

Chapter 1

Getting Started with Primavera P6 Professional 18

Learning Objectives

After completing this chapter, you will be able to:

- *Understand the basics of project management*
- *Understand the need of project management*
- *Understand project planning*
- *Start Primavera P6 Professional 18*
- *Understand interface screen of Primavera P6 Professional 18*
- *Understand workspace*
- *Set the user and admin preferences*
- *Create a new project*
- *Open a project*
- *Export and Import a project*

INTRODUCTION TO PRIMAVERA P6 PROFESSIONAL 18

Primavera P6 Professional 18 is a high end project management software which provides enterprise-wide solution. It helps in reducing costs, delivering the project on the projected time by streamlining and coordinating with the management level changes. This software optimizes the overall resources so that the project runs efficiently no matter how big the size of the project is. It is designed to manage a large number of projects at a time to fulfill the project management requirements in an organization.

By using Primavera P6 Professional 18, one can simultaneously plan major project strategies and control the minute details to finish the project. The resources will be used effectively and productively.

In this chapter, you will be introduced to Primavera P6 Professional 18. Also, you will learn to navigate in this software and to customize and save screen layouts. With the completion of this chapter, you will be able to comfortably navigate through the Oracle Primavera P6 Professional 18 and to customize the interface to suit your project needs.

BASIC FEATURES OF PRIMAVERA P6 PROFESSIONAL 18



Primavera P6 Professional 18 features a wide range of project management methodologies. These methodologies are briefly discussed below.

- **Import Zipped XER Files**

In Primavera P6 Professional 18, you can import *.xer* files directly from a zipped file without decompressing the file manually before importing.

- **Centralized Project Repository**

Primavera P6 Professional 18 offers flexibility for determining who will access a project from all projects in a centralized database.

- **Enterprise Project Structure & Codes**

Enterprise Project Structure (EPS) helps to create a hierarchical structure for the projects based on the requirements of an organization.

- **Cross Project Analysis and Reporting**

You can easily and quickly create cross-project dependencies and can determine how projects affect one another. You can also determine whether the resources are under or over allocated across projects.

- **CPM Scheduling**

Primavera P6 Professional 18 provides Critical Path Method (CPM) scheduling using the activities and relationships between activities and calendars to maintain a project schedule. It identifies the critical activities that affect the completion of the project.

- **Float Path Analysis**

Float Path Analysis identifies all the critical paths within a project to avoid potential delays. It also helps in visualizing the activity's importance.

- **Cross Project Dependencies**

It helps in monitoring the overall critical path of activities and minimizes the risk of multiple parties working together.

- **Resource Allocation**

Primavera P6 Professional 18 tracks labor, material, equipment, and expenses needed for the activities.

- **ERP or Accounting Integration**

Primavera allows integration with ERP or accounting system so that the schedule and cost information can be shared.

- **Resource Leveling**

It helps to ensure that sufficient resources are available to perform the activities in the project plan.

- **Baseline Management**

Unlimited versions of the schedules, resources, and costs can be stored to compare how the project progresses with reference to the original plan.

- **Project Reports**

In Primavera P6 Professional 18, you can generate predefined and customized reports for a project.

CONCEPT AND NEED OF PROJECT MANAGEMENT

In simple terms, project management is the process of achieving set goals within the specified time, budget, and other resources. It helps to get maximum out of the available resources like manpower, money, materials, facilities, information, and many more. This process helps management or teams in an organization to plan, execute, and complete tasks on specific date or time and within a limited budget.

Following are three stages or phases of project management:

1. Planning
2. Controlling
3. Managing

PLANNING PROJECTS

Project planning is a part of project management related to the use of schedules, such as Gantt charts, that help to plan and manage projects in the project environment. While planning a project, first the scope of the project is defined by the duration of various tasks necessary to complete the work. These tasks are listed and grouped in Work Breakdown Structure. The duration of tasks is often estimated through an average of optimistic, normal, and pessimistic cases.

Second, the resources necessary for the given project can be estimated and the costs of activities can be calculated according to the resources assigned to those activities to get the total project cost. The project is then optimized to achieve the balance between the resource usage and project

duration to comply with the objectives. This phase of project planning is followed by project schedule, and project management plan.

Purpose of Planning

The purpose of project planning is to achieve project objectives and to predict which activities and resources are critical for timely completion of the project. Therefore, planning helps in making strategies to attain the desired goals and thus ensuring that the project will be delivered on time and within the budget.

Planning helps in identifying the total scope of project and the resources to perform the work. It helps to optimize the resources according to the project needs. It also helps to identify the risks, plan to minimize them, and then set priorities of the project according to the risk. It also helps to provide a baseline plan based on which the progress of the project is measured.

Planning Cycle

While constructing a building, the first step required is to lay foundation. Similarly, before building-up projects using the Project Management module, one has to start from the foundation to be laid in the construction of Enterprise Project Structure. Figure 1-1 shows the flow chart of project planning.

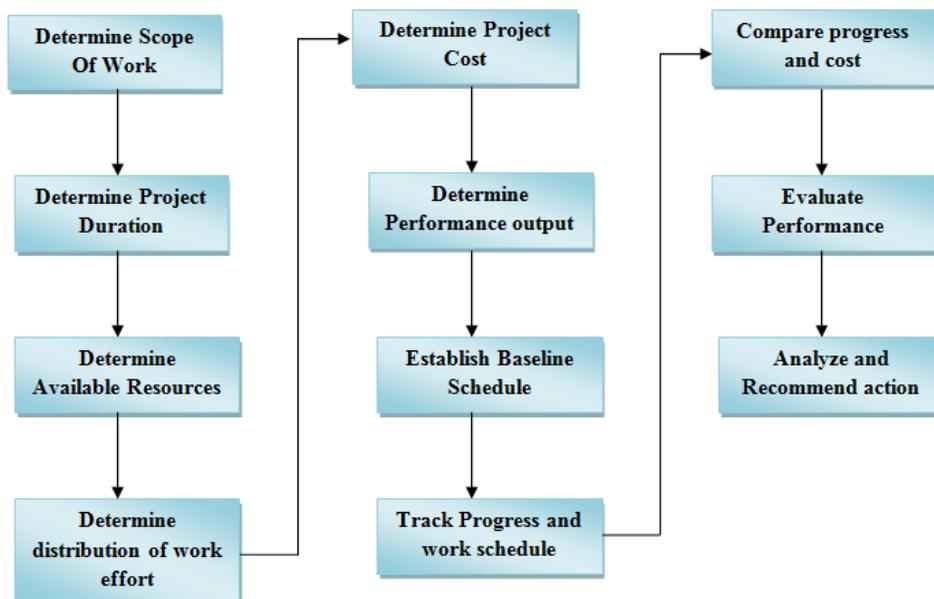


Figure 1-1 Flow chart of project planning

You can perform project planning using Primavera P6 Professional 18 module by following the steps given below:

- **Establish Goals:** The first step of the planning process is to identify and establish goals. The next step is to get the detailed information of goals including the reasons for the selection and the anticipated outcomes of the projects.

- **Established Goals to be achieved by Organization:** The Organizational Breakdown Structure (OBS) represents the hierarchical arrangement of the company management to fulfill the established needs. The OBS should be structured in such a way that each task in the Work Breakdown Structure (WBS) must be assigned to a person or committee. The OBS displays organizational relationships between the employees of an organization and according to that helps in assigning work resources in a project to the employees.

