

**PRIMAVERA P6 TRAINING DOCUMENTATION**



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## CREATE A PROJECT

- A. Log onto P6 and you will see your dashboards with your assigned/awarded projects.
- B. Locate your desired project – click on the hyperlink – it'll automatically go to the EPS (Enterprise Project Structure)
- C. Click on Activities. Once a project is approved the GC will see the activities table. This is where you'll establish phases, activities, logic, duration and dates.

**ORACLE Primavera P6**

Dashboards ▾ Portfolios ▾ **Projects ▾** Resources ▾

EPS Activities Workspace Team Usage Issues Documents Risks

**Enterprise Project Structure**

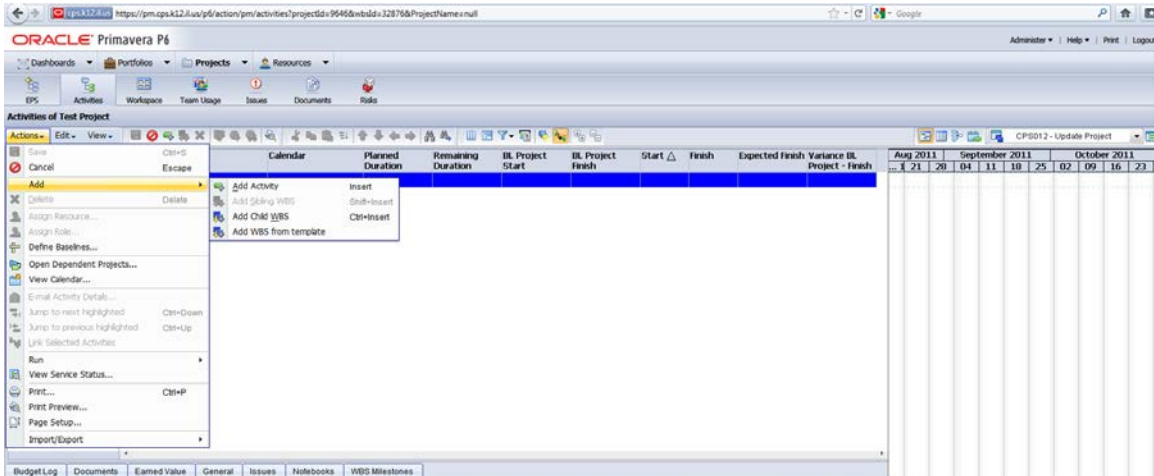
Actions ▾ Edit ▾ View ▾ [Icons]

EPS / Project Name	Project ID
+ Imported Projects	
+ 2011 CPS Capital Projects	
+ 2012 CPS Capital Projects	
+ 2013 CPS Capital Projects	
+ 2014 CPS Capital Projects	
- 2015 CPS Capital Projects	
+ 2015 - AGAE	
+ 2015 - All-Bry	
+ 2015 - Blinderman	
+ 2015 - F H Paschen	
+ 2015 - Friedler	
+ 2015 - KR Miller	
+ 2015 - McDonagh	
+ 2015 - OCA	
+ 2015 - OVC	

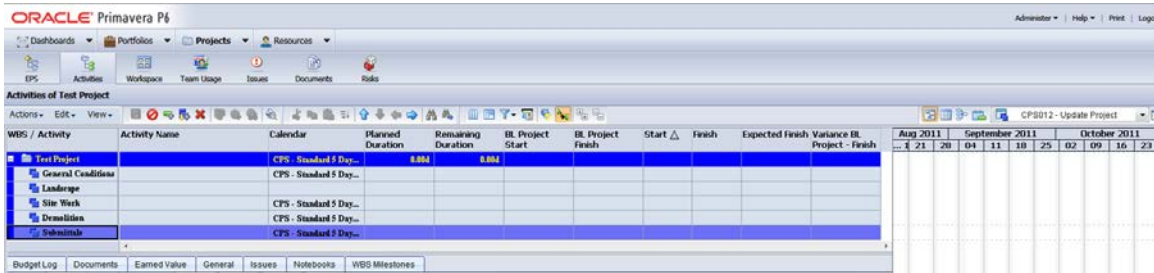
## CREATE WBS (WORK BREAKDOWN STRUCTURE) ELEMENTS

Establish the Phases of the Project - examples: General Conditions, Demolition, Site Work

- A. Click Actions, Add, Add Child WBS for each Phase.



