



ORACLE®
Primavera
P6 EPPM



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دوره آموزش

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Version 21.12 (B01599) 11.25.2021.1401 1c58cfa22d5a

ORACLE Primavera P6 EPPM



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مسعود امینی, PMP

- ✓ کارشناس ارشد مهندسی صنایع
- ✓ دارای مدرک مدیریت پروژه حرفه‌ای (PMP) از انجمن مدیریت پروژه آمریکا
- ✓ ۲۰ سال سابقه برنامه‌ریزی و کنترل پروژه در صنایع نفت و گاز، نیروگاه و انتقال آب
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☐ موسسه دکتر علوی پور (ACEMI)

☐ دوره های عالی مدیریت پروژه Primavera P6 و MSP در دانشگاه تهران و بیش از سیزده دوره
۲۲۰ ساعته

☐ دوره های عالی مدیریت پروژه در دانشگاه صنعتی امیرکبیر (سه دوره ۲۲۰ ساعته)

☐ شرکت ملی نفت - مدیریت اکتشاف

☐ شرکت PMPIRAN

☐ شرکت POGC

☐ شرکت هیربدان

☐ شرکت نفت پاسارگاد

☐ شرکت سپهر انرژی پارسیان

☐ جهاد دانشگاهی صنعتی شریف

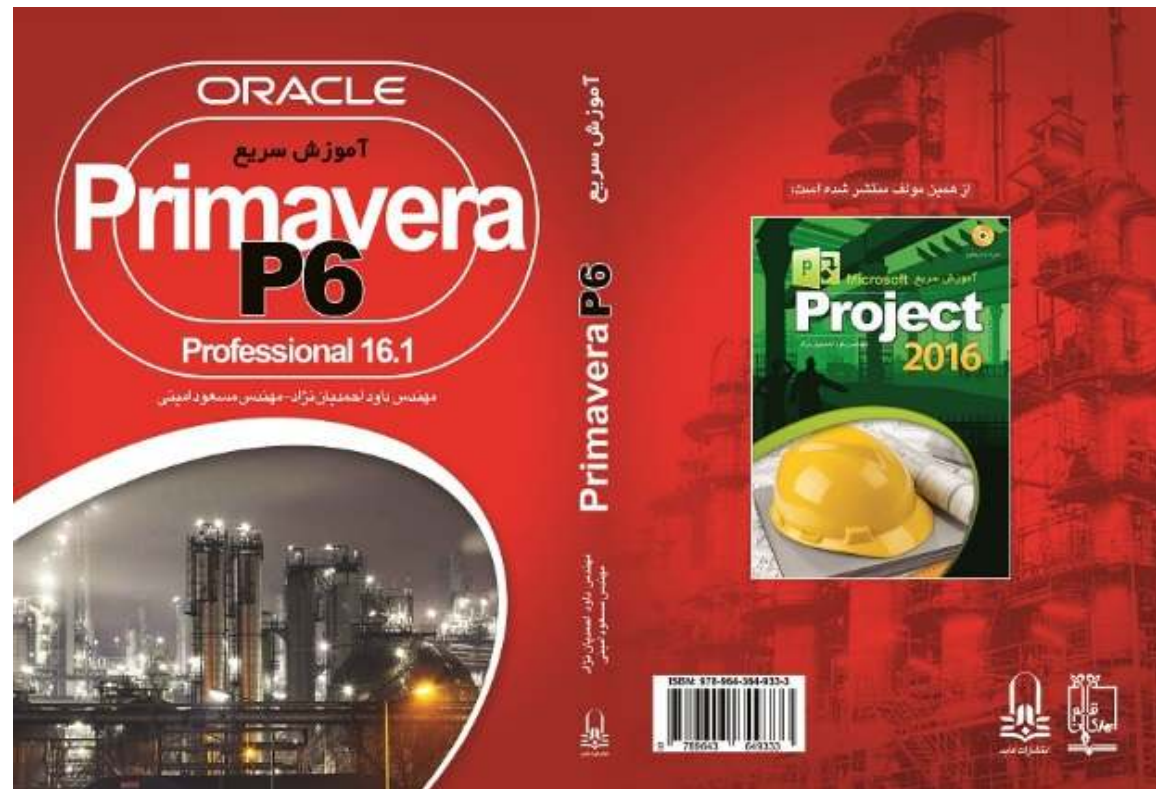
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- ☐ موسسه فلات قاره
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- ☐ مصلای تهران
- ☐ شرکت فامور مهر پرشیا
- ☐ شرکت فرودگاه مهرآباد
- ☐ بانک ملی ایران

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- ☐ شرکت تامین آب خلیج فارس

تالیف : آموزش سریع نرم افزار Primavera P6 16.1 ، انتشارات مهرگان قلم ، ۱۳۹۶



Course Agenda

- ✓ Project Management Lifecycle
- ✓ Understanding Data in P6
- ✓ Overview and Navigation
- ✓ Creating a Project
- ✓ Creating a Work Breakdown Structure
- ✓ Adding Activities
- ✓ Calendars
- ✓ Creating Relationships
- ✓ Scheduling
- ✓ Assigning Constraints
- ✓ Customizing Activity Views
- ✓ Understanding Roles and Resources
- ✓ Assigning Roles and Resources
- ✓ Optimizing the Project Plan
- ✓ Baselining the Project Plan
- ✓ Methods of Applying Progress
- ✓ Executing the Project Plan
- ✓ Analyzing the Updated Project
- ✓ Updating the Project Using Timesheets
- ✓ Reporting



Project Management Life Cycle

Objectives

After completing this lesson, you should be able to:

- Identify the five process groups in the Project Management Life Cycle.
- Describe the steps included in each process group.

Project Management Definitions

- **Project** – A temporary effort undertaken for the purpose of creating a unique product, service, or result.
- **Project Management** – The process of achieving project objectives within the constraints of schedule, cost, and resource restrictions.
- **Project Management Life Cycle** – A sequence of phases that defines the overall process from the beginning to the end of a project.

Project Management Life Cycle

Can be divided into five process groups:



Initiating Process Group

- Collect project information.
- Obtain organizational commitment.
- Develop the team.

Planning Process Group

- Establish project objectives and scope of work.
- Define the work.
- Determine the timing.
- Establish resource requirements/availability.
- Establish a cost budget.
- Evaluate, optimize, and create a baseline plan.

Executing Process Group

- Track work in progress and actual costs
- Distribute information.

Controlling Process Group

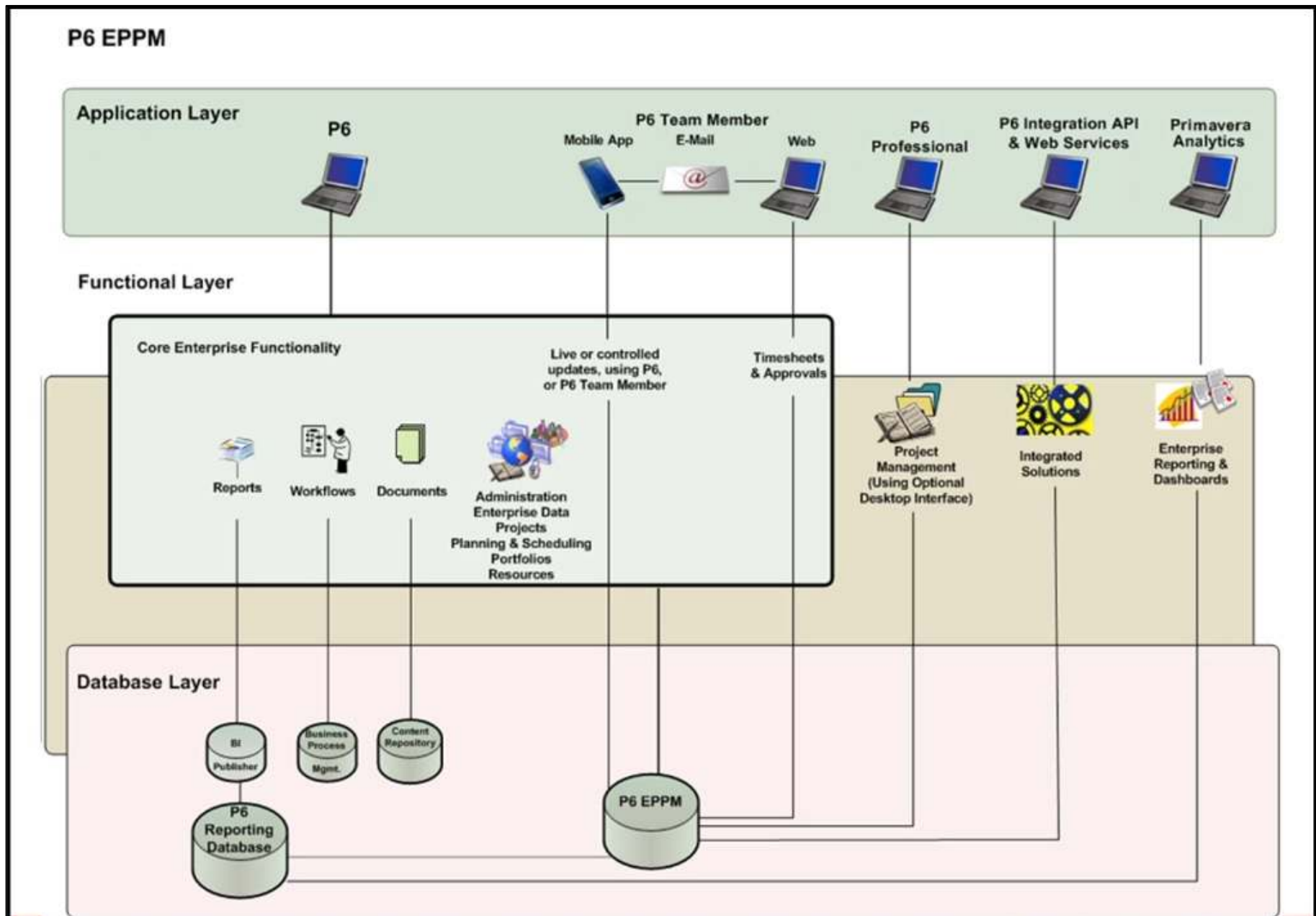
- Analyze and evaluate the project.
- Recommend necessary action.
- Modify the current project with realistic data.
- Reforecast the schedule.
- Communicate project performance to the project team.

Closing Process Group

- Deliver product to client or stakeholders.
- Document lessons learned.
- Back-up or archive project files.



Understanding Data in EPPM



۱- Application Layer (لایه کاربردی)

در این بخش کاربران نهایی به سیستم دسترسی دارند از طریق ابزارهای مختلف:

- **P6 Web Access**: رابط کاربری مبتنی بر مرورگر
- **P6 Team Member** (از طریق موبایل، ایمیل یا وب): مناسب برای تیم پروژه جهت ارسال تایم‌شیت، مشاهده وظایف و تأییدیه‌ها.
- **P6 Professional**: نسخه دسکتاپ برای برنامه‌ریزی دقیق و مدیریت پیچیده پروژه‌ها
- **Integration API & Web Services**: جهت یکپارچه‌سازی با سایر سیستم‌ها
- **Primavera Analytics**: برای گزارش‌گیری تحلیلی و داشبوردهای پیشرفته

۲- Functional Layer (لایه عملکردی)

هسته اصلی سیستم با امکانات گسترده:

• **Reports, Workflows, Documents** : مدیریت گزارش‌ها، گردش کار و مستندات.

• **Core Enterprise Functionality**

• مدیریت پروژه‌ها

• برنامه‌ریزی و زمان‌بندی

• منابع و پرتفولیوها

• مدیریت داده‌های سازمانی و ادمین سیستم

• **Timesheets & Approvals** : ثبت تایم‌شیت‌ها و تأیید آن‌ها.

• **Project Management Interface** : امکان مدیریت پروژه از طریق نسخه دسکتاپ نیز فراهم است.

• **Integrated Solutions & Reporting** : برای تعامل با راهکارهای جانبی و داشبوردهای BI

۳ – Database Layer (لایه پایگاه داده)

اطلاعات و داده‌های کل سیستم در این لایه ذخیره می‌شوند:

- **P6 EPPM Database** : پایگاه داده اصلی پروژه‌ها.
- **P6 Reporting Database** : برای گزارش‌گیری و BI
- **BI Publisher** : ابزار ساخت گزارشات.
- **Business Process Management (BPM)** : مدیریت فرآیندهای کسب‌وکار.
- **Content Repository** : نگهداری مستندات و فایل‌ها.

P6

- **Project, portfolio, and resource management:** Manage and schedule projects, administer and assign resources, analyze portfolios and future capacity, and create personal dashboards.
- **Administration and enterprise data:** Administer user accounts, preferences, views, settings, and enterprise data.
- **Document management:** Manage documents and, with optional features, review and collaborate on documents.
- **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.
- **Reports:** Generate and view reports using Web browser. Reports can be routed via e-mail, saved to a shared or local file, or printed.

P6 Team Member Applications

- P6 Team Member suite of applications is designed for individual contributors or team members to record status on their tasks using the platform or device that accommodates their line of work:
 - P6 Mobile
 - P6 Team Member
 - E-mail Statusing Service
- Project manager uses P6 to create and update the project schedule and task list. Depending on project preferences, updates in P6 Team Member applications are applied immediately or may require approval before updates are applied to the project.
- Resources record time spent working on assignments via electronic timesheets, which are reviewed and approved in P6.