Each goal should have tasks or projects associated with its achievement. To achieve the goals, most useful and important structure for a project is the WBS. The WBS is continuation to the EPS for individual projects in an organization. WBS can be identified as breaking down complex projects into simpler, manageable, and interrelated tasks. A good work breakdown structure encourages a systematic planning process that covers all the key elements in a project and simplifies the project into manageable units. A WBS is used as a road map for planning, monitoring, and managing all the elements of a project such as scope of work, cost and time estimation, resource allocation and scheduling, productivity, and many more.

- **Identifying Resources:** EPS is the hierarchical arrangements of the projects. It helps in managing multiple projects from higher to individual level and thereby facilitates the performance of specific tasks in an organization.

- **Prioritize Goals and Tasks:** Prioritizing goals and tasks process is to arrange goals or tasks in terms of their importance. The most important tasks will be theoretically and practically approached and completed first.

- **Goals Assigned to Resources:** Each goal has some financial and human resource requirements associated with it. To achieve the goals, certain resources are required to be assigned. In Primavera P6 Professional 18, Resources Breakdown Structure (RBS) is an hierarchical structure of resources which are needed to accomplish the objectives of project. It is logical and useful classification of resources that can be used to optimize resource utilization.

- **Create Assignments and Baselines:** As the projects are prioritized, it is required to establish baselines for completing associated tasks and assign resources to complete them. This portion of the management planning process should consider the abilities of the staff members and the time necessary to complete the assignments.

- **Tracking the Project's Progress:** A management planning process includes a strategy for evaluating the progress toward goal completion throughout an established time period. To evaluate the progress of a project, you need to keep a track of it.

CONTROLLING PROJECTS

Project control processes are performed to observe the project execution so that problems can be timely identified and corrective action can be taken, when necessary, to control the execution of the project. Project control includes measuring the ongoing project activities, monitoring the project variables such as cost, effort, scope and identifying the corrective actions to address risks and issues.

MANAGING PROJECTS

Project management is done by the Project Manager responsible for accomplishing the stated project objectives. Project management includes development of the project plan, managing project stakeholders, managing communication, managing project team, managing project risk, managing project schedule, managing project budget, managing project conflicts, and managing project delivery. Project Management depends upon the industry type, size, maturity, and culture of the company.

STARTING PRIMAVERA P6 PROFESSIONAL 18

Planning is an integral part in managing a project. Primavera P6 Professional 18 is a planning software that makes this activity an easier task. To start with Primavera P6 Professional 18, choose **Start > Oracle - Primavera P6 > P6 Professional 18** (for Windows 10); the **P6 Professional 18** dialog box will be displayed with the **Login to P6 Professional 18** area, as shown in Figure 1-2. By default, the login name is displayed in the **Login Name** edit box. To login to Primavera P6, enter password in the **Password** edit box and then choose the **CONNECT** button. By default, the login name and password to enter into primavera is **admin**.



Figure 1-2 The Login to P6 Professional 18 area

A PMDB database is already created for Primavera to work in the specified database. Create your own database by using the options from the **Databases** tab in the **P6 Professional 18** dialog box. When you choose this tab, the **Database List** area will be displayed, as shown in Figure 1-3.

In this area, select the required database from the **Database List** area or continue working on the standalone primavera with predefined database. You can add more database to the Primavera. To do so, choose the **Add** button below the list box of the dialog box; the **Database Configuration** wizard with the **Select or Create Alias** page will be displayed. Enter the required values in the page and keep choosing the **Next** button until you create your own database. You are required to enter the public login information like username and password for the database that you have created. As you finish creating database, choose the **Finish** button in this wizard. The new database would be added in the **Database List** box with a tick which means that it is selected as the default database. After specifying the database, choose the **Login** tab. Enter the login

name and password in their respective edit box and then choose the **CONNECT** button; the **Primavera P6 Professional 18** user interface will be displayed, as shown in Figure 1-4.

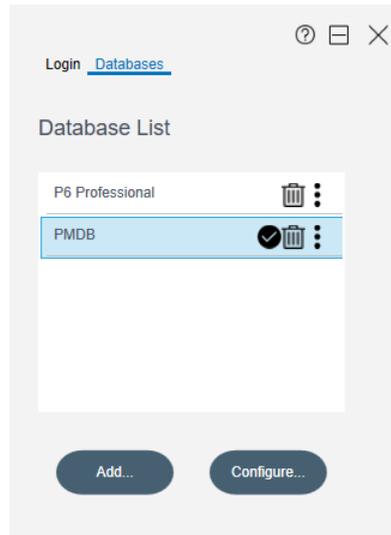


Figure 1-3 The Edit Database Connections dialog box

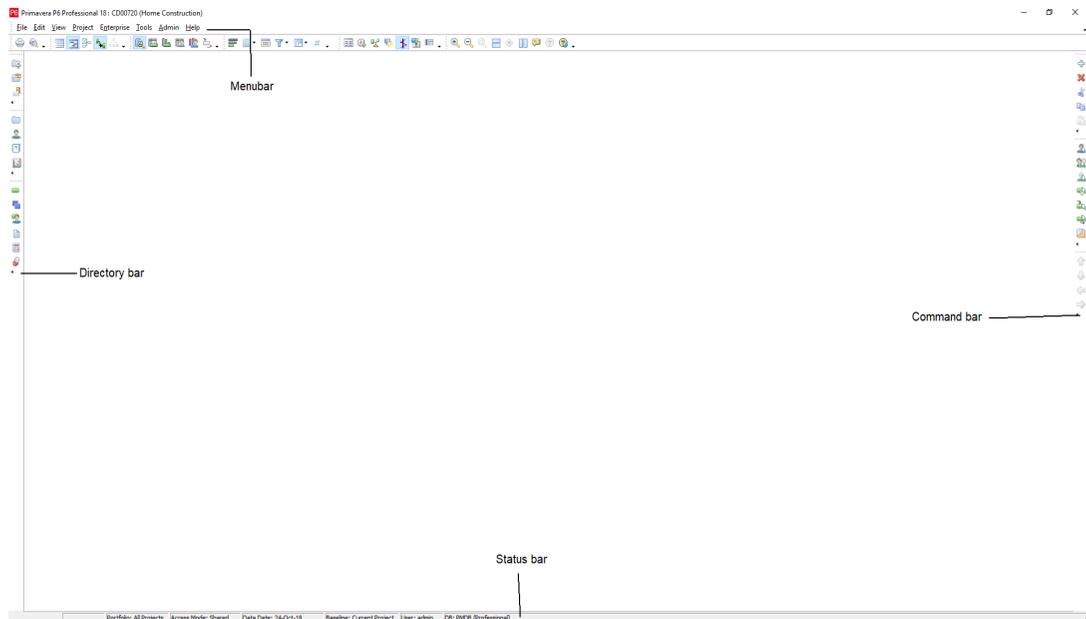


Figure 1-4 The Primavera P6 Professional 18 interface with the Home window

USER INTERFACE SCREEN

The Primavera P6 interface with the **Home** window consists of Directory bar, Menubar, Command bar, and Status bar, refer to Figure 1-4. You can hide and unhide these options using the toolbar. To hide any of the toolbars, choose **View > Toolbars**, refer to Figure 1-5 and then

clear the check mark corresponding to the toolbar name that you want to hide in the **Home** screen. You can choose the **Customize** option from the cascading menu; the **Customize** dialog box will be displayed, as shown in Figure 1-6. In the **Customize** dialog box, select the check boxes corresponding to the toolbar that you want to display. You can clear the check box from the **Customize** dialog box to hide the options from the toolbar.

