



# Working with P6 Schedules in P6 EPPM

**Don McNatty, PSP**

August 20, 2014

**ORACLE®** Platinum  
Partner



**ORACLE SPECIALIZED  
CONSULTANTS**

- Unifier Implementation Specialists
- Primavera P6 Implementation Specialists
- Primavera Contract Management Implementation Specialists
- P6 Certified Trainers
- Contract Management Certified Trainers

***2014 Technical  
Webinar Series***



# Thank you for joining today's technical webinar

- Mute – all call in phones are automatically muted in order to preserve the quality of the audio for all attendees.
- Questions – during the session, questions can be submitted through the Questions Box on the right side of the screen . We will try to address your questions at the end of the presentation, time permitting.
- Follow up – all registrants will receive an Excel file listing all questions and responses along with a link to the recorded webinar.



# Safe Harbor

- The statements made in this technical presentation are based on our current knowledge of the tools.
- Our statements should not be construed to be an official “Oracle perspective”, but are intended to be the sharing of technical and user knowledge gained as we explore new paths and technologies, usually in advance of our clients.
- Our statements should not be construed as in conflict with any Oracle statement, as the Oracle statement is may be based on more current information than has been made available to us.



- Oracle Primavera Software
- Oracle Primavera Certified Training & Implementation Services
- Custom Integration, Analytics and Dashboard Utilities
- Project Support Services and Partnering



- Global Hosting Services
- Primavera OPPM, P6 EPPM, P6 Pro, Primavera Unifier, Contract Management, BI Publisher, UCM/Sharepoint, P6 Risk, AutoVue and Analytics
- Hard Dollar, HCSS, Acumen Fuse, Ecosys, Prism G2, US Cost, Microsoft...
- Data Centers in USA, London, Singapore and Brisbane



# **Abstract – Working with P6 Schedules in P6 EPPM 8.3**

**This presentation assumes a working knowledge of Primavera P6 Pro to manage schedules.**

of choice for professional schedulers, the scheduling functionality of EPPM is perfect for many users, especially those who don't spend every day in the scheduling tool. P6 EPPM is a great way to get other project stakeholders involved and interacting with their schedules. This technical webinar will focus on the scheduling functionality of P6 EPPM 8.3.2 and will demonstrate the many useful (and sometimes better) ways of working with schedules.



# Agenda – Working with P6 Schedules in P6 EPPM 8.3

- Differences between P6 EPPM and P6 Pro
- P6 EPPM Overview, Navigation and Activity Views.
- Working in the EPPM environment
- Demonstrate Projects, Activities and Workspace Tabs
- Run the Schedule Checker Report.
- Run Reports with BI Publisher
- Team member to gather status information
- Summary



