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Contents

Lesson 1 - Understanding Data in Primavera P6 EPPM ................................................................. 4
  Enterprise and Project-Specific Data .......................................................................................... 5
  Logging In and Navigation .......................................................................................................... 7
  Open an existing Project.............................................................................................................. 8
Lesson 2 - Creating a Project......................................................................................................... 17
  Create a Project ......................................................................................................................... 17
  Navigating in the Projects Window ............................................................................................ 21
  Viewing Project Details............................................................................................................... 21
  Reviewing Project Codes ........................................................................................................... 25
Lesson 3 - Creating a Work Breakdown Structure ...................................................................... 26
  Defining a Work Breakdown Structure ....................................................................................... 26
  Creating a Work Breakdown Structure ...................................................................................... 26
  Setting User Preferences ........................................................................................................... 28
Lesson 4 - Adding Activities ........................................................................................................ 30
  Describing an Activity and its Components ................................................................................ 30
  Describing Activity Types ......................................................................................................... 34
  Adding Activities ....................................................................................................................... 35
  Adding a Notebook Topic ........................................................................................................... 36
  Assigning Activity Codes ........................................................................................................... 37
  Assigning Calendars .................................................................................................................... 38
Lesson 5 - Relationships ............................................................................................................. 41
  Viewing a Network Logic Diagram ............................................................................................ 41
  Relationship Types ..................................................................................................................... 42
  Creating Relationships ................................................................................................................ 42
  Inter-project Relationships .......................................................................................................... 44
Lesson 6 - Scheduling .................................................................................................................. 46
  Objectives ................................................................................................................................. 46
  Performing a Forward and Backward Pass ............................................................................... 46
  Total Float ................................................................................................................................. 48
  Scheduling Options .................................................................................................................... 51
Lesson 7 – Constraints ................................................................................................................ 54
  Applying an Overall Deadline to the Project .............................................................................. 55
Lesson 1 - Understanding Data in Primavera P6 EPPM

Objectives
✓ Describing Enterprise and Project-Specific data
✓ Reviewing YOUR COMPANY’s EPS
✓ Logging In using YOUR COMPANY’s STANDARDS
✓ Opening an Existing Project
✓ Opening and Customizing Layouts

Your Company is utilizing Oracle’s Primavera P6 Enterprise Project Portfolio Management (P6 EPPM) system because <EXPLAIN THE USE OF AND THE REASONS FOR USING P6>.

Primavera P6 EPPM is an integrated solution that includes Web-based and a desktop applications that provide role-specific tools to satisfy each team member’s needs, responsibilities and skills.

P6 EPPM

P6 Professional
The Project Management module is <EXPLAIN USE IN THE COMPANY>. 
P6 Web Client
P6 Web is the Web interface for those who require Web-enabled project management functionality. <EXPLAIN USE IN THE COMPANY>.

Database Environment
Since all information is stored in one database <EXPLAIN DATABASES AVAILABLE IN COMPANY>, Primavera splits data into two specific categories: Enterprise and Project.

Enterprise and Project-Specific Data
Enterprise Data
Enterprise data provides the global structure needed to manage multiple projects. It is available to all projects across the organization and provides the structure necessary for centralized project and resource management.

The Enterprise Project Structure is a hierarchy used to organize projects.

- Provides:
  - Foundation for enterprise-wide project management.
  - Access to project priorities, scope, budget, and resource information across the enterprise.

- Enables:
  - Individuals to manage projects separately.
  - Organizations to summarize data and view resource allocation across multiple projects.
  - Control access to project data at any level.

The following is a sample EPS:
Examples of Enterprise Data include:

- Project structure
- Project codes
- Administrative categories and preferences
- Access rights
- Resources
- Cost accounts
- Resource codes

**Project Data**

Project-specific data is only available to the project in which it is defined. Each project manager controls this data, allowing for the flexibility to manage a project independently. These project-specific components include:

- Dates
- Work Breakdown Structure (WBS)
- Activities
- Activity relationships
- Baselines
- Expenses (Cost Tracking)
- Risks
- Thresholds and Issues
- Project Web Site

Certain items can be both enterprise and project specific. These components are:

- Calendars
- Reports
- Activity Codes

Logging In and Navigation

- Before using Primavera, you must enter a valid login name and password.
  - <Describe the Log-in names for the company>
- If you do not know your login name/password, contact your system administrator.
- Your password is case-sensitive.

Navigation

- The Project window is the starting point for navigation. It provides quick access to enterprise data and project data.
- To the left of the Project window is the Directory bar, which lists the 12 windows within Primavera. Each window provides specific functionality to help you manage projects. Click an item in the Directory bar to access it.
1. **Title Bar**: Indicates which projects are open.

2. **Menu Bar**: Each selection has a drop-down menu with various choices.

3. **Upper Tool Bar**: Each section allows you to do specific functions.

4. **Left Tool Bar**: Allows users to move from module to module.

5. **Right Tool Bar**: Allows users to perform commands on selected projects.

6. **Status Bar**: Indicates user, data date of current project, access and baseline in use.

### Open an existing Project

1. Choose **File** from the **Menu** bar.

2. Select **Open**.

The Open Project dialog box lists all the projects a user has access to open.

- Open a single project.
- Open a single EPS node
  - All projects under the node are opened.
- Open multiple projects under different nodes.
  - Press **Ctrl+click** to select more than one project.
- Select Project **Overview and Navigation**
Access Modes

1. **Read Only**: Users can view data, but cannot input or change data.

2. **Shared**: Multiple users can view, input, and change data (default setting).

