



PROJECT MANAGEMENT SOLUTIONS THAT *SIMPLY WORK* SINCE 1989.

Oracle Primavera P6 User Forum

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December 13, 2017

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Thank you for joining today's 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 “Vendor 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.
- You need to make your own judgments as to the application of our shared ideas in your own, unique environment.

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- Integration, Analytics, Dashboards, Risk and Role-based User Access Tools
- Program and Project System Support Services and Partnering
- Mentored and Supported SB/DVBE Project Staffing Resources

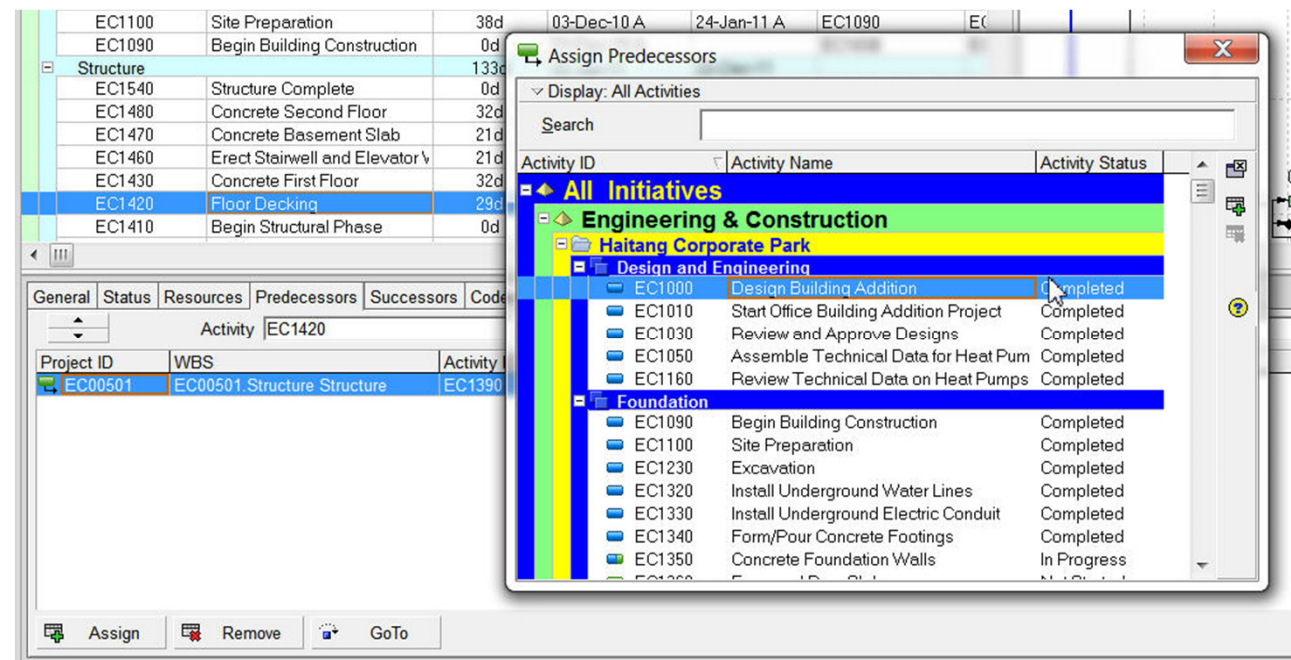
Agenda

P6 User Forum

- The purpose of the P6 User Forum is to engage the P6 community to improve efficiency and use of P6.
- Attendees are welcome to continue to submit their questions that may be used in future DRMcNatty webinars.
- Comments and suggestions are welcome.

Question #1

I have suddenly lost the ability to add a predecessor to an activity, by trying to use the "assign" button on the predecessor window, and also by trying to use the predecessor icon. When I try either of those steps, nothing happens. I can only add a predecessor using the link icon. This problem does not apply to adding successors; there is no issue with that. Has anyone experienced this, and know how to resolve?



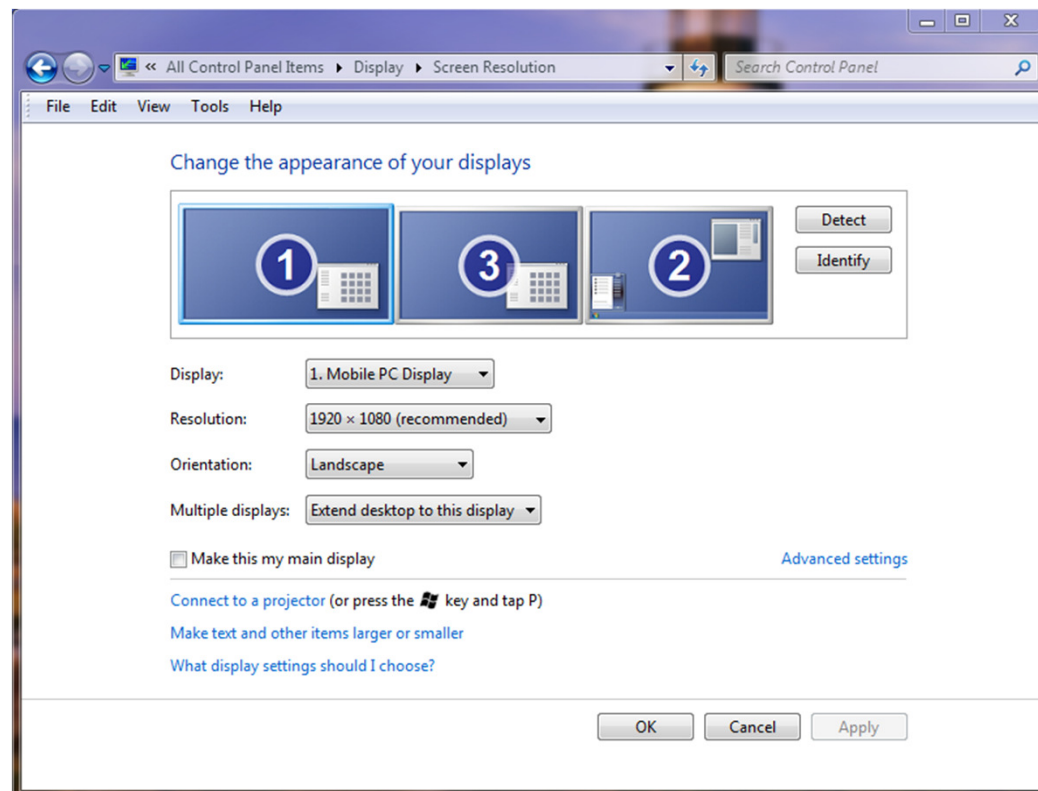
Question #1

Answer:

Possibly have connected with two monitors and the assign predecessor window the window popping up on a different monitor.

