>Start</th><th>Finish</th></tr> <tr> <td>Paul Kim</td><td>441.6</td><td>11/01/2010</td><td>01/19/2011</td></tr> <tr> <td>Scott Esposito</td><td>417.6</td><td>11/01/2010</td><td>01/19/2011</td></tr> <tr> <td>Scott Esposito</td><td>417.6</td><td>11/01/2010</td><td>01/19/2011</td></tr> </table>				Resource Name	Duration	Start	Finish	Paul Kim	441.6	11/01/2010	01/19/2011	Scott Esposito	417.6	11/01/2010	01/19/2011	Scott Esposito	417.6	11/01/2010	01/19/2011
Resource Name	Duration	Start	Finish																
Paul Kim	441.6	11/01/2010	01/19/2011																
Scott Esposito	417.6	11/01/2010	01/19/2011																
Scott Esposito	417.6	11/01/2010	01/19/2011																
Start Office Building Addition Project (EC1010)	0	11/01/2010	11/01/2010																
Review and Approve Designs (EC1030)	86.4	01/17/2011	02/17/2011																
<table> <tr> <th>Resource Name</th><th>Duration</th><th>Start</th><th>Finish</th></tr> <tr> <td>Paul Kim</td><td>86.4</td><td>01/17/2011</td><td>02/17/2011</td></tr> <tr> <td>Scott Esposito</td><td>86.4</td><td>01/17/2011</td><td>02/17/2011</td></tr> </table>				Resource Name	Duration	Start	Finish	Paul Kim	86.4	01/17/2011	02/17/2011	Scott Esposito	86.4	01/17/2011	02/17/2011				
Resource Name	Duration	Start	Finish																
Paul Kim	86.4	01/17/2011	02/17/2011																
Scott Esposito	86.4	01/17/2011	02/17/2011																

Description

Lists resources assigned to each activity in the selected projects. Information includes Start and Finish dates along with Duration.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Resource** folder.
 - d. Click **Activity Resource Assignments**.

High Level Planning Assignments

Figure 47: High Level Planning Assignments

High Level Planning Assignments										
Project (ID)		Start	Finish	Allocated (h)						
Project Swordfish (IT00351)		4/4/2011	8/17/2011	1,162			Apr 2011	May 2011	Jun 2011	Jul 2011
Role	Resource	Committed	Life of Project	Start	Finish	Allocated (h)				
BA	VincentI	Y	Y	4/4/2011	8/17/2011	178	48	42	17	46
DBA	LaffertyV	Y	N	6/10/2011	6/21/2011	35			35	
DEV	MathisL			4/4/2011	4/8/2011	10	50	39	63	29
DEV	SharpeD	Y	N	5/17/2011	7/13/2011	131	50	39	63	29
DEV	VincentI	Y	Y	4/4/2011	4/8/2011	40	50	39	63	29
EA	CharlesM	Y	N	4/28/2011	7/13/2011	276	7	116	115	37
PM	ITCon	Y	N	4/7/2011	8/17/2011	152	87	30		15
PMO	WrenJ	Y	N	4/4/2011	8/17/2011	59	21	3		15
QA	SinghD	Y	N	6/10/2011	8/17/2011	99			28	46
REL	ZhuS	Y	N	4/4/2011	8/17/2011	77	21	8		29
TRN	ITCon	Y	N	7/18/2011	8/17/2011	105				46

Description

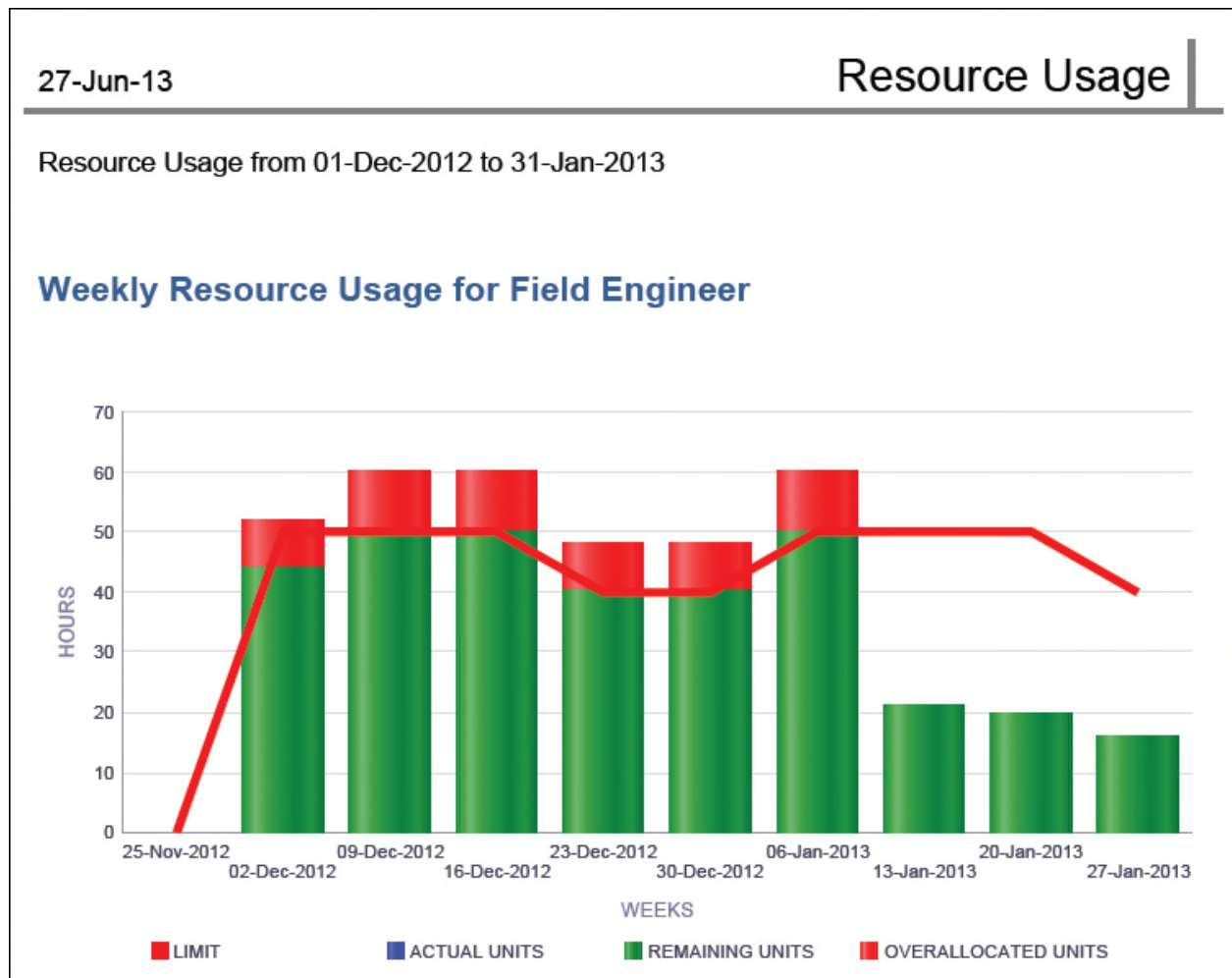
A nine month look ahead of high level resources and roles assigned to the selected projects through the resource planning spreadsheet. Information includes effort, commitment status, and dates.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Resource** folder.
 - d. Click **High Level Planning Assignments**.

Limit Line

Figure 48: Limit Line



Description

A bar-line graph for each resource showing bars for Actual Units, Remaining Units, and Overallocated Units and a line for the resource's Limit. The y-axis shows hours. The x-axis shows week.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Resource** folder.
 - d. Click **Limit Line**.

Resource Code Assignments

Figure 49: Resource Code Assignments

Resource Code Assignments		
Resource Code		
	Code Value	Resource Name
Classification		
	CONTR	Gary Marshall
		Conveying Subcontractor
		Roofing Subcontractor
		Utilities Subcontractor
		BPM Consultant 1
		Millwork Subcontractor
		Thermal Protection Subcontractor
		Finishes & Fit-out Subcontractor
		Fire Suppression Subcontractor

Description

Displays a list of all Resource Codes and Resource Code Values along with the resources assigned to each code value.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Resource** folder.
 - d. Click **Resource Code Assignments**.

Resource Role Associations

Figure 50: Resource Role Associations

Resource Role Associations		
Role (count)		
Resource (ID)	Proficiency	Primary Role
Process Architect (5)		
Judy Billings (BillingsJ)	3 - Skilled	Yes
Frank Chu (Chuf)	2 - Expert	Yes
Wayne Prescott (PrescottW)	3 - Skilled	Yes
Michelle Peterson (PetersonM)	4 - Proficient	No
Ben Frost (FrostB)	2 - Expert	No
Accounting (2)		
Project Controls (Project Controls)	3 - Skilled	No
Administrator (Admin)	3 - Skilled	No

Description

Displays a list of all roles in the system and the resources assigned to each role. The Primary Role and Proficiency level are identified for each resource.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Resource** folder.
 - d. Click **Resource Role Associations**.

Resource Role Skill Sets

Figure 51: Resource Role Skill Sets

Resource Role Skill Sets			
Resource (Role count)			
	Role	Primary Role	Proficiency
Painter (1)			
	Trades	Yes	3 - Skilled
Project Managers (1)			
	Management	Yes	3 - Skilled
Alice Wynn (2)			
	Product Tester	Yes	3 - Skilled
	Lean Six Sigma Specialist	No	3 - Skilled

Description

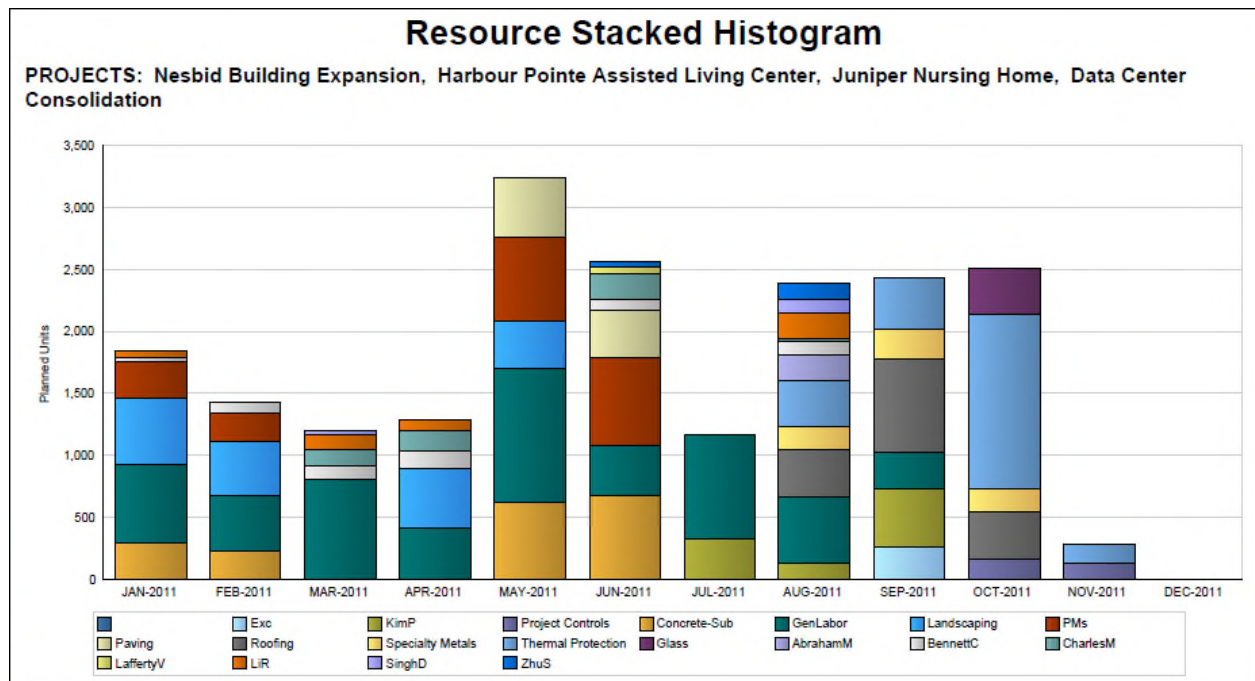
Lists all resources along with their assigned roles. The Primary Role and Proficiency level are identified for each role.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Resource** folder.
 - d. Click **Resource Role Skill Sets**.