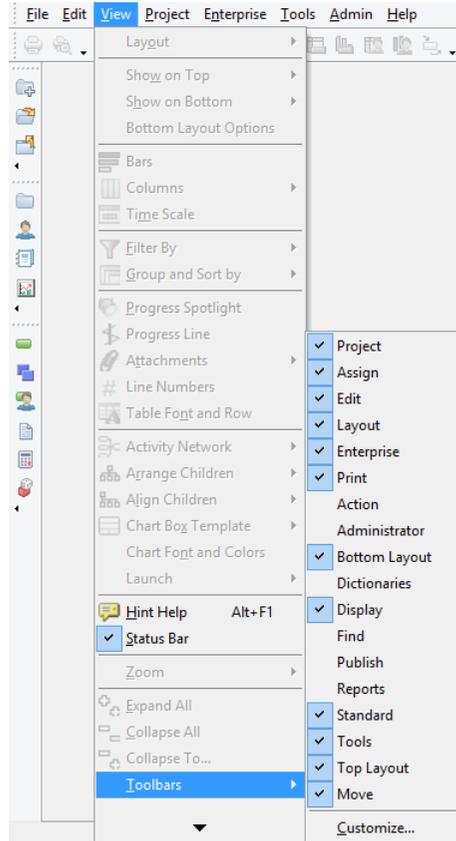


Figure 1-5 Options to hide or unhide a toolbar

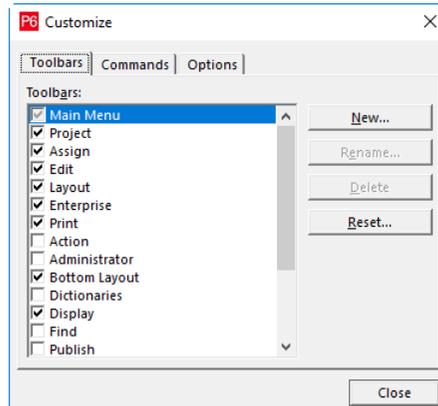


Figure 1-6 The Customize dialog box

Directory Bar

The buttons of the Directory bar help in displaying the windows quickly. The buttons in the Directory bar are described next.

Buttons	Description
Projects	Projects tab displays the Project window to review the Enterprise Project Structure (EPS) and allows to work on individual project.
Resources	Displays the Resources window. It helps to add and modify the organization resources.
Reports	Displays the Reports window which helps to create, run, edit, and delete project reports globally. You can also export and import the project reports.
Tracking	Displays the Tracking window which helps in monitoring the progress of projects.
WBS	Displays the Work Breakdown Structure window. This window helps in creating the work breakdown of the created projects.
Activities	Displays the Activities window in which you can create, edit, and modify the activities of an open project.
Assignments	Displays the Resources Assignments window to view all the resource assignments of opened projects. You can view, add, and delete the resources assigned to the activities.
WPs & Docs	Displays the Work Products and Documents window which helps to maintain work products and document records of the opened projects.
Expenses	Displays the Project Expenses window to work with all the expense items for the open project.
Thresholds	Displays the Project Thresholds window to calculate the estimated threshold for each activity in an open project.
Issues	Displays the Project Issues window which helps to add, edit, or delete project related issues.
Risks	Displays the Project Risks window which helps to calculate risks for the project.

Menubar

The menubar contains drop-down menus which are used to access functions like creating and opening project, setting user preferences, and so on. The menubar also helps to hide and unhide the toolbars. It also helps to access project activities, create WBS, EPS, OBS, and access the help file from the menubar. The menus available in the menubar are briefly described next.

Menu	Description
File	It helps to open existing project or create new projects and also allows to print, import and export the project.
Edit	It helps to cut, copy, and paste the project and also helps in setting the user preferences.
View	It helps in the formatting of the projects.
Project	It includes all the elements of project such as activities, resource assignments, and WBS. It helps in creating WBS or activities and also enables users to enter into project risks and thresholds.
Enterprise	It helps in creating EPS, OBS, tracking projects, and arranging calendars.
Tools	It helps to generate reports and monitor thresholds.
Admin	It helps in the admin services.
Help	It allows to access the help content of primavera.

Command Bar

The Command bar is displayed by default on the right side of the Primavera interface screen when a project is opened. The Command bar displays the command to add a new project or activity, delete an existing project or activity and so on.

Status Bar

The Status bar is located at the bottom of the Project screen which describes the status of an opened project.

WORKSPACE

In the user interface, you can select any of the tabs to display the corresponding layout. The workspace of each window will display the menubar, Directory bar, Toolbar, Command bar and its detailed table. For example, if you choose the **Activities** button from the Directory bar, the **Activities** window will be displayed, as shown in Figure 1-7.

The **Details** table in the window displays the details of the opened window. You can enter general information, status, summary, comments, and so on related to the corresponding window in the table.

The screenshot displays the Primavera P6 Professional 18 interface. The main window is titled 'Activities' and shows a project named 'CD00720 Home Construction'. The 'Activities' table lists various tasks such as 'Project Management', 'Grading', 'Foundation', 'Structure', 'Roof', and 'Mechanical'. The Gantt chart visualizes the project schedule, showing activity bars and dependencies. The 'Details table' at the bottom provides specific information for the selected activity, including its type, duration, and manager.

Figure 1-7 The Activities window with the details of the window

SETTING USER PREFERENCES

In Primavera, you can set user preferences as required. For example, indicate the format for displaying time units and dates, specify the currency to be used for viewing costs, and set startup display preferences. To set the user preferences, choose the **User Preferences** option from the **Edit** tab of the menubar; the **User Preferences** dialog box will be displayed. This **User Preferences** dialog box is divided into nine tabs: **Time Units**, **Dates**, **Currency**, **Assistance**, **Application**, **Password**, **Resource Analysis**, **Calculations**, and **Startup Filters**. The description of these tabs is given next.

Time Units Tab

The **Time Units** tab, as shown in Figure 1-8, allows you to define the time scale and to set the format that you want to use while displaying small and large-scale time units. It also allows to track layouts, set duration of activities, set resource prices, check availability, and display work efforts.

In the **Units Format** area, set the time unit in the **Unit of Time** drop-down list. If you want to include the next smallest time interval, select the **Show Unit label** check box. On doing so, the **Sub-unit** check box will be enabled. Select the **Sub-unit** check box to display the time with primary and secondary units. For example, if you select **Hour** in the **Unit of Time** drop-down list, the **Sub-unit** edit box will display **Minutes**. In the **Decimals** drop-down list, select the number of decimal places you want to include in the time unit value.

In the **Durations Format** area, select an option for the unit from the **Unit of Time** drop-down list. To enable the **Sub-unit** edit box, select the **Show Duration label** check box. In the **Decimals** drop-down list, select the number of decimal places to display the activity duration value.