1. Check and change your display settings -> Multiple displays -> Show desktop only on 1

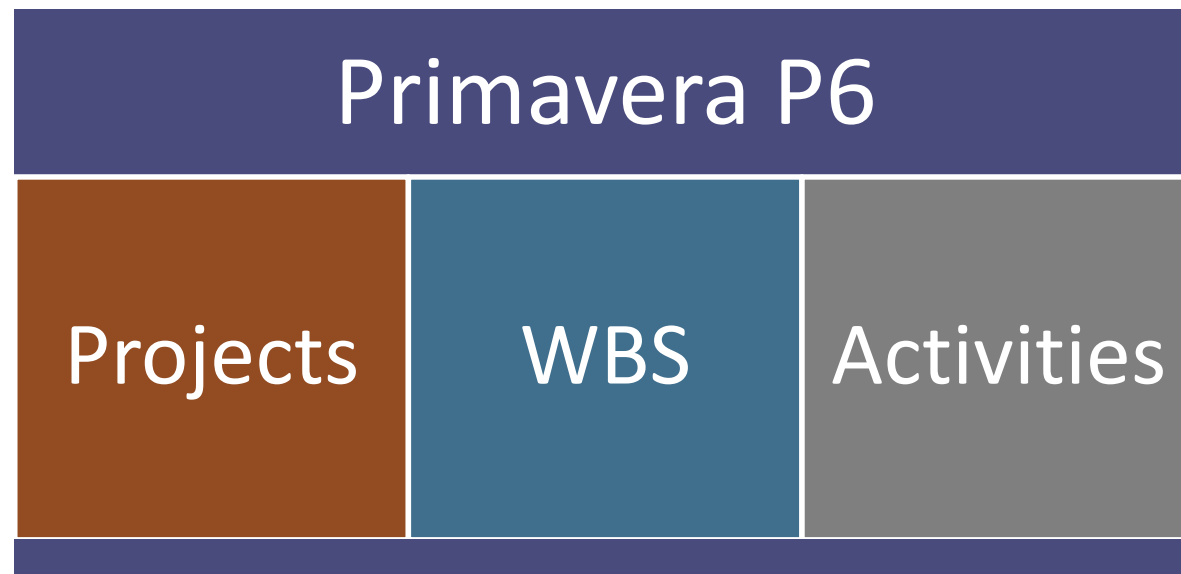
2. Restart P6 and test the Assign button display.



Question #2

I have a question. Is it possible to create dashboards where data for different levels are displayed on the same level?

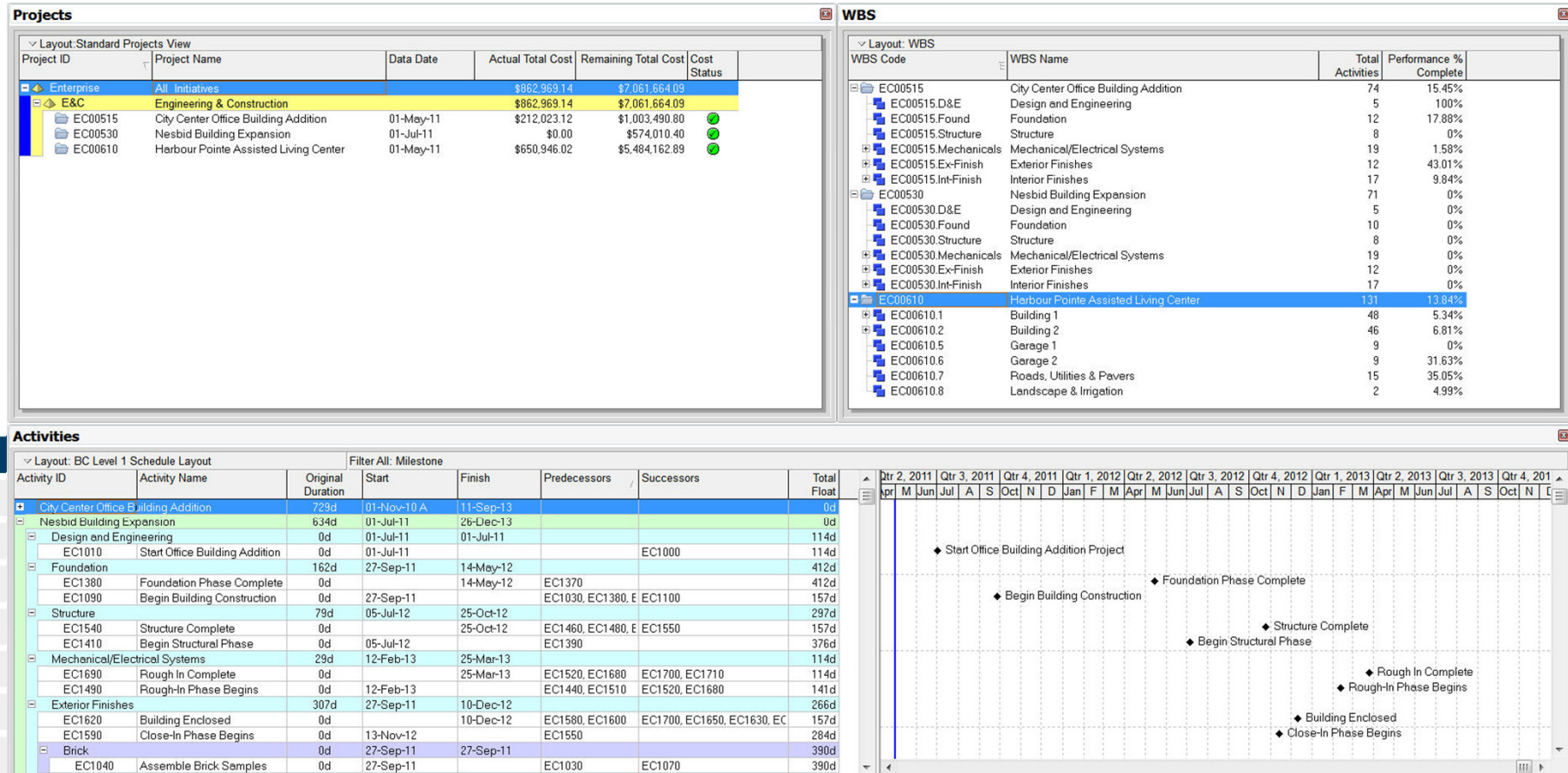
e.g., Activity level information side-by-side with WBS level or even Project level data on the same row in the same table in other words multiple Activity level data fields shown on the same row along with WBS and Project level data fields?