- B. After determining your Phases, you must click on each one and move them with the blue arrow to align under each other:



## Selecting Layouts and Columns

When building a schedule the schedule layout should be “CPS001-Basic Gantt Chart”. If the layout is anything other than “CPS001-Basic Gantt Chart” you can change it by selecting it within the drop down menu on the upper right portion of the screen (pictured below).



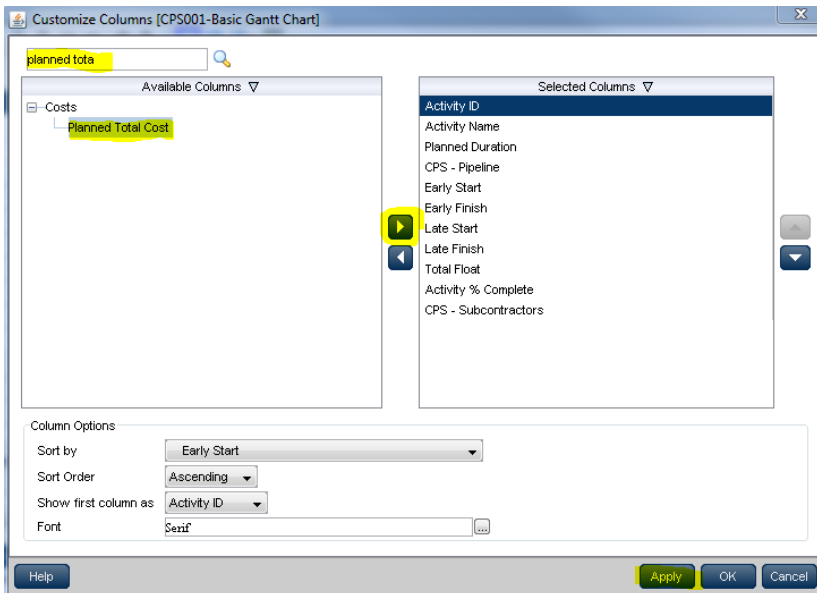
Once the proper layout is selected the columns you should see are;

WBS / Activity	Activity Name	Planned Duration	CPS - Pipeline	Early Start	Early Finish	Late Start	Late Finish	Total Float	Activity % Complete	CPS - Subcontractors	Planned Total Cost
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If you do not see one of these columns at any time you can add them by first selecting the column button in the task bar at the top of the screen.

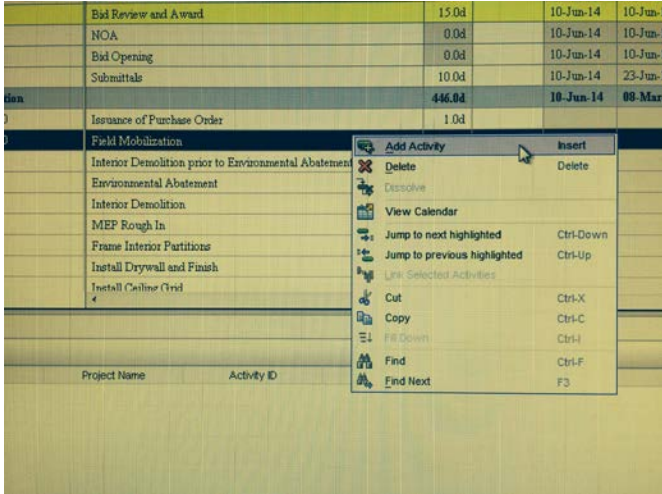


This will populate the Customize Columns selections. Within the window type the name of the missing column into the search bar, click on the column name, and press the right arrow button. You can arrow up or down to position the selected column(s) in your desired order. Click apply and the column will be added to your schedule.