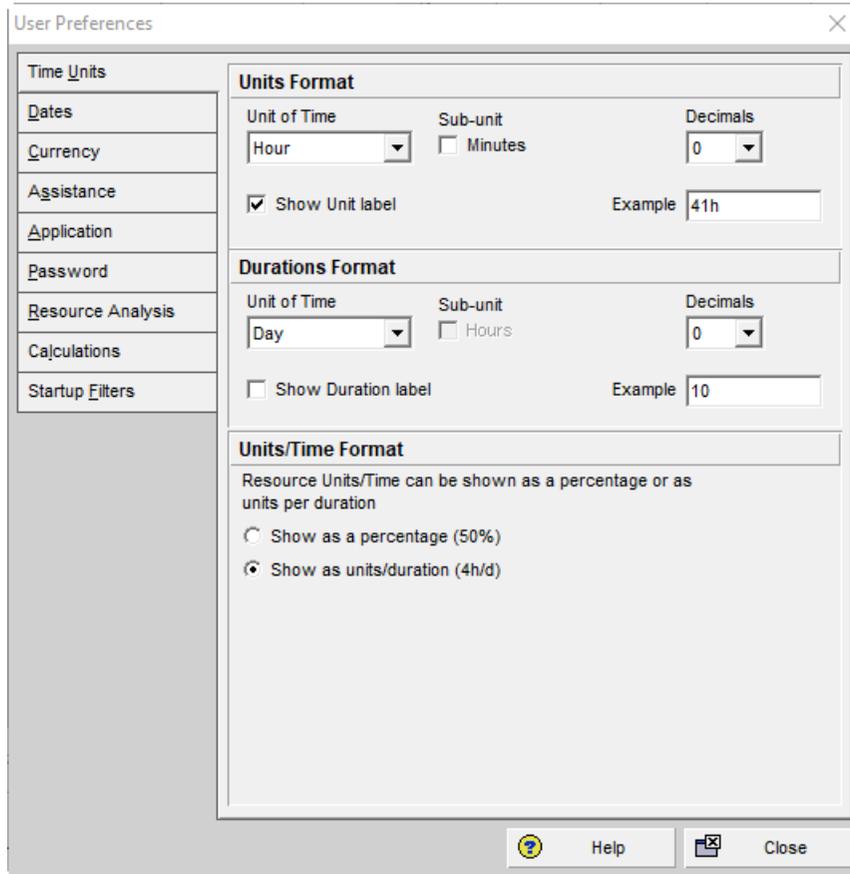


Figure 1-8 The User Preferences dialog box with the Time Units tab displayed

In the **Units/Time Format** area, select the **Show as a percentage(50%)** radio button to display the resources units/time as percentage. To display the resources units/time as a unit duration value, select the **Show as units/duration** radio button.

Dates Tab

In the **Dates** tab, as shown in Figure 1-9, you can change the date and time format as desired.

In the **Dates Format** area, select the radio button corresponding to the date format you want to use. Similarly, select the required radio button of the time format from the **Time** area. In the **Time** area, the **Show minutes** check box will be enabled only when you choose a radio button corresponding to time. Select the check boxes in the **Options** area to indicate how the selected date format should appear. In the **Separator** edit box of the **Options** area, select the character you want to use for distinguishing date, month, and year.

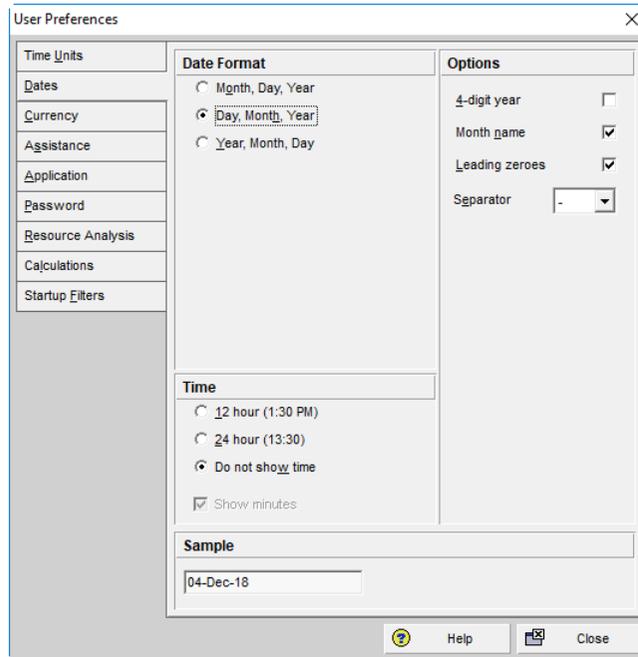


Figure 1-9 The User Preferences dialog box with the **Dates** tab chosen

Currency Tab

The **Currency** tab, as shown in Figure 1-10, allows you to select a currency for viewing monetary values. To edit the monetary values, choose the **Browse** button from the **Select a currency for viewing monetary values** edit box; the **Select Currency** dialog box will be displayed. In the **Select Currency** dialog box, select the desired currency and choose the **Select** button;  the currency is assigned to the project and the **Select Currency** dialog box is closed and the **User Preferences** dialog box is displayed. The **Show currency symbol** and **Show decimal digits** check boxes are selected by default to display the currency symbol and decimal digit in the project.

Assistance Tab

The **Assistance** tab, refer to Figure 1-11, allows to use wizards instead of standard dialog boxes. Wizards guide you through necessary steps to complete a function. As you become comfortable in adding resources and activities, you can easily add them and do not need the directions. Select the check boxes in the **Wizards** area to display the **Use New Resource Wizard** for adding a new resource, and the **Use New Activity Wizard** wizard for adding a new activity in their respective windows.

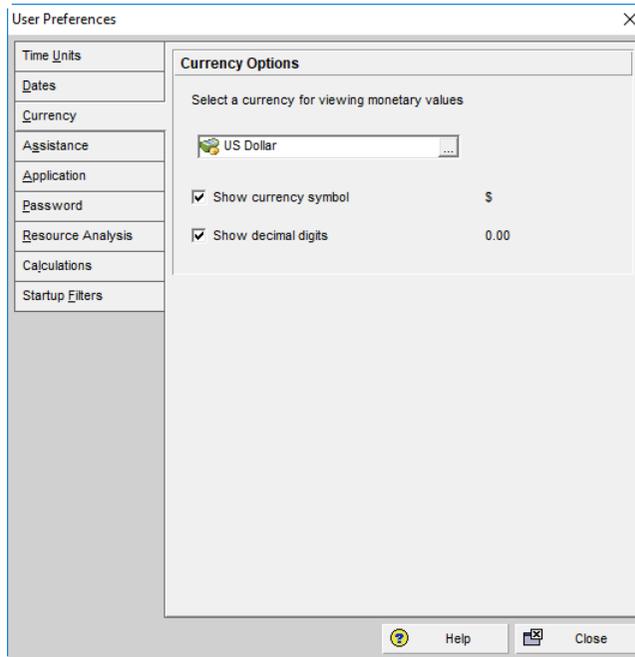


Figure 1-10 The User Preferences dialog box with the Currency tab chosen

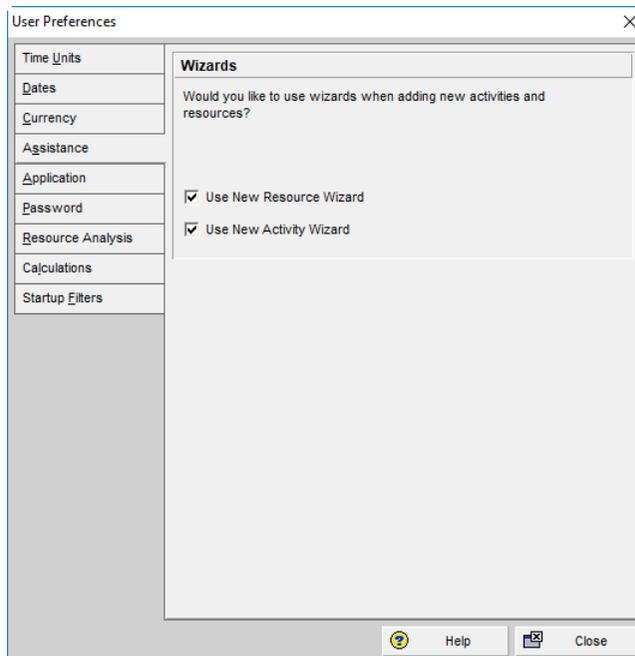


Figure 1-11 The User Preferences dialog box with the Assistance tab chosen

Application Tab

The **Application** tab, refer to Figure 1-12, allows you to customize startup window, and also enables the user to trace the internal function to the log file. Also, in this tab you can set options for grouping and sorting of data. In the **Columns** area, you can specify the financial periods to be set in columns. In the **Startup Window** area, select the options from the window that you wish to display each time you start the module from the **Application Startup Window** drop-down list. Select the **Show the Welcome dialog at startup** check box to display the **Welcome** dialog box at the startup. Using the options available in the **Welcome** dialog box, you can create a new project, open an existing project, open the last project opened in your previous session, and display global data only.