Question #2

I have a question. Is it possible to create dashboards where data for different levels are displayed on the same level?

- Tile Views in P6 Professional



Question #2

Implement a BI Reporting Solution for data alignment

ProjectStatusViewCollaborateStatusjbbk ★ Notices 1 Logout

Project Level Table

Project Level TableSelect a column

Drag column names to change column order

ID XName XTotal Costs XLabor Costs XContingency Remaining XProject Manager XProject Type X

SaveDelete

Excel

ID	Name	Total Costs	Labor Costs	Contingency Remaining	Project Manager	Project Type
315834	Sky Cities Bridge	\$34,936.00	\$27,136.00	\$30,000.00	Josh Jones	Engineering
301188	Bode Gardens	\$103,757.00	\$101,368.00	\$100,000.00	Josh Jones	Gas
310111	Sonoma Water Relocation	\$115,541.00	\$113,152.00	\$150,000.00	Josh Jones	Civil
336633	Brekke River	\$272,789.00	\$270,400.00	\$100,000.00	Josh Jones	Gas
312310	Line 134 Replacement	\$79,203.00	\$62,536.00	\$85,000.00	Tom Rogers	Gas

Project Deliverable Table

Project Deliverable TableSelect a column

Drag column names to change column order

ID XName XPlanning Finish XD&E Finish XConstruction Finish XClose Out Finish X

SaveDelete

Excel

ID	Name	Planning Finish	D&E Finish	Construction Finish	Close Out Finish
315834	Sky Cities Bridge	06/23/2017	08/09/2017	01/05/2018	02/19/2018
301188	Bode Gardens	03/04/2015	12/01/2017	04/03/2018	05/16/2018
310111	Sonoma Water Relocation	05/01/2015	12/01/2017	06/19/2018	08/01/2018
336633	Brekke River	10/23/2015	02/13/2018	08/22/2018	10/04/2018
312310	Line 134 Replacement	04/26/2017	07/07/2017	12/05/2017	01/17/2018
315891	Shady Canyon	08/02/2017	10/02/2017	02/28/2018	04/12/2018

Custom Table 3

Custom Table 3Select a column

Drag column names to change column order


ID XName X# Risks XRisks Average Score X# Issues XIssues Spent XTotal Contingency XContingency Unallocated X


SaveDelete

Excel

ID	Name	# Risks	Risks Average Score	# Issues	Issues Spent	Total Contingency	Contingency Unallocated
315806	Three Gorms Damn Project	8	19.00	5	\$400,000.00	\$950,000.00	\$950,000.00
315812	The Millennium Dome	5	24.80	10	\$199,000.00	\$400,000.00	\$400,000.00
311110	Darien Lake Bridge Repair	3	12.33	2	\$168,000.00	\$200,000.00	\$200,000.00
313290	Woodbridge & Line 134	11	15.60	9	\$98,525.00	\$250,000.00	\$250,000.00

ProjectStatus Ad hoc Table Creation

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Question #3

Is there a way to automatically trigger one or more Global Changes as part of a scheduled service (i.e., in the EPPM Project Scheduled Services page)?