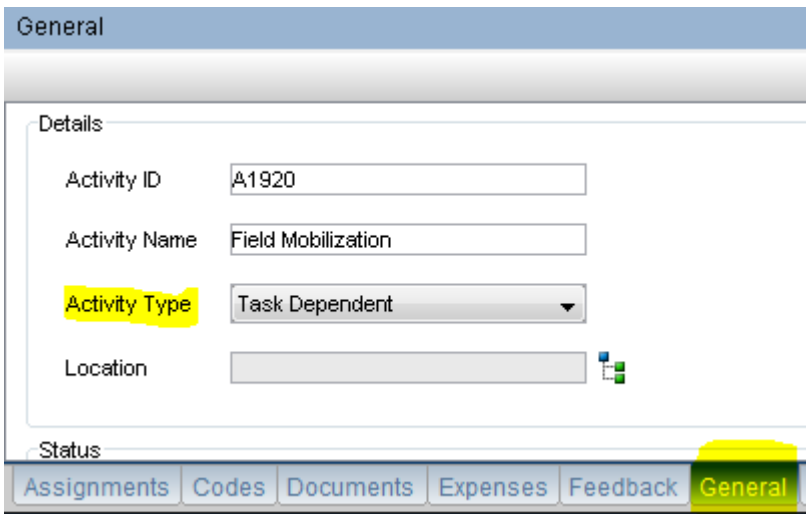


**CREATING ACTIVITIES – (Please remember to SAVE frequently when building your schedule.)**

A. Under the construction node of the schedule right click and select “add activity”.

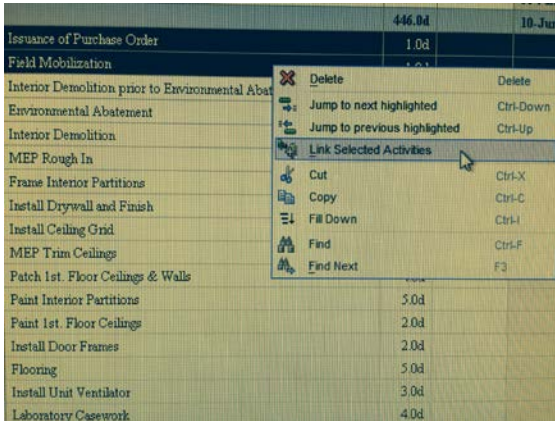


B. To select the activity type click on the general tab at the bottom of the screen. Within the general tab on the left side you can select the activity type from the activity type drop down menu. Most activities in your schedule will be either task dependent, start milestones, or finish milestones.



## ASSIGNING LOGIC

Every activity must have a predecessor or successor except the first and the last activity of a schedule. To link two activities together first click on one of the two activities you wish to link. Hold down the control button on the keyboard and select the second desired activity so now both activities should be highlighted. Right click and select Link Activities. The first activity selected will be the predecessor and the second activity will now be the successor.



The relationship between the two activities defaults to a finish to start relationship. To change the relationship type to a finish to finish, start to start, or a start to finish relationship click on the first activity. At the bottom of the screen select the Successors tab and under the column "Relationship Type" double click to select a different Relationship type. To add a lag, simply type a numerical value into the "Lag" field next to "Relationship Type".

Project ID	Project Name	Activity ID	Activity Name	Relationship Type	Lag
2014-41081-SCI	Marshall Middle FY14 SCI	A1920	Field Mobilization	Finish to Start	0.0d

Assignments	Codes	Documents	Expenses	Feedback	General	Issues	Notebooks	Predecessors	Risks	Steps	Successors	Trace Logic
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## Define Durations

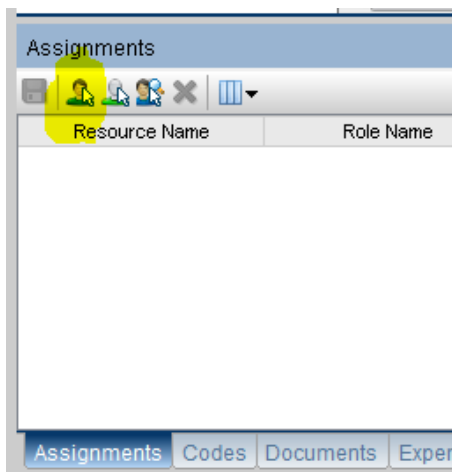
Under the column “Planned Duration” click on each activity and enter how many days it will take to complete each task. The duration days must be 10 days or less for each construction activity (except for fabrication or long lead items) CLICK SAVE