# Fundamental Differences Between EPPM/Pro

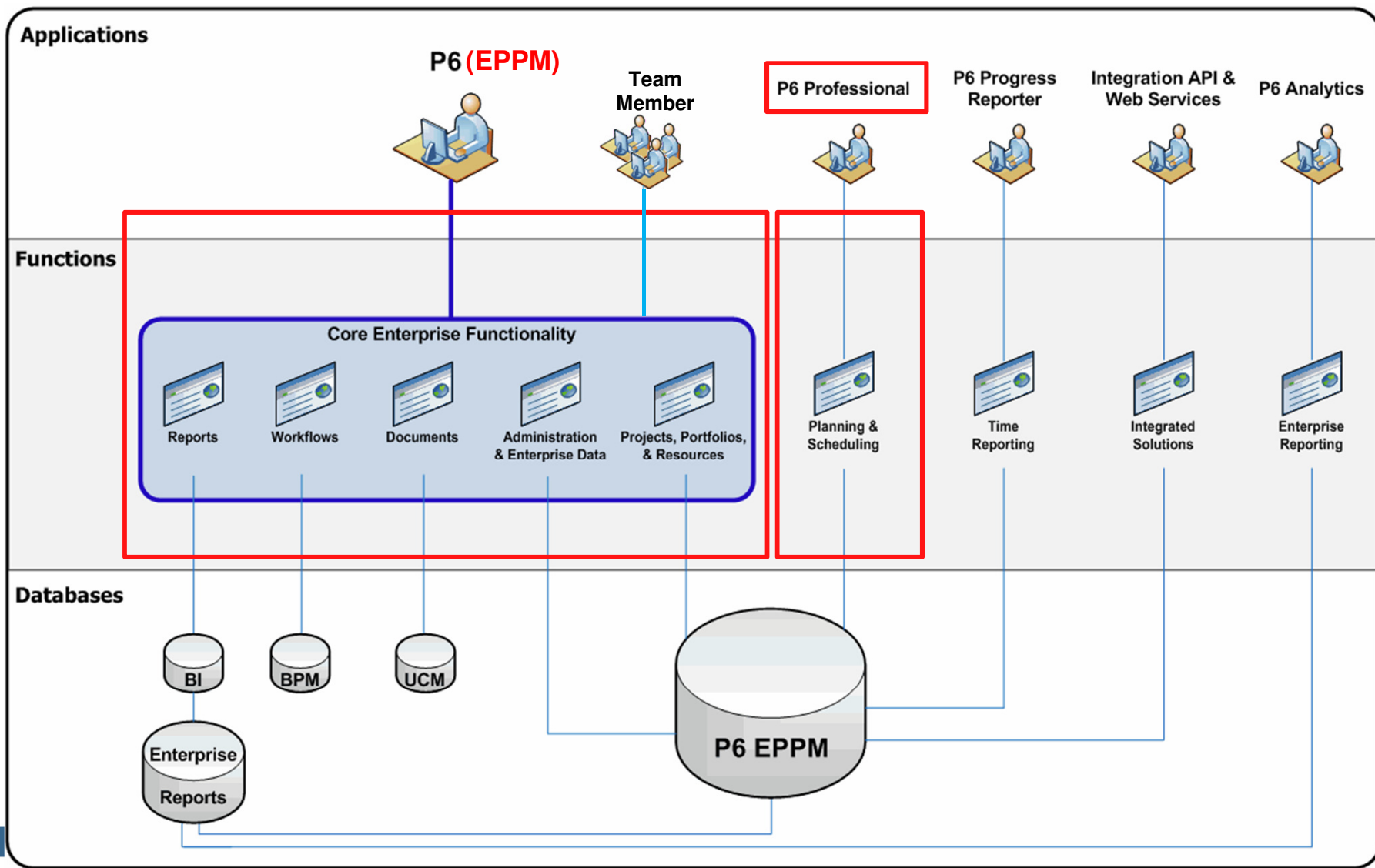
Both EPPM and Pro can be accessed via the “cloud”

[Apr-2014-Webinar-Migrating-to-8-3.pdf](#)

- P6 EPPM is a true web enabled (browser based) tool.
- P6 Pro still runs in Windows – can run via web through a web interface
  - *The “cloud” is the internet, you can run both “in the cloud” either through direct access (EPPM) or a remote access tool (TS/Citrix).*
- P6 Pro can also run on a local desktop/laptop – EPPM (not).
- Best of all worlds – they can run together in one “cloud” environment.
- Some P6 Pro functionality is limited when linking to a EPPM database.



- EPPM encompasses much broader functionality than P6 Pro.
- Add-on functionality is optional.
- All Administration is in EPPM when Pro is connected to EPPM DB.







# Functionality Unique to EPPM

EPPM (web) contains some unique capabilities...

- Enhanced administration module
- Project level, formula driven custom fields.
- Schedule Checker
- Preview Schedule Changes
- P6 Team Member
- Email links to Activity Views
- Risk Register
- Dashboards, link to Contract Management.



# P6 EPPM Overview, Navigation and Views

P6 EPPM is the primary Primavera tool and referred to as “P6”