Primavera P6 - Global Scheduled Services - Mozilla Firefox

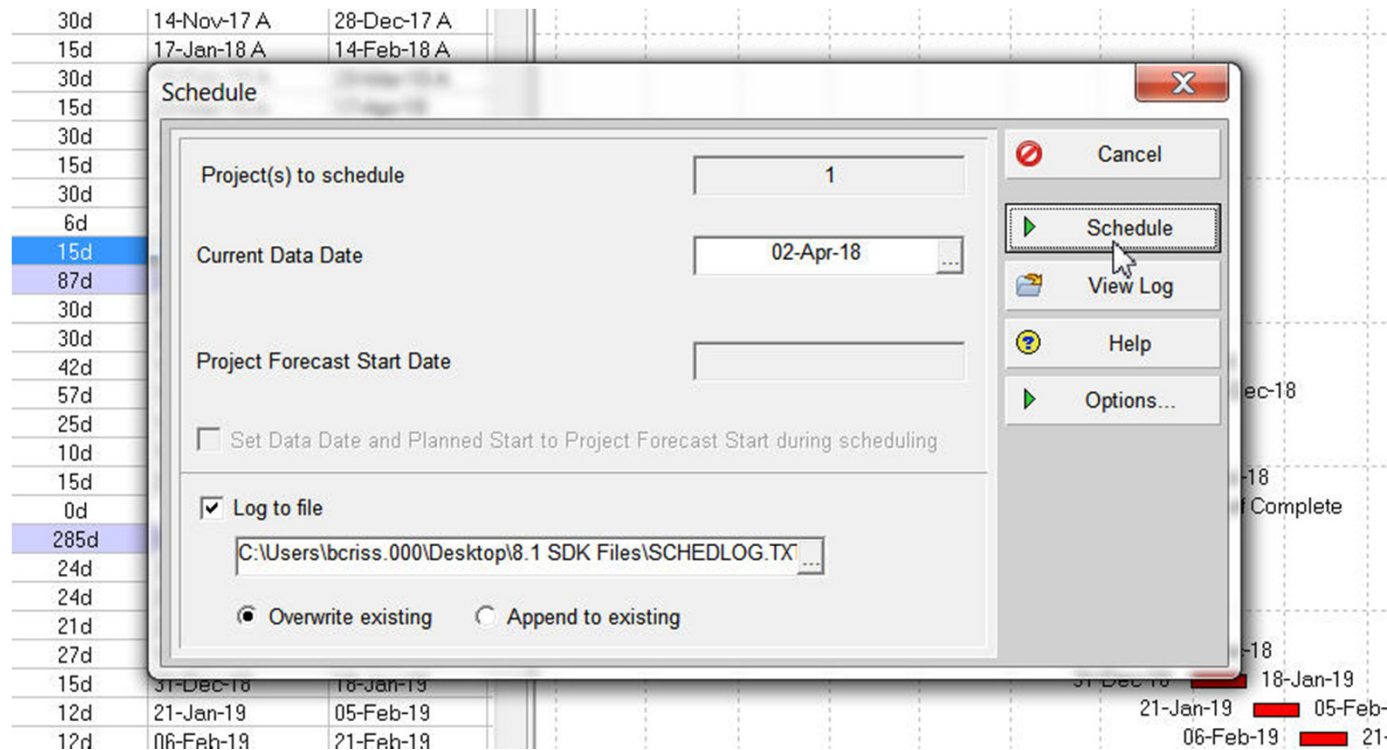
The screenshot displays the 'Global Scheduled Services' page in a web browser. The page title is 'Global Scheduled Services'. Below the title is a table with the following columns: Name, Enabled, Status, Last Run, and Next Run. The table contains five rows of services, all of which are enabled and completed.

Name	Enabled	Status	Last Run	Next Run
Publish Security	<input checked="" type="checkbox"/>	Completed	11-Dec-17 00:00 PST	12-Dec-17 00:00 PST
Publish Enterprise Data	<input checked="" type="checkbox"/>	Completed	11-Dec-17 00:00 PST	12-Dec-17 00:00 PST
Publish Enterprise Summaries	<input checked="" type="checkbox"/>	Completed	11-Dec-17 00:00 PST	12-Dec-17 00:00 PST
Publish Resource Management	<input checked="" type="checkbox"/>	Completed	11-Dec-17 00:00 PST	12-Dec-17 00:00 PST
Publish Audit Data	<input checked="" type="checkbox"/>	Completed	11-Dec-17 00:00 PST	12-Dec-17 00:00 PST

Below the table is a section titled 'Publish Security Settings'. It contains a 'Run Service' dropdown menu set to 'Daily' and a 'Start Time' field set to '00:00 PST'. At the bottom of the page are 'Help' and 'Close' buttons.

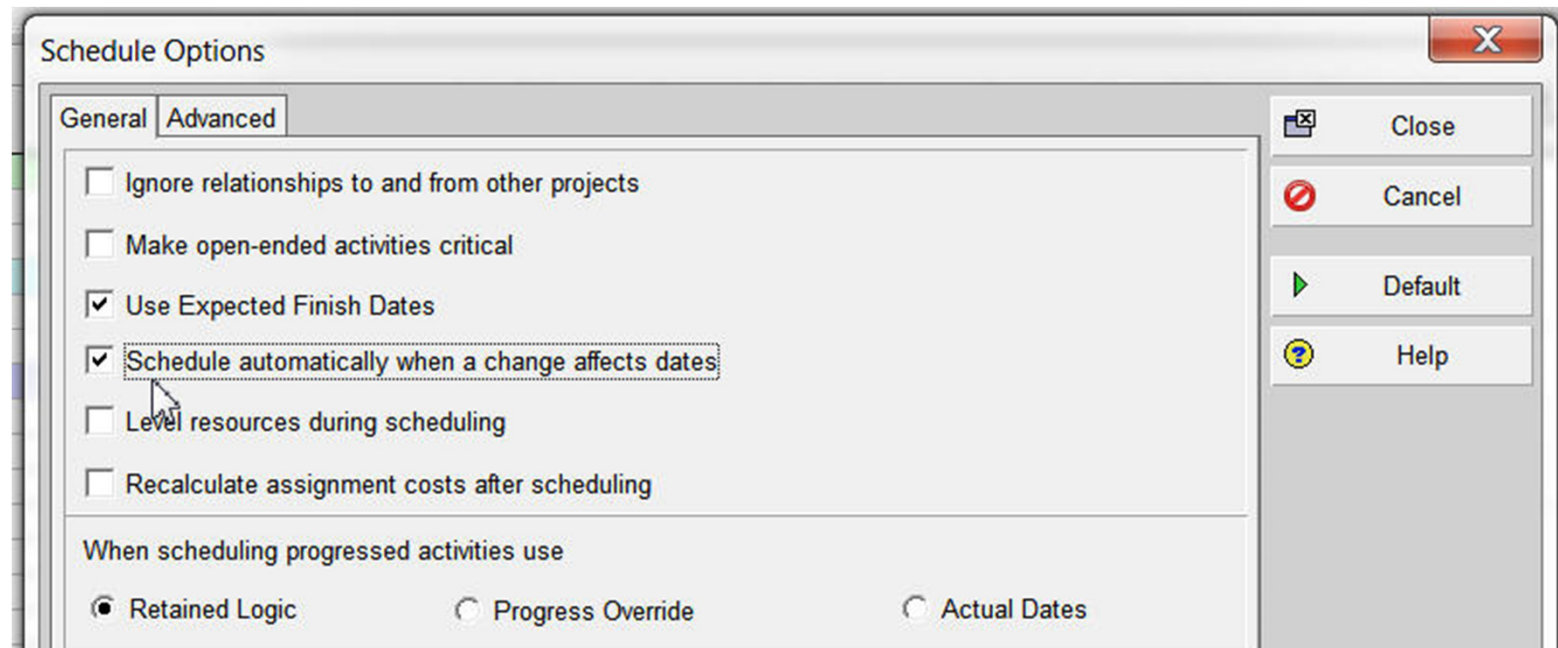
Question #4

When making changes to relationships or durations in P6, is it possible to see the changes reflected automatically? Do I always need to hit the F9 key to see the changes?