Other Applications in P6 EPPM

- **P6 Professional for EPPM:** Windows-based project planning and scheduling functionality.
- **P6 Integration API:** A Java-based application programming interface enabling P6 EPPM to interface with other components and systems.
- **P6 EPPM Web Services:** Integration technology that extends P6 business objects and functionality. It enables developers to leverage standard interfaces to create integrated software solutions with a wide variety of enterprise software applications.
- **Primavera Analytics:** An optional reporting tool with advanced visual features, including pre-built dashboards with P6 data.

Enterprise Project Structure (EPS)

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.

EPS

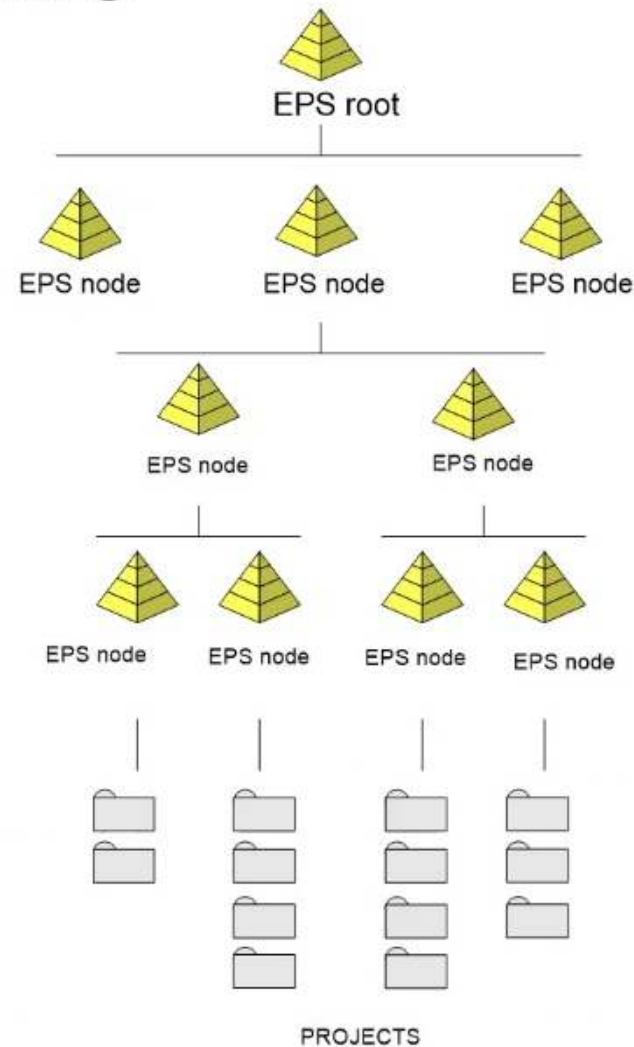
Comprised of roots, nodes, and projects.

- **Root** – There is usually only one root, which represents the top level of an organization. A root can be subdivided into many nodes.
- **Nodes** – Represent different levels within the structure. Nodes can contain an unlimited number of projects.
- **Projects** – Represent the lowest level of a hierarchal branch. All projects must be included in a node.

Placement of a project in the hierarchy determines the summary level in which it is included.

Sample EPS

- Any node in the EPS can contain projects.
- Some nodes in the EPS do not contain projects. These nodes are used to organize projects.

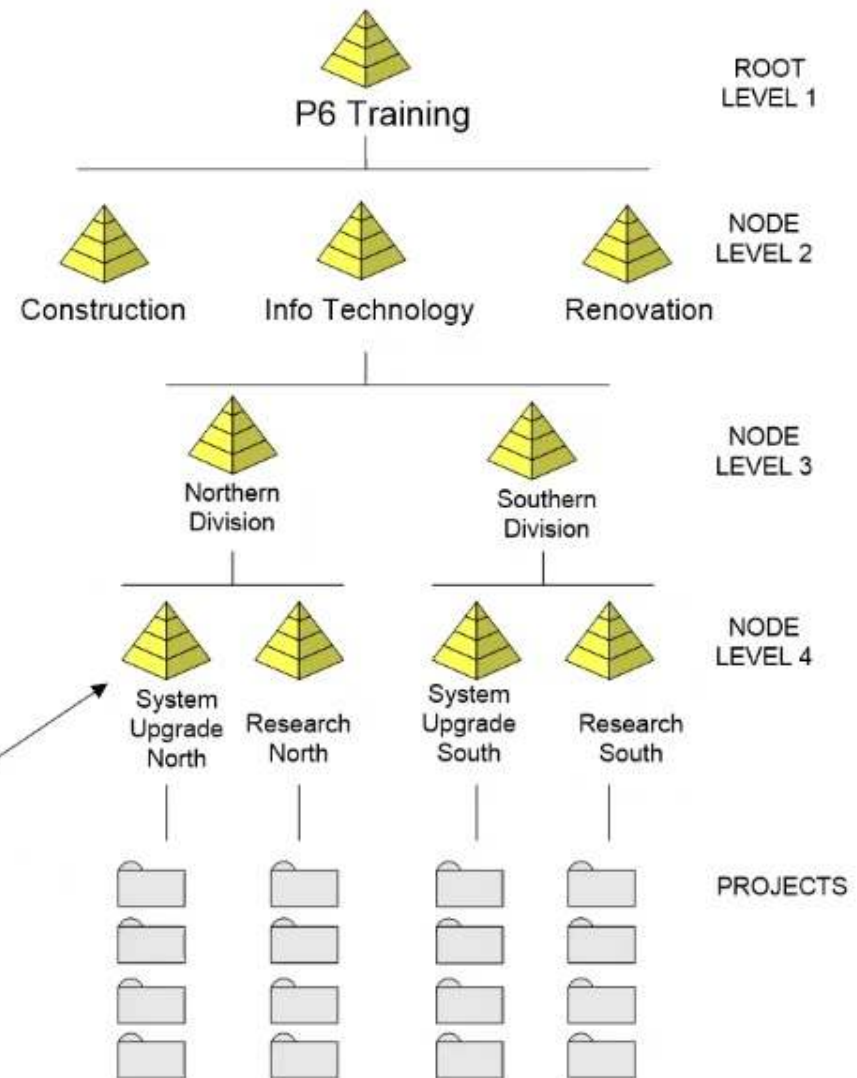


Benefits of the EPS

- View project priorities, scope, budgets, and resources across entire project structure or within specific node.
- Manage projects separately while retaining ability to roll up and summarize data across multiple projects.
 - Each node acts as a master project, rolling up all "child" nodes and projects.
 - Node can be opened to view all detailed activity information from "child" projects.
- View resource allocation across projects.

EPS and Security

- Assign security at any level of EPS to provide users with appropriate access to project information.
- For this course, you can access only the *Info Technology* and *Renovation* EPS nodes.
- Most of the projects you will open will be in the *System Upgrade North* node.



Enterprise Data and Project-Specific Data

- Enterprise data
 - Available to all projects across an organization.
 - Provides global standards and structure necessary for centralized project and resource management.
 - Defined and maintained by administrator.
- Project-specific data
 - Available only to the project in which it is defined.
 - Usually defined by project managers.
- Some data can be both enterprise and project-specific.

Enterprise Data

Examples of enterprise data are listed below:

- EPS
- OBS
- Resources
- Roles
- Resource codes
- Project codes
- User-defined fields
- Cost accounts
- Currencies
- Financial periods
- Notebook topics
- Issue codes
- Risk categories
- Step templates

Project-Specific Data

Examples of project-specific data are listed below:

- Work Breakdown Structure
- Activities
- Baselines
- Risks
- Issues
- Documents

Common Data

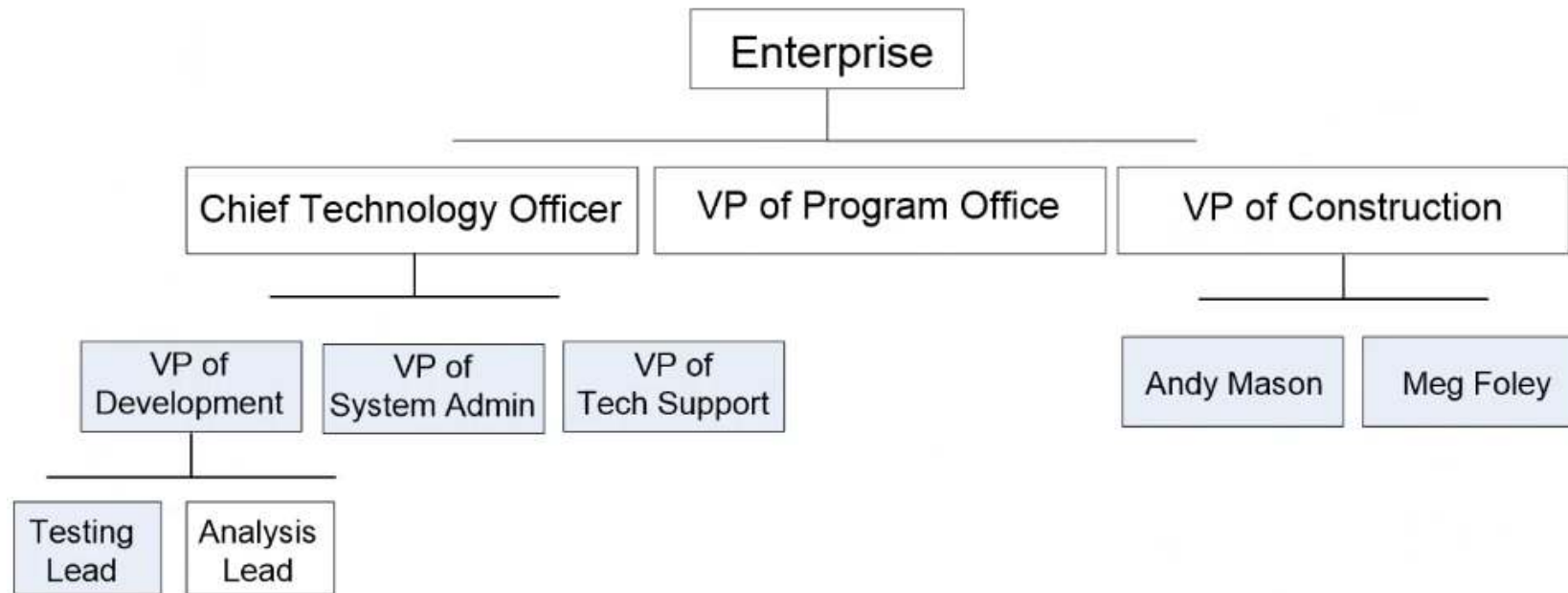
Example of common data are listed below:

- **Calendar**
- **Activity codes**

Organizational Breakdown Structure (OBS)

- Hierarchical arrangement of organization's project management structure.
- Controls user access to project data
 - All users are assigned to an OBS element to establish their access to project data.
- Designation of Responsible Manager
 - OBS element is assigned as Responsible Manager for work within an EPS node, a project, a Work Breakdown Structure, or an issue or risk within a project.
- Can be configured:
 - Detailed: Employee names
 - General: Departments and divisions
- Defined by the administrator.

Sample OBS



Overview and Navigation

Objectives

After completing this lesson, you should be able to:

- Open existing projects.
- Use context-sensitive P6 Help.
- Navigate the Projects section.
- Use the Activities page to view project data in multiple formats.

Navigating P6

Two areas of the screen do not change as you navigate through the application:

- **Title bar** — Displays the Oracle Primavera logo and provides access to the User Menu (including My Preferences), and context-sensitive P6 Help.
- **P6 navigation bar** — Provides access to sections in P6: Dashboards, Portfolios, Projects, Resources, Approvals, Administration and Reports.

P6 Sections

- **Dashboards** — Use data windows called portlets to display portfolio, project, and resource data.
- **Portfolios** — Create portfolios of projects and use customizable reporting features to track project status and make informed decisions about strategic initiatives.
- **Projects** — Create and manage projects, request or staff resources, and update project status.
- **Resources** — Review resource assignments, analyze allocation, and configure resource and role teams.

P6 Sections

- **Approvals** — Review team members status updates and timesheets.
- **Administration** — Manage application settings, enterprise data, scheduled services, and user administration.
- **Reports** — Create, manage, and deliver reports via Oracle Business Intelligence (BI).

P6 Pages

Some sections are divided into pages that provide specific information and functionality.

Availability and arrangement of pages is based on each user's User Interface View.

- **Pages in Portfolios section** — Analysis, Capacity Planning, Performance Status.
- **Pages in Projects section** — EPS, Activities, Team Usage, Issues, Documents, Risks.
- **Pages in Resources section** — Administration, Assignments, Analysis.

P6 Pages (continued)

- **Pages in Approvals section** — Status Updates, Timesheets.
- **Pages in Administration section** — Application Settings, Enterprise Data, Scheduled Services, User Administration, User Interface Views.