WBS / Activity	Activity Name	Planned Duration
■ A1960	MEP Rough In	10.0d
■ A1970	Frame Interior Partitions	5.0d

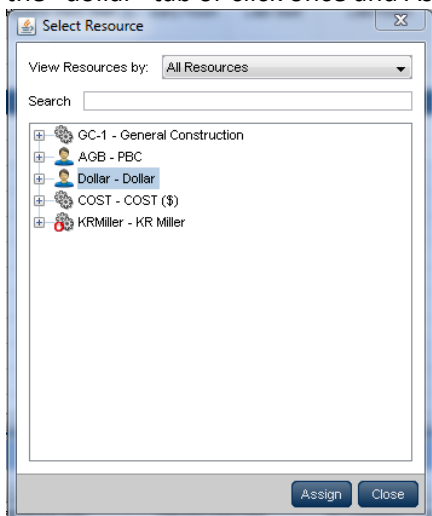
## Define Costs

Select the activity you wish to cost load by clicking on it.

With an activity highlighted select the assignments tab located at the bottom left portion of the screen. Click on the Assign Resource button which is the second button from the left as shown.



A smaller window will appear. Ensure that the “View” is set at “All Resources”. Double click on the “dollar” tab or click once and Assign.





This will add a row of columns within the assignments tab. Under the column “planned cost” within the assignments tab enter the cost of the selected line item.

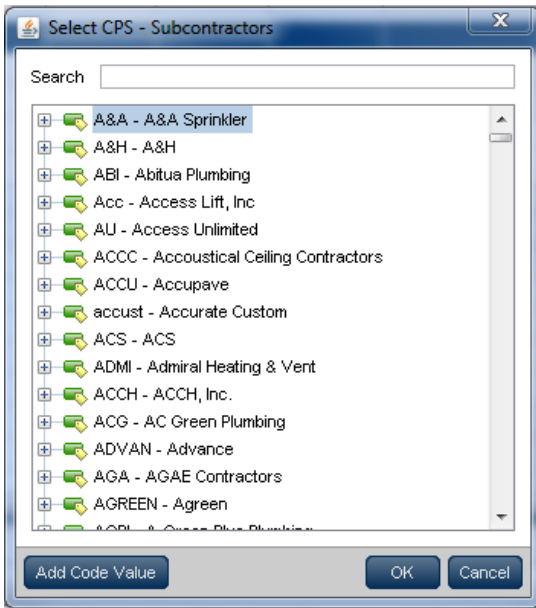
Assignments								
Resource Name	Role Name	Planned Units	Actual Units	Remaining Units	Planned Units/Time	At Completion Cost	Planned Cost	
Dollar		1.25d	0.00d	1.25d	12.5%	0	0	

### **Define Subcontractors**

Select an activity for which you would like to add a subcontractor. Double click within the selected activity under the column “CPS – Subcontractors” on the right side of box.

WBS / Activity	Activity Name	Planned Duration	CPS - Pipeline	Early Start	Early Finish	Late Start	Late Finish	Total Float	Activity % Complete	CPS - Subcontractors
A1960	MEP Rough In	10.0d							0%	

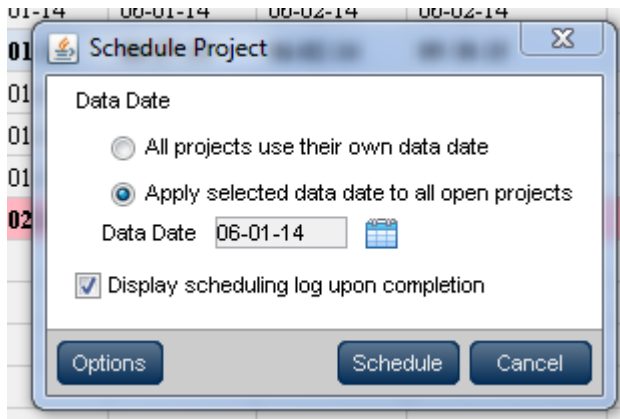
A smaller window will open containing an alphabetical list of CPS subcontractors. Scroll through and double click on the desired subcontractor or click once and OK.