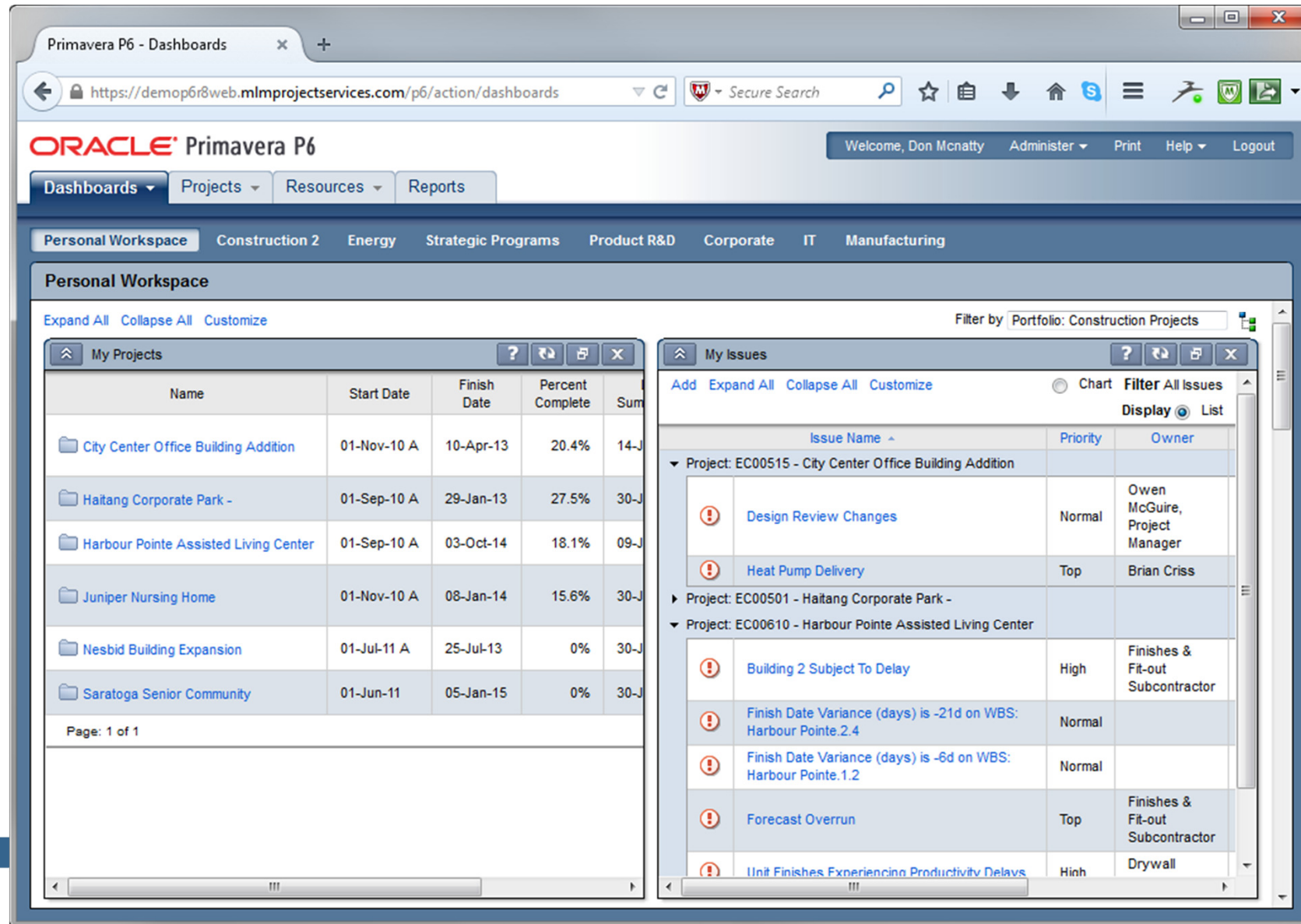
- P6 EPPM license includes the basic browser application P6, windows based P6 Professional, BI Publisher for reports, P6 Team Member, P6 BPM, and UCM document repository.
- P6 EPPM can be deployed as just the basic P6 browser application
  - Be sure to double check/request the other related applications if needed.
  - P6 Pro requires a separate deployment (Citrix/Terminal Server) unless you direct link.
- P6 EPPM has multiple modules
  - Dashboards, Portfolios, Projects, Resources and Reports.
  - P6 EPPM uses “layouts” which it refers to as “Views”.



- Login by accessing a web location (URL) where P6 is deployed.

A screenshot of a web browser window displaying the Primavera P6 login page. The browser's address bar shows the URL 'https://demop6r8web.mlmpjectservices.com/p6/action/login?logoff=true'. The page has a blue background. In the center, there is a white login box with the 'ORACLE Primavera P6' logo at the top. Below the logo are two input fields: 'Username' with the text 'don' and 'Password' with masked characters. To the right of each field is a small blue icon of a person. Below the password field is a blue 'Login' button. Underneath the login box, there is a link that says '► Advanced'. At the bottom of the page, there is small text: 'Release 8.3.2 (B0211) 01.17.2014.0931 7e07b9bc3be1', 'Copyright © 1999, 2014, Oracle and/or its affiliates. All rights reserved.', 'Oracle and Java are registered trademarks of Oracle and/or its affiliates.', and 'Other names may be trademarks of their respective owners.'

- Dashboards provide an overview of projects
- Create multiple dashboards and filters.
- Drill through Dashboard data to detailed information.



The screenshot shows the Primavera P6 Dashboards web application. The browser address bar displays the URL: <https://demop6r8web.mlmpojectservices.com/p6/action/dashboards>. The page header includes the Oracle Primavera P6 logo and a welcome message for Don McNatty, with links for Administer, Print, Help, and Logout.

The main navigation bar includes tabs for Dashboards, Projects, Resources, and Reports. Below this, a secondary navigation bar lists various project portfolios: Personal Workspace, Construction 2, Energy, Strategic Programs, Product R&D, Corporate, IT, and Manufacturing.