3. **Exclusive**: The current user is the only user who can edit data on these projects. Other users can access these projects in Read Only mode. If someone has the project opened in exclusive mode, the user will automatically be put into Read-Only mode; however, P6 does not display a message warning about this. To see who has the project opened, click on the Users button from the side of the dialog box.

Activities Window

When a project is opened in P6 from the File, Open Dialog box, the Activities Window will automatically display. This window is used to create, view, and edit activities for open projects.
1. **Gantt Chart:** Provides graphical display of activity progress over time.

2. **Activity Details:** View/edit detailed information for selected activity.

3. **Horizontal Split Bar:** Hide or show more information in top/bottom layouts.

4. **Vertical Split Bar:** Drag bar to hide/show more information in each pane.

5. **Activity Table:** Display activity information in spreadsheet format.

6. **Layout Options Bar:** Displays menu of available options for Activities window.

**Opening and Customizing Layouts**

A layout is a customizable view of information, combining all the visual elements that appear on the screen. Layouts are available in the Projects, WBS, Activities, Resource Assignments, and Tracking windows.

The Activities window provides the option of viewing data in top/bottom layouts.
Choose one of the following to show on top:

- **Activity Table** - Displays activity data in columns
- **Bar Area (Gantt Chart)** - Provides a graphical display of activity progress over the duration of the project
- **Activity Usage Spreadsheet** - Displays unit, cost, or earned value data by activity over time. Use this type of layout to review per period and rolled up activity resource/cost data
- **Activity Network** - Use to view the relationships between activities and the logical flow of the activities in the project:
  - Left pane - Displays the WBS hierarchy
  - Right pane - Shows a graphical display of activities and their relationships

Choose one of the following to show on bottom:

- **Activity Details** – Use to view and edit detailed information about the selected activity
- **Activity Table** – Displays activity data in columns
- **Gantt Chart** – Provides a graphical display of activity progress over the duration of the project
- **Activity Usage Spreadsheet** - Displays activity data in a spreadsheet format. View baseline, budgeted, actual, remaining, and at completion values or review information such as earned value cost, actual labor and non-labor units, and remaining total cost for the activities in your project
• **Resource Usage Spreadsheet** - Use to analyze quantity or cost usage for resources or roles across time

• **Activity Usage Profile** - Displays cost or unit values for activities in the open project over time according to a timescale you specify

• **Resource Usage Profile** - Use to analyze quantity or cost usage for resources or roles with the use of vertical bars

• **Trace Logic** - Enables you to step forward or backward through a sequence of activities to focus on predecessor/successor relationships

**Opening an Existing Activity Layout**

• A variety of layouts are available to present activity data from different perspectives. You can create user-specific layouts and project-specific layouts, or use global layouts provided by your company.

• After selecting a layout, you can click either Apply or Open.
  
  - Apply - Displays layout but keeps Open Layout dialog box open.
  - Open - Displays layout and closes Open Layout dialog box.

1. From the Layout Options Bar, select **Layout**.

2. Select **Open** to activate the Open Layout dialogue box.
3. A list of Global layouts available to use is shown. Scroll through the list using the up/down arrow keys, and highlight the layout to view.

4. Select the **Classic WBS** layout.

5. Select the **Open** button, and the dialogue box will close, and the applied layout is viewable.

**Customizing Layouts**

If an acceptable Global layout cannot be found, a **custom layout** can be made.

The Activities window can be customized and saved as a layout. Saving layouts for future use allows you to quickly retrieve information.

The Layout Options bar is the centralized menu for layout customization. The following is a list of layout elements that are customizable:

- Bars
- Columns
- Timescale
- Table font and colors
- Row height
- Filters
- Activity grouping and sorting
- Top/bottom layouts

**Selecting Columns**

The Columns dialog box enables you to select columns to display in the Activity Table and specify the order in which they appear:
- **Available Options** section - Lists data items in groups or in list.
- **Selected Options** section - Lists items you have chosen to display.
- **Single arrows** - Move highlighted data items to the other section.
- **Double arrows** - Move all data items to the other section.
- **Up/down arrows** - Configure the order of the data items.
- Click **Edit Column** to edit the selected item's title and choose its alignment in the display.
- Select **Columns** from the **Layout Options Bar**
- Click on **Available Options drop-down arrow** and select **Group and Sort By, List**
1. Select Calendar and click on the single arrow pointing to the right
2. Select Project Manager, ctrl-click and select Remaining Duration
3. Click OK

Saving Layouts
1. Once the layout has been customized by choosing the columns, grouping/sorting, and filters, select Layout from the Layout Options Bar.

2. Select Save As to open the save layout pop up dialogue box.

3. In the Layout Name, type a name for the layout created.

4. Available to: isdefaulted to the current user. Select the drop down menu button to see the choice of availability.
a. **All Users**: The layout created is available to all users with access to your project.

b. **Current user**: The layout created is available to the current user only.

c. **Another User**: The layout created can be assigned to another user.

d. **Project**: will save the layout and associate it with a project. If the project is exported, the layout can be exported with it.

5. Once the above steps are completed, select the **Save** button to finish.

<NOTE: ENTER ANY SPECIAL NAMING CONVENTIONS OR RULES FOR THE COMPANY CONCERNING LAYOUTS.>

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**Lesson Review**

1. Which of the following is project specific data?
   a. Activities
   b. Resources
   c. Cost Codes
   d. All of the above

2. When you open a project in __________ mode, you are the only user who can change data in that project.
   a. Read Only
   b. Shared
   c. Exclusive
   d. User