The name of the subcontractor will then populate the “CPS – Subcontractors” column for the selected activity. If there is a subcontractor that is not on the list please contact Cynthia King ([ckking@cps.edu](mailto:ckking@cps.edu)) and she will add them for you. Please, refrain from adding subcontractors to the system yourself.

### **Schedule Baseline Completion**

Click on F9; Select the date for the current Data Date, which is the date that is utilized as the starting point for schedule calculations.



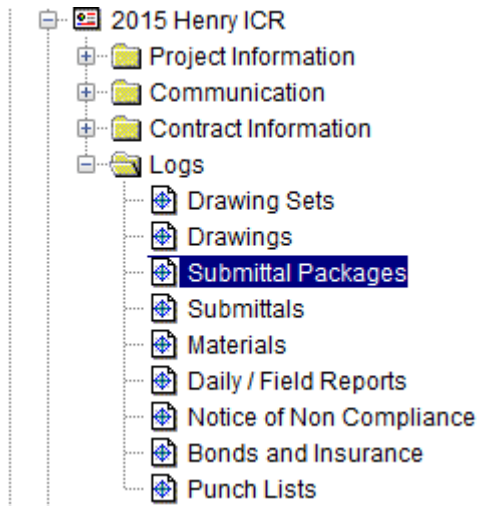
If needed, after calculating the schedule, refine the durations and or logic to meet the dates on other activities. DO NOT manually change the dates on the activities, as this will cause your schedule to have constraints.

The schedule is now ready to submit for baseline acceptance within Primavera CM.

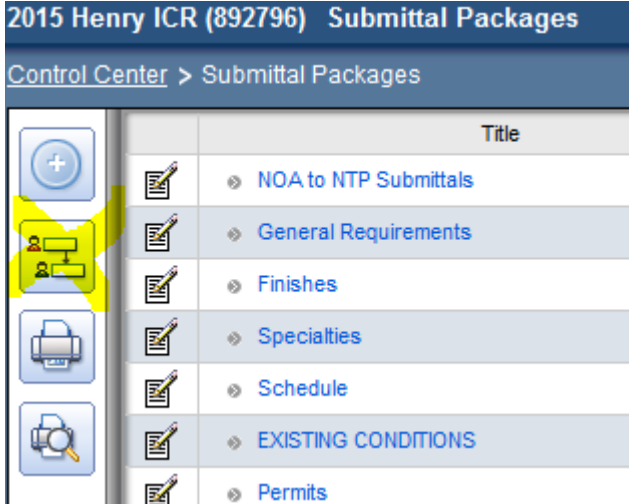
## PRIMAVERA CONTRACT MANAGEMENT

You'll log into Primavera CM - Go to the specified project and click into the Logs of the Project.

Click on the "Submittal Packages" tab.



Click on the highlighted Workflow button



Select the Schedule – click Next

**Assign Workflow**  
**Select Packages to Update**

[Select All](#) [Unselect All](#)

Select	Title
<input type="checkbox"/>	(Unassigned)
<input type="checkbox"/>	EXISTING CONDITIONS
<input type="checkbox"/>	Finishes
<input type="checkbox"/>	General Requirements
<input type="checkbox"/>	NOA to NTP Submittals
<input type="checkbox"/>	Permits
<input checked="" type="checkbox"/>	Schedule
<input type="checkbox"/>	Specialties
<input type="checkbox"/>	WOOD, PLASTICS, AND COMPOSITES

Select All – Click Next

**Assign Workflow**  
**Select Submittals to Update**

[Select All](#) [Unselect All](#)