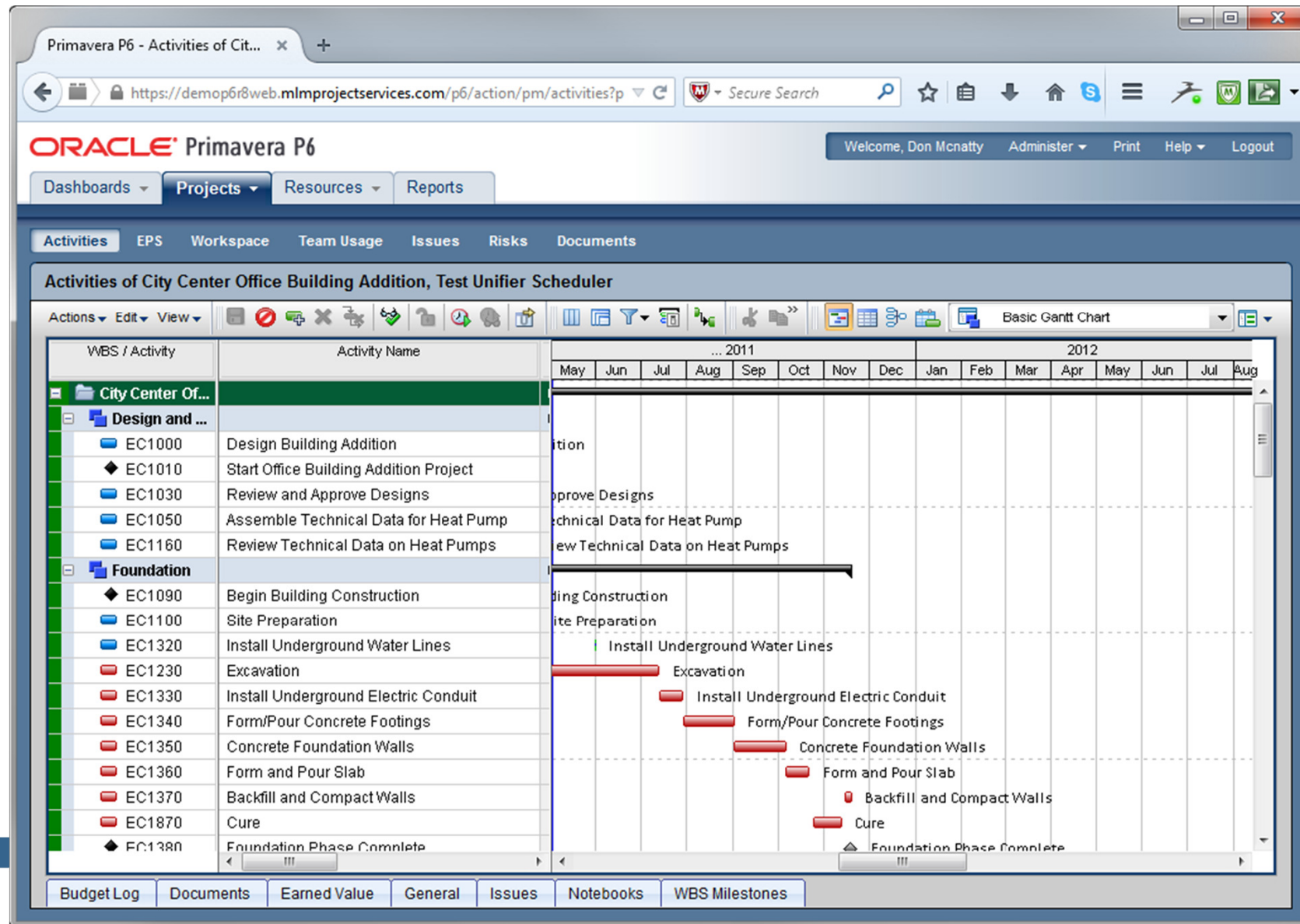
The "Personal Workspace" section is active, showing a filter for "Portfolio: Construction Projects". It contains two main panels:

- My Projects:** A table listing projects with columns for Name, Start Date, Finish Date, Percent Complete, and Summary. The table shows six projects, including "City Center Office Building Addition", "Haitang Corporate Park -", "Harbour Pointe Assisted Living Center", "Juniper Nursing Home", "Nesbid Building Expansion", and "Saratoga Senior Community".
- My Issues:** A table listing issues with columns for Issue Name, Priority, and Owner. The table shows issues for three projects: "EC00515 - City Center Office Building Addition", "EC00501 - Haitang Corporate Park -", and "EC00610 - Harbour Pointe Assisted Living Center".

