



## What you will learn

The two-day course covers how to build enterprise data structures and configure settings to support an enterprise implementation. Learn how to build and manage the EPS and OBS; add users and configure security.



**Duration:** Two Days

## Course Objectives

- ▶ Configure Security
- ▶ Add Users
- ▶ Add resources
- ▶ Set enterprise data
- ▶ Set project data
- ▶ Establish project defaults
- ▶ Manage reporting
- ▶ Build Organisation Breakdown Structure
- ▶ Build Enterprise Projects Structure

## Suggested Prerequisites

Knowledge of Project Management principles  
Primavera P6 Fundamentals Course  
Knowledge of Windows

## Target Audience

Project Manager, Administrators , Functional Implementers,

## Trainer Profile

Our trainers are accredited by Oracle University and are experienced planners, resource and project managers with experience of implementing project management systems

## Professional Development

Delegate can qualify for Personal Development Units by requesting approval from the appropriate awarding bodies

## FIND OUT MORE

Contact one of our expert advisors today for more information or a product demo

## UK Office

+44 (0)20 8326 5760  
info@milestoneuk.com  
www.milestoneuk.com

## South Africa Office

+27 (0)11-655-7117  
info@milestonesa.co.za  
www.milestonesa.co.za

# Course Topics

## DAY 1

### P6 Overview

- ▶ P6 EPPM
- ▶ P6
- ▶ Additional P6 Applications
- ▶ Other Applications
- ▶ Integration
- ▶ Organizational Roles for P6
- ▶ Network Administrators
- ▶ Database Administrators
- ▶ P6 Application Administrators
- ▶ P6 Project and Resource Managers
- ▶ Web Application Administrators
- ▶ Cloud Administrator

### Administering P6

- ▶ Implementing P6
- ▶ Structures
- ▶ Enterprise Data
- ▶ Application Settings
- ▶ User Access
- ▶ Project Control
- ▶ Services
- ▶ Reporting
- ▶ Team Members

### Managing the EPS

- ▶ Enterprise Project Structure (EPS)
- ▶ Elements of the EPS
- ▶ Benefits of the EPS
- ▶ Creating the EPS
- ▶ Sample EPS: Organized by Business Unit
- ▶ Sample EPS: Organized by Project Type
- ▶ Sample EPS: Organized by Location
- ▶ Overview: Building the EPS
- ▶ Accessing the EPS Page
- ▶ Creating EPS Elements
- ▶ Creating Additional EPS Elements
- ▶ Using EPS Detail Windows

### Managing the OBS

- ▶ Organizational Breakdown Structure (OBS)
- ▶ Matching OBS, EPS
- ▶ User Access
- ▶ Defining the Structure
- ▶ Sample OBS: Organized by Business Units
- ▶ Sample OBS: Organized by Roles
- ▶ Sample OBS: Organized by Location
- ▶ Sample OBS: Similar to EPS
- ▶ Overview: Building the OBS
- ▶ Adding OBS Elements
- ▶ Viewing the Responsibility Detail Window
- ▶ Viewing the Users Detail Window
- ▶ Assigning a Responsible Manager

### Defining Resources and Roles

- ▶ Using Roles and Resources
- ▶ Sample Resource and Role
- ▶ Relationship Between Roles and Resources
- ▶ Resource Types
- ▶ Define a Resource Plan
- ▶ Establish the Hierarchy of Resources

- ▶ Define Resource Codes
- ▶ Create Role Teams
- ▶ Create Resource Teams
- ▶ Overview: Configuring Roles
- ▶ Creating a Role
- ▶ Specifying Rates for a Role
- ▶ Specifying Role Limits
- ▶ Assigning a Role to a Role Team
- ▶ Overview: Configuring Resources
- ▶ Viewing Resources
- ▶ Creating a Resource
- ▶ Using the General Detail Window
- ▶ Using the Settings Detail Window
- ▶ Using the Units and Prices Detail Window
- ▶ Using the Codes Detail Window
- ▶ Using the Roles Detail Window
- ▶ Creating a Resource Team

### Enterprise Data

- ▶ Configuring Enterprise Data - Global Section
- ▶ Configuring Enterprise Data - Project Section
- ▶ Configuring Enterprise Data - Activities Section
- ▶ Configuring Enterprise Data - Resources
- ▶ Configuring Enterprise Data - Risks
- ▶ Configuring Enterprise Data - Issues
- ▶ Configuring Enterprise Data - Documents
- ▶ Configuring Financial Periods
- ▶ Creating Financial Periods
- ▶ Using Financial Periods
- ▶ Configuring Resource Curves
- ▶ Creating Resource Curves
- ▶ Using Resource Curves
- ▶ Configuring Calendars
- ▶ Creating a Global Calendar
- ▶ Configuring Codes
- ▶ Creating Weighted Project Codes
- ▶ Using Weighted Project Codes
- ▶ Configuring User-Defined Fields
- ▶ Creating Graphic and Calculated UDFs
- ▶ Using Graphic and Calculated UDFs