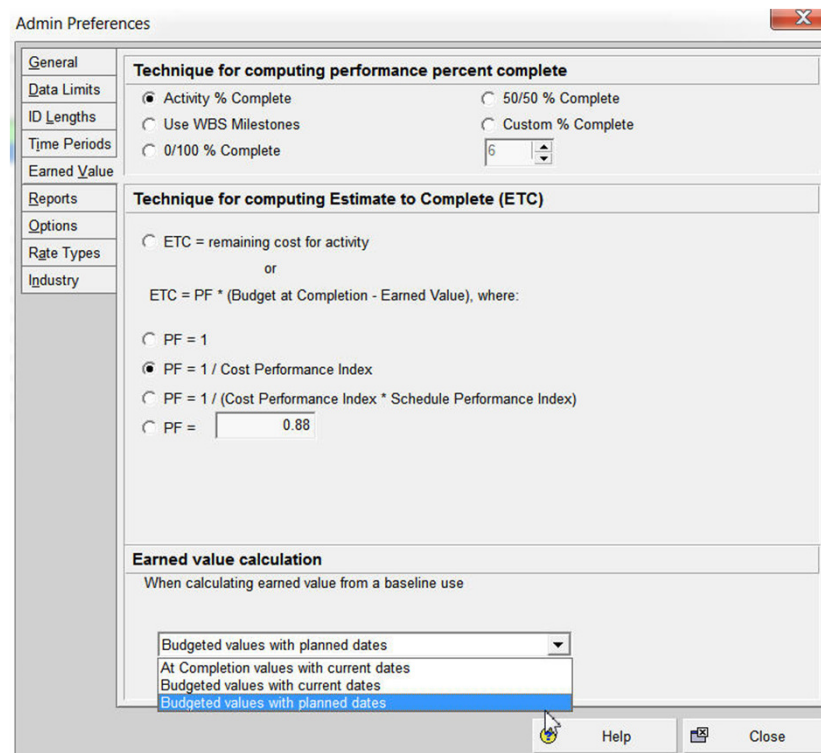
Question #4

1. Display the “Schedule” window (F9)
2. Choose “Options”
3. Check the box for “Schedule automatically when change affects dates



Question #5

I run P6 on my stand-alone PC. When using layouts which compare current task status to a baseline (typically last month's update set as the Project Baseline), dates for in-process activities do not come through correctly. Past and future activities are ok, but not ongoing activities. This situation has survived a number of P6 updates and several different computer installations. Thoughts? Solution?



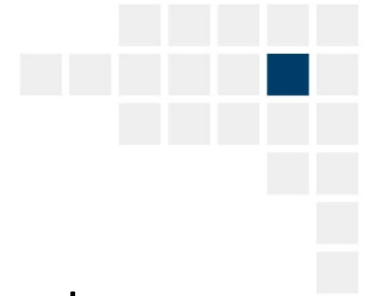
Question #5

Answer: Check the following two items in the project schedule and choose edit either of the following:

1. Settings in the Admin Preferences (on the Earned Value Tab) to determine if Current Dates or Planned Dates are being used.
2. Check the Planned Start and Finish for activities in the current schedule prior to establishing a baseline.

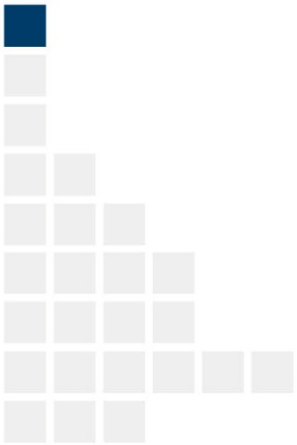
Activity ID	Activity Name	Original Duration	Start	Finish	Total Float	Planned Start	Planned Finish
Webinar Sample Project		70d	13-Dec-17	20-Feb-18	0d	13-Dec-17	20-Feb-18
A1000	New Activity	5d	13-Dec-17	17-Dec-17	0d	13-Dec-17	17-Dec-17
A1010	New Activity	5d	18-Dec-17	22-Dec-17	0d	18-Dec-17	22-Dec-17
A1020	New Activity	5d	23-Dec-17	27-Dec-17	0d	23-Dec-17	27-Dec-17
A1030	New Activity	5d	28-Dec-17	01-Jan-18	0d	28-Dec-17	01-Jan-18
A1040	New Activity	5d	02-Jan-18	06-Jan-18	0d	02-Jan-18	06-Jan-18
A1050	New Activity	5d	07-Jan-18	11-Jan-18	0d	07-Jan-18	11-Jan-18
A1060	New Activity	5d	12-Jan-18	16-Jan-18	0d	12-Jan-18	16-Jan-18
A1070	New Activity	5d	17-Jan-18	21-Jan-18	0d	17-Jan-18	21-Jan-18
A1080	New Activity	5d	22-Jan-18	26-Jan-18	0d	22-Jan-18	26-Jan-18
A1090	New Activity	5d	27-Jan-18	31-Jan-18	0d	27-Jan-18	31-Jan-18
A1100	New Activity	5d	01-Feb-18	05-Feb-18	0d	01-Feb-18	05-Feb-18
A1110	New Activity	5d	06-Feb-18	10-Feb-18	0d	06-Feb-18	10-Feb-18
A1120	New Activity	5d	11-Feb-18	15-Feb-18	0d	11-Feb-18	15-Feb-18
A1130	New Activity	5d	16-Feb-18	20-Feb-18	0d	16-Feb-18	20-Feb-18

Team Member Question?