The "My Issues" table includes the following data:

Issue Name	Priority	Owner
Design Review Changes	Normal	Owen McGuire, Project Manager
Heat Pump Delivery	Top	Brian Criss
Building 2 Subject To Delay	High	Finishes & Fit-out Subcontractor
Finish Date Variance (days) is -21d on WBS: Harbour Pointe.2.4	Normal	
Finish Date Variance (days) is -6d on WBS: Harbour Pointe.1.2	Normal	
Forecast Overrun	Top	Finishes & Fit-out Subcontractor
Unit Finishes Experiencing Productivity Delays	Hinh	Drywall

- With User Interface Views, you can configure what users see when they log into P6.



- The Projects, EPS screen lists all projects based on security and selected filters.

Primavera P6 - Enterprise Proje... x

https://demop6r8web.mlmpjctservices.com/p6/action/pm/projects?pr

ORACLE Primavera P6

Welcome, Don McNatty Administer Print Help Logout

Dashboards Projects Resources Reports

Activities EPS Workspace Team Usage Issues Risks Documents

Enterprise Project Structure

Actions Edit View

EPS / Project Name	Current Phase	Total Activities	Responsible Manager	Location	Business Segment	Project Score
All Initiatives		2814	Enterprise			71
Engineering & Construction		1087	E&C			77
City Center Office Building Addition	Design	72	E&C	Europe	Commercial Co...	80
Haitang Corporate Park -	Development	72	E&C	China	Commercial Co...	78
Haitang Corporate Park - Reflection	Development	72	E&C	China	Commercial Co...	78
Harbour Pointe Assisted Living Center	Development	131	E&C	Australia	Healthcare	72
Harbour Pointe Assisted Living Center	Development	131	E&C	Australia	Healthcare	72
Juniper Nursing Home	Design	132	E&C	Latin America	Healthcare	84
Juniper Nursing Home - B5	Design	132	E&C	Latin America	Healthcare	84
Nesbid Building Expansion	Initiation	71	E&C	India	Commercial Co...	75
Nesbid Building Expansion 1	Initiation	71	E&C	India	Commercial Co...	75
Nesbid Building Expansion 1 - B2	Initiation	71	E&C	India	Commercial Co...	75
Saratoga Senior Community	Initiation	132	E&C	North America	Healthcare	77
Energy Services		690	Energy			72

Budget Log Codes Description Funding General Issues Notebooks Risks



- Project, Workspace directly connects to Contract Management to provide access to additional project information.

Primavera P6 - Workspace of C...

https://demop6r8web.mlmpjctservices.com/p6/action/pm/projectwor

Secure Search

Welcome, Don McNatty Administer Print Help Logout

Dashboards Projects Resources Reports

Activities EPS Workspace Team Usage Issues Risks Documents

Workspace of City Center Office Building Addition

Critical Activities behind Schedule

Activity	Days Late	Total Float
Rough-In Plumbing/Piping	131d	0d
Install Wiring and Cable	73d	0d
Structure Complete	71d	0d
Concrete Second Floor	71d	0d
Insulation and Built-up Roofing	72d	0d
Building Enclosed	72d	0d
Brick Exterior Walls	71d	0d
Erect Structural Frame	54d	0d
Concrete First Floor	57d	0d
Floor Decking	56d	0d

Page: 1 of 2 [Next >>]

RFI Turnaround

RFI Turnaround Time (1)