Resource Stacked Histogram

Figure 52: Resource Stacked Histogram



Description

Displays a stacked histogram that shows effort as Planned Units (in hours) for selected resources, stacking bars by resource within the start and end date ranges.

Location

- 1) Click **Reports**.
- 2) On the **Report** page:
 - a. Click the **Reports** tab.
 - b. Expand the **P6Reports** folder.
 - c. Expand the **Resource** folder.
 - d. Click **Resource Stacked Histogram**.

About Publication Services

Before you can generate reports or view data in the Team Usage or Resource Analysis pages, data must be refreshed and calculations must be made in precisely arranged tables and fields. *Publication Services* address these needs gathering and calculating data as close as possible to real-time. To make this happen, you can configure P6 to automatically publish data to specific tables used for these features. An administrator must configure settings for Publication Services before publishing data. For reports, depending on the type of data published, P6 tables may still be used to generate reports, or a combination of P6 and reporting tables may be used to generate them.

Your organization's P6 EPPM data has two categories: *project* data and *global* data. Published project data includes all information about your projects, including summaries, calculations, and auditing data. Published global data includes enterprise data, resource and role data, portfolio data, security, and auditing data. The Team Usage and Resource Analysis pages use published project data. Reports use published project data and published global data.

To summarize the process:

- 1) Users create new data or make changes to existing data in P6.
- 2) P6 global and project data publishes, automatically or manually.
 - a. Team Usage and Resource Analysis pages draw from the published project data.
 - b. Reports generate directly from the collective P6 EPPM database with the P6 Extended Schema reporting tables.

Note: The BI Publisher sample reports were designed to be run against the small data set included in the sample database. These reports are provided as an example of the product's capability only. Oracle provides no guarantee, implied or explicit, that the BI Publisher sample reports will run against your database or will produce meaningful data when they are run against your database. You may modify the BI Publisher sample reports to suit your own data set, including adding filter criteria to limit data output or changing filter criteria to suit your data. You need a full BI license to modify sample reports.

Working with Publication Services

To achieve near real-time reporting, team usage and resource analysis, you can configure P6 to automatically publish to tables that store updated data, including calculations and summary data. These tables also create views for generating reports. The P6 data is split into two general categories: *project* data and *global* data. Project data includes all information about your projects, including summaries and calculations. Global data includes enterprise data, as well as resource and role, portfolio, and security data. The image below summarizes the key concepts in the publication and reporting process.

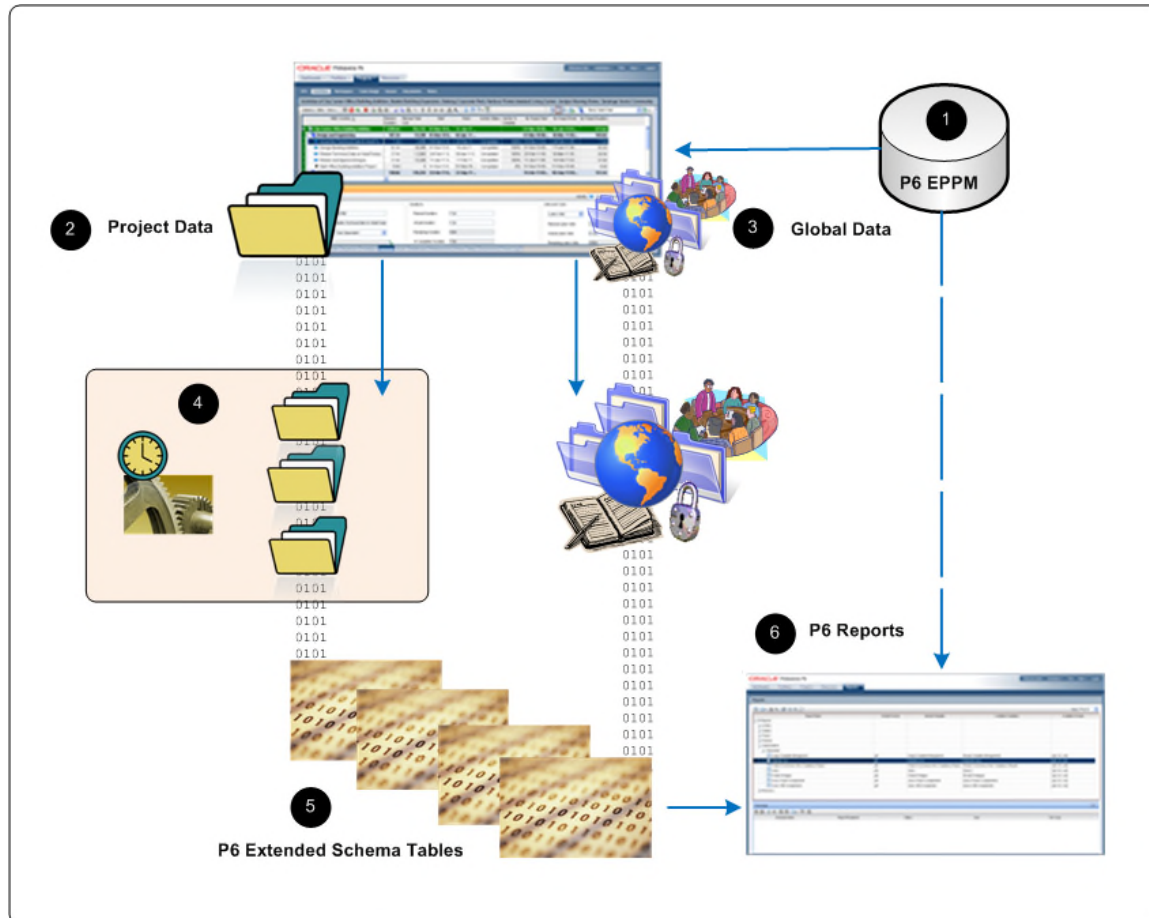


Table of Key Publication Services Concepts

Item	Description
1	EPPM Database: The EPPM database captures all the data your organization generates every second of every day. However, the raw data in the EPPM database is not structured for immediate reporting.

Item	Description
2	Project Data: You can configure P6 to automatically publish a project based on publication thresholds. Based on the options you select, you can prioritize projects for publication in a queue. If necessary, you can manually add a project to the queue.
3	Global Data: You can configure services in P6 to schedule the publication of global data based on recurring intervals that you specify. If necessary, you can also immediately publish this data manually.
4	Project Queue: Projects publish in sequential order based on priority. Your administrator can control which projects are added to the publishing queue, when, and in what order. These options ensure the project data you need most is available for P6 in near real-time.
5	P6 Extended Schema Tables: The project and global services recalculate certain logical fields in the P6 EPPM database and store them as physical fields in the P6 Extended Schema tables so they are available for reporting and other purposes. Some fields in P6, such as durations, are calculated in real time as related field data is changed and are not stored in the database. Publication services recalculate these fields and store their values in the extended schema tables. Other fields, such as note fields, are not stored in the database in a format suitable for reporting. For these fields, publication services will convert them to a format more suitable for reporting. Note: For information about which tables are updated by the Publication Services, see the following knowledge management document: What PX tables are updated when running Global Scheduled Services or Publish Project [ID 1491245.1] https://support.oracle.com/epmos/faces/ui/km/DocumentDisplay.jspx?id=1491245.1
6	P6 Reports: You can run reports directly against P6 Extended Schema table views.

P6 administrators control project and global publication processes, which are summarized below.

The screenshot displays the Oracle Primavera P6 EPPM interface, showing the 'Application Settings' page and a 'Project Preferences' dialog box for 'Harbour Pointe Assisted Living Center'.

Application Settings - Services

Publication

Specify the time period and interval for publishing time-distributed data.

Start date *
01-Jan-16 12:00 AM

Finish date is current date plus
2 Years
Between 0 and 99.

Time distributed interval
Week

Summarization

Specify the interval to summarize and store resource spreads.

☒ Summarize by Calendar

WBS Level
Week

Resource/Role Assignment
Week

☐ Summarize by Financial Periods

Project Publication

☒ Enable Publish Projects

Publish projects every
1 Minutes
Between 1 and 99.

Publish a changed project when the...

Number of changes exceeds
100
Between 0 and 999.

Time since last publication exceeds *
8h

☐ Publish idle projects

Maximum number to publish
100
Between 1 and 999.

☒ Publish resource and role data

☐ Enable Baseline Publication

☐ Enable Notification Email

Notification Email address

Project Preferences of Harbour Pointe Assisted Living Center

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

Summarization

☒ Enable Summarization

Summarize project based on
☐ High level resource planning
☒ Detailed activity resources assignments
 Summarize to WBS Level
 All, 1...

Last Summarized Date
20-Jan-17 04:16 AM

Publication

☒ Enable Publication

Publication Priority
50

Last Published On
19-Jan-17 09:12 PM

Publish resource and role data based on
☐ High level resource planning
☒ Detailed activity resources assignments

Analytics

Specify how historical project data is stored for use in P6 Analytics.

History Level
Project

History Interval - Project or WBS
Week

History Interval - Activity
Daily

Data Warehouse Update Frequency (OOO Only)
Scheduled

Scheduled Services

Global **Project**

Run Service View Log

Name	Enabled	Status	Last Run	Next Run
Publish Security	☒	Completed	20-Jan-17 04:21 AM GST	05-Feb-17 12:00 AM GST
Publish Enterprise Data	☒	Completed	20-Jan-17 04:22 AM GST	31-Jan-17 05:00 PM GST
Publish Resource Management	☒	Completed	20-Jan-17 04:22 AM GST	21-Jan-17 12:00 AM GST
Publish Enterprise Summaries	☒	Completed	20-Jan-17 04:22 AM GST	21-Jan-17 12:00 AM GST
Publish Audit Data	☒	Completed	20-Jan-17 04:22 AM GST	20-Jan-17 05:22 AM GST

Service Settings Service Summary

Run Service
Daily

Start Time
12:00 AM GST

Table of Key Publication Services Elements

Item	Description
①	Application Settings for Publication Services: Located under the Administer menu, begin by clicking Application Settings , and then choose Services . On the Services page, specify the start date, period of time to add to the current publication date to determine a finish date, and time-distributed interval for publication. In the Project Publication section, you can enable the <i>Publish Projects</i> services to refresh project data according to a time interval you set. You can further determine a change threshold, time threshold, and even decide if idle projects should be added to the queue, and if so, set a maximum limit to the concurrent number of idle projects being published.
②	Project Preferences for Publication Services: Then, navigate to the EPS page in the Projects section. Click a project and select Set Project Preferences from the Actions menu or the Row Actions menu. On the Services or Analytics and Services page, select the Enable Publication option to indicate you want to include this project in the <i>Publish Projects</i> services. All new projects are enabled for publication by default. Clear the option if you do not want to publish the project's data. On this page, you can also set the project's priority relative to other projects entering the publication queue.
③	Global Scheduled Publication Services: Return to the Administer menu and navigate to the Global Scheduled Services dialog box to enable the types of global data services you want to schedule. Below each service you enable, specify the recurring interval and start time in the detail window.

Publishing P6 Data

Reports based on P6 data require timely access to the most current data in order to be accurate. For example, report recipients expect to see updated enterprise data and project data including any calculations.

Some other areas of P6, including Team Usage and Resource Analysis also rely on published data to provide accurate information.

In order to provide this data, P6 generates and stores data in reporting tables (the *P6 Extended Schema*). You can configure P6 to automatically publish essential data to the tables or manually generate it so that the most current data is available. You can select to be notified by email if publication services fail.

The data is split into two general categories: *project* data and *global* data. Project data includes all information about your projects, including baselines, summaries, calculations, and audit data and global data includes enterprise data, resource and role data, security and audit data. The Team Usage and Resource Analysis views access project data. Reports can use both project and global data.