Q: Can a user in EPPM that has “View Only” rights in the web update tasks in Team Member?

A: Yes they can update tasks in Team Member. You will need to assign the update to be the “Owner” for the Task at the Activity level, in the activities view.



User Access

- View Right only


Login Name *	Personal Name *	Global Security Profile
 dclark	Duane Clark	<Admin Superuser>
  dduck	Donald Duck	View Right only

↓ Download

Module Access

Project Access

Assign OBS

Responsible Manager	Project Security Profile
 E&C	Read Only rights
Enterprise	Read Only rights

Activity Level

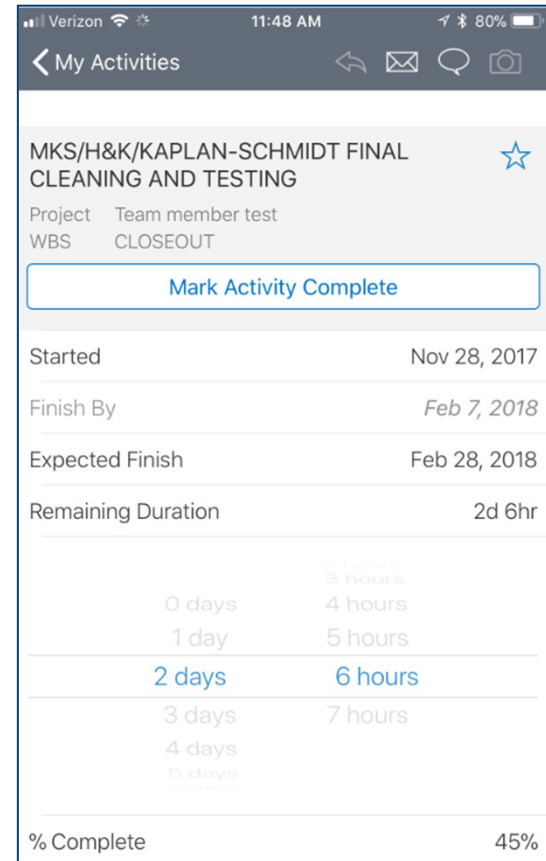
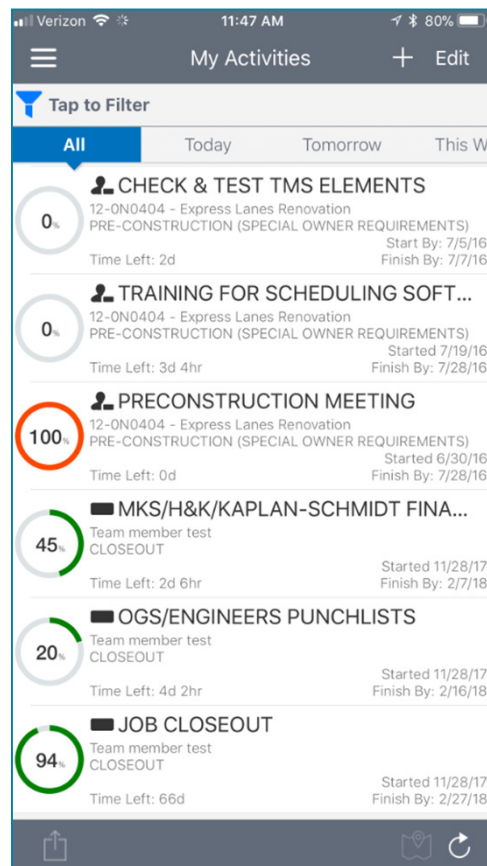
- Assign the user to tasks they need to update by adding the Owner column and assigning the user



ID/Code *	Name *	Start	Finish	Duration	Complete	Owner
○ TM T...	Team member test	12-Mar-15 08:...				
○ 1	CLOSEOUT					
■ TM60	JOB CLOSEOUT	28-Nov-17 12:...	27-Feb-18 05:...	66.0d	0%	dduck
■ TM61	OGS/ENGINEERS PUNCHLISTS	28-Nov-17 12:...	16-Feb-18 10:...	4.3d	15%	dduck
■ tm62	MKS/H&K/KAPLAN-SCHMIDT FINAL CLEANING AND TESTING	28-Nov-17 12:...	07-Feb-18 03:...	2.8d	45%	dduck