Open Project

1. Project window – Open Projects

ORACLE Primavera P6 EPPM

Dashboards ▾ **Portfolios** ▾ **Projects** ▾ **Resources** **Approvals** **Administration**

Cost **IT** **Personal Workspace** **Open Projects**

Personal Workspace
[Expand All](#) [Collapse All](#) [Customize](#)

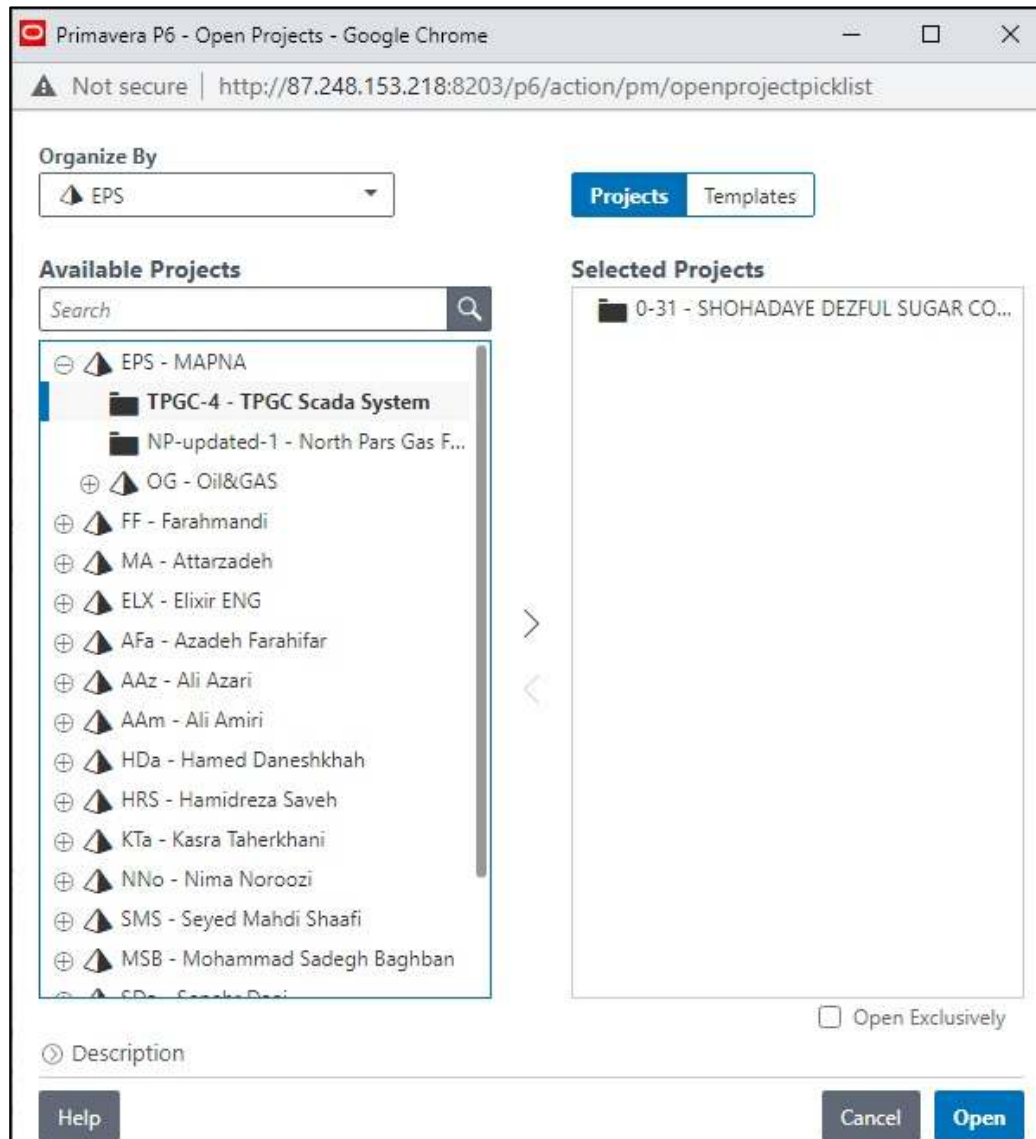
My Projects

Name	Early Works - REV 00 - 1401-03-24	Percent Complete	Last Summarized	Project Owner
Arya Sasol Accommodation Complex2	01-Jun-22 08:00 AM A 28-Sep-22 05:00 PM	0%	14-May-22 03:39 PM	
SHOHADAYE DEZFUL SUGAR COMPANY02	15-Mar-22 08:00 AM 09-Dec-22 04:00 PM	0%	01-Aug-22 10:54 AM	
TPGC Scada System	06-Jul-19 12:00 AM			صافقی

Page: 1 of 1

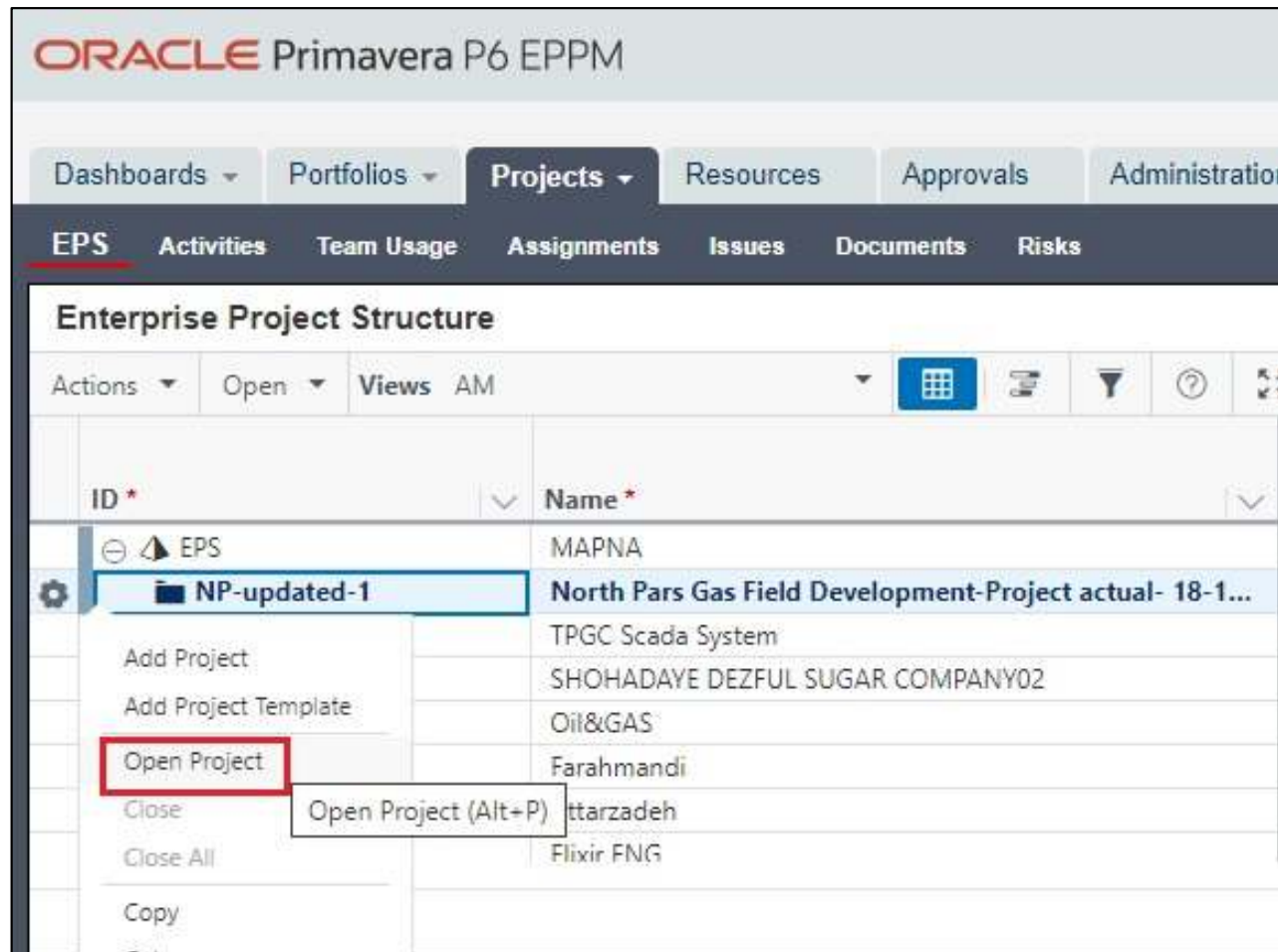
Open Project

- Select the project(s)
- Double Click or drag project to right
- Open



Open Project

2. Projects Menu – EPS – Right click project ID – Open Project (Alt+P)



The screenshot displays the Oracle Primavera P6 EPPM web application interface. The top navigation bar includes tabs for Dashboards, Portfolios, Projects, Resources, Approvals, and Administration. The 'Projects' tab is active, and the 'EPS' sub-tab is selected. The main content area is titled 'Enterprise Project Structure' and shows a list of projects. The project 'NP-updated-1' is selected, and a context menu is open over it. The 'Open Project' option is highlighted with a red box, and a tooltip 'Open Project (Alt+P)' is visible. The list of projects includes:

ID *	Name *
EPS	MAPNA
NP-updated-1	North Pars Gas Field Development-Project actual- 18-1...
	TPGC Scada System
	SHOHADAYE DEZFUL SUGAR COMPANY02
	Oil&GAS
	Farahmandi
	ttarzadeh
	Flixir FNG

Open Project

2. Projects Menu – EPS – Open - Project

ORACLE Primavera P6 EPPM

Dashboards ▾ Portfolios ▾ **Projects ▾** Resources Approvals Administration

EPS Activities Team Usage Assignments Issues Documents Risks

Enterprise Project Structure

Actions ▾ Open ▾ Views AM

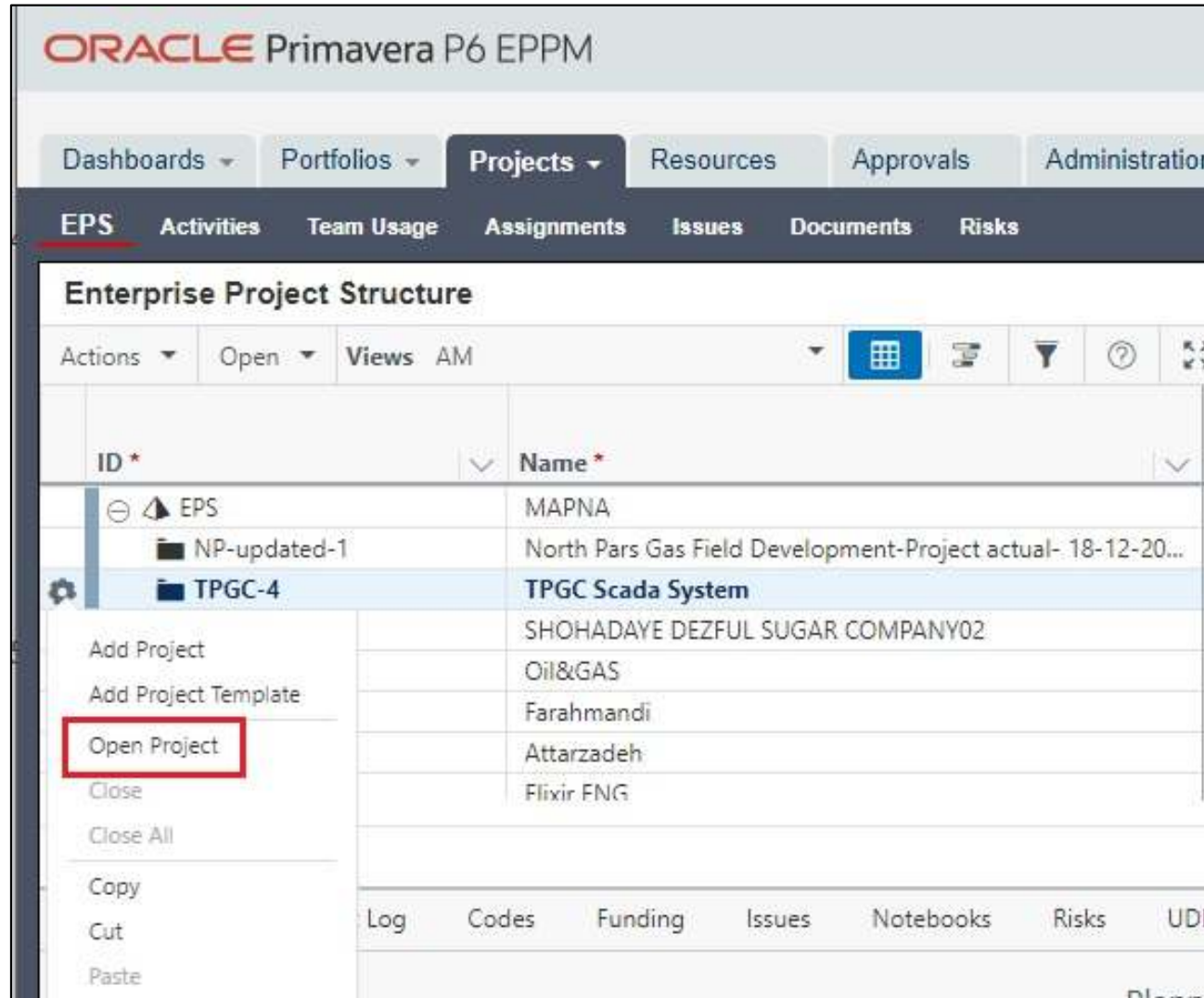
Project
Project Template
Open Exclusively

ID *	Name *
EP	MAPNA
I	North Pars Gas Field Development-Project actual- 18-12-20...
TPGC-4	TPGC Scada System
0-31	SHOHADAYE DEZFUL SUGAR COMPANY02
OG	Oil&GAS
FF	Farahmandi
MA	Attarzadeh
FI X	Flixir FNG

Download

Open Project

3. Projects Menu – EPS – Context Menu – Open Project



The screenshot displays the Oracle Primavera P6 EPPM interface. The top navigation bar includes tabs for Dashboards, Portfolios, Projects, Resources, Approvals, and Administration. The 'Projects' tab is active, and the 'EPS' sub-tab is selected. The main area shows the 'Enterprise Project Structure' with a table of projects. The 'TPGC-4' project is selected, and a context menu is open, highlighting the 'Open Project' option.