In the **Group and Sorting** area, you can enable or disable the **Show ID / Code** or **Show Name / Description** edit box by selecting or clearing the corresponding check boxes. In the **Columns** area, choose the Browse button to assign a range of financial periods to be viewed in columns.

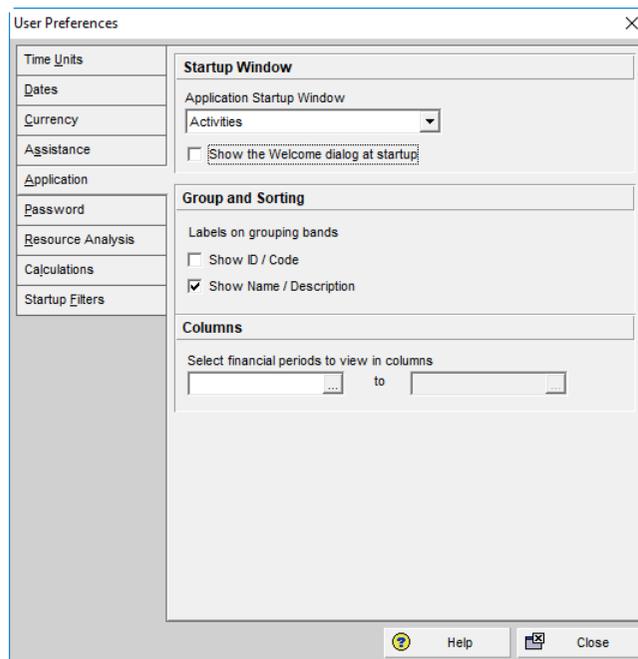


Figure 1-12 The User Preferences dialog box with the **Application** tab chosen

Password Tab

The **Password** tab allows you to change the password of the current application. To change the password, choose the **Password** button; the **Change Password** dialog box will be displayed. In this dialog box, enter a new password and then confirm the password. Next, choose the **OK** button; the **Primavera P6 Professional 18** message box will be displayed informing you that password has been changed successfully.

Resource Analysis Tab

The **Resource Analysis** tab, refer to Figure 1-13, allows you to specify the resources to be shown in the resource usage spreadsheet. Also in this tab, you can specify the date and time interval to be used to calculate time-distributed data for resource spreadsheets and profiles.

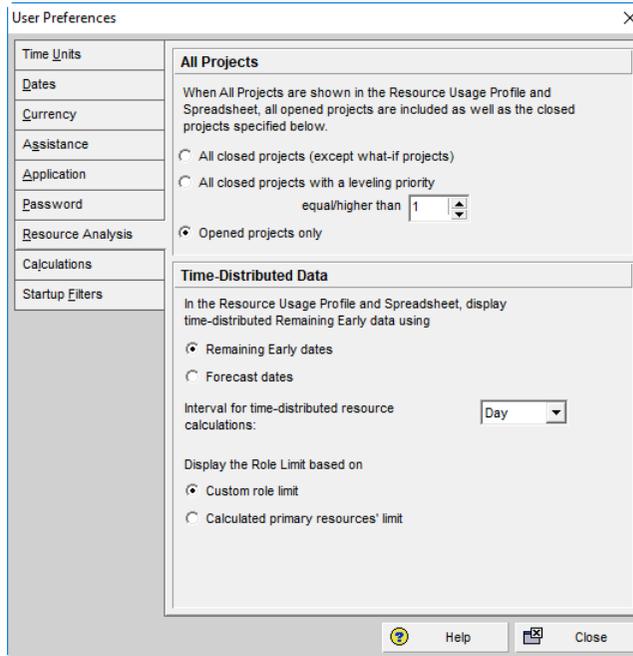


Figure 1-13 The User Preferences dialog box with the Resource Analysis tab chosen

In the **All Projects** area, you can select any one of the radio buttons to define the projects you want to display in the resources usage profile and spreadsheet. In the **Time-Distributed Data** area, select a starting point for calculating remaining units and costs to be displayed in the Resource Usage Profiles, the Resource Usage Spreadsheet, tracking layouts, and Primavera Web application charts. To show the remaining values, select the **Remaining Early dates** radio button to calculate values based on remaining start/finish dates. To show remaining values, select the **Forecast dates** radio button to calculate values based on forecasted start/finish dates.

Next, select an interval from the **Interval for time-distributed resource calculations** drop-down list at which the live resource and cost calculations are performed for Resource Usage Profiles and Resource Usage Spreadsheet.

Calculations Tab

The **Calculations** tab, refer to Figure 1-14, allows you to allocate cost and units on adding and deleting multiple project resources. It also enables you to specify how to calculate remaining values when new resource assignments are added or removed from activities. You can also choose the default behavior when replacing a resource/role on an existing activity assignment with a different resource/role.

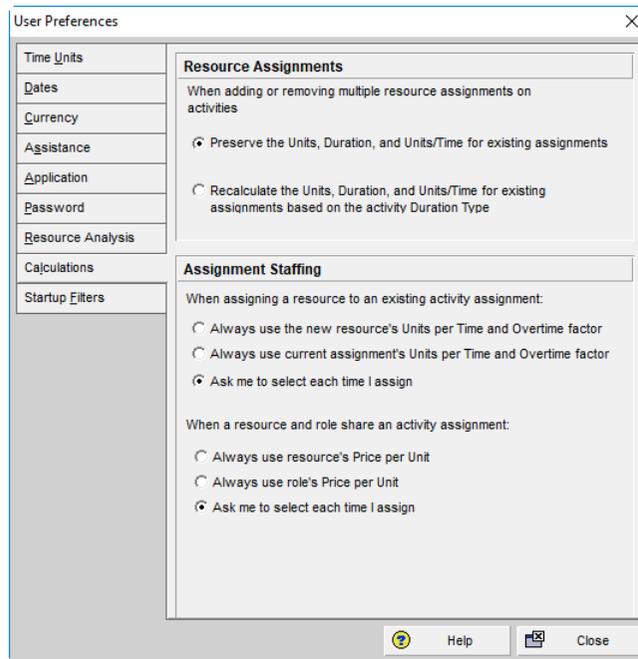


Figure 1-14 The User Preferences dialog box with the Calculations tab chosen

In the **Resource Assignments** area, select the **Preserve the Units, Duration, and Units/Time for existing assignments** radio button for units, duration and units/time to remain constant even if new resource assignments are added to existing projects. To recalculate the units, duration and units/time for existing assignments or for newly added assignments, you need to select the **Recalculate the Units, Duration, and Units/Time for existing assignments based on the activity Duration Type** radio button. While replacing a resource on an existing activity assignment, you need to use the units/time and overtime factor of the new resource. While assigning a resource to an existing role, you need to use the price/unit of the resource or role.

Startup Filters Tab

The **Startup Filters** tab contains the default filters to start the Primavera P6 **Professional 18** application. You can choose this tab to view the data related to current projects or all the data in the database. These filters can reduce the time taken in opening projects.