6

4

2

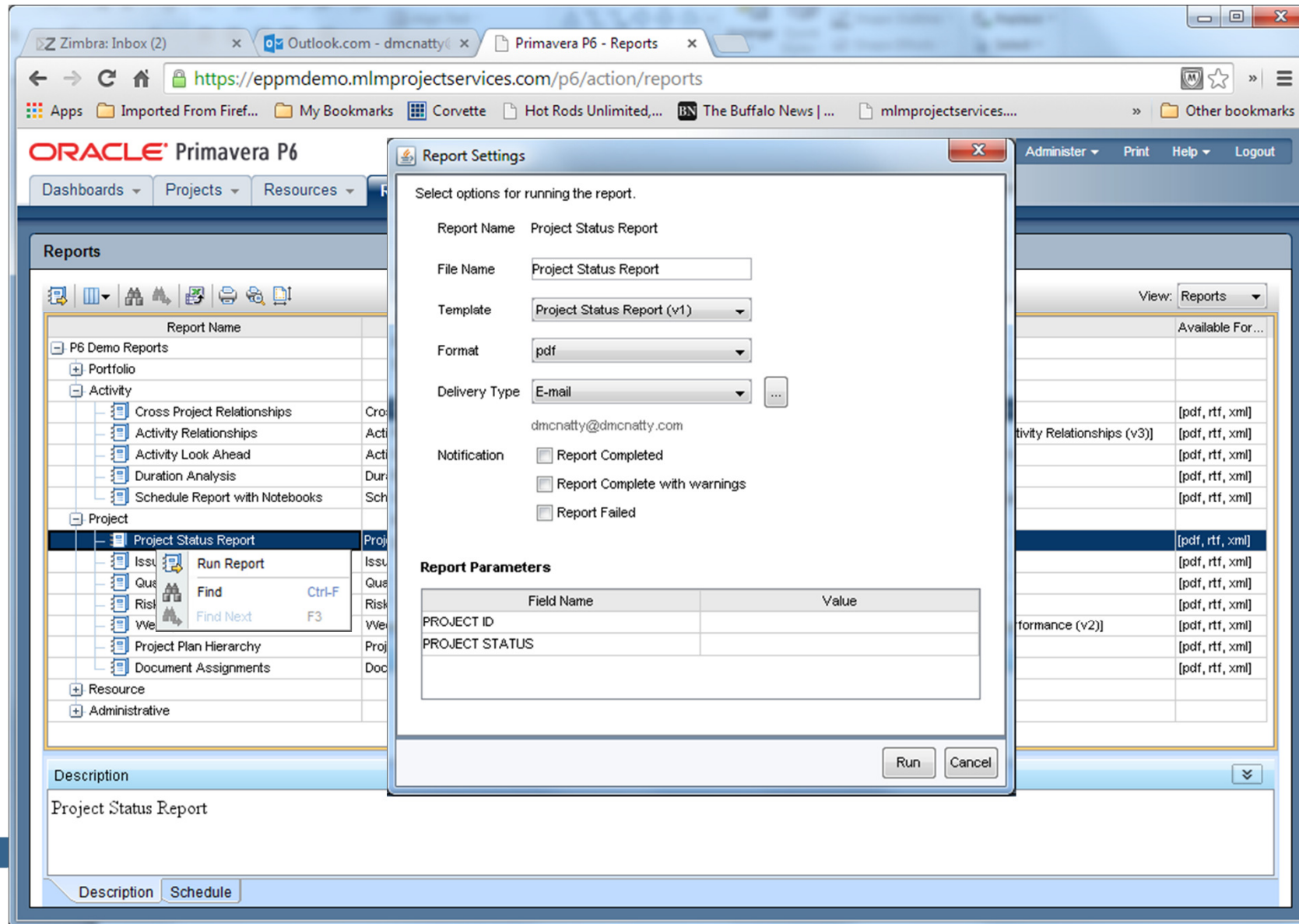
0

RFI

Submittals

Request for Information (RFI)

- Reports module requires installation of BI Publisher.
- Run Report opens a dialog to select options for the report.



The screenshot shows the Oracle Primavera P6 web interface. The browser address bar displays <https://epmdemo.mlmpojectservices.com/p6/action/reports>. The main navigation bar includes 'Dashboards', 'Projects', and 'Resources'. The 'Reports' section is active, showing a tree view of report categories: P6 Demo Reports, Portfolio, Activity, Project, Resource, and Administrative. The 'Project' category is expanded, and 'Project Status Report' is selected. A 'Run Report' button is visible next to it. The 'Report Settings' dialog is open, allowing configuration for the 'Project Status Report'. The dialog includes fields for Report Name, File Name, Template, Format, and Delivery Type. The 'Notification' section has checkboxes for 'Report Completed', 'Report Complete with warnings', and 'Report Failed'. The 'Report Parameters' section contains a table for inputting specific report data.

Field Name	Value
PROJECT ID	
PROJECT STATUS	





- The report runs for each project selected.
- BI Reports are modified or created using the BI Report Developer software.

**ORACLE**

As of: **05/01/2011**

Project Status Report for: **City Center Office Building Addition (EC00515)**

SPONSOR <b>Forsyth</b>	BUSINESS SEGMENT <b>1004050</b>	PROJECT MANAGER <b>Thomas</b>	CURRENT PHASE <b>Design</b>	LOCATION <b>Europe</b>	
DESCRIPTION <b>Project is for the addition to the office building in center city. This includes design and construct work.</b>					
START <b>11/01/2010</b>	FINISH <b>07/03/2013</b>	TARGET FINISH <b>06/19/2013</b>	% COMPLETE <b>14.88%</b>	ACTIVITIES COMPLETED <b>13 of 71</b>	PROJECT SCORE <b>80</b>
APPROVED BUDGET <b>\$734,195</b>	COST TO DATE <b>\$124,028</b>	AT COMPLETION <b>\$745,786</b>	COST VARIANCE <b>-\$11,591</b>	LABOR TO DATE <b>2038 h</b>	LABOR VARIANCE <b>-201.4 h</b>

PRIORITY ISSUES

0 priority of 0 issues

OPEN RISKS

0 open of 0 risks

NOTEBOOKS

MILESTONES

	Date	Status
Assemble Brick Samples	2/15/2011	Completed
Assemble and Submit Flooring Samples	2/15/2011	Completed
Begin Building Construction	2/15/2011	Completed
Begin Structural Phase	11/10/2011	Not Started
Building Addition Complete	6/19/2013	Not Started

- The Activity Screen lets you default to or change the View (layout)
- This View provides a spreadsheet – like screen for updating the schedule.