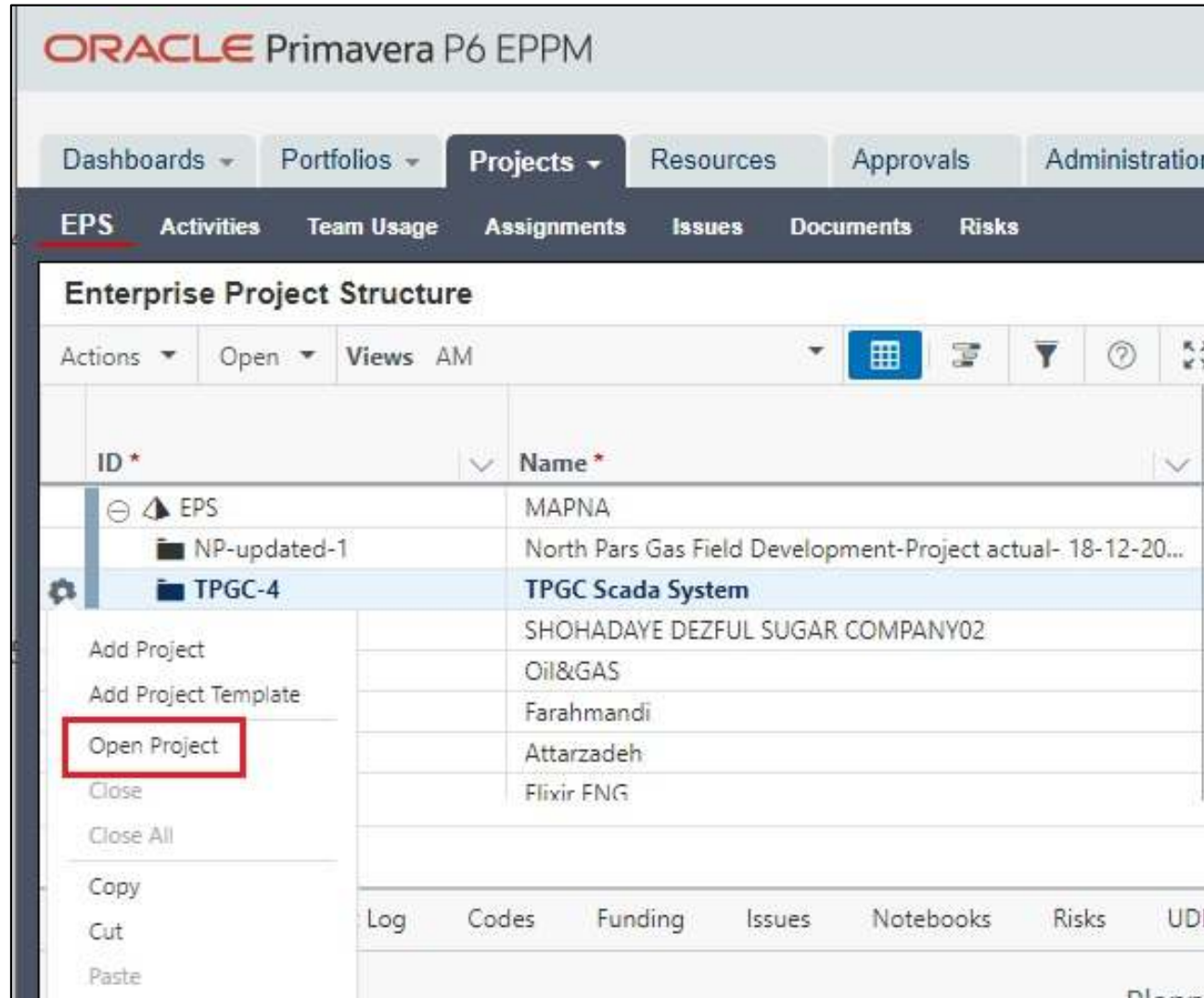
ID *	Name *
EPS	MAPNA
NP-updated-1	North Pars Gas Field Development-Project actual- 18-12-20...
TPGC-4	TPGC Scada System
	SHOHADAYE DEZFUL SUGAR COMPANY02
	Oil&GAS
	Farahmandi
	Attarzadeh
	Flixir FNG

Context Menu Options:

- Add Project
- Add Project Template
- Open Project
- Close
- Close All
- Copy
- Cut
- Paste

Close Project

3. Projects Menu – EPS – Context Menu – Open Project

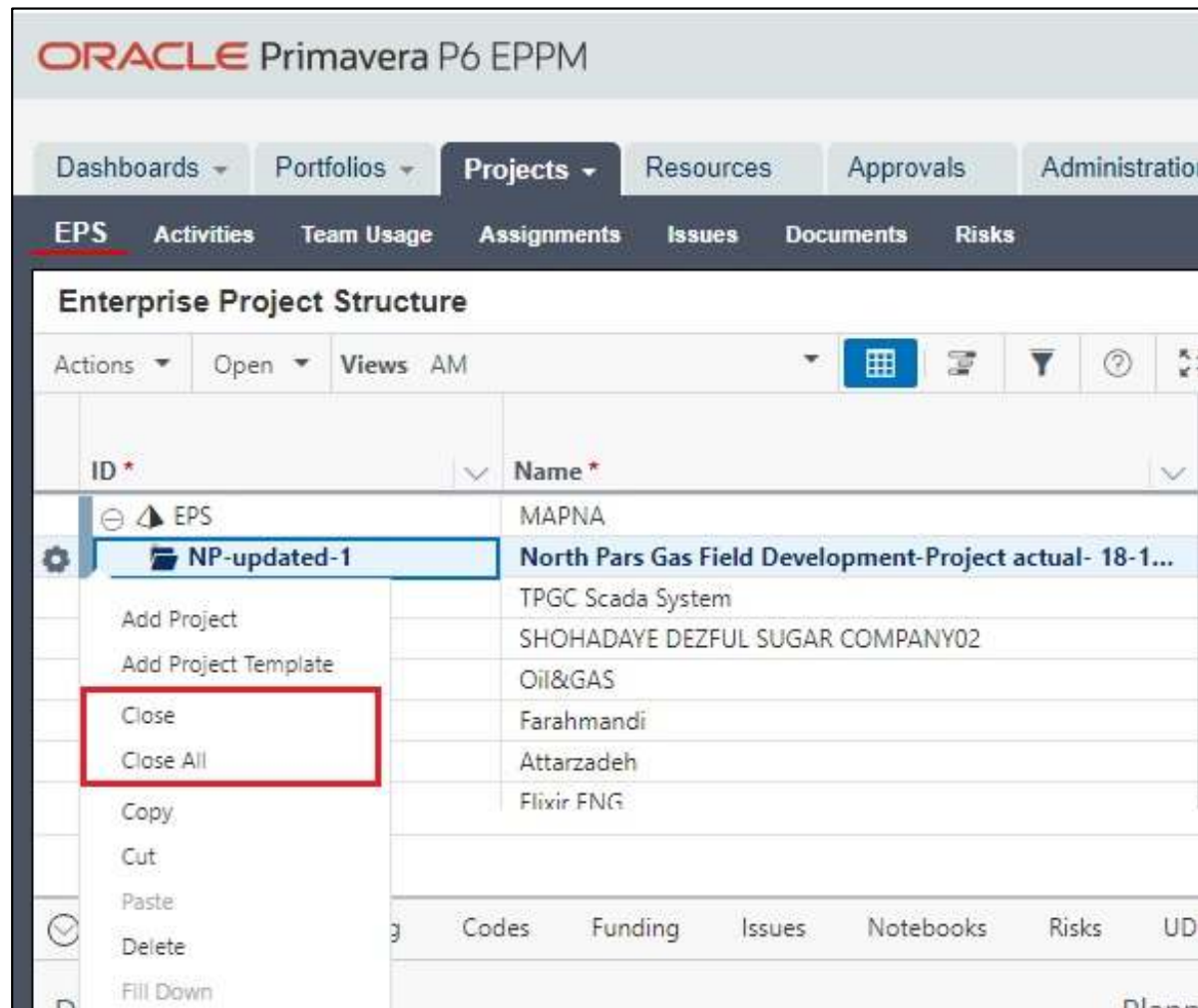


The screenshot displays the Oracle Primavera P6 EPPM interface. The top navigation bar includes tabs for Dashboards, Portfolios, Projects, Resources, Approvals, and Administration. The 'Projects' tab is active, and the 'EPS' sub-tab is selected. The main area shows the 'Enterprise Project Structure' with a table of projects. The 'TPGC-4' project is highlighted, and a context menu is open, showing options like 'Add Project', 'Add Project Template', 'Open Project' (highlighted with a red box), 'Close', 'Close All', 'Copy', 'Cut', and 'Paste'.

ID *	Name *
EPS	MAPNA
NP-updated-1	North Pars Gas Field Development-Project actual- 18-12-20...
TPGC-4	TPGC Scada System
	SHOHADAYE DEZFUL SUGAR COMPANY02
	Oil&GAS
	Farahmandi
	Attarzadeh
	Flixir FNG