Update Tasks in Team Member

Activities assigned as Owner available for update



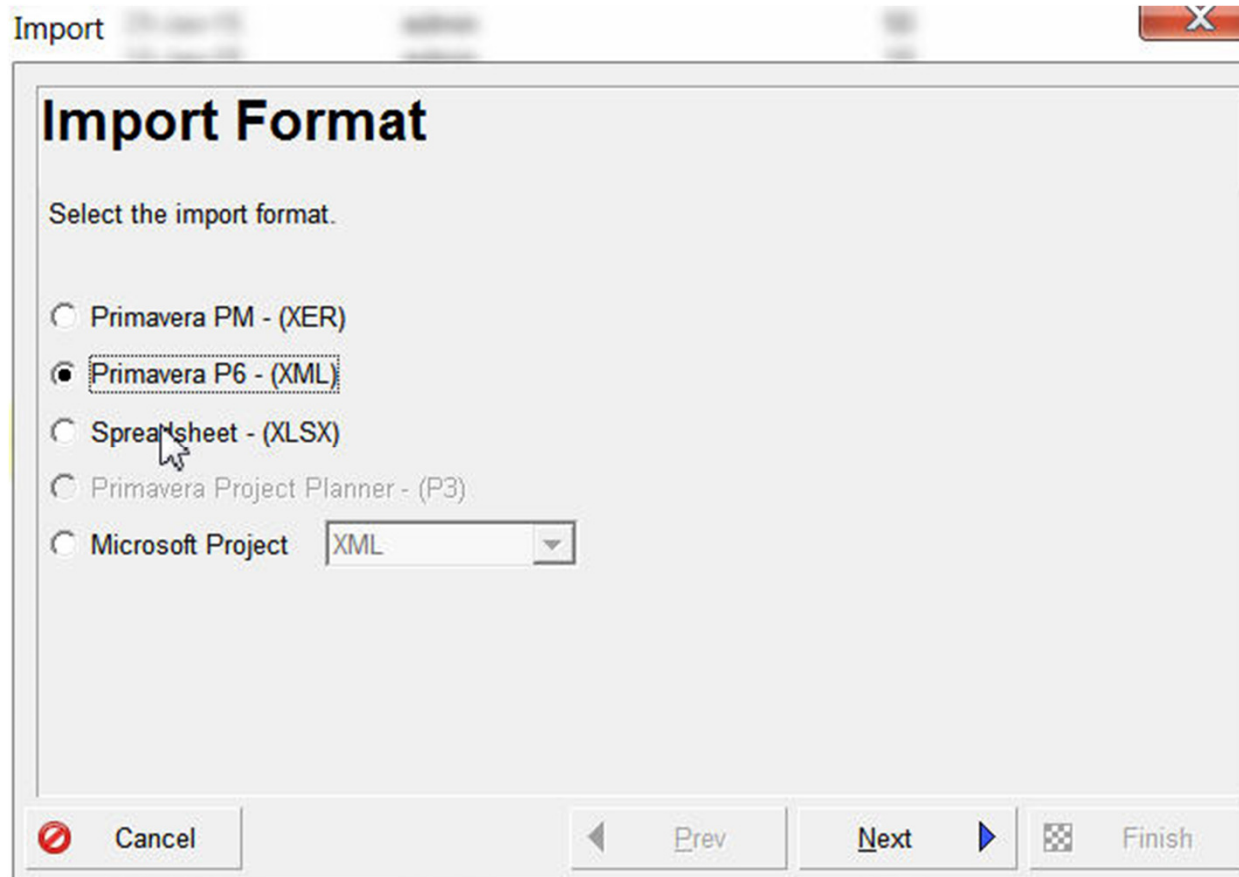
Bonus Play

1. XML File Import
2. Display multiple P6 projects by Activity ID / Name
3. Nested Filters



P6 XML

- If not already using, it is something to become familiar with.



P6 XML

Calendar Options

Import Options

Template Name: Default Import Template

Basic | **Advanced**

Codes

UDFs

Calendars

Resources

Basic Action

Global/Resource Calendars: Keep Existing

Advanced Actions

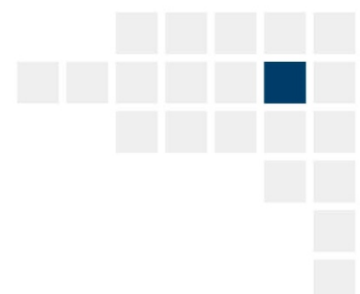
Name	Type	Details	Action	New Name
Corporate - Standard Full Time	Global		Keep	
Trades - 5 Day Workweek	Global		Keep	
Carpenters Shared 5x8	Resource		Move to Project	
IT - Information Technology Group	Resource		Do Not Import	
			Keep	

Calendar Details

IT - Information Technology Group

Day of Week	Time periods
Sunday	--
Monday	09:00 AM-04:30 PM
Tuesday	08:00 AM-04:00 PM
Wednesday	08:00 AM-04:00 PM
Thursday	08:00 AM-04:00 PM
Friday	08:00 AM-04:00 PM
Saturday	--

- Review Calendar Settings Prior to Import
- Options to give Calendar "New Name"
- Review to hourly work days for compliance.



P6 XML

- Options for Resources and Codes during import

Import Options

Template Name: Default Import Template

Basic | Advanced

Codes

UDFs

Calendars

Resources

Basic Action

Resources: Keep Existing

Advanced Actions

Import Resources Under:

ID	Name	Type	New ID
IT	Information Technology Group	Labor	
E&C Resources	E&C Resources	Labor	
Subcontractors	Subcontractor	Labor	
Trades	Trades	Labor	
Management	Management	Labor	
Engineering	Engineering Department	Labor	
Elec	Electrician	Labor	
Floor	Floor and Carpet Layer	Labor	
Plumb	Plumber	Labor	
FCarp	Finish Carpenter	Labor	
RCarp	Rough Carpenter	Labor	
GenLabor	Laborer-Construction	Labor	
ImWrk	Ironworker	Labor	
Exc	Excavator	Labor	
YoungJ	Jeff Young	Labor	
PMs	Project Managers	Labor	
HVAC	HVAC	Labor	
Millwork Carpentry	Millwork Subcontractor	Labor	
Thermal Protection	Thermal Protection Subcontractor	Labor	
Finishes	Finishes & Fit-out Subcontractor	Labor	
Concrete-Sub	Concrete Foundation Subcontractor	Labor	
Specialty Metals	Specialty Metal Fabricator Subcontractor	Labor	

Help Save Save As... Cancel

Import Options

Template Name: Default Import Template

Basic | Advanced

Codes

UDFs

Calendars

Resources

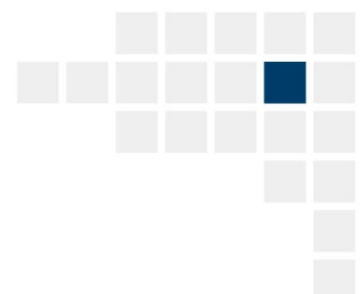
Basic Action

Activity Codes/Values: Keep Existing

Advanced Actions

Select subject area: Activity

Name	Scope	Action	New Name
Key Milestones	Global	Keep	
Department	Global	Keep	
Responsibility	Global	Keep	
Phase	Global	Keep	
STRUC		Move to Project	
ROUGH		Do Not Import	
CLOSE		Keep	
FINSH			
DESGN			
PROCR			
FOUND			



Tips for Opening Multiple Files

- Use Global Change to allow group by Act ID / Name

Modify Global Change

Select Subject Area: Activities

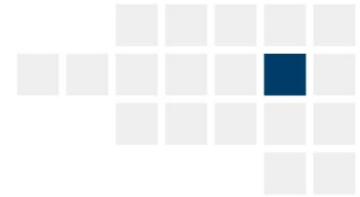
Global Change Name: AACE: Store Act ID & Name