Primavera P6 - Activities of Cit... x +

https://demop6r8web.mlmpjoprojectservices.com/p6/action/pm/activities?p Secure Search

**ORACLE Primavera P6** Welcome, Don McNatty Administer Print Help Logout

Dashboards Projects Resources Reports

Activities EPS Workspace Team Usage Issues Risks Documents

Activities of City Center Office Building Addition, Test Unifier Scheduler

Actions Edit View Status Updating

Activity ID	Activity Name	Start	Actual Start	Finish	Actual Finish	Remaining Duration	Physical % Complete
<b>April 2011</b>		<b>04-Apr-11 A</b>	<b>04-Apr-11</b>	<b>12-Jul-11</b>		<b>50d</b>	
EC1260	Award Contract for Brick	21-Apr-11 A	21-Apr-11	05-May-11		3d	8%
EC1230	Excavation	22-Apr-11 A	22-Apr-11	12-Jul-11		50d	50%
EC1170	Prepare and Solicit Bids for Flooring	04-Apr-11 A	04-Apr-11	02-May-11		0d	95%
<b>May 2011</b>		<b>02-May-11</b>	<b>25-May-11</b>	<b>13-Aug-12</b>		<b>328d</b>	
EC1300	Award Contract for Flooring	20-May-11		27-May-11		5d	0%
EC1280	Deliver Brick	05-May-11		06-May-11		1d	0%
EC1310	Fabricate and Deliver Flooring	27-May-11		29-Jun-12		278d	0%
EC1290	Fabricate and Deliver Heat Pump and Controls	25-May-11 A	25-May-11	13-Aug-12		328d	0%
EC1250	Review Bids for Flooring	02-May-11		20-May-11		14d	0%
<b>July 2011</b>		<b>13-Jul-11</b>		<b>31-Aug-11</b>		<b>36d</b>	
EC1340	Form/Pour Concrete Footings	29-Jul-11		31-Aug-11		24d	75%
EC1330	Install Underground Electric Conduit	13-Jul-11		28-Jul-11		12d	50%
<b>September 2011</b>		<b>01-Sep-11</b>		<b>05-Oct-11</b>		<b>24d</b>	
EC1350	Concrete Foundation Walls	01-Sep-11		05-Oct-11		24d	0%
<b>October 2011</b>		<b>06-Oct-11</b>		<b>11-Nov-11</b>		<b>27d</b>	
EC1870	Cure	24-Oct-11		11-Nov-11		15d	0%
EC1360	Form and Pour Slab	06-Oct-11		21-Oct-11		12d	0%
<b>November 2011</b>		<b>14-Nov-11</b>		<b>30-Jan-12</b>		<b>53d</b>	



# Working with EPPM

User Access can be configured to open to the Projects Screen

- EPPM Administer, User Interface Views, is used to set the Project Tab and EPS screen as the default.
- EPPM uses “Views” the same way P6 Pro uses “Layouts”.
- Views can be specific to users.
- “Views” can be emailed to other users who can click to open in EPPM.
- Can only import XML backups (have to do XER imports in P6 Pro).
- Project Activities screen is used to work with activities.
- BI Publisher produces reports.



# Demonstrate Projects Tab

EPPM “Views” work like P6 Pro Layouts

- EPPM opens to Projects/EPS/”Performance Schedule”.
- Review “Administer User Interface Views”.
- Change EPS View to “Scheduler Worksheet”.
- Change EPS View to “Project Group”.
- Open Workspace Screen for City Center (Current).



# The Project Workspace

Contains various screens and portals of specific information

- Contains portals of project information including external links.
- Review available portals and link to PCM.
- Drill through Cost Worksheet to details in PCM.
- Review Issues.
- Review Risks.
- Review Documents.
- Go to Activities Screen



# Working on the Activities Screen

The Activity Screen is the primary workspace

- Open in “Basic Gantt” View – show Network Diagram & Calendar.
- Show Tabs for detail windows, open “Status Updating” View
- Review filter, Update History, Email View to another user.
- Manually status several activities and Save changes.
- Calculate and move data date, display calculation log.
- Show Basic Gantt – Compare to BL.