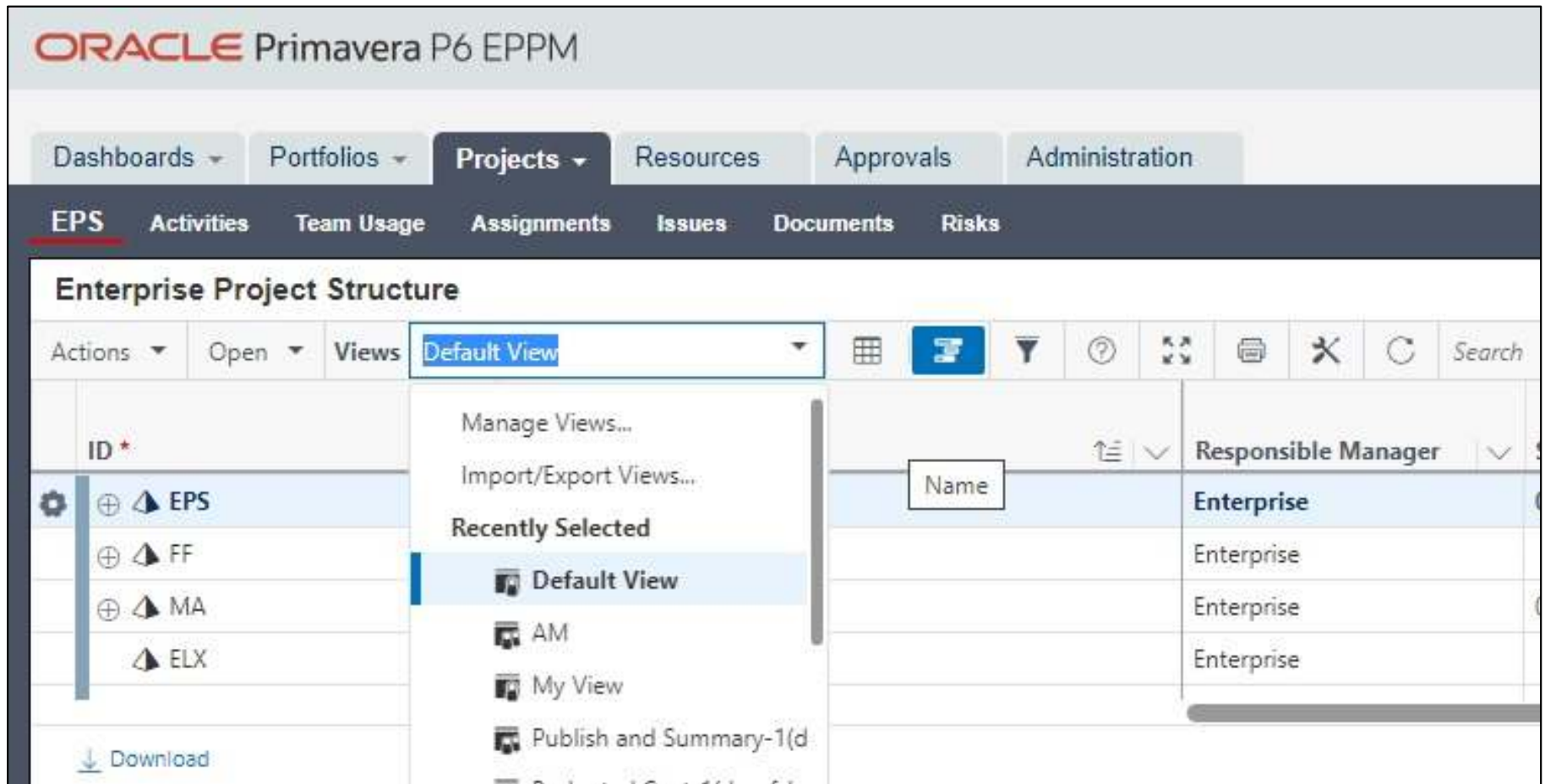
Close Project

3. Projects Menu – EPS – Right click on project or click on context menu – Close/ Close all



Manage Views

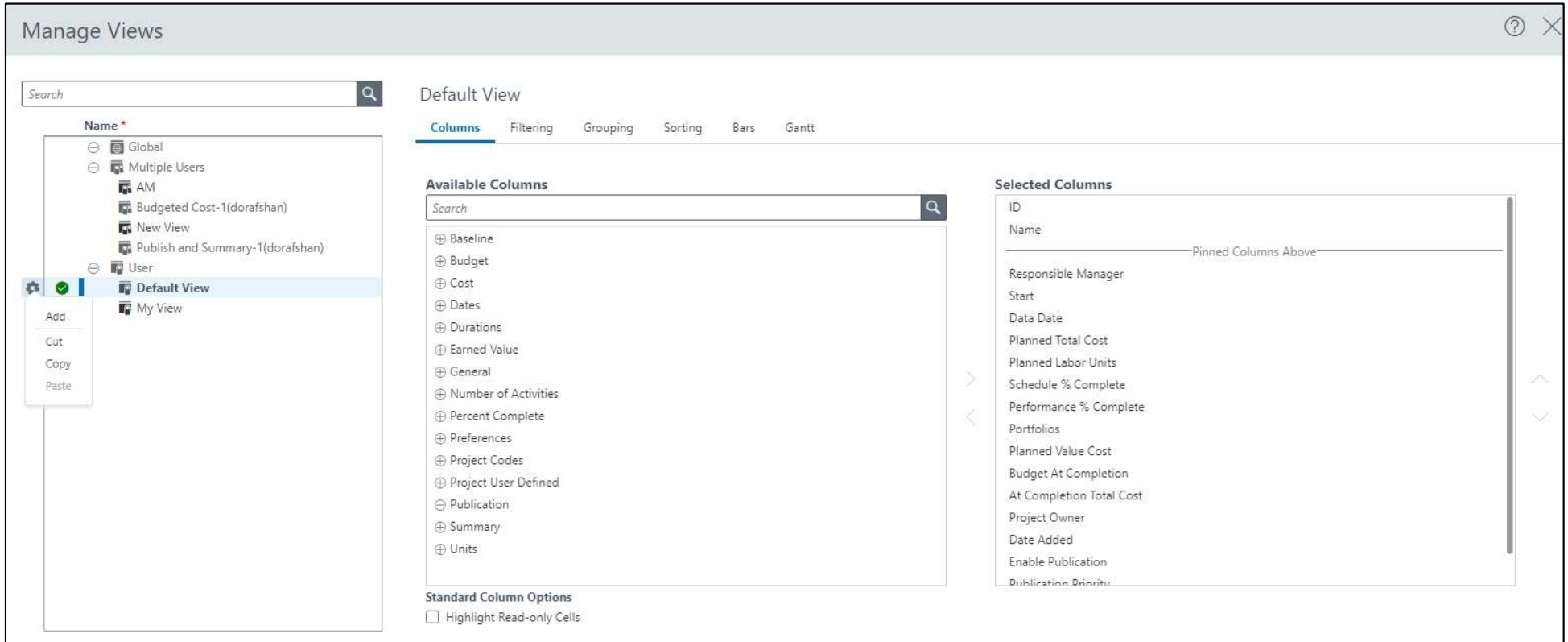
Projects Menu – EPS – Views – Manage Views or Click on
Customize view icon 



The screenshot displays the Oracle Primavera P6 EPPM interface. The top navigation bar includes tabs for Dashboards, Portfolios, Projects, Resources, Approvals, and Administration. The 'Projects' tab is active, and the 'Enterprise Project Structure' (EPS) sub-tab is selected. The 'Views' dropdown menu is open, showing options to 'Manage Views...', 'Import/Export Views...', and a list of 'Recently Selected' views: 'Default View', 'AM', 'My View', and 'Publish and Summary-1(d)'. The 'Default View' is currently selected. The main table displays project data with columns for 'Name' and 'Responsible Manager', showing multiple 'Enterprise' entries.

Manage Views

Context Menu – Add - ...



The screenshot shows the 'Manage Views' application window. On the left, a tree view lists various views, with 'Default View' selected. A context menu is open over 'Default View', showing options: 'Add', 'Cut', 'Copy', and 'Paste'. The 'Add' option is highlighted. The main area of the window is titled 'Default View' and contains a 'Columns' tab. Below this tab, there are two lists: 'Available Columns' and 'Selected Columns'. The 'Available Columns' list includes: Baseline, Budget, Cost, Dates, Durations, Earned Value, General, Number of Activities, Percent Complete, Preferences, Project Codes, Project User Defined, Publication, Summary, and Units. The 'Selected Columns' list includes: ID, Name, Responsible Manager, Start, Data Date, Planned Total Cost, Planned Labor Units, Schedule % Complete, Performance % Complete, Portfolios, Planned Value Cost, Budget At Completion, At Completion Total Cost, Project Owner, Date Added, Enable Publication, and Publication Priority. A 'Standard Column Options' section at the bottom has a checkbox for 'Highlight Read-only Cells' which is currently unchecked.

Manage Views

Change the view – Save View as ...

ORACLE Primavera P6 EPPM

Welcome, Primavera Admin

Dashboards Portfolios **Projects** Resources Approvals Administration

EPS Activities Team Usage Assignments Issues Documents Risks

Enterprise Project Structure

Actions Open Views Default View

ID *	Name *	Data Date	Start	Planned Total Cost	Planned Labor Units	Schedule % Complete	Performa... % Complete	Portfolios
EPS	MAPNA		01-Sep-21 08:00...	36,636,715,950	1,000,490.00d	1.83%	0.16%	
FF	Farahmandi							
MA	Attarzadeh		04-Jun-22 08:00...	18,394,340,000	297.00d	3.91%	0.09%	
ELX	Elixir ENG							

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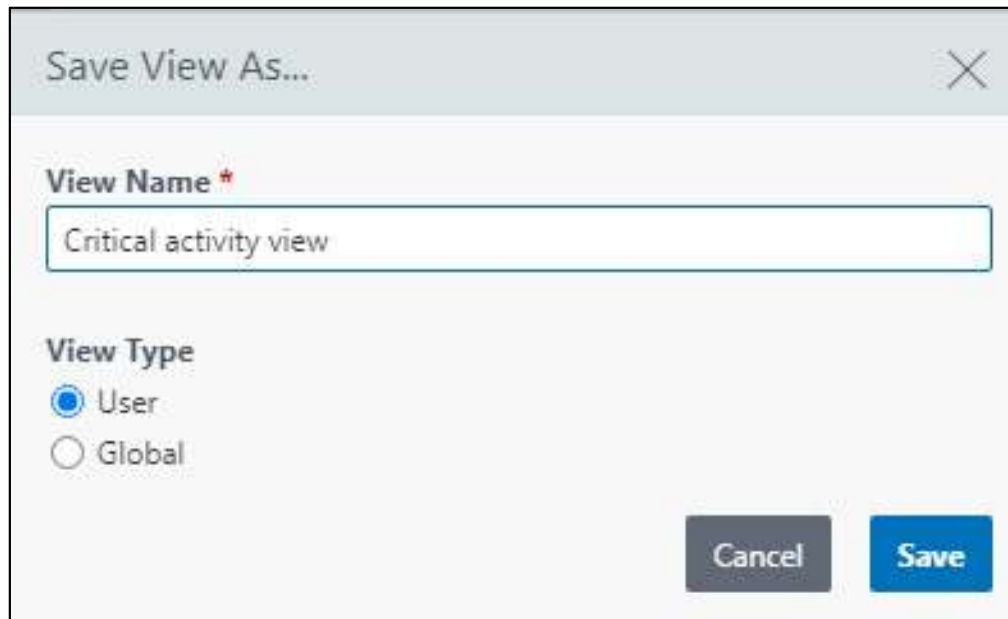
Cancel Save View Save

Save View As... Reset View

Gantt Settings

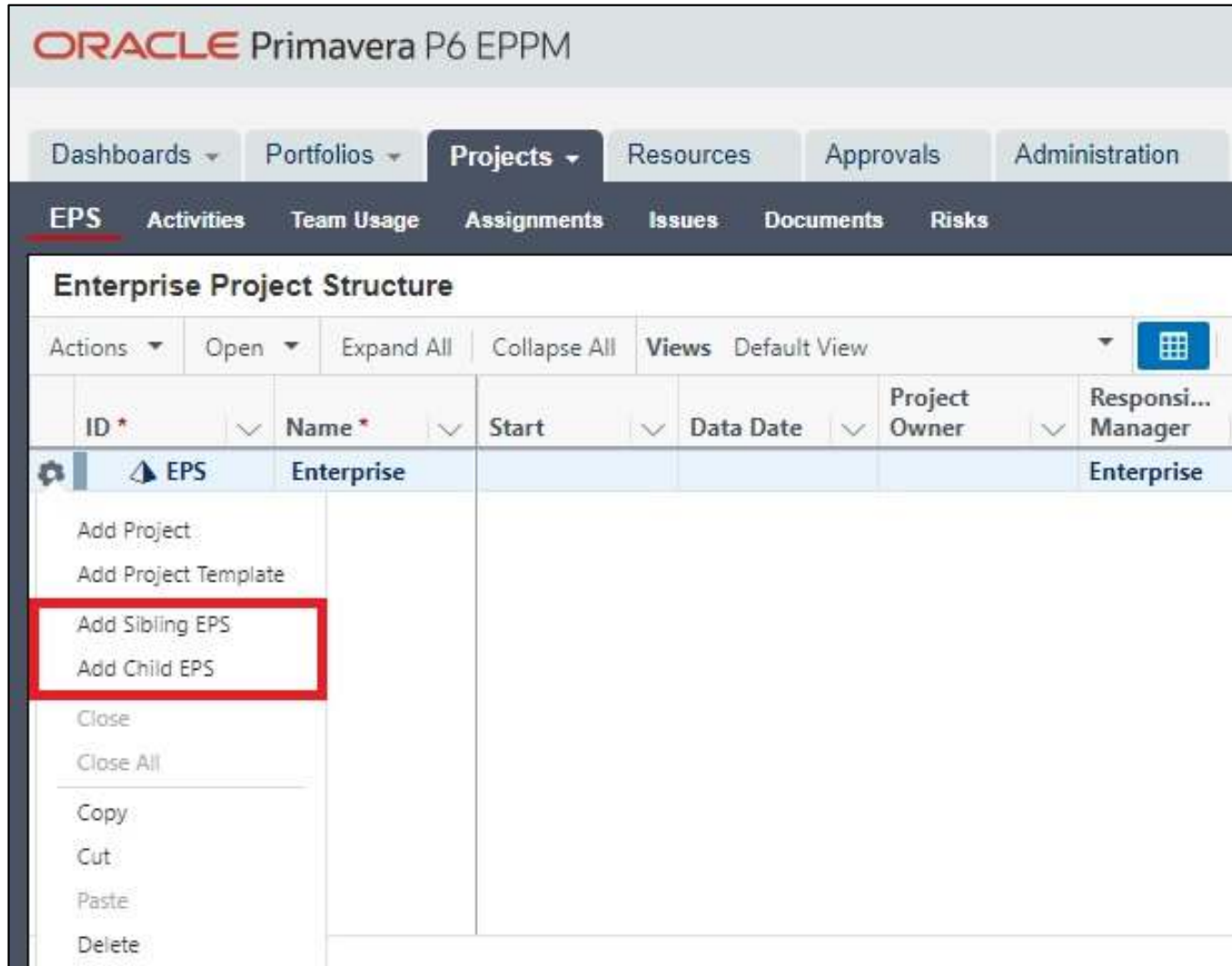
Manage Views

Define View Name ...

A screenshot of a 'Save View As...' dialog box. The dialog has a title bar with the text 'Save View As...' and a close button (X). Inside the dialog, there is a section labeled 'View Name *' with a text input field containing 'Critical activity view'. Below this is a section labeled 'View Type' with two radio button options: 'User' (which is selected) and 'Global'. At the bottom right of the dialog are two buttons: 'Cancel' and 'Save'.

Create EPS

Projects Menu – EPS – Context Menu - Add Sibling EPS or Add Child EPS

The screenshot shows the Oracle Primavera P6 EPPM web interface. The top navigation bar includes "Dashboards", "Portfolios", "Projects", "Resources", "Approvals", and "Administration". The "Projects" menu is expanded, showing sub-menus: "EPS", "Activities", "Team Usage", "Assignments", "Issues", "Documents", and "Risks". The "EPS" sub-menu is selected, displaying the "Enterprise Project Structure" table. The table has columns for "ID", "Name", "Start", "Data Date", "Project Owner", and "Responsi... Manager". A context menu is open over the "Enterprise" row, listing actions: "Add Project", "Add Project Template", "Add Sibling EPS", "Add Child EPS", "Close", "Close All", "Copy", "Cut", "Paste", and "Delete". The "Add Sibling EPS" and "Add Child EPS" options are highlighted with a red rectangle.