Publication Services

Data in the P6 Extended Schema is calculated and stored by Publication Services, which gives administrators control over when data is calculated and stored in the P6 Extended Schema. Publication Services exist for project and global data. Global data includes enterprise data, as well as resource and role, portfolio, security and audit data. Project data includes all information about projects and baselines, including summaries and calculations.

The Publish Project service is dedicated to publishing project and baseline data to the P6 Extended Schema.

Note: The Publish Project service recalculates and publishes all project business objects containing calculated or denormalized data including, but not limited to: the WBS, activities, resource/role assignments, high-level planning assignments, relationships, risks, documents, expenses, steps, milestones, UDF values, notes, issues, budget change logs, timesheets, code assignments, funding source assignments.

These additional Publication Services publish global data to the P6 Extended Schema:

- ▶ Publish Audit Data
- ▶ Publish Enterprise Data
- ▶ Publish Enterprise Summaries
- ▶ Publish Resource Management
- ▶ Publish Security

The first time a data type is published to the P6 Extended Schema all data is recalculated and published to the extended schema tables. After a data type has been published for the first time, future publication services recalculate and publish only data that has changed since the last time that data was published.

When any of the publication services runs, each business object type processed by the service is individually timestamped, and the timestamp stored in the database. The services can accurately determine exactly which data has changed since the last time it was published using these timestamps because they exist at the individual business object type level.

Configure Publication Services in P6 as follows:

- ▶ Set up automatic publication and enable P6 to publish project and global data on the Services page in Application settings.
- ▶ Enable the types of global data to be scheduled in Global Scheduled Services.
- ▶ Disable or enable publication for a selected project on the Services page in Project Preferences.
- ▶ Add, verify the status of, modify, or delete project management services on the Project Scheduled Services page.

Tip

Run the global data services before turning on the Project Arbiter service.

To learn more about the Arbiter service see

https://blogs.oracle.com/priminout/entry/px_services_project_publication_arbiter.

Defining Publication Periods

Before publishing global or project data for reporting, define the publication period. The publication period you define should be large enough to capture all the project data you need to include in reports.

Caution: You can perform these steps again at any time to modify your settings. However, if an *Admin Superuser* modifies the Start date, Time distributed interval, or Finish date is current date plus fields, all data will be fully recalculated. Oracle recommends that you only reconfigure publication options on weekends or during off-peak hours to prevent the disruption of other P6 features.

To define the publication period:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Application Settings**.
- 3) On the **Application Settings** page, click **Services**.
- 4) On the Services page, in the Publication Periods section:
 - a. In the **Start date** field, click  **Select Date** to select the exact month, day, year, and time to mark the initial start of the data publication period. Select any date in the past that represents a reasonable amount of historical spread data for your organization. For example, in order for users to be able to produce time-distributed reports for any date range, enter the earliest project start date at your organization.
 - b. In the **Finish date is current date plus** field, select a numeric quantity and unit of time to construct a dynamic period of time. Whenever a publication service runs, this period of time is added to the current date to determine the finish date for the publication of data. For example, if the value is 5 years, time-distributed data will always be published covering the period of time that begins with the value in the Start Date field and extends five years into the future each time a service runs.
 - c. In the **Time distributed interval** field, select the unit of time in which time distributed data will be recalculated and published. Time distributed interval is set to Week by default. Set this to Day if you need to see daily data.
 - d. Click **Save**.

Enabling Automatic Publishing of P6 Project Data

Perform the following procedure to enable projects for publication, and to set options for automatic project publication. Then, as you work, P6 automatically detects the changes to your projects that trigger the publication of their data.

To enable Publication Services for project data:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Application Settings**.
- 3) On the Application Settings page, select **Services**.
- 4) On the Services page, in the Project Publication section:

- a. Select **Enable Publish Projects** to enable automatic project publication based on defined thresholds. Selecting this option also allows users to manually publish projects.
- b. In the **Publish projects every** field, select an interval by which projects are polled to be published.
- c. Enter a number in the **Number of changes exceeds** field. This threshold setting determines the number of edits users can make to the project data before P6 publishes its data. Assuming a constant rate of change among projects, a lower value will result in more frequent publication of project data. If you enter a value of 0, projects with tracked changes will be automatically published.
- d. Enter a time period for the **Time since last publication exceeds** field. This threshold setting determines how often the publication of project data should occur. For example, if you enter 12 hours, the project data will be published every 12 hours unless the threshold for the number of changes has already been reached.
- e. Select **Publish idle projects** to add projects to the service queue that are enabled for publication but have not been changed during the time threshold. This setting is only valid for the initial run of the service.
- f. In the **Maximum number to publish** field, enter the maximum number of pending idle *Publish Project* services that can be present at once in the service queue. This prevents performance problems during peak demand when enabling the publication of a large number of projects. For example, if the service runs and queues 40 projects that have exceeded specified thresholds and must be published, or that have been manually published, and you have set the maximum to 100, P6 will schedule up to 60 idle projects for publication.
- g. Select **Publish resource and role data** if you want to be able to publish resource and role data in the Team Usage view.
- h. Select **Enable Baseline Publication** if you want to be able to publish baseline data.
- i. Select **Enable Notification Email** and type an email address in the **Notification Email address** field if you want to receive an email if publication services fail.
- j. Click **Save**.

Tips

- ▶ If your organization is upgrading to P6, select Publish idle projects to add your migrated projects to the service queue after your database is upgraded. This will publish all your projects in the queue and refresh the available data for reporting. After an upgrade, this setting is no longer applicable, and projects will be submitted to the service queue based on threshold values specified on the Application Settings page.
- ▶ Clear the Publish idle projects option if your organization does not report against completed projects.
- ▶ The Maximum number to publish field is only applicable immediately following an upgrade, when all projects are considered idle. When all projects have been published, the service queue will no longer be constrained based on this setting.
- ▶ A project will be automatically submitted to the service queue if you change the project baseline, calendar, or data date. Projects are also automatically submitted to the queue if you select or clear Calculate Activity % Complete from activity steps option, or modify the default price/unit value for assignments without activities, from the Set Project Preferences dialog box available from the Actions menu on the EPS page.

- ▶ For threshold settings, projects are added to the service queue based on tracked changes to data. Only changes to activities, resource/role assignments, relationships, and the WBS are tracked.
- ▶ You can delete published project data by selecting **Delete Published Data** on the **Actions** menu in the Standard View of the EPS page.

Enabling Automatic Publishing of P6 Global Data

Perform the steps below to configure P6 to automatically publish any of the following types of global data to reporting tables.

- ▶ Enterprise Data
- ▶ Enterprise Summary Data including portfolio data
- ▶ Resource Management Data
- ▶ Security Data
- ▶ Audit Data

To automatically publish P6 global data:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Scheduled Services**.
- 3) On the Scheduled Services page, select **Global**.
- 4) On the Global page:
 - a. Select a service, then configure its settings in the Service Settings detail window. For example, you might specify that the service runs daily on Wednesdays with a start time of 10:15 PM.

Note: Oracle recommends running the Publish Security service first if the Run After Previous option is selected in the Run Service list for other publication services. Running the Publish Security service first will ensure that security data updates in the extended schema as soon as possible and ensures that the security restrictions are in place before you run the report.

- b. Select the **Enabled** option for any of the global services listed.
- c. If you choose to run one or more services with the relative frequency value of *After previous service*, click **Move Up** or **Move Down** to arrange the services in your preferred sequence.
- d. Click **Save**.

Configuring Publication Service Settings for Projects

After enabling automatic publishing, perform the following procedure to configure settings for each individual project in *Publication Services*. Then, as you work, P6 automatically detects the changes to your project that trigger the publication of its data in the service queue.

To configure Publication Service settings for a project:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:

In Classic View:

- a. Select a project.
- b. Click the **Actions**  menu and select  **Set Project Preferences....**
- c. On the **Project Preferences** pane, select **Services**.
- d. On the **Services** page, in the **Publication** section:
- e. Select the **Enable Publication** option.
- f. Adjust the relative **Publication Priority** up or down between 1 and 100 with 50 being the default priority value, 1 being the highest priority, and 100 being the lowest.
- g. Click **Save and Close**.

In Standard View:

- a. Select a project.
- b. Click  **Row Actions** and select **Set Project Preferences**.
- c. In the **Project Preferences** dialog box, select **Analytics & Services**.
- d. On the **Analytics & Services** page, in the **Publication** section:
 - Select the **Enable Publication** option.
 - Adjust the relative **Publication Priority** up or down between 1 and 100 with 50 being the default priority value, 1 being the highest priority, and 100 being the lowest.
 - Choose whether to publish resource and role data for the team usage view based on **High level resource planning** or **Detailed activity resource assignments**.

Note: If you use the Team Usage and Resource Analysis pages select **Detailed activity resource assignments**. If you want to report on the data for resource assignments made at the project or WBS level, select **High level resource planning**.

- e. Click **OK**.

Tips

- ▶ By default, all projects are enabled for publication. The **Enable Publication** setting only needs to be modified if you wish to disable publication for a project or re-enable publication of a previously disabled project.
- ▶ Clearing the **Enable Publication** setting does not delete previously published data. You can delete published project data by selecting **Delete Published Data** on the **Actions**  menu in the Standard View of the EPS page.
- ▶ If you wish to modify publication settings for many projects at one time, you can display the **Enable Publication**, **Last Published On**, and **Publication Priority** fields as columns in your EPS view.
- ▶ If you want to publish Baseline data, the project must be published.

Configuring Publication Service Settings for Baselines

After enabling automatic publishing, perform the following procedure to configure settings for each individual project's baselines in *Publication Services*. Then, as you work, P6 automatically detects the changes to your baselines that trigger the publication of its data in the service queue.

To configure Publication Service settings for a baseline:

- 1) Click the **Projects**  menu and choose **Open Projects**.
- 2) In the **Open Projects** dialog box, open one or more projects whose baselines you want to enable for publication.
- 3) On the **Project** navigation bar, click **Activities** or **EPS**.

In **Classic View**:

- a. On the **Activities** or **EPS** page, click the **Actions**  menu and select  **Define Baselines...**
- b. In the **Baselines** dialog box, decide if you want to switch on publication for all baselines for a project or only for some:
 - If you want to switch on publication for all baselines, select the **Publish** option in the project band.
 - If you want to switch on publication for only some baselines, expand the project band and select the **Publish** option for the baselines you want to publish.

Note: You cannot switch on baseline publication if the project has not been published.

- Click **Save and Close**.

In **Standard View**:

- a. On the **Activities** or **EPS** page, click **Actions**  and select **Define Baselines**.
- b. In the **Define Baselines** dialog box, decide if you want to switch on publication for all baselines for a project or only for some:
 - If you want to switch on publication for all baselines, select the **Publish** option in the project band.
 - If you want to switch on publication for only some baselines, expand the project band and select the **Publish** option for the baselines you want to publish.

Note: You cannot switch on baseline publication if the project has not been published.

- Click **Save**.

Tips

- ▶ When a new baseline is added, the **Publish** option is off by default.
- ▶ To publish baseline data for reporting as soon as possible, in the Classic View click  **Publish Baseline**.

Manually Publishing P6 Project Data

Perform the steps below to publish the data from one or more projects. Any of the projects' baselines which is enabled for publishing will also be published when you perform these steps. P6 will automatically publish project data; however, you may want to publish the data manually in special cases such as when generating an important report at a specific time.

To manually publish P6 project data:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page
 - In **Classic View**:
 - a. Select one or more projects, or select an EPS node to publish all of its subordinate projects.
 - b. On the **Actions** menu, click  **Publish Projects**.

In **Standard View**:

- a. On the **Actions**  menu, click **Publish Projects**.