# Running the Schedule Checker Report

Schedule Checker Report runs in EPPM

- Check 15 criteria within the parameters that you define.
- Indicates if cross project logic exists.
- Provides details on variances.
- Useful report in checking how your schedule compares to industry standards.



# Run Reports with BI Publisher

BI Publisher included with P6 EPPM license

- BI Publisher use is limited to through the P6 EPPM interface.
- Requires separate deployment of BI server and security.
- Links to one data base at a time.
- Requires separate user security for access.
- Modifying or creating new reports requires BI Report Developer license.
- Predefined reports are provided with EPPM.
- Right-click a report to run it.





# Team Member provides mobile access

P6 8.4 may change how we deploy Team Member!

- Team Member Web, Smartphone & Email Statusing
- 8.3 adds Work Distribution Filters, Discussions, Task Filters, Steps, Codes, UDF's, Notebook topics and View Documents.
- Team Member changes get reviewed and approved before impacting the schedule.
- 8.4 reportedly combines Team Member and Timesheets (Progress Reporter).

# P6 Team Member – Add/Delete/Update Steps

**ORACLE P6 Team Member** Welcome Eileen Schurmann Preferences Help Logout

Projects: All projects Status: Active Time frame: All Filter Go Displaying 9 tasks

	<b>IT1010 - Define Project Charter</b> Project: ACH Integration Project WBS: Planning Phase <a href="#">Documents</a> , <a href="#">Related Tasks</a>	Started: Apr-01-2011 Finish By: May-05-2011
	<b>IT9006 - Project Complete Milestone</b> Project: Project Swordfish WBS: Key Milestones <a href="#">Related Tasks</a>	Start By: Aug-17-2011 Finish By: Aug-17-2011
	<b>IT1030 - Define Business Requirements *</b> Project: ACH Integration Project WBS: Requirements Phase <a href="#">Documents</a> , <a href="#">Notebooks</a> , <a href="#">Related Tasks</a>	Start By: Jul-07-2011 Finish By: Aug-30-2011
	<b>IT1000 - Explore Opportunity</b> Project: Zenith Continuity Program WBS: Initiation Phase <a href="#">Documents</a> , <a href="#">Related Tasks</a>	Start By: Apr-30-2012 Finish By: May-08-2012
	<b>IT1010 - Define Project Charter</b> Project: Zenith Continuity Program WBS: Planning Phase <a href="#">Documents</a> , <a href="#">Related Tasks</a>	Start By: May-09-2012 Finish By: Jun-05-2012
	<b>IT1030 - Define Business Requirements</b> Project: Zenith Continuity Program WBS: Requirements Phase <a href="#">Documents</a> , <a href="#">Notebooks</a> , <a href="#">Related Tasks</a>	Started: Aug-01-2012 Finish By: Sep-24-2012

**Explore Opportunity**

Start By: Apr-30-2012

Finish By: May-08-2012

Time Spent: 0d 0hr

Time Left: 1d 3hr

**Steps**

Review scope and objectives as state...	100	% Complete	✓
Conduct business requirements meet...	0	% Complete	✓
Create outline of requirements	0	% Complete	✓
Clearly define the business requireme...	0	% Complete	✓
Business Requirements Document s...	0	% Complete	✓
x <input type="text"/>	0	% Complete	✓

Please enter step name.

Help Add Cancel Save



# Summary

## Using P6 EPPM to manage schedules

- In a well deployed environment, speed has not been an issue.
- Easy to share work with others – email a View works well to encourage others to status their own activities on-line.
- Team Member allows you to gather status updates and then review/approve before applying changes to the schedule.
- Good use of Views/filters and User Access to Views can make it easier to share information with others.
- The Project Workspace provides easy access to related information.



## Questions

All questions are gathered into a master sheet, answered and distributed to all registrants as well as posted on our website.

Answers are based on our own experiences using the various software products related to your questions.

## Thank you for participating

Contact – [contact@drmcnatty.com](mailto:contact@drmcnatty.com)



Proud of our Past.  
Focused on our Future.

# UPCOMING EVENTS

We participate in and support many local and national events.



[www.oracle.com/openworld](http://www.oracle.com/openworld)



<http://cmaanet.org/cmaa-national-conference-trade-show-2014>



<https://sites.google.com/site/aacesocal/symposium>

*Hope to see you there!*



## UPCOMING EVENTS – January 2015



- Will include AACE Education event, user meeting for Synchro
- First USA Conference for Planning Planet



## DRMcNatty monthly e-newsletter



Get updates on the latest news,  
events and upcoming webinars.

Sign up for our newsletter on our website [www.drmcnatty.com](http://www.drmcnatty.com)

*Click on "News"*