SETTING ADMIN PREFERENCES

The admin preference settings established by the project controller are required to make specific changes in a project. To specify the admin settings, select the **Admin Preferences** option from the **Admin** tab of the menubar; the **Admin Preferences** dialog box will be displayed, refer to Figure 1-15. This dialog box consists of nine tabs: **General, Data Limits, ID Lengths, Time Periods, Earned Value, Reports, Options, Rate Types, and Industry.**

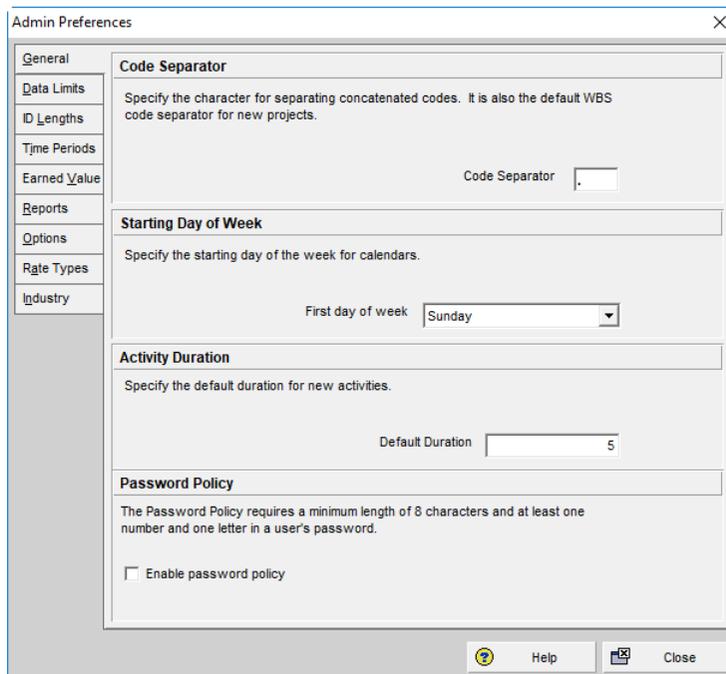


Figure 1-15 The Admin Preferences dialog box with the **General** tab chosen

General Tab

In the **General** tab, you can specify general options, such as the weekday from which the calendar week begins. You can change the character used to separate hierarchy levels in resource, project, activity codes, roles, cost accounts, and WBS elements. You can also change the default duration of activities. You can change the password policy by selecting the **Enable password policy** check box.

Data Limits Tab

The **Data Limits** tab enables you to specify the maximum number of levels for hierarchical structures. You can also specify the maximum number of baselines and activity codes that can be included in a project.

ID Lengths Tab

The **ID Lengths** tab enables you to set the number of characters to be displayed as ID or Code such as Project ID, WBS Code, Resource ID, Activity ID, Cost Account ID, and so on at each tree level.

Time Periods Tab

In the **Time Periods** tab, you can set the number of work hours such as Hours/Day, Hours/Week, Hours/Month, or Hours/Year. You can also specify abbreviations for displaying minutes, hours, days, weeks, months, and years.

Earned Value Tab

In the **Earned Value** tab, you can change the default earned value settings. You can also change the settings for computing the techniques of budget estimation.

Reports Tab

In the **Reports** tab, you can make settings for the display of reports. Using this tab, you can define the sets to display the reports. It can be displayed in first set, second set, and third set with the header, footer, and custom label for reports.

Options Tab

In the **Specify the interval to Summarize and store resources spreads** area of the **Options** tab, you can specify the time interval during which the cost and quantity summaries can be calculated for Resource Usage Spreadsheet and Activity Usage Spreadsheet.

To access Contract Management, select the **Enable Link to Contract Management** check box, and then type the URL and port number in the Contract Management web server. Once the access to Contract Management is established with the required privilege, you can then link your project to a Contract Management project to enable users to import and view Contract Management project information.

When you select the **Online Help** option from the **Help** menu, the URL that is specified in this section will be launched. If the **P6 Professional Online Help URL** field is blank, the **Online Help** option in the **Help** tab of the menubar is disabled for all users.

Rate Types Tab

The **Rate Types** tab enables you to specify the resources and roles rate types.

Industry Tab

This tab allows you to choose the type of industry in which you want to use the application. To select an industry for the project, select the radio button correspondig to the required options.

CREATING A NEW PROJECT

A project can be defined as a set of planned interrelated tasks to be executed over a fixed period of time and within certain cost and limitations. In Primavera P6 Professional 18, there are existing sample projects that can be used as a reference or you can create your own project.

WBS is defined as Work Breakdown Structure which is a hierarchical arrangement of deliverables produced during or by a project. WBS allows you to divide a project into meaningful and logical pieces for the purpose of planning and control.

The projects are created under EPS (Enterprise Project Structure). To create a new project, choose the **New** option from the **File** tab of the menubar; the **Create a New Project** wizard with the **Select EPS** page will be displayed. In this dialog box, choose the Browse button corresponding to the **Select EPS** edit box and select the EPS under which you want to create the project.

OPENING A PROJECT

You can open a project by choosing the **Open** option from the **File** menu. When you choose this option, the **Open Project** dialog box will be displayed, refer to Figure 1-16. In this dialog box, expand the projects node to view the complete project. From the displayed list, select a project and then choose the **Open** button to open the existing project.

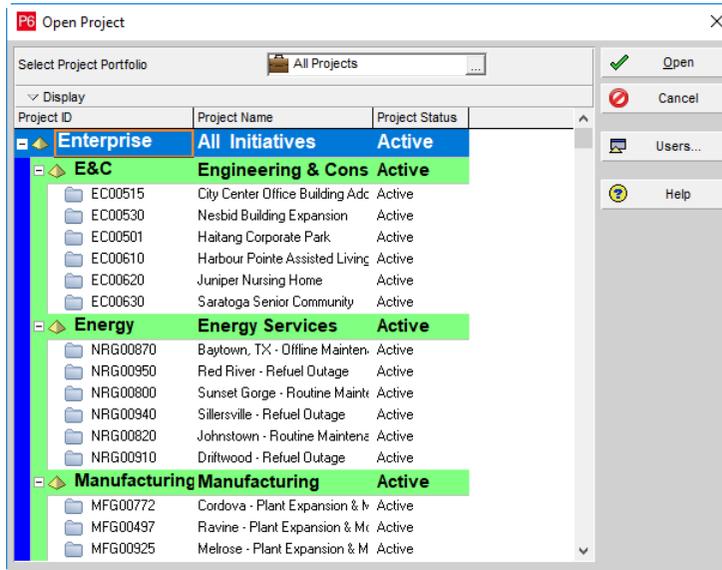


Figure 1-16 The **Open Project** dialog box

EXPORTING A PROJECT

You can export a project and save it for further use. To export a project, choose the **Export** option available in the **File** tab of the menubar; the **Export** wizard with the **Export Format** page will be displayed, as shown in Figure 1-17.

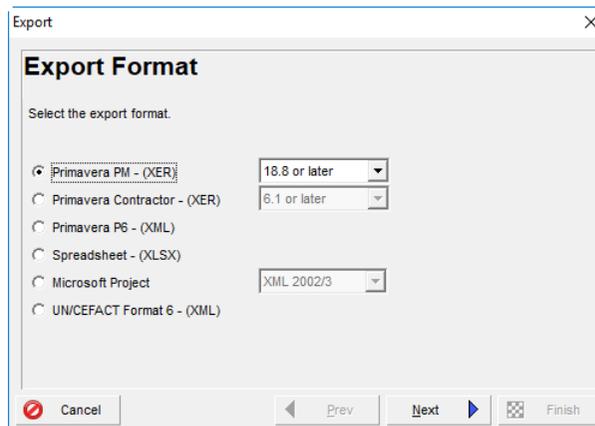


Figure 1-17 The **Export** wizard with the **Export Format** page

In this dialog box, select the required radio button to set the format in which you want to export the file. Then, choose the **Next** button; the **Export Type** page will be displayed, as shown in Figure 1-18.