Select	Submittal No.	Package	Submittal Title
<input type="checkbox"/>	Schedule-000	Schedule(Schedule)	Baseline Schedule
<input type="checkbox"/>	Schedule-001	Schedule(Schedule)	1st Update
<input type="checkbox"/>	Schedule-002	Schedule(Schedule)	2nd Update
<input type="checkbox"/>	Schedule-003	Schedule(Schedule)	3rd Update
<input type="checkbox"/>	Schedule-004	Schedule(Schedule)	4th Update
<input type="checkbox"/>	Schedule-005	Schedule(Schedule)	5th Update
<input type="checkbox"/>	Schedule-006	Schedule(Schedule)	6th Update
<input type="checkbox"/>	Schedule-007	Schedule(Schedule)	7th Update

Put a Check Mark on each item, then go into each Box and assign the “Received From”: GC, Sent to: Dan Moore (Jacobs), Returned by: Lend Lease CM, and Forwarded to: GC

**Assign Workflow**

Change	Change to	
<input checked="" type="checkbox"/> Received from	<do not change>	...
<input checked="" type="checkbox"/> Sent to	<do not change>	...
<input checked="" type="checkbox"/> Returned by	<do not change>	...
<input checked="" type="checkbox"/> Forwarded to	<do not change>	...

You're ready to process your first submittal – click on the Baseline Schedule:

2015 Henry ICR (892796) Submittal Package : Schedule | Schedule

Control Center > Submittal Packages Log > Submittal Package

General Status Workflow Template **Submittals** Schedule Issues Attachments Versio

Add Add Multiple Submittals Update Package

Submittals	Date Received	Date Sent	Date Returned
Baseline Schedule (Schedule-000)			
1st Update (Schedule-001)			
2nd Update (Schedule-002)			
3rd Update (Schedule-003)			
4th Update (Schedule-004)			
5th Update (Schedule-005)			
6th Update (Schedule-006)			
7th Update (Schedule-007)			

Click the tab "Review Cycles" and click on the Add as shown:

2015 Henry ICR (892796) Submittal : Schedule-000 | Baseline Schedule

Control Center > Submittals Log > Submittal > Return to Submittal Package

General Status Workflow **Review Cycles** Schedule Details Issues Attach

New Review Cycle **Add** There are currently no review cycles for this Submittal

Click your Edit Document button and Input the Title of the Submittal in the Description, click on the calendar on the Received on From GC and select the date you are sending, then click on the calendar for the Sent on to Dan Moore.

General Status Workflow **Review Cycles** Schedule Details Issues Attachments

001 Add

General Details Distributions Custom Issues Attachments

Review Cycle 001 Delete

Review Cycle \* 001

Description Baseline Schedule

Received on Mar 29, 2016 Calendar

Sent on Mar 29, 2016 Calendar

Returned on Calendar

Status New Item ▼

Forwarded on Calendar

\* Required

Calendar - Windows Inte... March 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	<b>31</b>		