ORACLE Primavera P6 EPPM

Dashboards ▾ Portfolios ▾ **Projects ▾** Resources Approvals Administration

EPS Activities Team Usage Assignments Issues Documents Risks

Enterprise Project Structure

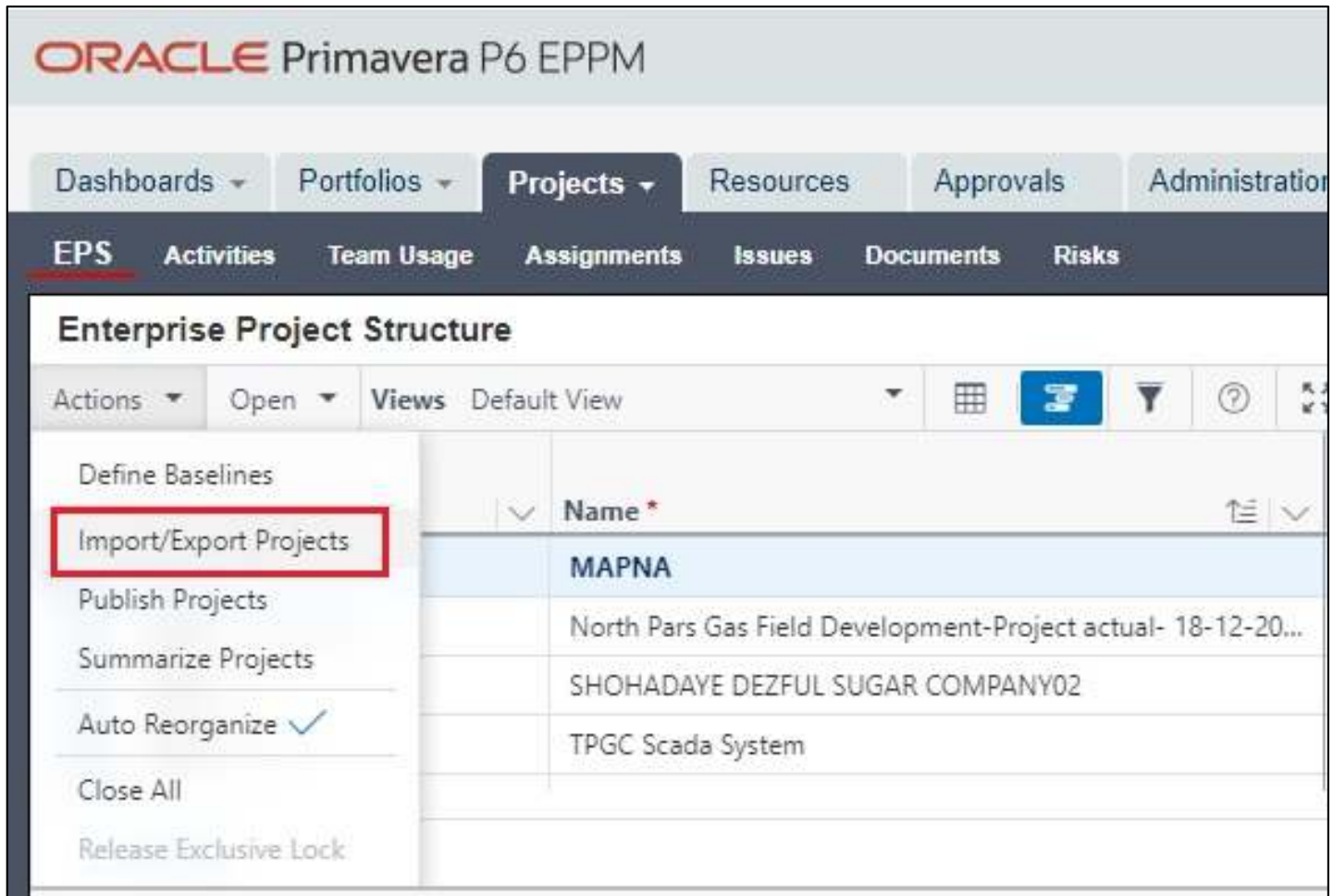
Actions ▾ Open ▾ Expand All Collapse All Views Default View ▾ 

ID *	Name *	Start	Data Date	Project Owner	Responsi... Manager
  EPS	Enterprise				Enterprise

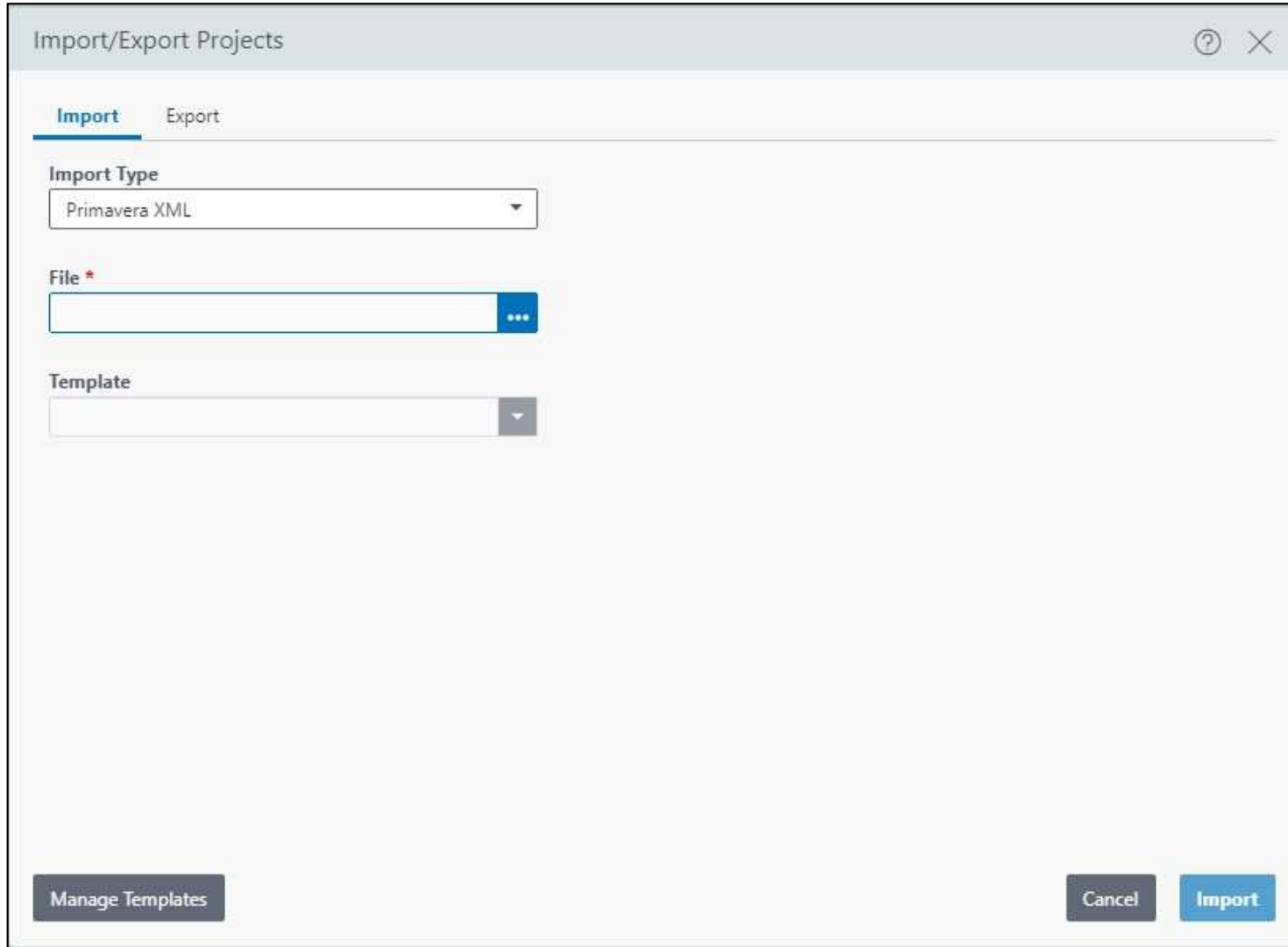
Context Menu:

- Add Project
- Add Project Template
- Add Sibling EPS**
- Add Child EPS**
- Close
- Close All
- Copy
- Cut
- Paste
- Delete

Import / Export Projects

The screenshot shows the Oracle Primavera P6 EPPM web interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects' (selected), 'Resources', 'Approvals', and 'Administration'. Below this, a sub-navigation bar shows 'EPS' (selected), 'Activities', 'Team Usage', 'Assignments', 'Issues', 'Documents', and 'Risks'. The main content area is titled 'Enterprise Project Structure'. It features a toolbar with 'Actions', 'Open', and 'Views' (set to 'Default View'). A dropdown menu is open under 'Actions', with 'Import/Export Projects' highlighted by a red rectangle. Other options in the menu include 'Define Baselines', 'Publish Projects', 'Summarize Projects', 'Auto Reorganize' (checked), 'Close All', and 'Release Exclusive Lock'. The background table lists projects with a 'Name' column. The first project is 'MAPNA', followed by 'North Pars Gas Field Development-Project actual- 18-12-20...', 'SHOHADAYE DEZFUL SUGAR COMPANY02', and 'TPGC Scada System'.

Import / Export Projects

A screenshot of a software dialog box titled "Import/Export Projects". The dialog has a light gray header with a question mark icon and a close button. Below the header, there are two tabs: "Import" (selected) and "Export". Under the "Import" tab, there are three main sections: "Import Type" with a dropdown menu showing "Primavera XML"; "File" with a text input field and a blue button with three dots; and "Template" with a dropdown menu. At the bottom left is a "Manage Templates" button, and at the bottom right are "Cancel" and "Import" buttons.

Import/Export Projects

Import Export

Import Type

Primavera XML

File *

Template

Manage Templates

Cancel Import

Import / Export Projects

Import/Export Projects

?

×

Import

Export

Export Type

Primavera XML

+ Add Project...

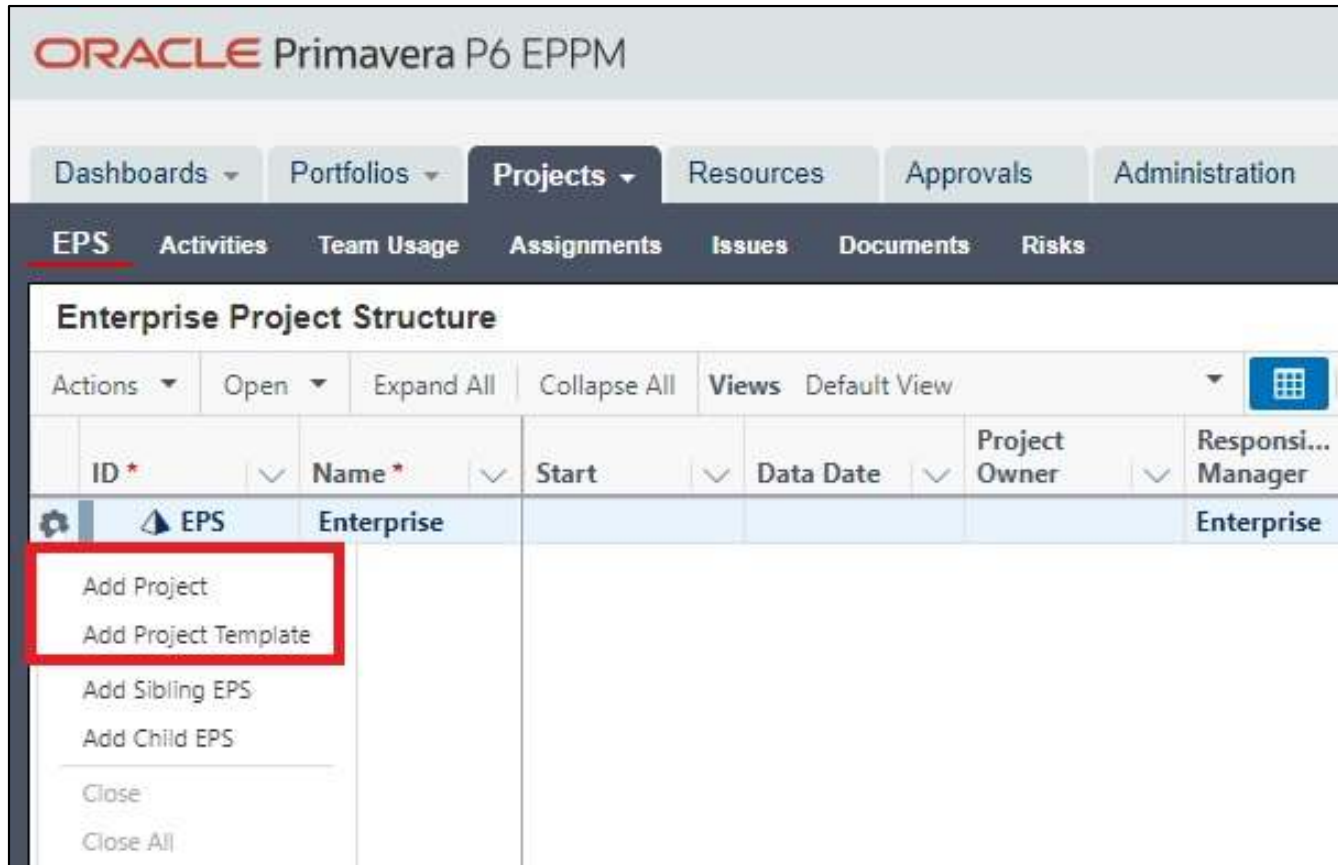
Project ID	Project Name	Financial Period Calendar	Basel
⚙️ TPGC-4	TPGC Scada System	Calendar	

Cancel

Export

Create New Project

Projects Menu – EPS – Add Project or Add Project Template



The screenshot shows the Oracle Primavera P6 EPPM interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', 'Resources', 'Approvals', and 'Administration'. The 'Projects' menu is expanded, showing sub-menus: 'EPS', 'Activities', 'Team Usage', 'Assignments', 'Issues', 'Documents', and 'Risks'. The 'EPS' sub-menu is further expanded, revealing a list of actions: 'Add Project', 'Add Project Template', 'Add Sibling EPS', 'Add Child EPS', 'Close', and 'Close All'. The 'Add Project' and 'Add Project Template' options are highlighted with a red rectangle. Below the menu, the 'Enterprise Project Structure' table is visible, with columns for ID, Name, Start, Data Date, Project Owner, and Responsibility Manager. The table contains one row for the 'Enterprise' project.