Tips

- ▶ In order to manually publish project data from the EPS page, *Publication Services* must be enabled and configured.
- ▶ You can publish all open projects by clicking  **Publish Projects** on the Run submenu on the Actions menu of the Classic View of the Activities page or by clicking Publish Projects on the **Actions**  menu in the Standard View of the Activities page. You can also publish projects by selecting one or more projects on the EPS page, and then using the right-click menu.
- ▶ Projects are not immediately published. Instead, they will be added to the queue of projects being processed for publication the next time the Publish Projects service runs. View settings for the Publish Projects service, including how often the service runs, on the Services page, which is located on the Application Settings pane. Depending on your security privileges, the Application Settings pane may not be accessible. You can check the status of the Publish Projects service after it has been added to the service queue by selecting View Service Status from the Administer menu.
- ▶ If some of the selected projects are not enabled for publication, only those projects enabled for publication will be submitted to the service queue. If none of the selected projects is enabled for publication, you will not be able to select the  **Publish Projects** or **Publish Projects** option.
- ▶ A project will be automatically submitted to the service queue if you change the project baseline, calendar, or data date. Projects are also automatically submitted to the queue if you select or clear the Calculate Activity % Complete from activity steps option, or modify the default price/unit value for assignments without activities from the Set Project Preferences dialog box available from the **Actions**  menu the **EPS** page.
- ▶ You can delete published project data by selecting **Delete Published Data** on the **Actions**  menu in the Standard View of the EPS page.

Manually Publishing P6 Global Data

Perform the steps below to manually publish any of the following types of global data to the reporting tables.

- ▶ Enterprise Data
- ▶ Enterprise Summary Data including portfolio data
- ▶ Resource Management Data
- ▶ Security Data
- ▶ Audit Data

P6 will automatically publish global data; however, you may want to publish the data manually in special cases such as when generating an important report at a specific time.

To manually publish P6 global data:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Scheduled Services**.
- 3) On the Scheduled Services page, select **Global**.
- 4) On the Global page:
 - a. Select any of the global services listed.
 - b. Click **Run Service**.
 - c. In the resulting message box, click **OK**.

Tips

- ▶ If the service listed under the manually selected service is configured to run After previous service, it will run automatically when the selected service finishes.
- ▶ You must have the *Administer Global Scheduled Services* global security privilege to run a global scheduled service.

Deleting Published P6 Project Data

In Standard View, perform the steps below to delete published project data. This is useful when you no longer need to report on projects which are completed, but you need to retain the projects in your database.

To manually delete P6 global data:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the EPS page:
 - a. On the **Actions**  menu, click **Delete Published Data**.

Tips

- ▶ You need the xxx privilege assigned
- ▶ This process is for Oracle databases only.

About Table Auditing

Table auditing helps you to determine what changes have been made at a table level in the database. You can log changes made to each table regardless of who made the change or when the change was made. You can then run reports on audited data. Two sample BI Publisher reports are available.

Notes:

- You must configure auditing before any data will be captured against which you can run reports.
- Table auditing involves an increased amount of interaction between P6 and the database, which can affect performance.

Configuring Audit Settings

Configure Auditing in P6 so that you can produce reports about incremental changes to projects and project related data.

Note: Table auditing involves an increased amount of interaction between P6 and the database, which can affect performance.

To configure Auditing:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Application Settings**.
- 3) On the Application Settings page, click **Audit**.
- 4) On the Audit page:
 - a. In the Select the tables and operations to audit list, select a table or operation to audit and click **Add**.
 - b. In the Audit Tables section:
 - Select **Audit Insert** to audit insertions to the table.
 - Select **Audit Update** to audit updates to data in the table.
 - Select **Audit Delete** to audit deletions of data in the table.

Notes:

- Select **Audit Inserts** to see when new rows have been added to that table. For example, auditing inserts on the PROJECT table will show you when someone has created a new project.
 - Select **Audit Updates** to see when data in a table has been edited. For example, auditing updates on the PROJECT table will show you when someone has changed the name of a Project.
 - Select **Audit Delete** to see when data in a table has been deleted. For example, auditing updates on the PROJECT table will show you when someone has deleted a project.
- c. Select **Enable auditing for all tables**.

5) Click **Save**.

Tips

- ▶ To stop auditing on a particular table, remove it from the list by selecting **✕Delete**.
- ▶ If you need to suspend all auditing without changing the configuration of the actions and tables which will be audited, clear the **Enable auditing for all tables** option.

Importing and Exporting Data

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About Importing and Exporting Data

Import/Export features allow you to bring data into P6 as well as export data to other tools when needed.

Available Import Options:

- ▶ Import Projects from other P6 EPPM users or Microsoft Project
- ▶ Import multiple projects in a single XML file
- ▶ Import Activities
- ▶ Import Resources
- ▶ Import Locations
- ▶ Import Appointments as personal non-work exception time from Microsoft Outlook and other applications that support the iCalendar format
- ▶ Move activity codes and calendars to projects
- ▶ Remove codes, UDFs, and calendars from projects
- ▶ Rename codes, UDFs, and calendars
- ▶ Specify resource hierarchical position for importing into the resource breakdown structure
- ▶ Map resources to generic resource names
- ▶ Save import options in a template

Available Export Options:

- ▶ Export Projects
- ▶ Export multiple projects in a single XML file
- ▶ Export Activities
- ▶ Export Resources
- ▶ Export Resource Allocation and Cost
- ▶ Export Risks
- ▶ Export Project Data to an ERP System

Working with Primavera XML Project Import

Use the Primavera XML format to share specific project and baseline data with users outside your primary P6 network. This includes P6 users at other organizations or P6 Professional users. For example, in order to share in-house project data with an outside firm, export the projects to a Primavera XML file, send the data, and the outside firm can import it into their P6 environment.

When you import Primavera XML projects, several considerations apply:

- ▶ You are not required to have *All Resources* access. The import process continues even for users without full resource access.
- ▶ You can import resources at or below your access level in your resource hierarchy. This includes the ability to create new resources at or below your level.
- ▶ If the import would result in the creation of resources above your access level in the resource hierarchy, it will not continue. The entire import operation will be canceled.
- ▶ If the import would result in the creation of resources at or below your access level in your resource hierarchy, and this new data conflicts with existing resource data, the import process will continue by taking action on the conflicting data based on the option you selected in **Import Action**. For example, if resource IDs are in conflict and Update Existing is selected, the import process would update the Resource ID attributes present in the database with data present in the file.
- ▶ To prevent the import process from attempting to create new resources in P6, select the **Do Not Import** option for resources. This option will still match existing resources and allow their assignments to be imported and updated, but it will not import new resources.
- ▶ Even when you have sufficient project security access, if you do not have the proper resource access, you will not be able to assign or modify a resource above your access level in the resource hierarchy to a project to which the resource is already assigned.
- ▶ You cannot update baselines when you import a project and its baselines from an XML file. If you choose to import baselines new baselines will be created.

Note: These considerations only affect Primavera XML imported data, not Microsoft Project import data.

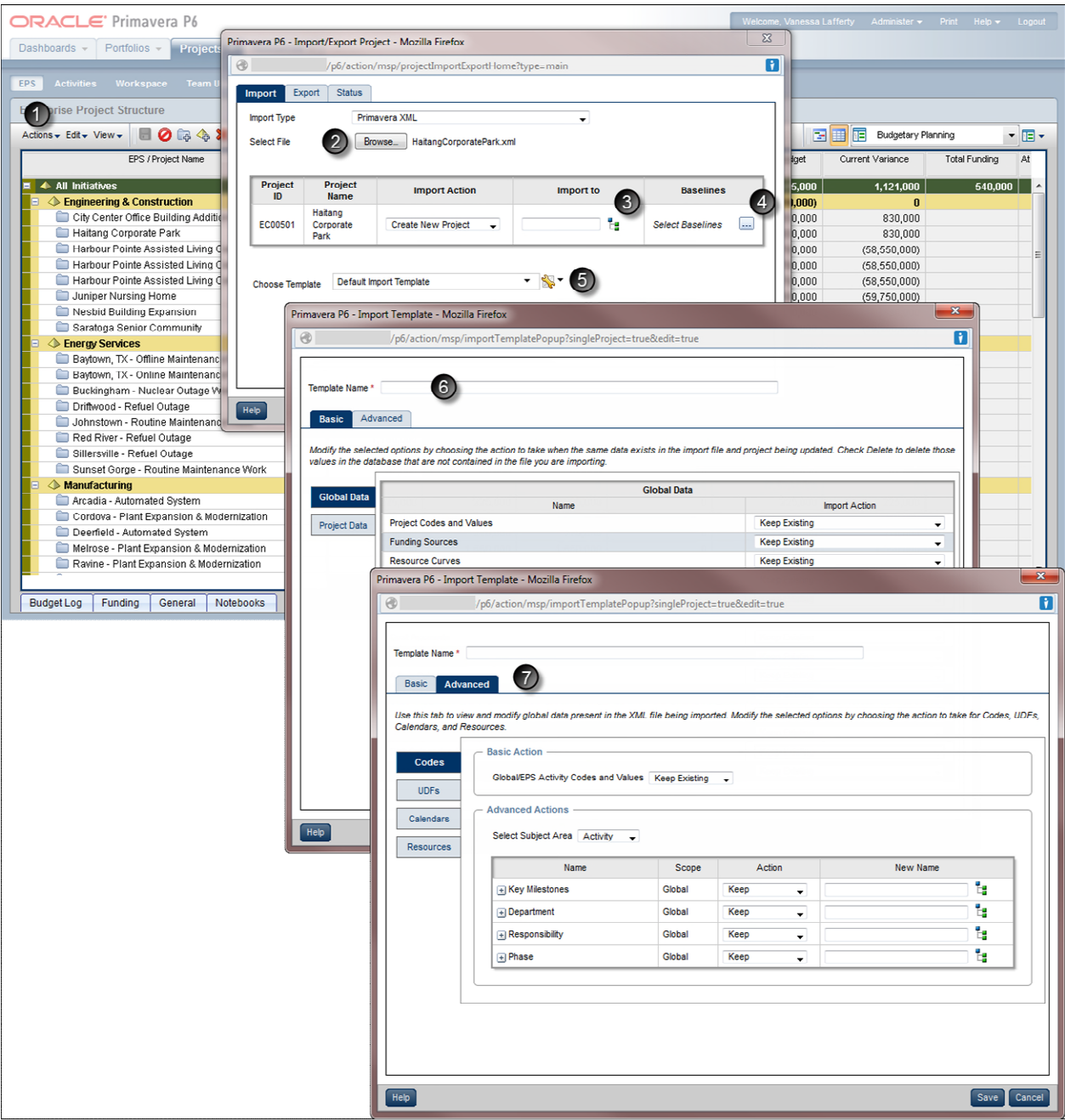


Table of Key Primavera XML Project Import Elements (Classic View)

Item	Description
1	Navigation: Begin by navigating to the EPS page. Then, click the Actions menu and select Import/Export and then XML Project Import/Export .
2	Type and File: On the Import tab, choose the <i>Primavera XML</i> import type and then click Browse to select the file to import.
3	Import Action: If you decide to import the project as a new project, select Create New Project and specify its destination level in the EPS hierarchy. If you decide to update an existing project with the imported data, select Update Existing Project and specify the existing project to update.
4	Baselines: If the file you have chosen to import contains baselines, you can select which baselines will be imported.
5	Choose Template: Choose an existing template from the list, modify a template, or create a new template. You can also delete a template. You can type in this field to filter templates that match the type text. A Default Import Template is provided. You cannot edit the default template.
6	Basic Tab: Use this tab to select an action to take when the same data exists in the import file and your global dictionary or in the project being updated.
7	Advanced Tab: Use this tab to modify global data being imported, including codes, UDFs, calendars, and resources. This tab is disabled if multiple projects are being imported. However, if an XML filing containing multiple projects is selected and the "Ignore this Project" option is selected for all projects but one, this tab is enabled.

ORACLE PRIMAVERA P6 EPPM

Welcome, Vanessa Lafferty Administer Print Help Logout

Dashboards Portfolios **Projects** Resources Reports

EPS Activities Workspace Team Usage Issues Documents Risks

Enterprise Project Structure

Views: Basic Gantt View Open Actions Define Baselines Import/Export Projects Publish Projects Summarize Projects Close All Release Exclusive Lock

ID *	Name *	Start	Project	July	August	September
ProdProg1	Product Program 1			27	03	10
PROD00914	Project Nano	01-Jul	12:00 AM	Wayn		
PROD00228	Xstar Release II	25-Aug	12:00 AM	Peg II		
PROD00516	3D Prototype Project	04-Apr	12:00 AM	Wayn		
PROD00752	Zepher Phase III	01-Apr	12:00 AM	Wayn		
PROD00444	Mass Prod Product Test	01-Dec	12:00 AM	Wayn		

Switch to Classic View

Import/Export Projects

Download Import Export

Import Type: Primavera XML

File: ProjectNano.xml

Template: Default Import Template

Project ID	Project Name	Import Action	Import To	Baselines
PROD00914	Project Nano	Create New		

Manage Primavera Templates

Search

Name *

+ Start Typing...