If	Parameter	Is	Value	High Value
<input checked="" type="checkbox"/>	(All of the following)			
<input type="checkbox"/>	Where			

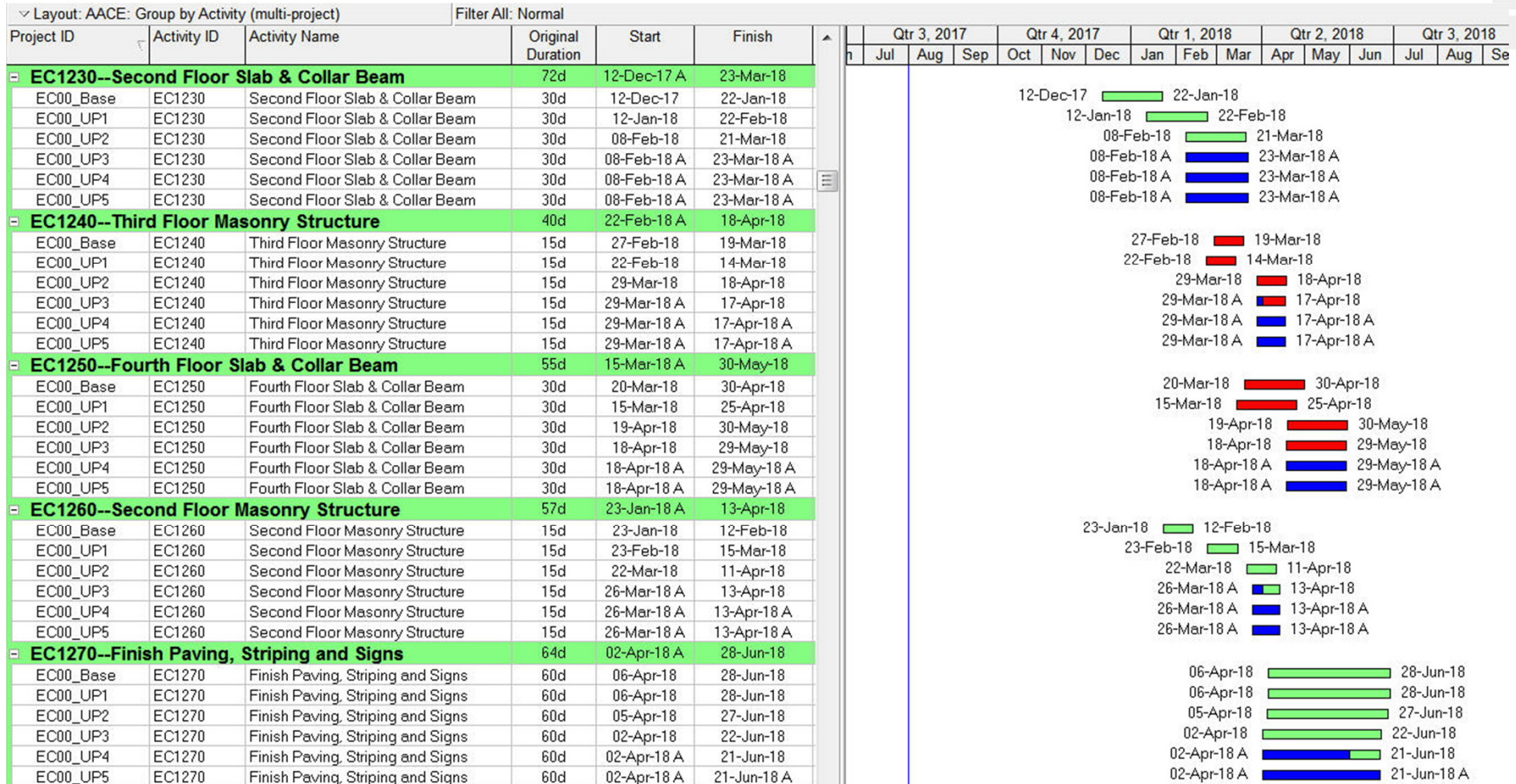
Then	Parameter	Is	Parameter/Value	Operator	Parameter/Value
<input checked="" type="checkbox"/>	Act ID_UDF	=	Activity ID	&	--
<input type="checkbox"/>	And				
<input type="checkbox"/>	Act ID_UDF	=	Act ID_UDF	&	Activity Name

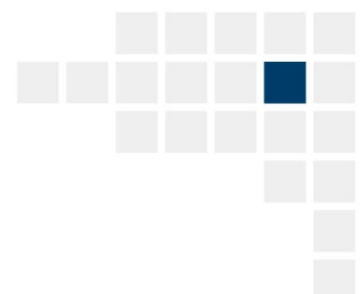
Else	Parameter	Is	Parameter/Value	Operator	Parameter/Value
------	-----------	----	-----------------	----------	-----------------

OK Cancel Change Add Delete Cut Copy Paste Help



Multiple Project View





Nested Filters

Nested Filters allow for greater flexibility in the creation of complex filters in P6.

Parameter changes between:
And "All" /Or "Any"

Display all rows	Parameter	Is	Value	High Value
<input type="checkbox"/>	(All of the following)	1		
<input type="checkbox"/>	Where ADMIN - NOTE	does not contain	x	
<input type="checkbox"/>	And (Any of the following)	2		
<input type="checkbox"/>	Where Activity Summary	equals	IFC	
<input type="checkbox"/>	Or Activity Summary	equals	RTC	
<input type="checkbox"/>	Or Activity Summary	equals	PMTENC	
<input type="checkbox"/>	Or Activity Summary	equals	PMTENV	
<input type="checkbox"/>	Or (All of the following)	3		
<input type="checkbox"/>	Where Activity Summary	equals	CN24	
<input type="checkbox"/>	And Start	is within range of	01-Jan-17	31-Mar-17

Hierarchy controlled by arrows

Upcoming Events



DRMcNatty Monthly e-newsletter



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events and upcoming webinars.

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