ID *	Name *	Start	Data Date	Project Owner	Responsi... Manager
EPS	Enterprise				Enterprise

Add Project - General

Add Project

General

Advanced

Project ID *

ACEMI

Project Name *

ACEMI Class Project

Description

Sample Project for students

EPS *

Enterprise

Responsible Manager *

Enterprise

Project Planned Start *

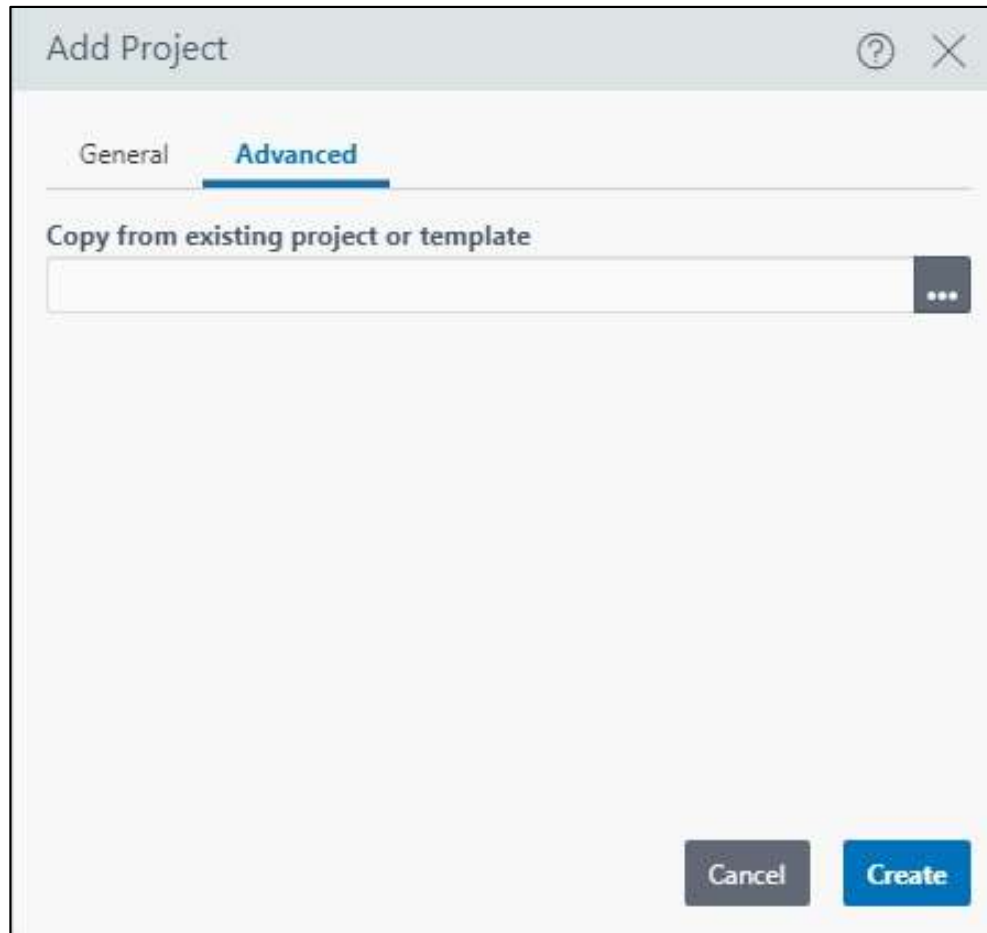
01-May-23 12:00 AM

Must Finish By

Cancel

Create

Add Project - Advanced

A screenshot of the "Add Project" dialog box in Oracle Primavera, specifically the "Advanced" tab. The dialog has a title bar with a question mark and a close button. Below the title bar, there are two tabs: "General" and "Advanced", with "Advanced" being the active tab. The main content area is titled "Copy from existing project or template" and contains a large empty text field with a small menu icon (three dots) on the right side. At the bottom right of the dialog, there are two buttons: "Cancel" and "Create".

Add Project

General **Advanced**

Copy from existing project or template

...

Cancel Create

Project Details

ORACLE Primavera P6 EPPM Welcome, Primavera Admin Help

Dashboards ▾ Portfolios ▾ **Projects ▾** Resources Approvals Administration

EPS Activities Team Usage Assignments Issues Documents Risks

Enterprise Project Structure

Actions ▾ Open ▾ Expand All Collapse All Views Default View Grid View Download Search

ID *	Name *	Start	Data Date	Project Owner	Responsible Manager	Location
EPS	Enterprise				Enterprise	
A	ACEMI				ACEMI Class	
OGT	Oil & Gas Tem...	28-Apr-23 12:00...	28-Apr-23 12:00...		ACEMI Class	

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Project Details

Project ID * SAZ **Project Status *** Active

Project Name * South Azadegan Oil Field **Location** Search

Responsible Manager * ACEMI Class **Checked Out By**

Project Owner Search **Date Checked Out**

Financial Period Calendar Calendar

Planned Dates

Anticipated Start

Anticipated Finish

Project Planned Start * 28-Apr-23 12:00 AM

Must Finish By

Actual Dates

Actual Start

Actual Finish

Scheduled Finish

Data Date * 28-Apr-23 12:00 AM

Description



Creating Work Breakdown Structure

Objectives

After completing this lesson, you should be able to:

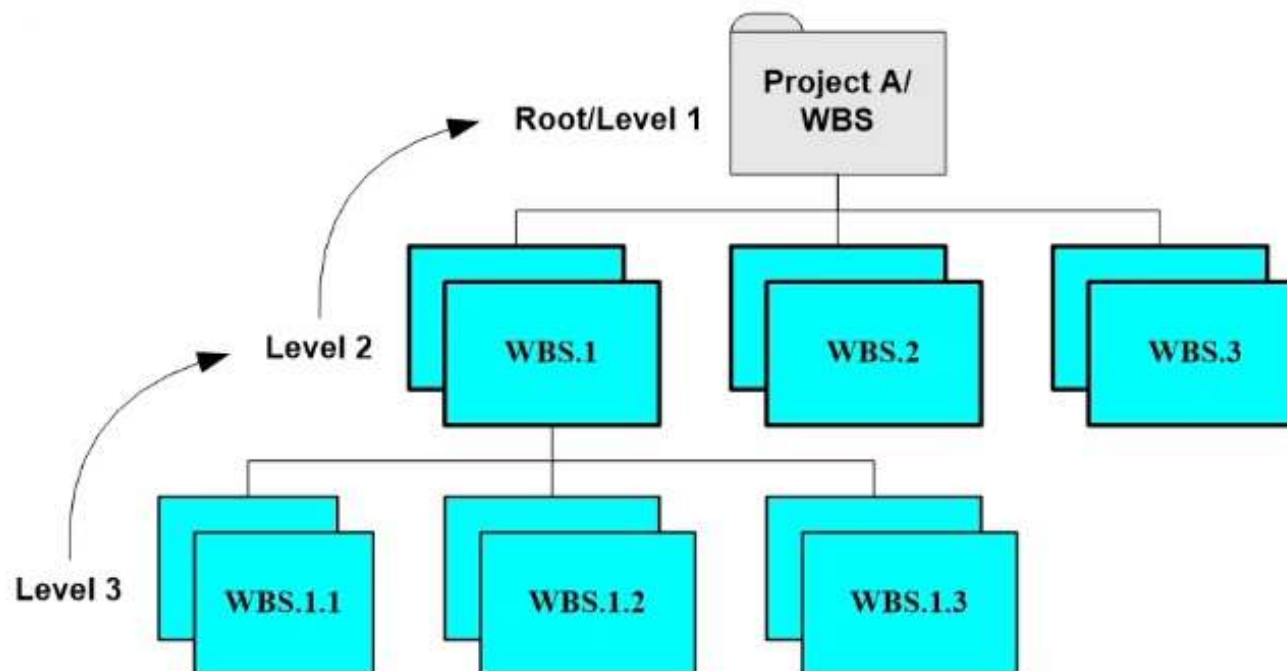
- Define a Work Breakdown Structure (WBS).
- Create multiple levels of a WBS hierarchy.

WBS

- A hierarchical arrangement of the products and services produced during, and by, a project.
- Hierarchy divided into WBS elements:
 - Represent a deliverable, product, or service.
 - Contain activities needed to produce the deliverable.
- Enables you to divide a project into logical pieces for the purpose of planning and control.

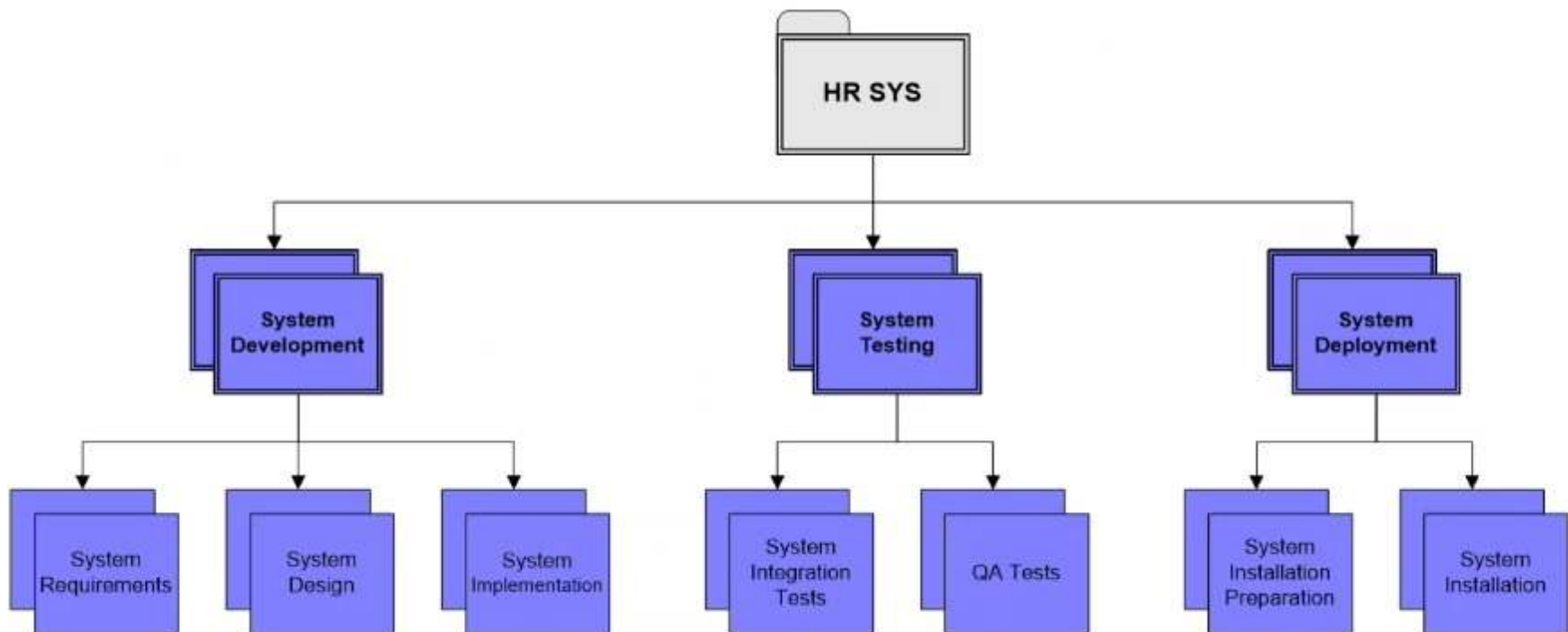
WBS

- Project is root node of WBS.
- Child/parent relationships between elements enable lower levels to be rolled up and summarized.