- Default Import Template
- Weekly Update Import Template

Manage Templates

Primavera Template - Default Import Template

Template Name: Default Import Template

Basic Advanced

Global Data Project Data

Name	Import Action
Project Codes and Values	Keep Existing
Funding Sources	Keep Existing
Resource Curves	Keep Existing
Resource Codes and Values	Keep Existing
Shift Names	Keep Existing
User Defined Fields	Keep Existing
Cost Accounts	Keep Existing
Roles	Keep Existing
Admin Categories	Keep Existing
GlobalResource Calendars	Keep Existing
Resources	Keep Existing

< Back

Primavera Template - Default Import Template

Template Name: Default Import Template

Basic **Advanced**

Codes UDFs Calendars Resources

Basic

GlobalEPS Activity Codes and Values: Keep Existing

Advanced

Select Subject Area: Activity

Name	Scope	Action	New Name
New			

< Back Cancel Save As

Table of Key Primavera XML Project Import Elements (Standard View)

Item	Description
❶	Navigation: Begin by navigating to the EPS page. Then, click the Actions menu and select Import/Export Projects .
❷	Import Type and File: On the Import tab, choose the <i>Primavera XML</i> import type and then click ...Browse to select the file to import.
❸	Template: Choose an existing template from the list.
❹	Import Action: If you decide to import the project as a new project, select Create New Project and specify its destination level in the EPS hierarchy. If you decide to update an existing project with the imported data, select Update Existing Project and specify the existing project to update.
❺	Baselines: If the file you have chosen to import contains baselines, you can select which baselines will be imported.
❻	Manage Templates: Choose a template to modify, or create a new template. You can also delete a template. You can type in the 🔍 Search field to filter templates that match the type text. A Default Import Template is provided. You cannot edit the default template.
❼	Basic Tab: Use this tab to select an action to take when the same data exists in the import file and your global dictionary or in the project being updated.
❽	Advanced Tab: Use this tab to modify global data being imported, including codes, UDFs, calendars, and resources. This tab is disabled if multiple projects are being imported. However, if an XML filing containing multiple projects is selected and the "Ignore this Project" option is selected for all projects but one, this tab is enabled.

Importing Projects using Primavera XML Format

You can import projects and baselines using the Primavera XML format and create or update a project.

Note: Avoid using the pipe character (|), or brackets (< or >) in the Project Name.

To import projects using Primavera XML format:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. Click the **Actions**  menu and select **Import/Export**  **XML Project Import/Export...**
 - b. In the **Import/Export Project** dialog box, choose the **Import** tab.
 - c. On the **Import** tab:
 - In the **Import Type** field, select **Primavera XML**.
 - In the **Select File** field, click **Browse**.
 - d. In the **File Upload** dialog box, select a file and click **Open**.
 - e. On the **Import** tab:
 - Select an option for **Import Action**.
 - Select a location for **Import to**.

If you selected **Create New Project**, click  **Select Parent EPS** and select the EPS where you want to import the XML file.

If you selected **Update Existing Project**, click  **Select Project** and select the project where you want to import the XML file.

If you selected **Ignore this Project**, you cannot select the EPS or project because this project will not be imported to the Primavera database.
 - Select which **Baselines** to import.
 - f. In the **Choose Template** field, select, create, or modify a template.
 - g. Click **Import**.

In **Standard View**:

- a. Click the **Actions**  menu and select **Import/Export Projects**.
- b. In the **Import/Export Project** dialog box, click the **Import** tab.
- c. On the **Import** tab:
 - In the **Import Type** list, select **Primavera XML**.
 - In the **File** field, click **...Browse**.
- d. In the **File Upload** dialog box, select a file and click **Open**.
- e. On the **Import** tab:
 - Select a **Template** to use.

Note: If you need to create a template or modify an existing template, click **Manage Templates**.

- Select an option for **Import Action**.
If you selected **Create New Project**, click **...Select** in the **Import To** field and select the EPS where you want to import the XML file.
If you selected **Update Existing Project**, click **...Select** in the **Import To** field and select the project where you want to import the XML file.
- Select which **Baselines** to import.

f. Click **Import**.

Tips

- ▶ In Classic view, click the **Status** tab to see the status of the import. On the **Status** tab, you can also delete the import. In Standard View, you can see the status of the import in the **View Service Status** dialog box.
- ▶ You can import multiple projects as one file using Primavera XML format.
- ▶ You cannot update baseline when you import a project and its baselines from an XML file. If you choose to import baselines new baselines will be created.

Working with Primavera XML Project Export

Use the Primavera XML format to share specific project and baseline data with users outside your primary P6 network. This includes P6 users at other organizations or P6 Professional users. For example, in order to share in-house project data with an outside firm, export the project to a Primavera XML file, send the data, and the outside firm can import it into their P6 environment.

When you export projects in the Primavera XML format, the following consideration applies:

- ▶ Even when you have sufficient project security access, if you do not have the proper resource access, you will not be able to export projects in their entirety when resources are above your access level in the resource hierarchy. The export will not necessarily fail, but data will be limited since some resources in the project will be excluded.

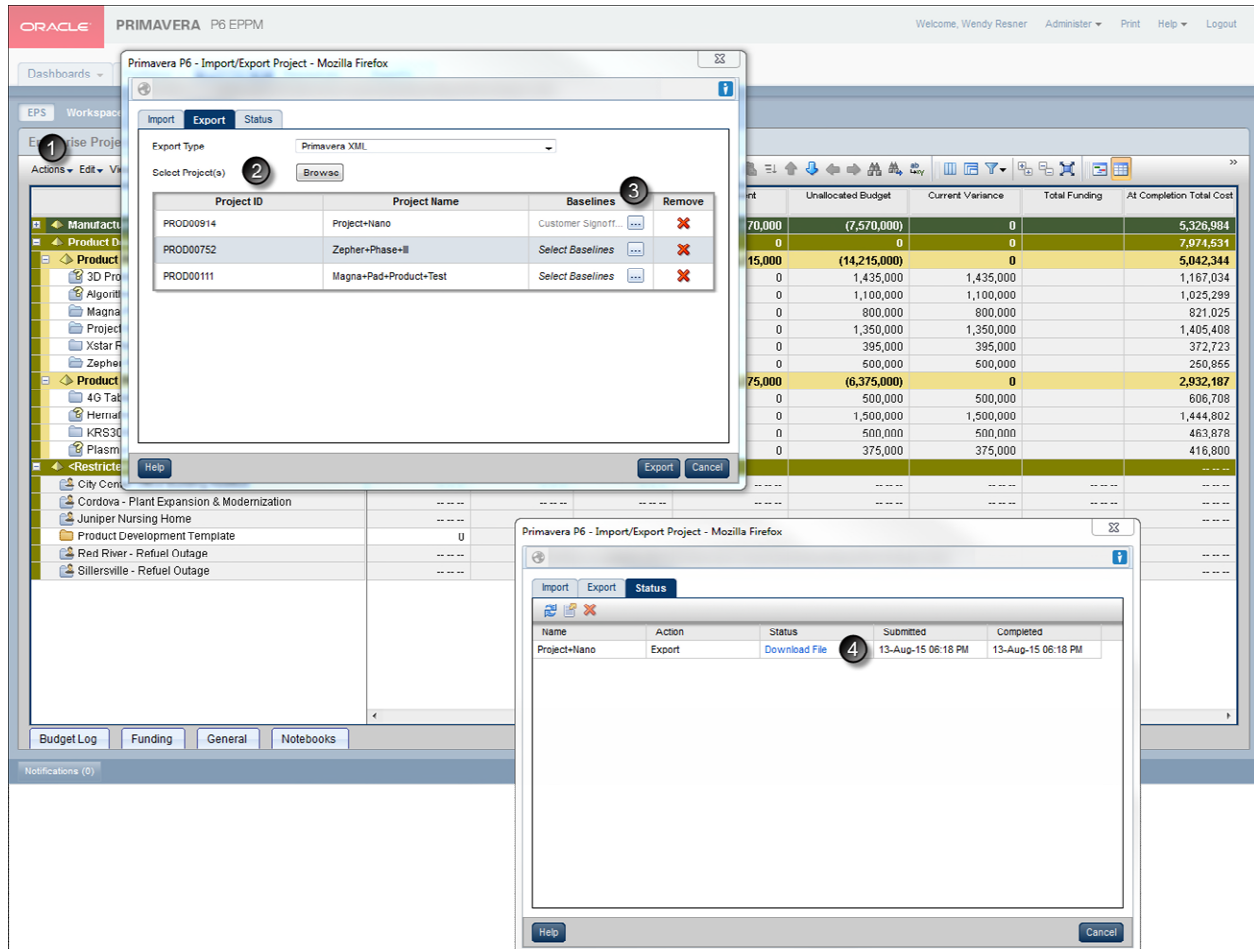


Table of Key Primavera XML Project Export Elements (Classic View)

Item	Description
1	Navigation: Begin by navigating to the EPS page. Then, click the Actions menu and select Import/Export and then XML Project Import/Export .
2	Type and Project: Choose the <i>Primavera XML</i> export type and then specify the projects to export.
3	Baselines: Specify which baselines to export with the projects. Click Export .
4	Download: Click Download File on the Status tab.

Enterprise Project Structure

ID	Name	Start	Project
ProdProg1	Product Program 1		
PROD00914	Project Nano	01-Jul	Wayn
PROD00228	Xstar Release II	25-Aug	Peg
PROD00516	3D Prototype Project	04-Apr	Lend
PROD00752	Zepher Phase III	01-Apr	Wayn

Import/Export Projects

Export Type: Primavera XML

Select Project

- Enterprise - All Initiatives
- Templates - Project Templates

Information

Job Submitted

The Export job was submitted. To check the status of this service, under Administer Menu, click [View Service Status](#)

Primavera P6 - Service Status - Mozilla Firefox

Service	Status	Submitted	Completed	Initiator	Projects
Export	Download File	08-Sep-16 09:25 PM	08-Sep-16 09:25 PM	Wendy Resner	PROD00914 - Pro
Import	Completed	08-Sep-16 05:36 PM	08-Sep-16 05:37 PM	Wendy Resner	E&C - Engineering
Export	Download File	08-Sep-16 03:03 PM	08-Sep-16 03:03 PM	Wendy Resner	PROD00914 - Pro

Table of Key Primavera XML Project Export Elements (Standard View)

Item	Description
①	Navigation: Begin by navigating to the EPS page. Then, click the Actions menu and select Import/Export Project .
②	Export Type: Choose the <i>Primavera XML</i> export type.
③	Add Projects: Select the projects you want to export.
④	Baselines: Specify which baselines to export with the projects. Click Export .
⑤	View Status and Download: Click View Service Status and once the export is complete, click Download File in the View Service Status dialog box.

Exporting Projects using Primavera XML Format

You can export projects to locations outside P6 using the Primavera XML format to share project information between Project Management databases.

To export projects using Primavera XML format:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page
 - In **Classic View**:
 - a. Click the **Actions**  menu and select **Import/Export**  **XML Project Import/Export...**
 - b. In the **Import/Export Project** dialog box, choose the **Import** tab.
 - c. On the **Export** tab:
 - In the **Export Type** field, select **Primavera XML**.
 - In the **Select Project** field, click **Browse** and select a project from the dialog box.
 - In the **Baselines** field, click and select which baselines you want to include with the export.
 - Click **Export**.
 - In **Standard View**:
 - a. Click the **Actions**  menu and select **Import/Export Projects**.
 - b. In the **Import/Export Project** dialog box, click the **Export** tab.
 - c. On the **Export** tab:
 - In the **Export Type** field, select **Primavera XML**.
 - Click **+Add Project...**, and in the **Select Project** dialog box select a project then click **Select**.