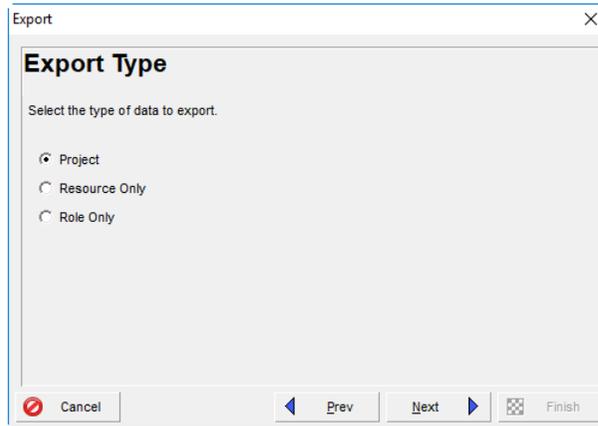


Figure 1-18 The *Export* wizard with the *Export Type* page

In this page, select the type of data that you want to export by selecting the **Project**, **Resource Only**, or **Role Only** radio button. On selecting the **Project** radio button, the complete project will be exported. The **Resource Only** radio button allows you to export the resources of the open project. You can select the **Role Only** radio button to export the roles of the opened project. Now, choose the **Next** button; the **Projects To Export** page will be displayed, as shown in Figure 1-19.

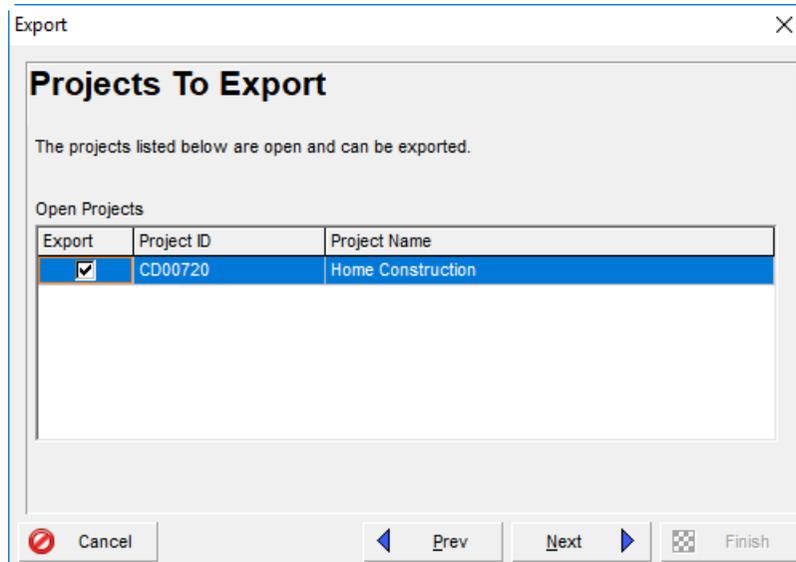


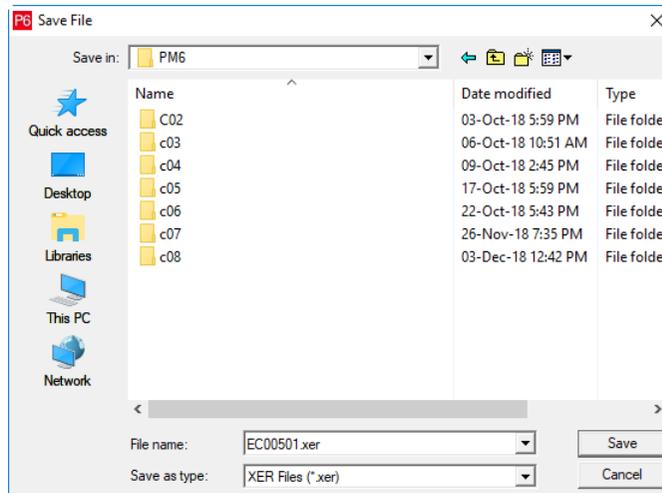
Figure 1-19 The *Export* wizard with the *Projects To Export* page

In this page, you can view the opened projects that are to be exported as a file. Choose the **Next** button; the **File Name** page will be displayed, as shown in Figure 1-20. In this page, you can choose the Browse button corresponding to the **File Name** edit box.



*Figure 1-20 The **Export** wizard with the **File Name** page*

On doing so, the **Save File** dialog box will be displayed, as shown in Figure 1-21. In this dialog box, browse to the folder where you want to save the opened file and then choose the **OK** button; the **Save File** dialog box will be closed. Now, choose the **Finish** button, the export process will start and then the **Primavera P6** message box will be displayed, as shown in Figure 1-22, informing that the export was successful. Choose the **Close** button; the file will be exported and the export dialog box will be closed.



*Figure 1-21 The **Save File** dialog box*

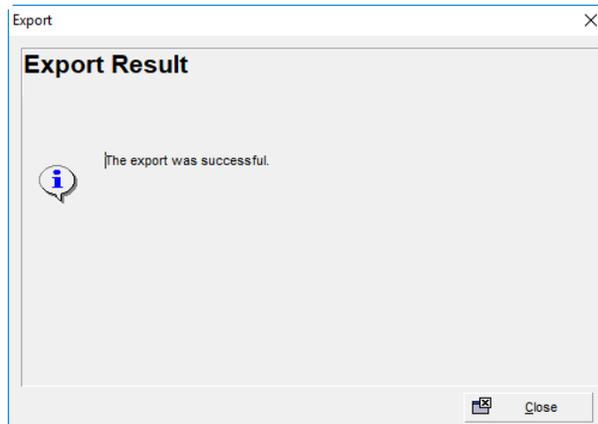


Figure 1-22 The *Export* wizard with the *Export Results* page

IMPORTING A PROJECT

To save time, you can import Primavera files to the module. To import a project, Enterprise Project Structure (EPS) should be in the **Projects** window under which the project will be imported. Now, select the **Import** option from the **File** tab of the menubar; the **Import** wizard with the **Import Format** page will be displayed, as shown in Figure 1-23.

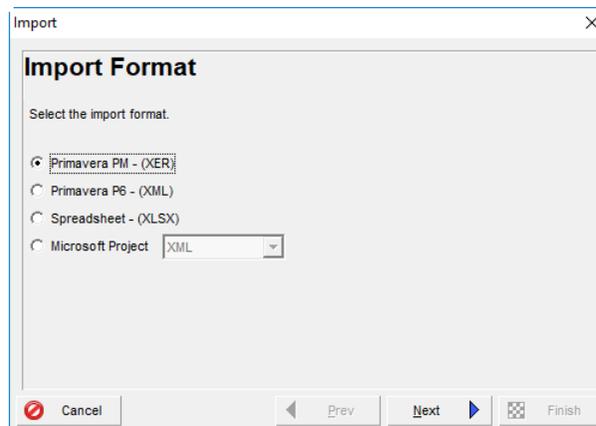


Figure 1-23 The *Import* wizard with the *Import Format* page

In this dialog box, select the desired radio button for the file format that you want to import. Now, choose the **Next** button; the **Import Type** page will be displayed, as shown in Figure 1-24.