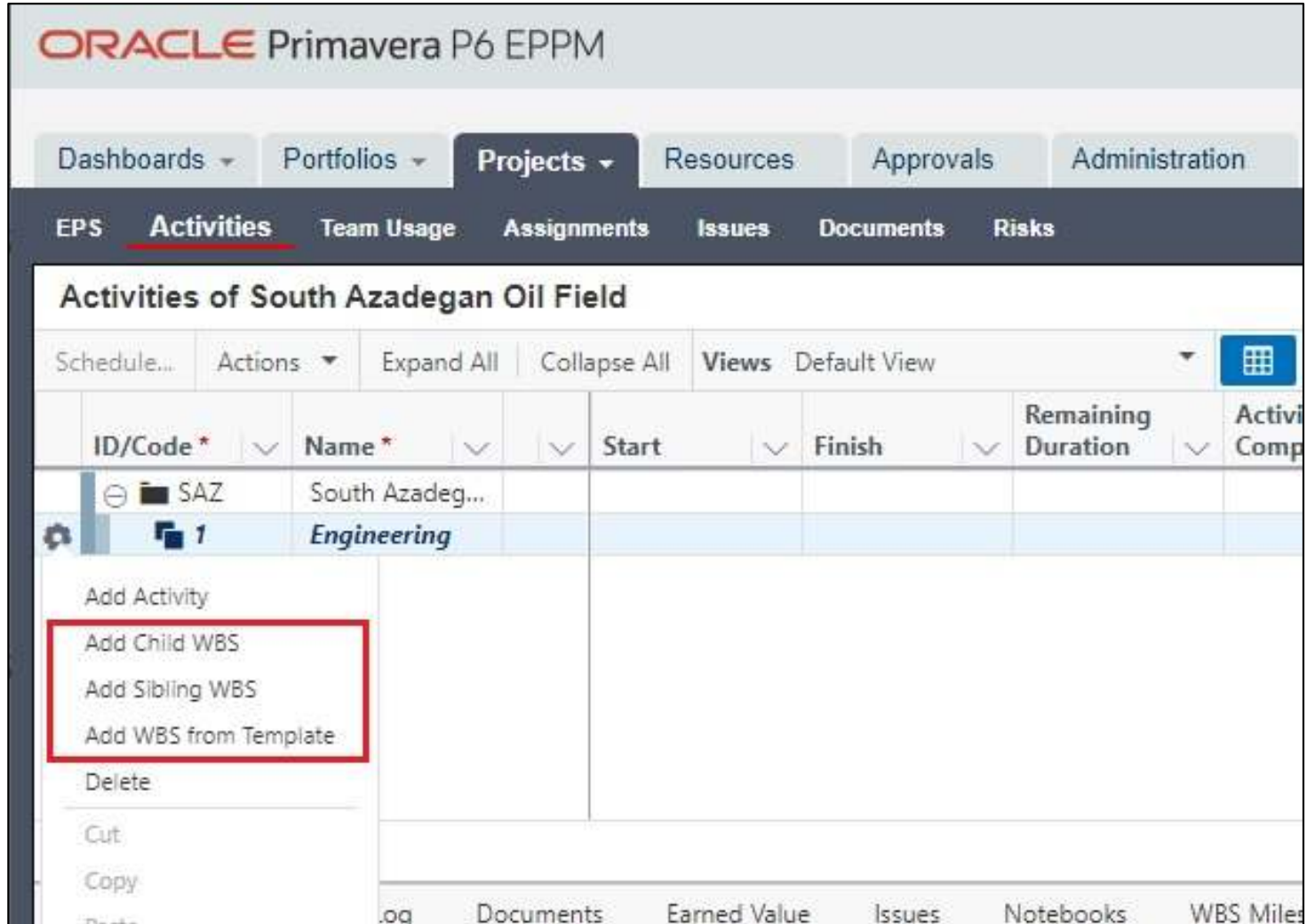
WBS

WBS of the *HRSYS* project, which you will use throughout this course.



Create WBS

Projects Menu – Activities – Add Child WBS or Add Sibling WBS



The screenshot displays the Oracle Primavera P6 EPPM interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', 'Resources', 'Approvals', and 'Administration'. The 'Projects' menu is expanded, showing sub-menus: 'EPS', 'Activities', 'Team Usage', 'Assignments', 'Issues', 'Documents', and 'Risks'. The 'Activities' sub-menu is selected, showing 'Activities of South Azadegan Oil Field'. The table below lists activities, with 'Engineering' selected. A context menu is open for the 'Engineering' activity, showing options: 'Add Activity', 'Add Child WBS', 'Add Sibling WBS', 'Add WBS from Template', 'Delete', 'Cut', and 'Copy'. The 'Add Child WBS' and 'Add Sibling WBS' options are highlighted with a red box.

ID/Code *	Name *	Start	Finish	Remaining Duration	Activi Comp
SAZ	South Azadeg...				
1	Engineering				

WBS Details

ORACLE Primavera P6 EPPM Welcome, Primavera Admin Help

Dashboards Portfolios **Projects** Resources Approvals Administration

EPS **Activities** Team Usage Assignments Issues Documents Risks

Activities of South Azadegan Oil Field

Schedule... Actions Expand All Collapse All Views Default View Grid Print Filter Help Refresh Close Search

ID/Code *	Name *	Start	Finish	Remaining Duration	Activity % Complete	Primary Resource
SAZ	South Azadeg...					

Download

General Budget Log Codes Documents Earned Value Issues Notebooks WBS Milestones UDF

WBS Code *	WBS Name *	Anticipated Start	Anticipated Finish	Responsible Manager	Project Status
SAZ	South Azadeg...			ACEMI Class	Active

87.248.153.218:8203/p6/action/pm/activities?isApplet=false&projectId=384&wbsId=3696&ProjectName=null&selectedItem=ARO117_3696#wbsGeneral-tab

Adding Activities

Objectives

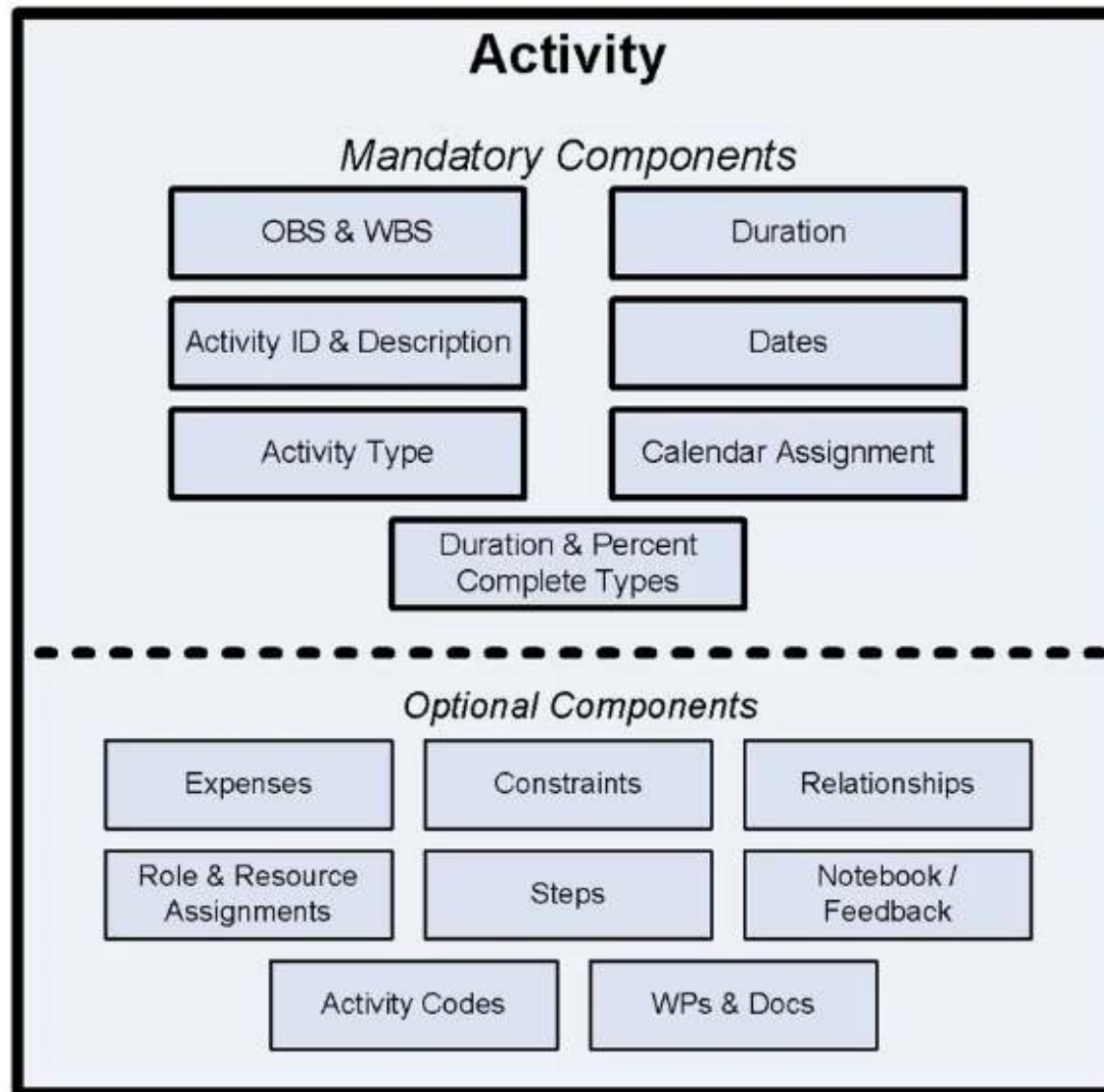
After completing this lesson, you should be able to:

- Describe an activity and its components.
- Describe activity types.
- Add activities.
- Add a Notebook topic to an activity.
- Add steps to an activity.
- Assign activity code values to activities.

Activities

- Fundamental work element of a project.
 - Also known as a task, item, event, or work package.
- Lowest level of a WBS.
 - Most detailed work unit tracked in the project schedule.
 - Contains all information about the work to be performed.
 - Smallest subdivision of work that directly concerns project manager.

Activity Components



Activity Type

- Controls how activity's dates are calculated.
- Depends on the activity's function in the project and the calendar used for the activity during scheduling.
- P6 supports six activity types:
 - Start Milestone
 - Finish Milestone
 - Task Dependent
 - Resource Dependent
 - Level of Effort
 - WBS Summary

Start Milestone

- Used to mark the beginning of a project phase or to communicate project deliverables.
- Has zero duration.
- Has a Start date only.
- Constraints, steps, expenses, work products, and documents can be assigned.
- Roles cannot be assigned.
- Resources cannot be assigned except for the Primary Resource.

Finish Milestone

- Used to mark the end of a project phase or to communicate project deliverables.
- Has zero duration.
- Has a Finish date only.
- Constraints, steps, expenses, work products, and documents can be assigned.
- Roles cannot be assigned.
- Resources cannot be assigned except for the Primary Resource.

Task Dependent

- Used when work needs to be accomplished in a given timeframe, regardless of the assigned resources' availability.
- Resources are scheduled to work according to the activity calendar.
- Duration is determined by the activity calendar.
- Roles and resources can be assigned.
- Constraints, steps, expenses, work products, and documents can be assigned.

Resource Dependent

- Typically used when multiple resources assigned to the same activity can work independently.
- Resources are scheduled according to the individual resource's calendar.
- Roles and resources can be assigned.
- Constraints, steps, expenses, work products, and documents can be assigned.

How Activity Type Affects Dates

- Activity duration = 2 days
- Scheduled to start Monday
- Requires three resources, each working two days
- Each of the three resources has a resource calendar:

	Mon	Tue	Wed	Thu	Fri
Laborer	X	W	X	W	X
Engineer	W	X	W	W	W
High-Capacity Crane	X	X	W	W	X

W = work day X = nonwork day

- How many days will activity be scheduled, based on activity type?
 - Task Dependent
 - Resource Dependent

How Activity Type Affects Dates

Task Dependent: Scheduled for 2 days

	Mon	Tue	Wed	Thu	Fri
Laborer	X	W	X	W	X
Engineer	W	X	W	W	W
High-Capacity Crane	X	X	W	W	X

Resource Dependent: Scheduled for 4 days

	Mon	Tue	Wed	Thu	Fri
Laborer	X	W	X	W	X
Engineer	W	X	W	W	W
High-Capacity Crane	X	X	W	W	X

Level of Effort

- Used for ongoing tasks dependent on other activities.
- Duration is determined by its predecessor and successor activities and its assigned calendar.
- Roles and resources can be assigned.
- Constraints cannot be assigned.

WBS Summary

- Used to summarize at the WBS level.
- Comprises a group of activities that share a common WBS level.
- Dates are based on the earliest Start date and the latest Finish date of the activities in the WBS level.
- Duration is based on its assigned calendar.
- Constraints cannot be assigned.

Lesson Review

- Use the Activities page to add activities and edit activity details.
- Activity IDs must be unique in the project.
- Activity type controls how an activity's dates are scheduled.
- Use the right-click menu or Context menu to add, copy, or delete activities.
- Use activity codes to group activities by a common attribute. Create unlimited code values for each activity code.