- In the **Baselines** field, click and select which baselines you want to include with the export.
- Click **Export**.

Tips

- ▶ You can see the status of the import in the View Service Status dialog box.
- ▶ To download the exported file, click the link in the View Service Status tab or Notifications dialog box.
- ▶ You can export multiple projects as one file using Primavera XML format.

Table of Key Elements for Microsoft Project Import

Item	Description
1	Navigation: Begin by navigating to the EPS page in the Projects section. Then, click the Actions menu and select Import/Export and then XML Project Import/Export .
2	Type and File: On the Import tab, choose the <i>Microsoft Project XML</i> import type and then click Browse to select the file to import. When you import from Microsoft Project, you can create a new project or update an existing project. In addition, you must specify the new project's destination level in the EPS hierarchy.
3	Microsoft Project Mapping Template: Choose an existing template from the list, modify a template, or create a new template. These templates store your preferences for handling data exchanges between P6 and Microsoft Project.
4	Mapping Template General data: Enter a name for your template and make other selections. Continue by clicking your choice of tabs on this dialog box.
5	Mapping Template Resource data: Specify how P6 should handle import data for resources already in P6. You can also select an option to create new resources in P6 when the import introduces entirely new resources.
6	Mapping Template Custom Field Mapping data: Use this tab to map your organization's user-defined fields to Microsoft Project fields.
7	Status: Check the status of the imported project on the Status tab of the Import/Export Project dialog box.

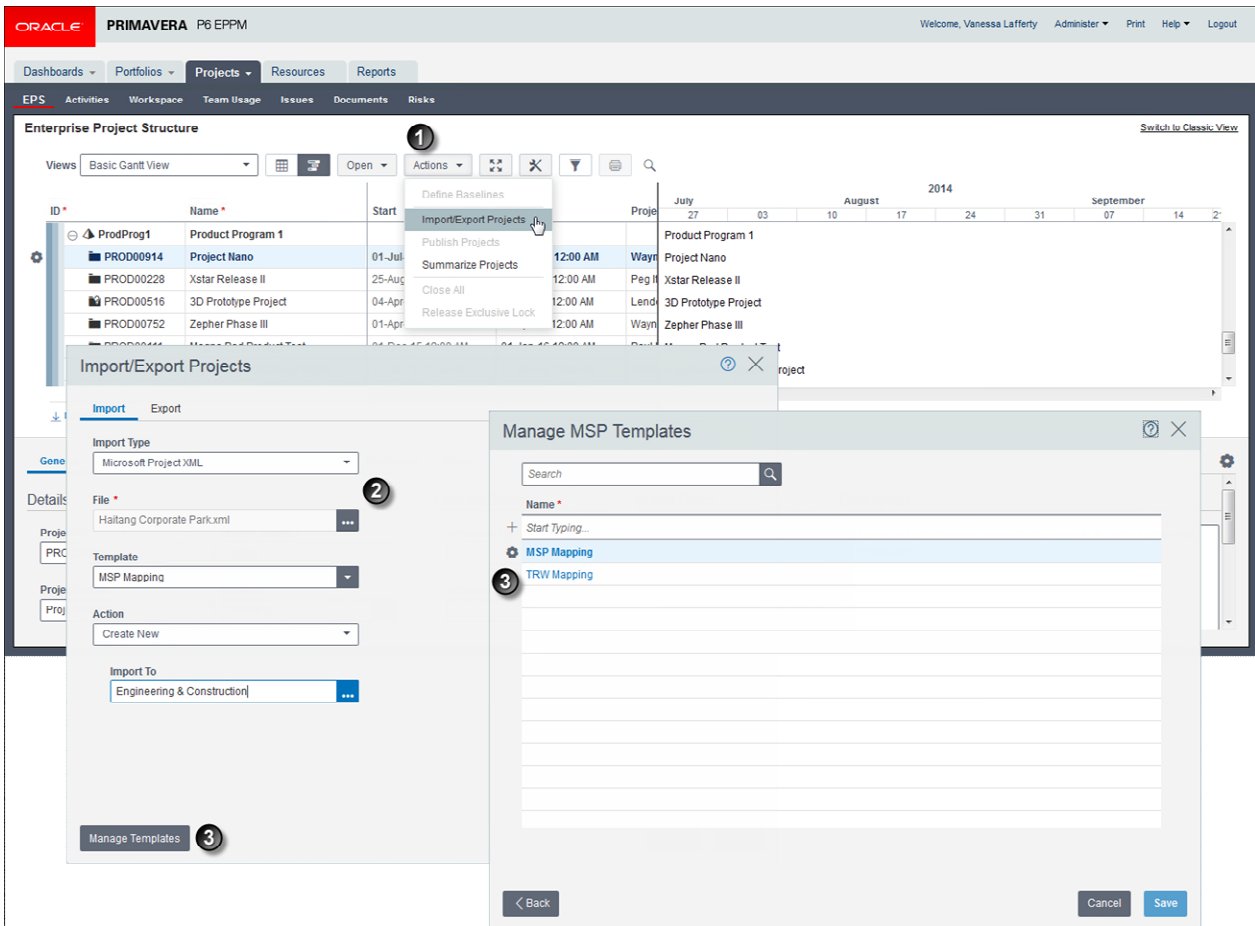


Table of Key Elements for Microsoft Project Import

Item	Description
1	Navigation: Begin by navigating to the EPS page in the Projects section. Then, click the Actions menu and select Import/Export Project .
2	Type and File: On the Import tab, choose the <i>Microsoft Project XML</i> import type and then click ...Browse to select the file to import. When you import from Microsoft Project, you can create a new project or update an existing project. In addition, you must specify the new project's destination level in the EPS hierarchy.
3	Microsoft Project Mapping Template: Choose an existing template from the list. If you need to modify or delete a template, or create a new template click Manage Templates . These templates store your preferences for handling data exchanges between P6 and Microsoft Project.

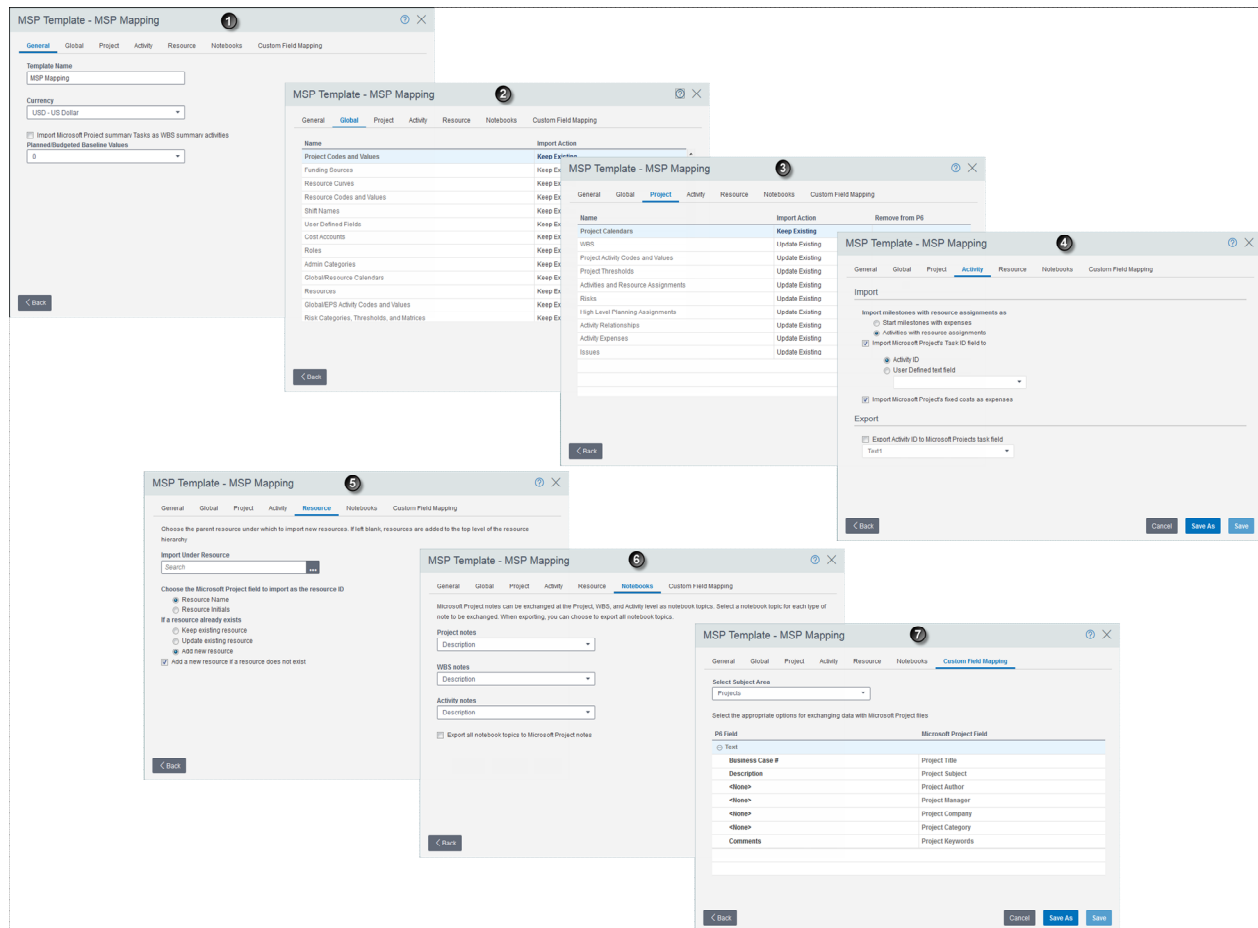


Table of Key Elements for Microsoft Project Mapping

Item	Description
1	Mapping Template General data: Enter a name for your template and make other selections. Continue by clicking your choice of tabs on this dialog box.
2	Mapping Template Global data: Specify how P6 should handle global data when updating an existing project.
3	Mapping Template Project data: Specify how P6 should handle project data when updating an existing project.
4	Mapping Template Activity data: Specify how P6 should handle activity data when updating an existing project, including how to handle milestone activities with resource assignments and which data to use for the Activity ID.
5	Mapping Template Resource data: Specify how P6 should handle import data for resources already in P6. You can also select an option to create new resources in P6 when the import introduces entirely new resources.

Item	Description
6	Mapping Template Notebook data: Specify how P6 should handle project notes, WBS notes and activity notes data when updating an existing project.
7	Mapping Template Custom Field Mapping data: Use this tab to map your organization's user-defined fields to Microsoft Project fields.

Importing Projects using Microsoft Project XML

In Classic View, you can import projects using the Microsoft Project XML format to create and manage them as new projects in P6.

Notes:

- To import a project via XML using P6 or P6 Professional, your user account's Resource Access field must be set to *All Resources*. This change can be made temporarily and then restored on the Users pane on the User Access page.
- Avoid using the pipe character (|), or brackets (< or >) in the Project Name.

To import projects using the Microsoft Project XML format:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page

In **Classic View**:

- a. Click the **Actions**  menu and select **Import/Export**  **XML Project Import/Export...**
- b. In the **Import/Export Project** dialog box, choose the **Import** tab.
- c. On the **Import** tab:
 - In the **Import Type** field, select **Microsoft Project XML**.
 - In the **Choose Template** field, select, create, or modify a template.
 - In the **Select File** field, click **Browse**.
- d. In the **File Upload** dialog box, select a file and click **Open**.
- e. On the **Import** tab:
 - Select an option for **Select Import Action**.
If you select **Create New Project**, click  **Select Parent EPS** and select the EPS where you want to import the XML file.
If you select **Update Existing Project**, click  **Select Project** and choose the project you are updating. Click **Advanced** to choose the type of data to include in the import.

- Click **Import**.

In **Standard View**:

- a. Click the **Actions**  menu and select **Import/Export Projects**.
- b. In the **Import/Export Project** dialog box, click the **Import** tab.
- c. On the **Import** tab:
 - In the **Import Type** list, select **Microsoft Project XML**.
- d. In the **File** field, click **...Browse**.
- e. In the **File Upload** dialog box, select a file and click **Open**.
- f. On the **Import** tab:
 - Select a **Template** to use.