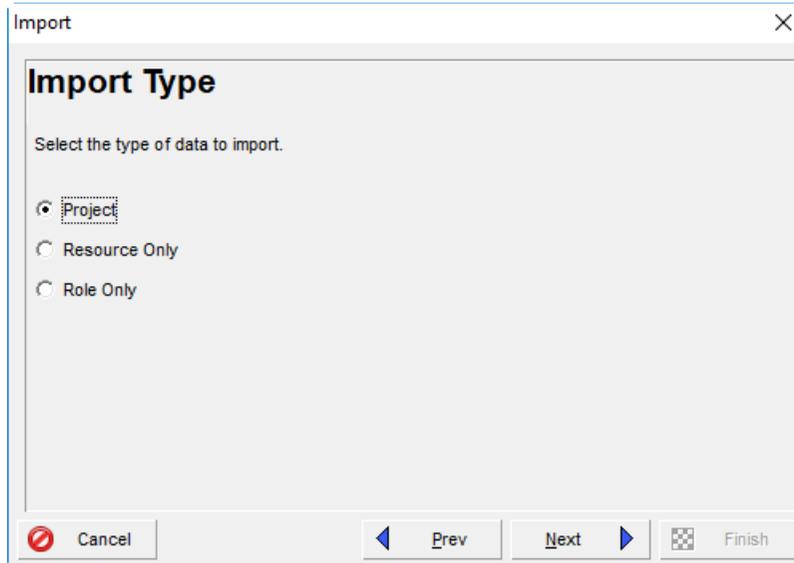


Figure 1-24 The Import wizard with the Import Type page

In this page, select the radio button corresponding to the type of data you want to import in a project. The data types can be a project, resource or role only. After making the selection, choose the **Next** button; the **File Name** page will be displayed. In this page, browse to the *.xer* format file by choosing the Browse button corresponding to the **File Name** edit box; the **Select Import File** dialog box will be displayed. In this dialog box, browse to the location where the file is saved and then choose the **Open** button; the path of the file will be displayed in the **File Name** edit box. Choose the **Next** button; the **Import Project Options** page will be displayed, as shown in Figure 1-25. The options in this page will allow you to find the project that is to be imported.

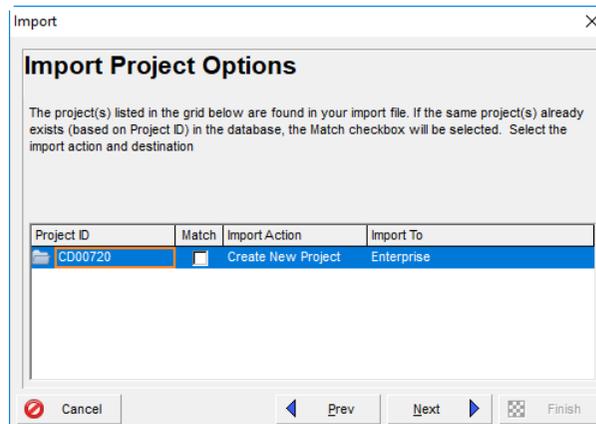
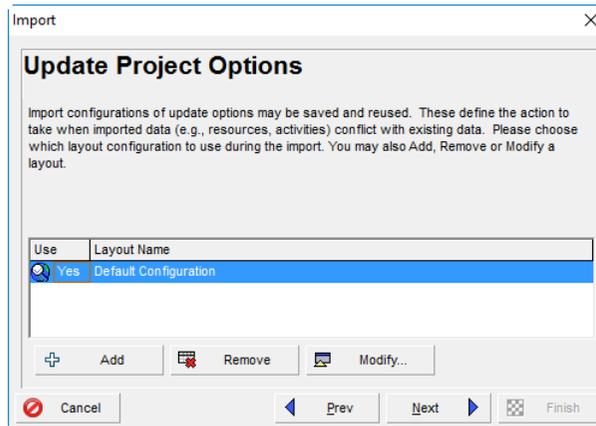


Figure 1-25 The Import wizard with the Import Project Options page

Choose the Browse button under the **Import To** column; the **Select EPS to add into** dialog box will be displayed. In this dialog box, select the project that you want to import and then choose

the **Select** button; the selected project will be assigned under the **Import To** column. Now, choose the **Next** button; the **Update Project Options** page will be displayed, as shown in Figure 1-26.



*Figure 1-26 The **Import** wizard with the **Update Project Options** page*

In this page, you can add, modify, or remove the layout that is created in a project. To add a new layout, choose the **Add** button to make changes in the layout and name it accordingly. Once the modifications are done, choose the **Next** button; the **Finish** page will be displayed with the message that you are ready to import the file, as shown in Figure 1-27. Choose the **Finish** button; the **Primavera P6 Professional 18** dialog box with the import process will start. When the process is complete, the dialog box will close automatically and the **Import** dialog box with the **Import** page will be displayed informing you that the import was successful. Choose the **Close** button; the dialog box will be closed and the project will be imported.



*Figure 1-27 The **Import** dialog box with the **Finish** page*

Self Evaluation Test

Answer the following questions and then compare them to those given at the end of this chapter:

1. In which of the following menus, the **User Defined Fields** option appears?
 - (a) **File**
 - (b) **Edit**
 - (c) **Enterprise**
 - (d) **Tool**
2. Which of the following tabs is used to modify the currency in a project?
 - (a) **Currency**
 - (b) **Assistance**
 - (c) **Resource Analysis**
 - (d) **Calculations**
3. The _____ tab is used to display the default application startup window.
4. The _____ window is used to calculate the threshold in a project.
5. The _____ tab is used to set the date format.
6. You can create your own database in Primavera P6 module. (T/F)
7. You cannot toggle on/off the display of toolbars. (T/F)
8. The **Time Units** tab enables you to change unit of time. (T/F)
9. In Primavera P6, you can access to either network such as MAPI or SMTP. (T/F)
10. You cannot control the display of wizards on adding new activities and resources. (T/F)

Review Questions

Answer the following questions:

1. Which of the following options allows you to import a file?
 - (a) Export
 - (b) Page Setup
 - (c) Send Project
 - (d) Import
2. Which of the following duration types is used in a project?
 - (a) Fixed Unit
 - (b) Fixed Duration and Units/Time
 - (c) Fixed Units/Time
 - (d) Fixed Duration & Units

3. Which of the following softwares is used to generate the project schedule?
 - (a) Microsoft Excel
 - (b) Microsoft Project
 - (c) Primavera
 - (d) All of the above

4. Which of the following is full form of MAPI ?
 - (a) Messaging Application Internet
 - (b) Messaging Applicant Investigation
 - (c) Mail Application Internet
 - (d) Messaging Application Interfcae

5. Which of the following tabs helps in displaying the issues in a project?
 - (a) Risks
 - (b) Thresholds
 - (c) Issues
 - (d) Expenses

6. Which of the following bars is displayed on initial interface screen?
 - (a) Navigation Bar
 - (b) Directory bar
 - (c) Status bar
 - (d) All of the above

7. You can create a PMDB database in Primavera P6. (T/F)

8. You can open an existing project using the **Open** option from the **File** tab. (T/F)

9. You can create a new project using the **Open** option from the **File** menu. (T/F)

10. The **Issue Navigator** dialog box is used for outstanding issues that are generated based on the preset thresholds. (T/F)

Answer to Self Evaluation Test

1. c, 2. a, 3. Application, 4. Threshold, 5. Dates, 6. T, 7. T, 8. T, 9. T, 10. F