From Sanjay Vimawala

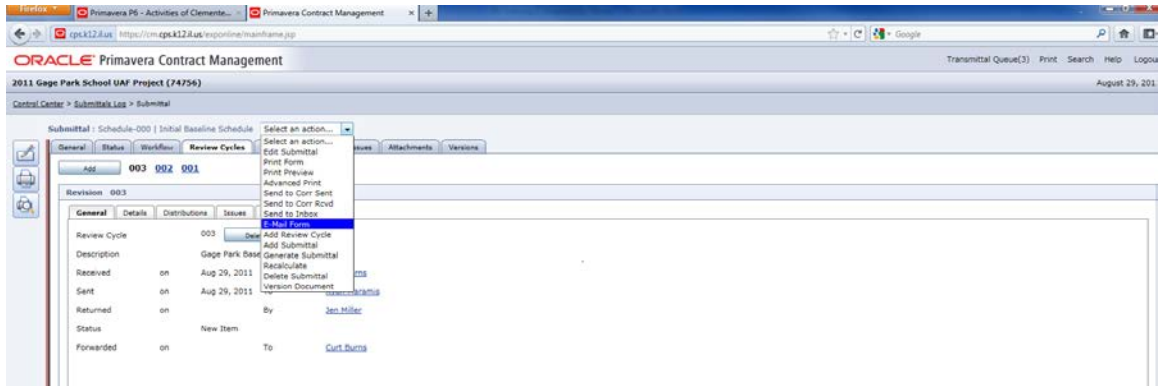
To Dan R Moore

By Jason Latimer

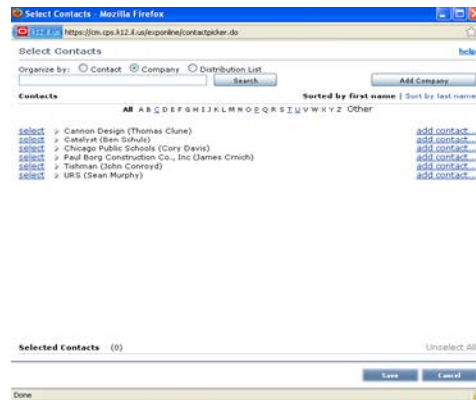
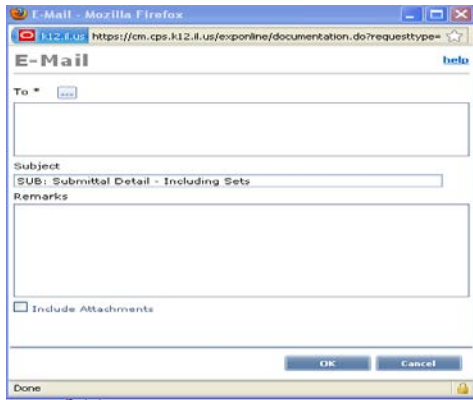
To Sanjay Vimawala

today clear cancel

CLICK SAVE – then click the dropdown box "Select an action" and choose "E-mail Form"



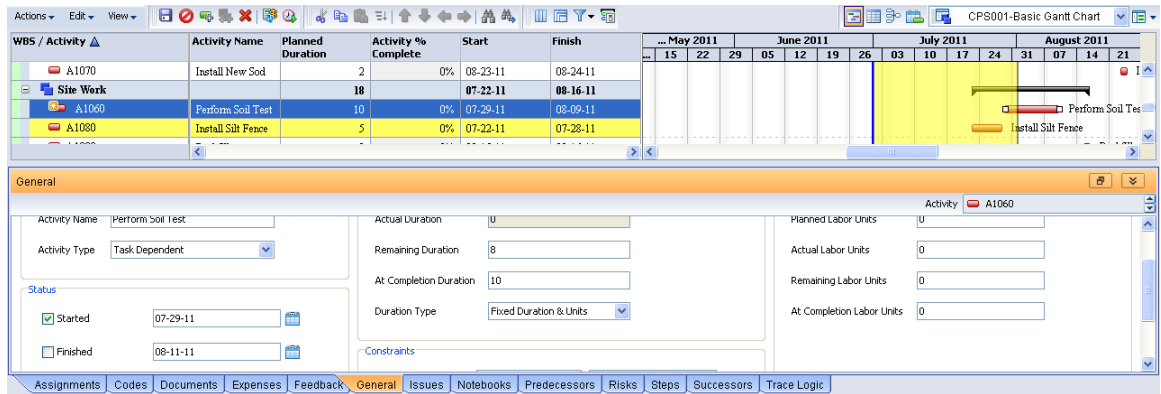
– click in the “To” box and select the following from the Contacts List:  
 Lend Lease – Click the gray arrow to expand the company listing and choose your project CM,  
 Jacobs – Dan Moore, and the PD, along with sending a copy to yourself.



Click Save, put in your Project Name and Project Number in the Subject field and your comments in the Remarks section. Click OK to send.

### **UPDATING A SCHEDULE IN P6**

- A. Great TIP – the easiest way to update a schedule is within your View dropdown, click on the “Progress Spotlight” and within the Gantt Chart drag the data date line to the new required “update” data date. All activities within the shaded area are to be the updated items.
- B. Click on an activity, click on the General tab, and identify the Status and determine if there is Remaining Duration Days as shown:



- C. When this update is complete, F9 the schedule with the new required Data Date and go back into Primavera CM and repeat the approval process with updating the review cycle of the “Schedule Update #1” and send the email form as directed with remarks of any delay information.

Updated 3/31/16