Note: If you need to create a template or modify an existing template, click **Manage Templates**.

- Select an option for **Action**.
If you selected **Create New Project**, click ☐ Select in the **Import To** field and select the EPS where you want to import the XML file.
If you selected **Update Existing Project**, click ☐ Select in the **Import To** field and select the project where you want to import the XML file.
 - Select an EPS to element in the **Import To** field.
- g. Click **Import**.

Tips

- ▶ In Classic view, click the **Status** tab to see the status of the import. On the **Status** tab, you can also delete the import. In Standard View, you can see the status of the import in the **View Service Status** dialog box.
- ▶ You can import multiple projects as one file using Microsoft Project XML format.

Working with Microsoft Project Export

You can export projects and activities to the Microsoft Project XML format.

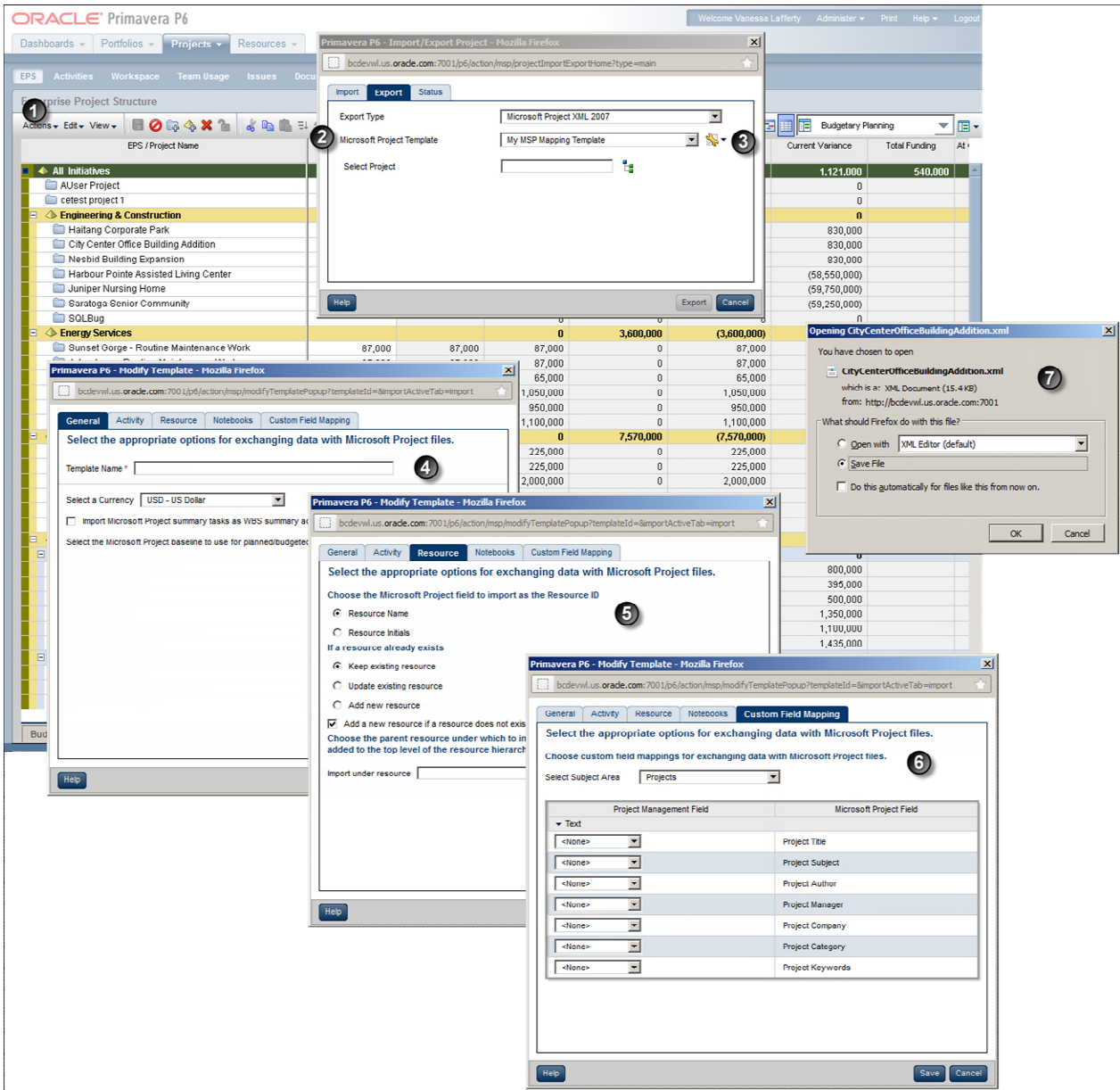


Table of Key Elements for Microsoft Project Export

Item	Description
1	Navigation: Begin by navigating to the EPS page in the Projects section. Then, click the Actions menu and select Import/Export and then XML Project Import/Export .

Item	Description
2	Type and File: On the Export tab, choose either the <i>Microsoft Project XML 2007</i> or <i>Microsoft Project XML 2010</i> export type and then select a project in the Select Project field.
3	Microsoft Project Mapping Template: Choose an existing template from the list, modify one, or create a new template. Mapping templates store your preferences for handling data exchanged between P6 and Microsoft Project.
4	Mapping Template General data: Enter a name for your template and make other selections. Continue by clicking your choice of tabs on this dialog box.
5	Mapping Template Activity data: Specify the Microsoft Project task field to receive the exported P6 Activity ID.
6	Mapping Template Custom Field Mapping data: Use this tab to map your organization's user-defined fields to Microsoft Project fields.
7	File Download: Use this dialog box to open or save the exported project in XML format.

Enterprise Project Structure

Views: Basic Gantt View

Actions: Define Baselines, Import/Export Projects, Publish Projects, Summarize Projects, Close All, Release Exclusive Lock

Import/Export Projects

Export Type: Microsoft Project XML 2010

Project: Project Nano

Template: MSP Mapping

Manage MSP Templates

Search: [Search Bar]

Name: MSP Mapping, TRW Mapping

MSP Template - MSP Mapping

General: Template Name (MSP Mapping), Currency (USD - US Dollar), Import Microsoft Project summary Tasks as Planned/Budgeted Baseline Values (0)

MSP Template - MSP Mapping (Activity Tab)

Import: Import milestones with resource assignments (Start milestones with expenses, Activities with resource assignments, Import Microsoft Projects Task ID field to Activity ID, User Defined text field), Import Microsoft Project's fixed costs as expense

Export: Export Activity ID to Microsoft Projects task field (Text1)

MSP Template - MSP Mapping (Custom Field Mapping Tab)

Select Subject Area: Projects

Select the appropriate options for exchanging data with Microsoft Project files

P6 Field	Microsoft Project Field
<None>	Project Title
<None>	Project Subject
<None>	Project Author
<None>	Project Manager
<None>	Project Company
<None>	Project Category
<None>	Project Keywords

Table of Key Elements for Microsoft Project Export

Item	Description
1	Navigation: Begin by navigating to the EPS page in the Projects section. Then, click the Actions menu and select Import/Export Project .
2	Type and File: On the Export tab, choose a Microsoft Project XML export type and then select a project in the Project field.
3	Microsoft Project Mapping Template: Choose an existing template from the list. If you need to modify or delete a template or create a new template click Manage Templates . Mapping templates store your preferences for handling data exchanged between P6 and Microsoft Project.
4	Mapping Template General data: Enter a name for your template and make other selections. Continue by clicking your choice of tabs on this dialog box.
5	Mapping Template Activity data: Specify the Microsoft Project task field to receive the exported P6 Activity ID.
6	Mapping Template Custom Field Mapping data: Use this tab to map your organization's user-defined fields to Microsoft Project fields.

Exporting Projects using Microsoft Project XML

In Classic View, you can export projects to locations outside of P6 using the Microsoft XML format to share information with Microsoft Project.

To export projects using Microsoft Project XML format:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. Click the **Actions**  menu and select **Import/Export**  **XML Project Import/Export....**
 - b. In the **Import/Export Project** dialog box, choose the **Export** tab.
 - c. On the **Export** tab:
 - In the **Export Type** field select a Microsoft Project XML file type to export.
 - In the **Microsoft Project Template** field, select, create, or modify a template.
 - In the **Select Project** field, click **Browse** and select a project from the dialog box.
 - Click **Export**.
 - In **Standard View**:
 - a. Click the **Actions**  menu and select **Import/Export Projects**.
 - b. In the **Import/Export Project** dialog box, click the **Export** tab.

c. On the **Export** tab:

- In the **Export Type** list select a Microsoft Project XML file type to export.
- In the **Project** field, click **...Select** and select a project to export.
- In the **Template** list select a template to use.

Note: If you need to create a template or modify an existing template, click **Manage Templates**.

- Click **Export**.

Tips

- ▶ In Classic view, click the **Status** tab to see the status of the import. On the **Status** tab, you can also delete the import. In Standard View, you can see the status of the import in the **View Service Status** dialog box.
- ▶ The software automatically creates a UDF called MSP Activity ID the first time anyone exports a project to Microsoft Project format. This UDF is hidden and cannot be modified. You should avoid creating a UDF with that name.

Configuring Microsoft Project Templates

Configure Microsoft Project templates to define data exchange options for both exporting to and importing from Microsoft Project.

To configure Microsoft Project templates:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:

In **Classic View**:

- a. Click the **Actions**  menu and select **Import/Export**  **XML Project Import/Export...**
- b. In the **XML Project Import/Export** dialog box, click the **Import** or **Export** tab.
- c. On the **Import** tab:
 - Select **Microsoft Project XML** from the **Import Type** list.
 - Select a template from the **Microsoft Project Template** list.
 - Click  **MSP Import Template Options** and select **Add New Template** or **Modify Selected Template**.
- d. Or on the **Export** tab:
 - In the **Export Type** list, select a Microsoft Project XML file type to export.
 - Click  **MSP Export Template Options** and select **Add New Template** or **Modify Selected Template**.
- e. In the **Modify Template** dialog box:
 - Configure the lists, options, and fields on each tab.
 - Click **Save**.

In Standard View:

- a. Click the **Actions**  menu and select **Import/Export Projects**.
- b. In the **Import/Export Projects** dialog box, click the **Import** or **Export** tab.
- c. On the **Import** tab:
 - In the **Import Type** list, select **Microsoft Project XML**.
 - On the **Import** tab, click **...Browse** in the **File** field and select a Microsoft Project XML file to import.
 - Click **Manage Templates**.
- d. Or on the **Export** tab:
 - In the **Export Type** list, select a Microsoft Project XML file type to export.
 - Click **Manage Templates**.
- e. In the **Manage Templates** dialog box, click a template.
- f. In the **Modify Template** dialog box
 - Configure the lists, options, and fields on each tab.
 - Click **Save**.

Tips

The area you select from the **Select Subject Area** list on the **Custom Field Mapping** tab determines what appears in the **Project Management** and **Microsoft Project Fields**.

Note: Once data is exported from P6 into another project management tool, dates, durations and other data may no longer reflect those in P6 if the other project management tool recalculates this data.

Working with UN/CEFACT Project Export

You can export projects and activities to UN/CEFACT XML Format 6. To comply with this format, select a template to specify the data to export.

Note: Templates are project specific, so you should open the project you intend to export before selecting or creating a template.

The screenshot displays the Primavera P6 EPPM interface with the following components and numbered callouts:

- 1**: Primavera P6 - Import/Export Project - Mozilla Firefox dialog box, Import tab.
- 2**: Export Type dropdown menu set to UNICEFACT XML Format 6.
- 3**: UNICEFACT Project Template dropdown menu.
- 4**: Primavera P6 - Add/Modify Template - Mozilla Firefox dialog box, General tab.
- 5**: Primavera P6 - Add/Modify Template - Mozilla Firefox dialog box, Project tab.
- 6**: Primavera P6 - Add/Modify Template - Mozilla Firefox dialog box, Activity tab, showing the mapping of UNICEFACT fields to P6 fields.
- 7**: Primavera P6 - Import/Export Project - Mozilla Firefox dialog box, Status tab, showing the export status for Project Nano.