### User Access

- ▶ Configuring User Access
- ▶ Distinguishing Users and Resources
- ▶ Module - Components of P6 EPPM
- ▶ Module - Role-Based Functions
- ▶ Module - Contributor
- ▶ Security Profiles
- ▶ Security Profiles Diagram
- ▶ Pre-Defined Security Profiles
- ▶ User Interface Views
- ▶ User Access in the Cloud
- ▶ Overview: Creating Security Profiles
- ▶ Creating Global Security Profiles
- ▶ Viewing Project Security Profiles
- ▶ Creating User Accounts
- ▶ Configuring User Access
- ▶ Overview: Creating User Interface Views
- ▶ Creating User Interface Views
- ▶ Testing New User Login

### FIND OUT MORE

Contact one of our expert advisors today for more information or a product demo

### UK Office

+44 (0)20 8326 5760  
info@milestoneuk.com  
www.milestoneuk.com

### South Africa Office

+27 (0)11-655-7117  
info@milestonesa.co.za  
www.milestonesa.co.za

## DAY 2

### Planning the Project

- ▶ Templates
- ▶ Baselines
- ▶ Baseline Data
- ▶ Project Preferences
- ▶ Overview: Configuring Project Templates
- ▶ Creating a Template from an Existing Project
- ▶ Overview: Configuring Baselines
- ▶ Setting the Project Baseline
- ▶ Configuring Project Preferences

### Updating the Project

- ▶ E-mail Statusing Service
- ▶ Configuring Access to Update Activities by E-mail
- ▶ P6 Mobile
- ▶ Configuring Access to P6 Mobile
- ▶ Delegating Status Updates
- ▶ Overview: Configuring Team Member Applications
- ▶ Configuring Team Member Applications

### Scheduling Services

- ▶ Project Scheduled Services
- ▶ P6 Publication and Reporting Process
- ▶ Configuring Publication Services
- ▶ Publishing Project Data and Global Data
- ▶ Oracle Business Intelligence Publisher
- ▶ Primavera Analytics and Oracle Business Intelligence
- ▶ Project Scheduled Services
- ▶ Scheduling Services
- ▶ View Service Status
- ▶ Publishing Global and Project Data
- ▶ Defining Publication Periods
- ▶ Enabling Automatic Publishing of Project Data
- ▶ Enabling Automatic Publishing of Global Data
- ▶ Configuring Publication Service Settings for a Project

- ▶ Modifying Publication Options for Multiple Projects

### Application Settings and My Preferences

- ▶ Application Settings
- ▶ Categories of Application Settings
- ▶ Overview: Auditing Database Tables
- ▶ Overview: Setting Data Limits
- ▶ Overview: Defining Earned Value
- ▶ Overview: Configuring General Settings
- ▶ Overview: Specifying ID Lengths
- ▶ Overview: Defining Reports Elements
- ▶ Overview: Configuring Timesheet Settings
- ▶ Overview: Setting Time Periods
- ▶ My Preferences
- ▶ Overview: Global tab
- ▶ Overview: View tab
- ▶ Overview: Password tab

### Managing Issues and Risks

- ▶ Issues
- ▶ Issue Forms
- ▶ Risks
- ▶ Risk Enterprise Data
- ▶ Define Risk Categories
- ▶ Define Risk Thresholds
- ▶ Define the Risk Scoring Matrix
- ▶ Define Risk User-Defined Fields (UDFs)
- ▶ Risk Register
- ▶ Configuring Enterprise Issue Data
- ▶ Creating Issue Forms - Selecting Fields
- ▶ Creating Issue Forms - Assigning Issue Codes
- ▶ Creating Issue Forms - Assigning UDFs
- ▶ Assigning Projects to Issue Forms
- ▶ Viewing an Issue Form
- ▶ Configuring Enterprise Risk Data
- ▶ Creating Risk Categories
- ▶ Creating Risk Thresholds
- ▶ Creating a Risk Scoring Matrix

### Explore the P6 Web Interface

Please note that this course uses the P6 Web interface. Case studies reinforce new skills and functionality.

**PLEASE NOTE: All courses are delivered using standard Oracle University materials - Industry specific offerings/examples are not included in standard materials.**

### Follow on Courses

- ▶ Managing Risk in Primavera Risk Analysis (Pertmaster)
- ▶ Primavera P6 Reporting with BI Publisher 11g

#### RELATED PRODUCTS

- ▶ Primavera Risk Analysis
- ▶ Primavera P6 Analytics
- ▶ Primavera Web Services
- ▶ Primavera P6 Team Member
- ▶ Primavera Gateway
- ▶ Primavera Unifier

#### RELATED SERVICES

- ▶ Application Consultancy
- ▶ Integration Consultancy
- ▶ Health Checks

#### FIND OUT MORE

Contact one of our expert advisors today for more information or a product demo

#### UK Office

+44 (0)20 8326 5760  
info@milestoneuk.com  
www.milestoneuk.com

#### South Africa Office

+27 (0)11-655-7117  
info@milestonesa.co.za  
www.milestonesa.co.za