The background workspace shows a table with budget data:

Unallocated Budget	Current Variance	Total Funding	At Completion Total Cost
(7,570,000)	0		5,326,984
0	0		7,974,531
(14,215,000)	0		5,042,344
1,435,000	1,435,000		1,167,034
1,100,000	1,100,000		1,025,299
800,000	800,000		821,025
1,350,000	1,350,000		1,405,408
395,000	395,000		372,723
500,000	500,000		250,855
(6,375,000)	0		2,932,187
500,000	500,000		606,708
1,500,000	1,500,000		1,444,802
500,000	500,000		463,878
375,000	375,000		416,800

Table of Key Elements for Microsoft Project Export

Item	Description
1	Navigation: Begin by navigating to the EPS page in the Projects section. Then, click the Actions menu and select Import/Export and then XML Project Import/Export .
2	Type and File: On the Export tab, choose either the <i>UN/CEFACT XML Format 6</i> export type and then select a project in the Select Project field.
3	UN/CEFACT Project Template: Choose an existing template from the list, modify one, or create a new template.
4	Template General data: Enter a name for your template and make other selections. Continue by clicking your choice of tabs on this dialog box.
5	Template Project data: Specify data about the contract and project and select Project level notebook topics to export.
6	Template Activity data: Select dates and durations for the Best Case, Most Likely and Worst Case on the Datas & Durations tab and make selections on the Miscellaneous and Notes tabs.
7	File Download: Click the link in the Status tab to download the exported project file.

Exporting Projects using UN/CEFACT XML

In Classic View, you can export projects to locations outside of P6 using UN/CEFACT XML Format 6.

To export projects using UN/CEFACT XML Format 6:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. , click the **Actions**  menu and select **Import/Export**  **XML Project Import/Export....**
 - b. In the **XML Project Import/Export** dialog box, click the **Export** tab.
 - c. On the **Export** tab:
 - In the **Export Type** field, select **UN/CEFACT XML Format 6**.
 - In the **Select Project** field, click **Browse** and select a project from the dialog box.
 - In the **Select Project Template** field, select, create, or modify a template.
 - Click **Export**.

In **Standard View**:

- a. On the **EPS** page, click the **Actions**  menu and select **Import/Export Projects**.
- b. In the **Import/Export Project** dialog box, click the **Export** tab.
- c. On the **Export** tab:
 - In the **Export Type** field, select **UN/CEFACT XML Format 6**.
 - In the **Project** field, click **...Select** and select a project from the dialog box.
 - In the **Template** field, select a template.

Note: If you need to create or modify a template, click the **Manage Templates** button.

- Click **Export**.

Tips

In Classic view, click the **Status** tab to see the status of the import. On the **Status** tab, you can also delete the import. In Standard View, you can see the status of the import in the **View Service Status** dialog box.

Configuring UN/CEFACT Templates

Configure UN/CEFACT templates to define data exchange options for exporting to UN/CEFACT XML Format 6.

To configure UN/CEFACT templates:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. Click the **Actions**  menu and select **Import/Export**  **XML Project Import/Export...**
 - b. In the **XML Project Import/Export** dialog box, click the **Export** tab.
 - c. On the **Export** tab:
 - Select **UN/CEFACT XML Format 6** from the **Export Type** list.
 - Select a project.
 - Click  **UN/CEFACT Export Template Options** and select  **Add New Template** or  **Modify Selected Template**.
 - d. In the **Add/Modify Template** dialog box:
 - Configure the lists, options, and fields on each tab.
 - Click **Save**.

In **Standard View**:

- a. Click the **Actions**  menu and select **Import/Export Projects**.
- b. In the **Import/Export Projects** dialog box, click the **Export** tab.
- c. On the **Export** tab:

- Select **UN/CEFACT XML Format 6** from the **Export Type** list.
 - Select a project.
 - Click **Manage Templates**.
- d. In the **Manage UN/CEFACT Templates** dialog box:
- Click a template or click **+** to create a new template.
- e. In the **UN/CEFACT Template** dialog box:
- Configure the lists, options, and fields on each tab.
 - Click **Save**.

Note: Once data is exported from P6 into another project management tool, dates, durations and other data may no longer reflect those in P6 if the other project management tool recalculates this data.

Importing Activities

You can import new activities into a P6 project from a Microsoft Excel (.xls) file. Create an import template, fill in the data you want to import, and save the file before completing these steps.

To import activities:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:

In **Classic View**:

- a. Click the **Actions**  menu and select **Import/Export**  **Import from Excel**.
- b. In the **Import Activities** dialog box:
 - Click **Import File**  and select a file from the dialog box.
 - Click **Select Project**  and select a project from the dialog box.
 - Click **Import**.
- c. On the **Activities** page, click the **Actions**  menu and select  **Save** (Ctrl+S).

In **Standard View**:

- a. Click the **Actions**  menu and select **Import** and then select **Import from Excel**.
- b. In the **Import Activities** dialog box:
 - Click **...Browse** in the **Import File** field and select a file from the dialog box.
 - Click **...Select** in the **Select Project** field and select a project from the dialog box.
 - Click **Import**.
- c. On the **Activities** page, click **Save**.

Tips

The import file must be in Microsoft Excel (.xls or .xlsx) format.

Creating Import Templates for Importing Activities

Create a Microsoft Excel template to use when importing new activities into a P6 project.

To create import templates:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Select an activity view from the **Activity View** list and configure it to include the columns you want in the import template.
 - b. Click the **Actions**  menu and select **Import/Export**  **Create Import Template**.
 - c. In the **File Download** dialog box, click **Open** to modify the template or click **Save** to save and close it.

In **Standard View**:

- a. Click  **Customize View**.
- b. In the **Customize View** dialog box:
 - Click the **Columns** tab.
 - Move the columns you want in the import template to the Selected Columns list.
 - Click **Apply**.
- c. In the **Activities** page, click **Save View**.
- d. Click the **Actions**  menu and select **Import** and then select **Create Import Template**.
- e. When prompted, choose whether to open or save the file.

Tips

- ▶ The import template is created as a Microsoft Excel file with the default file name, *ExportDataToSpreadsheet*.
- ▶ When you select columns for your activity view, include **Activity ID** or **Activity Name** to ensure that these fields are added to the import file spreadsheet. These fields are required in the spreadsheet to ensure that activities added during import are uniquely identified in your project when the import has completed.
- ▶ If a duplicate activity name exists, it will be added again as a new activity.
- ▶ In the import file, column order is irrelevant and the data fields you import are not required to match the columns in your current activity view. Data for import is identified by the internal names of the data fields in the first row of the spreadsheet.
- ▶ The import process will start at the first tab of the import file, regardless of the tab name.
- ▶ Blank rows are ignored.
- ▶ The import file contains two rows of column headings that match the columns you previously selected to display in the table or Gantt chart. The first row of headings identify the data to be imported into each column of your activity view. Do not change the content in columns of the first row. The second row contains descriptive information that is not used by the import process. You can modify the content in the second row.

- ▶ If values are not provided for mandatory fields, such as the date field, a default value will be set and corresponding data will be imported.
- ▶ Although the activity view is limited to 30 columns, you can add columns to your spreadsheet to import more than 30 fields of data.
- ▶ All activity fields except for non-editable fields are available for import. Examples of non-editable fields include: expenses, notebook topics, predecessors, resource IDs, resource names, role IDs, steps, and successors. Non-editable columns display an asterisk (*). You cannot import data for these fields. At least one editable field must be provided in a row of the import file for an activity to be imported.
- ▶ If an Enterprise Data field value does not exist for a Global Activity Code, Enterprise Project Structure (EPS) Activity Code, Project Activity Code, Calendar, Cost Account, or Primary Resource, the assignment will not be added.
- ▶ Secure activity codes are not imported, even if the column exists in the spreadsheet.
- ▶ Durations with abbreviations that match the abbreviations set on the **Time Periods** page of the **Application Settings** page are imported.

Importing Locations

You can import new locations into P6 from a Microsoft Excel (.xls) file.

To import locations:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Global** and click **Locations**.
- 4) On the Locations page, click **Actions**  and select Import from Excel  **Import**.
- 5) In the Import Locations dialog box:
 - a. In the Import File field, click **...Select** and select a file.
 - b. Click **Import**.
- 6) In the import confirmation message box, click **OK**.

Notes:

- Click **Actions**  and select **Create Import Template** to download a template file ready for you to populate with data.
- Input longitude and latitude in the format that is appropriate for your geolocation service. The default format for longitude and latitude is decimal degrees. Contact your P6 administrator for further details.
- Select a country when locating using longitude and latitude to improve results.

Creating Import Templates for Importing Locations

Create a Microsoft Excel template to use when importing location data.

To create an import template:

- 1) Click **Administration**.
- 2) On the Administration navigation bar, click **Enterprise Data**.
- 3) On the Enterprise Data page, expand **Global** and click **Locations**.
- 4) On the Locations page, click the **Actions**  menu and select **Create Import Template**.
- 5) In the File Download dialog box, click **Open** to modify the template or click **Save** to save it.

Tips

- ▶ The import template is created as a Microsoft Excel file with the default file name, *ExportDataToSpreadsheet*.
- ▶ The top two rows of the spreadsheet are required when importing data locations from a spreadsheet. Do not change the data in these rows.

Exporting Projects to Excel

In Classic View, you can export the list of projects in your EPS view to a Microsoft Excel (.xlsx) file.

To export projects:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **EPS**.
- 3) On the **EPS** page:
 - In **Classic View**:
 - a. Select an EPS view from the **EPS View** list.
 - b. Configure the EPS view to determine what data is exported.
 - c. Click the **Actions**  menu and select **Import/Export**  **Export to Excel**.
 - d. In the **File Download** dialog box, click **Open** to open the Excel spreadsheet or **Save** to save the file to your computer.

In **Standard View**:

- a. Select an EPS view from the **Views** list.
- b. Configure the EPS view to determine what data is exported.
- c. Click  **Download**.
- d. In the **Opening** dialog box, choose whether to open or save the file.

Tips

- ▶ All data is exported as it appears in the current EPS view.

Exporting Activities to Excel

You can export activity data to a Microsoft Excel (.xls) file.

To export activities:

- 1) Click **Projects**.
- 2) On the Projects navigation bar, click **Activities**.
- 3) On the **Activities** page:
 - In **Classic View**:
 - a. Select a view from the **Activity View** list.
 - b. Configure the activity view to determine what data are exported.
 - c. Click the **Actions**  menu and select **Import/Export**  **Export to Excel**.
 - d. When prompted, browse to a location to save the file to your computer.

In **Standard View**:

- a. Click  **Customize View**.
- b. In the **Customize View** dialog box:
 - Click the **Columns** tab.
 - Move the columns you want in the import template to the Selected Columns list.
 - Click **Apply**.
- c. In the **Activities** page, click **Save View**.
- d. Click  **Download**.
- e. When prompted, choose whether to open or save the file.

Tips

- ▶ All data, including grouping row information, is exported as it appears in the activity table or the activity grid.

Exporting Risk Data

Risk data can be saved to an Excel spreadsheet (*.xls). All data is exported as it appears in the current view. Customize the rows to display only the data you want to export.

To export risk data:

- 1) Click **Projects**.
- 2) On the **Projects** navigation bar, click **Risks**.
- 3) On the **Risks** page, customize the table using the customize features. The fields that are visible on the page are the fields that are exported to the Excel spreadsheet.
 - ▶ Click  **Select Columns** to select the columns you want displayed in the spreadsheet.
 - ▶ Click  **Filter By** to filter the data by an existing filter, or create a new filter to customize your view.
- 4) Click  **Export to Excel**.
When prompted, select whether you want to open or save the export file.

Exporting a List of Reports

Perform these steps to save a customized list of available reports to a Microsoft Excel spreadsheet.

All data is exported as it appears in the current view.

To export a list of reports:

- 1) Click **Reports**.
- 2) On the **Reports** page:
 - a. Click the **Reports** or **Schedules** tab.
 - b. Modify the table to view only the list of reports you want to export.
 - Expand or collapse group headings.
 - c. Click **Export**.
- 3) When prompted, choose whether you want to open or save the export file.

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